Proposal for the Establishment of the new School for Global Inclusion and Social Development

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Provost Winston Langley
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Proposal for the Establishment of the new School for Global Inclusion and Social Development

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Executive Summary

School for Global Inclusion and Social Development

This report proposes the establishment of a new School for Global Inclusion and Social Development at the University of Massachusetts Boston (UMB). The School will expand the University’s teaching and research base by integrating a focus on health, wellness, social and economic development, targeting groups of individuals who are excluded from communities here and abroad due to disability or other reasons and conditions. This will be achieved through graduate-degree and certificate programs, applied and translational research, professional development and in-service training, innovation, as well as information dissemination. Establishing such a school reinforces and helps realize UMB’s ambitions to be a world-class teaching and research university in the 21st century.

The Institute for Community Inclusion (ICI), the largest think-tank within UMB that focuses on disability and related issues, will lead the effort to establish this School and partner with UMB colleges, institutes, and centers to leverage expertise and resources. Specifically, the School will engage faculty, students, and staff of the University through the use of joint appointments; collaborative teaching; shared research efforts; shared project development; graduate assistance options; and integrated programs in teaching, research, and capacity development that cross college, department, institute, and center boundaries in a collaborative fashion. Partnering with other institutions of higher education in the region, nationally, and internationally and organizations that have a focus on global inclusion and social development will be equally important.

The School addresses a need for leadership personnel, research, training, and capacity development in health, wellness, social and economic development in excluded populations, thereby responding to an increasing labor-market demand for professionals knowledgeable about these issues in Massachusetts and the United States (BLS, 2009). There is also a demand for trained social-development personnel in developing countries (Pawar & Cox, 2010). Additionally, the School will start filling an existing gap in the provision of affordable and publically sponsored programs of study in global inclusion and social development offered by institutions of higher education (rather than typically only by private universities) in the state and the New England region (Merson & Page, 2009).

At the core of the school and all of its activities will be its reliance on a transdisciplinary approach to teaching, learning, knowledge generation and dissemination. Initially the School will establish one master’s and one doctoral degree program in global inclusion and social development. Once fully developed this master’s program will offer students several concentration areas, including but not limited to one in autism, transition and another in developmental disabilities; these will also be available for non-master’s students as electives or
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Certificate options. Through these programs, the School will graduate leadership professionals whose qualifications, skills, and competencies will meet local, state, national and international labor-market needs. In addition, the School with its partners (including the ICI, UMB entities, and external partners) will offer research, community capacity development (training and technical assistance), innovation (model demonstration), and information dissemination.

The School will make a major contribution to student learning. With its emphasis on the global needs of excluded persons and communities, the School will provide students opportunities to acquire the essential skills of a leader able to translate research into practice, and to integrate policies, procedures and practices into programs in communities with the goal of fostering local ownership, investment in inclusion and social development opportunities for all. Students will be exposed to a learning and research environment that is reflective of multiple perspectives and based on the application of such learning in both the academic and non-academic sectors. Research and teaching graduate assistantships and post-doctoral fellowships will be available to qualified and interested students not only in this School but throughout the University with a specific emphasis on doctoral GA supports available to the full range doctoral study programs on campus.

The School will also contribute to faculty teaching, research, and development. Through joint teaching and research appointments and formal collaborative agreements with colleges, departments, institutes, and centers at UMB, faculty interested in the content areas of the new School will have opportunities to design, develop, and implement teaching curricula, research and other projects. There will also be opportunities for faculty at UMB and other institutions of higher education nationally and internationally to work at the School as visiting fellows, guest lecturers, and research staff. Integrating the transdisciplinary nature of the school, outreach to and engagement of faculty and staff at UMB and other institutions of higher education will broaden the reach of the School regionally, nationally, and internationally and the quality of its instructional and research activities.

The School will initially benefit the state through the research, training and technical assistance activities associated with the ICI. As these activities are expanded within the School, additional activities in these areas will be developed and fostered through the faculty, staff, and partners of the School. Some of the activities will address issues of health, wellness, social and economic development through contracts to develop and / or evaluate programs, policies and or practices with state agencies in the health, education, and human service areas. The School will use a similar approach to contribute nationally by building on the ICI’s national reputation as the leading national center on adult services and supports addressing employment, education, national services, systemic change, and policy development for persons with disabilities.

Internationally the School will work closely with the Office of International and Transnational Affairs (OITA), the Office of Graduate Studies, faculty and staff at UMB and its partners in the development of the research, training, and outreach efforts in other countries; the sharing of effective practices in selected areas across countries; and the development of learning opportunities for students and faculty from those countries. The School will extend ICI’s current relationships in seven countries focused on supporting persons with disabilities. Through the ICI’s affiliation with the Center on Global Pediatrics at Children’s Hospital, the School will have
access to an additional 15 counties with many activities focusing on children, child health, wellness, and inclusion. Formal affiliations with other institutions of higher education through the Association of University Centers on Disabilities (AUCD) are also being developed.

By adopting national and international perspectives on inclusion (a society for all) and social development (improving people’s well being and quality of life), it is clear that the focus of the new School is one that will be consistent with the mission and values of the University, while addressing some of the growing needs in this country as well as internationally in global inclusion and social development. As was noted above, such a school by its nature will have a transdisciplinary focus (one that crosses disciplinary, academic and non-academic boundaries) as well as a transnational focus. These foci will drive the design of the School in the areas of instruction, research, capacity development (in-service training and technical assistance), innovation (model demonstration), as well as information dissemination.

The School curricula will be integrated with the curricula offered in the John W. McCormack Graduate School of Policy and Global Studies, the College of Nursing and Health Sciences, the College of Education and Human Development, the College of Public and Community Service and the College of Management. Specific departmental relationships with other Colleges (College of Liberal Arts and College of Science and Mathematics) will assure that there is a link to those content areas that can enhance the expertise of the school in all of its activities. The School will work closely with the University College in the development of distance capacity and in responding to needs for online instruction from interested parties. Selected programs in these colleges (such as programs in vision studies and rehabilitation counseling) will be linked to the graduate programs of the new School. The School will also utilize existing related course offerings in other colleges as components of the graduate programs, most likely as electives, but potentially in some cases as core course requirements.

The structure and processes for governing the new School are modeled after those of the College of Education and Human Development and are consistent with University Regulations. The chief executive officer of the new School will be the Dean. The Dean will be supported by the School Senate including four standing committees with specific responsibilities in one or more particular areas of School life. This includes: a School Personnel Committee, an Academic Affairs Committee, a Budget and Long-Range Planning Committee, and a Professional Education Coordinating Committee. In addition to these structures, the School will establish two Graduate Program Director positions: one for the master’s program and another for the doctoral program.

The School will be supported through UMB resources for faculty and staff as well as some support for GAs and supplies. The resources of the ICI will support the majority of the costs associated with the doctoral and masters GAs (85% of all costs), postdoctoral fellowships, senior visiting scholars, faculty scholars, marketing and supplies. The support for the school over a five-year period reflects 45% from UMB and 55% from ICI sources. In year three the revenues from tuition will exceed all faculty and staff expenses incurred by the University with the School showing a net fund balance in this year of $72,973 and over a five year period a total fund balance of $743,372, or an average annual fund balance of $148,674.
The considerable reputation of the ICI nationally and internationally as the premier center in the field of employment and training and school inclusion for students with disabilities brings to the School strong credibility with local, state, regional, national, and international funding resources. In addition to leading the effort to establish this School, the ICI will serve as a supportive fiscal resource through the shared funding of the graduate assistants, post-doctoral fellowships, and visiting faculty and scholars, all of whom will be supported through grant, contract, and other ICI resources. The School will also capitalize on the significant grant development expertise of the ICI.
Proposal for the Establishment of the new School for Global Inclusion and Social Development
(Submitted to Provost Winston Langley 8-24-2011)

I. Rationale for and Potential Importance of the New School

A. Rationale
This report proposes the establishment of a new School for Global Inclusion and Social Development that will expand the University of Massachusetts Boston’s (UMB) teaching and research base by integrating a focus on health, wellness, economic and social development for excluded populations due to disability or other reasons and conditions who are residing in local, state, national, and international communities. This will be achieved through graduate-degree and certificate programs, professional development and in-service training, applied and translational research, model demonstration and innovations, as well as information dissemination. The School will assist the University in responding to its mission as the “student-centered urban public University of the 21st century” (UMB Strategic Plan for 2010-2025). Together, these activities will allow UMB to see its vast intellectual resources “brought to bear on a deeper and broader range of academic research and civic engagement, with an impact that will draw serious consideration from a broader array of prospective students from around the world” (Chancellor Motley, March 2010: UMB Strategic Plan for 2010-2025). The School will prepare students to emerge as leaders with a responsibility to promote inclusion, equality of opportunity, and social development in diverse communities here and abroad.

The Institute for Community Inclusion (ICI), the largest research entity and think-tank within UMB focusing on disability and related issues, will lead the effort to establish the new School. However, collaboration with UMB colleges, departments, institutes, centers, the Office of International and Transnational Affairs (OITA), the Office of Graduate Studies and the Venture Development Center (VDC) will be central to the School’s goal of establishing a course of learning and inquiry that focuses on issues related to health, wellness, economic and social development in a wide range of communities here and abroad. In addition, the School will adopt a transdisciplinary approach (one that crosses disciplinary, academic and non-academic boundaries) to all activities, engage the talents of and existing efforts at UMB that are international in focus, and develop partnerships with institutions of higher education as well as non-academic programs and centers locally, nationally, and internationally with the goal to leverage expertise and resources.

B. Importance and Need
The advances in technology, communication and information sharing have made our understanding of and interaction with people across the globe a click away. Events around the
world are brought to us in real time, reflecting a realization that the needs of other communities and cultures are more similar than dissimilar to some of those that are within walking distance of the UMB campus. Sharing knowledge, concerns, policies and practices has been and continues to be revolutionized through technology, media, and leadership of many individuals in neighborhoods, governments, and institutions. Policy and practice solutions that have proven effective abroad may be relevant to and help solve issues and concerns faced by communities and cultures in the greater Boston area. Our world is becoming not smaller but more visible. Our students are going to assume roles not just in Boston but globally. Our teaching will enhance skills and capacities in our classrooms, be they actual or virtual. Our research will be augmented by research findings and new knowledge uncovered here and elsewhere and the translation of these findings and knowledge to our students as they emerge as the skilled leaders of the future who work in many different settings, cultures, and communities promoting inclusion, equality of opportunity, and social development opportunities for all.

If the School is to participate in the fulfillment of the mission and vision of UMB, it must look not only inside but outside for knowledge, skills and abilities; it must harvest the expertise of others in collaborative partnerships and offer students here and abroad the best and most comprehensive curricula that prepares them to lead and advance inclusion and social development in all settings. With the University striving to become an “increasingly sophisticated research university by 2025 and [to] join the ranks of initiations designated by the Carnegie Foundation as Research University / High,“¹ the activities of the School will be central to expanding the University’s teaching and research platform both in scope as well as geography. School partners will need to represent many disciplines, collaborators will be scientists and scholars with whom School faculty and staff will interact virtually more than in person and applications will be piloted and implemented in communities that are urban and rural serving diverse populations (UMB Strategic Plan for 2010-2025). Audiences are becoming more and more diverse and the need to understand, engage, and support them is central to the UMB mission as a research university that is student-centered and reflecting the needs of the diverse populations who share desires for a fully inclusive and equitable society.

In addition to assisting UMB in becoming a highly-ranked research university, the School addresses a need for leadership personnel, research, training, and capacity development in health, wellness, economic and social development in excluded populations, thereby responding to an increasing labor-market demand for professionals knowledgeable about these issues in Massachusetts and the US (BLS, 2009). There is also a demand for trained social-development personnel in developing countries (Pawar & Cox, 2010). Through its graduate-degree and certificate programs, the School will graduate the next generation of leadership professionals whose qualifications, skills, and competencies will meet these state and national labor-market needs but also the needs in the global marketplace. In addition, the School will start filling a gap in the provision of affordable and publically sponsored global-health and wellness education and training offered by institutions of higher education (rather than typically only by private universities) in the state and the New England region (Merson & Page, 2009).

C. Potential Contributions

The School will make a major contribution to student learning. With its emphasis on the global needs of disenfranchised persons and communities, the School will provide students opportunities to acquire the essential skills of a leader able to translate research into practice, and to implement policies and programs in communities with the goal of fostering local ownership, investment in inclusion, and social development opportunities for all. These learning opportunities will also be available to existing students enrolled in other graduate-degree and certificate programs at UMB (in the form of elective-course offerings, for example). Students will be exposed to a transdisciplinary and transnational learning and research environment that is reflective of multiple perspectives and based on the application of such learning in both the academic and non-academic sectors. This environment will provide students a platform to understand the intersection of research and practice and the application of evidence-based strategies in community settings.

As part of the School’s commitment to learning, opportunities for research and teaching graduate assistantships, a significant number of pre-doctoral and post-doctoral fellowships will be available to qualified and interested students not only in this School but throughout the University. The engagement of pre and post doctoral students in the school’s research and training activities will allow for the development of transdisciplinary experiences for students who are matriculated in other doctoral or post doctoral training throughout UMB. A clear focus on transdisciplinary experiences in the classroom, in the research areas and in the outreach will provide for a rich learning opportunity for doctoral students in the school as well as in other doctoral programs at UMB.

The School will significantly contribute to faculty teaching, research, and development in a transdisciplinary way and across UMB entities. Through joint appointments and formal collaborative agreements with colleges, departments, institutes, and centers at UMB, faculty interested in the research areas of the new School will have opportunities to design, develop, and implement new projects and research efforts. The broad range of programs at the ICI will serve as a platform for the School to develop activities across areas such as professional development, in-service training, community capacity building, program development, research and information dissemination addressing issues of health, wellness, economic and social development. Outreach to and engagement of faculty and staff at UMB will broaden the reach of the School in these areas locally, statewide, nationally, and internationally.

In addition, there will be opportunities for faculty at UMB and other institutions of higher education nationally and internationally to work at the School as visiting fellows, guest lecturers, and research staff. Faculty of the School will be encouraged to engage in guest lecturing, co-teaching in other graduate-degree and certificate programs, and sharing of research options in colleges, departments, institutes, and centers at UMB, as well as other institutions of higher education. Options for shared research in the School with the ICI, through the institutions of higher education affiliated with the School, as well as collaborating centers and programs associated with the School will create a rich array of opportunities for faculty at UMB.

The School will initially benefit the state through the research, training and technical assistance activities associated with the ICI. As these activities are expanded within the School additional
areas of research, training and technical assistance will emerge in related areas fostered through the faculty, staff, and partners of the School. Some of the activities will address issues of health, wellness, economic and social development through contracts to develop and / or evaluate policy and programs with state agencies in the health, education, and human service areas. The ICI currently has a number of state contracts to provide both training and technical assistance in state education and adult service agencies. The ICI also works closely with several state agencies in the implementation of program evaluation as well as implementation of model demonstrations addressing employment, early education, and transition. The School will build upon and expand these existing relationships within Massachusetts in the areas of staff development, research, program evaluation, and systemic change.

At the national level, the School will expand its research, systemic change, and policy development activities with a clear focus on supporting children, youth, and adults in the areas of health, wellness, economic and social development. Building upon the ICI’s national reputation as the leading national center on adult services and supports addressing employment, education, national service, systemic change and policy development for persons with disabilities, the School will expand this capacity to address the needs of children and youth. Additionally, and again in concert with the activities of the ICI, the School will support research and program evaluation documenting and / or developing evidence-based practices and assist in reframing policies to support the adoption of such practices in local communities. The graduates of the School will be well-positioned to assume leadership positions in public and private agencies and organizations here and abroad that focus on the issues of health, wellness, economic and social development for those groups and communities that are typically excluded from full community membership.

Internationally the School will work closely with faculty and staff at UMB and its partners in the development of the research, training, and outreach efforts in other countries, the sharing of effective practices in selected areas across countries, and the development of learning opportunities for students and faculty from those countries through fellowships, assistantships, online course offerings and structured learning exchanges and other electronic communication strategies. Additionally, through the affiliation with the ICI, the School will expand upon the ICI’s relationships in seven countries in supporting those countries in serving and supporting persons with disabilities.

Through the School’s affiliation with the Center on Global Pediatrics at Children’s Hospital, the School will have access to an additional 15 counties with many of these activities focusing on children, child health, wellness, and inclusion. Formal affiliations with other institutions of higher education through the International Council of the Association of University Centers on Disabilities (AUCD), the University of Salamanca in Spain and Curtin University in Australia are being developed and will be available as a resource to the School. More specifically, the School will engage in the development of shared curricula and learning exchanges for professionals in other countries as well as students from institutions of higher education in those countries. The School will develop joint research projects addressing issues related to inclusion and social development in multiple countries and disseminate research and information about effective practices in the areas of health, wellness, economic and social development in these countries. Through the use of the Visiting Scholar positions, the School will create opportunities
for faculty and staff exchanges internationally as well as the development of shared research projects within specific institutions of higher education on an annual basis.

II. Description of the ICI and Supporting the Implementation of the New School

A. Description of the ICI
The ICI has been a University Center for Excellence in Disabilities (UCED) or its equivalent since its founding in 1967, when the Maternal and Child Health Bureau (MCHB) awarded an interdisciplinary training grant to Children’s Hospital Boston / Harvard Medical School. In 2001, the ICI relocated the vast majority of its activities to UMB in order to play a greater role in the pre-service training and curricula development as well as the preparation of students to take leadership roles in the field of disabilities. Today, the ICI is a joint program of the University and Children’s Hospital Boston / Harvard Medical School and has formal affiliations with ten Institutions of Higher Education in the New England region. Over the 44 years of the ICI’s existence, its core mission has remained focused upon disability and has been translated into activities such as interdisciplinary and disciplinary training (both pre-service and in-service); applied and translational research; policy and practice development and implementation through regional and national centers; model demonstrations addressing organizational change at the local, state, regional, national, and international levels; as well as research and information dissemination efforts that reach local, state, regional, national, and international constituents. Over this past decade, the ICI has evolved from a center providing training as well as exemplary clinical and evaluation services to a comprehensive program that offers:

(1) training at the pre-service and in-service levels;

(2) research that is both applied and translational, addressing practices in early education, transition, community inclusion, health care, employment, and systemic change;

(3) exemplary services addressing a variety of major areas, including early education, transition, employment, recreation, national service, vision studies and health care;

(4) consultation and technical assistance in the areas of early education, teachers of the visually impaired, orientation and mobility, employment services, postsecondary educational opportunities, transition, peer leadership development, volunteerism (national service), public-policy formulation, and consultation to state agencies in the areas of welfare reform, employment services, health care, and early education supports;

(5) systemic change at the local, state, regional, national, and international levels via the State Employment Leadership Network (SELN, a national membership network of state developmental disabilities agencies); the 10 New England public Vocational Rehabilitation agencies served by the New England Technical Assistance and Continuing Education (TACE) center; the 43 state offices of the Corporation for National and Community Services and their collaborating partners; 27 institutions of higher education invested in the inclusion of students with intellectual disabilities in postsecondary settings; as well as ongoing training in seven countries in the field of disability services, public health, supported employment and systemic change; and
(6) dissemination of products and materials locally, regionally, statewide, nationally, and internationally through a variety of websites and electronic communication strategies (see Appendix D: Publications from 2000 to 2010 and www.communityinclusion.org).

The ICI hosts nine regional and national centers including: (1) the Rehabilitation Technical Assistance Center for Vocational Rehabilitation Management (RTAC), (2) the National Service Inclusion Project (NSIP), (3) the Leadership in Neurodevelopmental Disabilities (LEND) Program based at Children’s Hospital Boston, (4) the Rehabilitation Research and Training Center (Opening Doors RRTC) on children and youth with disabilities and significant medical needs based at Children’s Hospital Boston, (5) the New England Regional Center for Vision Education (NERCVE), (6) the Training, Technical Assistance and Continuing Education project for New England (TACE), (7) the Rehabilitation Research and Training Center on Vocational Rehabilitation (VR-RRTC), (8) the Disability Rehabilitation Research Center on Postsecondary Outcomes for Students with Intellectual Disabilities (DRRP/ADD Postsecondary), and (9) the National Service to Employment Project (NextSTEP).

The past year has been an active one for the ICI. Applications for federal and state government funding have continued, and the ICI is currently operating more than 62 grants, cooperatives agreements, contacts, and projects addressing a range of needs (see Appendix M: ICI Projects and Activities 2004-2010). About two-thirds of the ICI’s activities address needs of young adults and adults, with the remainder dealing with early childhood and youth issues as well as aging issues.

The following highlights some of the ICI’s major accomplishments in the past year. It is not an exhaustive list, but a selection of representative ICI activities on the UMB campus, at Children’s Hospital Boston, and at the local, state, regional, national, and international levels. These highlights include:

- Hosting in collaboration with the College of Education and Human Development, through the New England Regional Center for Vision Education (NERCVE), the only certificate pre-service training program in orientation and mobility and low-vision studies offered in New England. This ICI center receives support from all six New England state departments of education, and continues to have nearly 40 new students enrolling each year, with about 165 students enrolled in this degree and/or certificate program at any point in time.

- Realizing an 18% expansion of ICI funded grant activities this past year (consistent growth in grants and contracts of 12% to 15% annually over a ten-year period), with more than $4.7M in new revenue this past year, and a total of new revenues over the life of these new grants in excess of $24.5M.

- Supporting in-service training, through the Leadership in Neurodevelopmental Disabilities Program (LEND at Children’s Hospital Boston), more than 286 students/trainees representing more than 20 disciplines with 36 long-term, 22 intermediate, and 228 short-term trainees receiving over 20,700 hours of training (66 post-doctorate, 56 pre-doctoral, 109 master candidates or post-masters, and 55 unknown).

- Providing in-service and staff development to more than 23,121 individuals in a wide range of areas, including employment practices and policies, transition and
postsecondary education, early education, health care, interdisciplinary and disciplinary competencies in disability studies, public policy, program development, and systemic change.

- Conducting fifteen research studies that utilize multiple modalities, including both quantitative and qualitative designs, addressing early education, transition, postsecondary education for students with intellectual disabilities, vocational rehabilitation administration, employment trends, health disparities, and community capacity building.

- Maintaining a consultation and technical assistance round table (State Employment Leadership Network, an annual membership fee organization), currently consisting of 25 member states (AZ, CA, CT, CO, DC, DE, HI, IA, LA, MD, MA, MI, MO, NC, NJ, NV, NM, OH, OR, PA, TX, UT, VA, WA and WY).

- Providing intensive technical assistance and training to more than 9,826 participants, addressing administrative, policy, service delivery, and documentation issues in increasing employment supports for person with disabilities.

- Providing consultation and technical assistance to Saudi Arabia, addressing new program development in employment strategies for persons with disabilities and Turkey on trauma and the effects of natural disasters.

- Disseminating materials to over 500,000 individuals, utilizing brief reports, email blasts, technical reports, tailored responses to requests, social media methods, project websites, and printed materials.

- Conducting statewide, national, and international meetings and training sessions addressing employment and national service, reaching more than 3,697 attendees.

- Major Presentations at international events in the Saudi Arabia, Dubai, Turkey, Prague, and the European Union.

- Testifying as expert witnesses before four United States Congressional Committees addressing the issues of employment legislation and reauthorization, and presenting at three national listening sessions (a joint session of the Employment and Training Administration and the Office of Disability Employment Policy [ODEP], both in the US Department of Labor; a session for ODEP at a regional hearing on employment trends; and a session with the Administration on Developmental Disabilities). Testimony at the national hearing on employment of persons with disabilities hosted by the Equal Employment Opportunity Commission (EEOC).

The ICI has approximately 210 staff (including graduate assistants). One-third of the ICI staff are persons with disabilities; about seven out of ten ICI staff either have a disability or have an immediate family member with a disability. The ICI also supports about 240 UMB students (with fellowships, graduate assistantships, tuition supports, and summer employment).
B. Capacity to Implement the New School

The ICI has a number of activities that link directly with the focus areas of the School for Global Inclusion and Social Development. In the past three years, the ICI has greatly expanded its efforts to integrate its activities with the University through affiliations with faculty in colleges and departments, utilizing shared project development, joint teaching, and student supports. Over the same period, the ICI has funded through its grants and contracts 84 graduate assistants from more than 22 colleges and departments at UMB (see Appendix I: Student Engagement and Support, 2008-2011 for more detail). These affiliations have brought the activities of the ICI more closely to the faculty and staff of the University.

In the past five years, UMB faculty and ICI staff have been involved in the development of more than 15 grant applications serving as co-PIs, collaborators, writers or part-time personnel on these grants. Faculty members have come from a variety of colleges and departments with the predominance the College of Education and Human Development. In the coming years and in collaboration with the new School, a clear emphasis will be placed upon the development of shared grant applications with faculty and staff in the colleges, departments, institutes, and centers. ICI staff has served on many University and Collegiate committees including faculty search committees, faculty governance bodies, strategic planning committees, University planning groups, and accessibility committees to name just a few.

The investment of the ICI in the mission of the University has been strong and the primary reason for the relocation of the ICI from Children’s Hospital Boston / Harvard Medical School to UMB is reflective of our commitment to supporting UMB’s academic activities and student community as well as the University’s urban mission. The clear investment of UMB in supporting student with disabilities was a strong factor in the move of the ICI to UMB in 2001. The nature of the curricula offered created an opportunity for the ICI to get more closely involved in pre-service training and academic activities. The development of the vision programs that emerged through the efforts of the ICI in 2002 are a reflection of the collaborative relations that have been developed over a 10 year period in vision studies with the College of Education and Human Development and ICI’s New England Regional Center for Vision Education (NERCVE). Similar shared relationships with the securing of federal funds for the Rehabilitation Counseling pre-service training program at UMB are a reflection of the collaborative nature of the ICI and the College. Other grant applications that were developed with some of the institutes and centers, while not successful, have served as a base for potential project development in the future. Currently, the ICI shares a project with the Asian American Studies Program and is seeking to expand its relationship with similar programs as well as the ethnic centers at UMB.

The ICI brings to the School significant contacts and expertise in working in the areas of health, wellness, economic and social development and supporting cultures and communities that are seeking inclusion and equality of opportunity in the local neighborhoods, state, nation, and other countries. The considerable reputation of the ICI nationally and internationally as the premier center in the field of employment and training as well as school inclusion for students with disabilities brings to the School strong credibility with local, state, regional, national, and international funding resources. The ICI will also serve as a supportive fiscal resource through the shared funding of the graduate assistants, pre-doctoral and post-doctoral fellowships, visiting
faculty and scholars, all of whom will be supported through grant, contract, and other ICI resources. By the very collaborative design and transdisciplinary nature of the School, these positions will be filled by students, faculty, and staff who represent many disciplines from several colleges, departments, institutes, and centers at the University. These positions will be used to support interested parties in addressing the core mission of the School. The significant grant development expertise of the ICI will also serve to support the development of the pre-service training efforts of the School as well as the integration of the School efforts across other colleges and departments through the use of joint appointments, shared course offerings, shared support of pre and post doctoral students at the School and throughout UMB and co-development of grants, contracts, and projects in the School.

With the focus on global issues and international concerns addressing health, wellness, economic and social development, the ICI will be able to leverage its relationship with Children’s Hospital Boston recruiting the Center for Global Pediatrics to affiliate with the School. This Center has projects in more than 15 countries and its director, Dr. Judith Palfrey, is a long-standing faculty member who is jointly supported by the ICI and Harvard Medical School. As a University Center of Excellence in Disabilities, the ICI is a member in the Association of University Centers on Disabilities (AUCD). With one such center in every state, this network of national centers provides a great resource to the new School. Additionally, there are five international AUCD affiliates (Spain, Australia, Israel, Ireland and Wales) providing the School with access to the activities, staff and students of these centers. The Director of the ICI is a past president of AUCD.

III. The New School at UMB

A. Focus and Nature of the New School

The focus of the new School will be upon developing a greater understanding of how cultures can be inclusive of all of their members collectively as well as individually and that the focus on health, wellness, economic and social development will serve to promote this goal here and in other parts of the world. Such an effort does not reside within the domain of a single discipline but requires the knowledge, expertise and abilities of many, including a range of highly trained academics who will work collectively to support the instructional, research, capacity development, innovation, and dissemination efforts of the new School and its outreach to all learners, leaders, and scholars. At the heart of the new School will be a transdisciplinary core and focus where many disciplines and non-academic participants will play a shared role in implementing the activities of the School.

In considering the issues of inclusion and social development, we are looking at ways to support communities collectively, as well as those who are in or seeking to enter those communities. The School will assist these communities and their members to acquire skills in leadership, research, innovation, and demonstration to address the elements of social and economic development leading to improved well-being and quality of life for all. This focus will drive the design of the School in the areas of instruction (teaching and pre-service training), research, capacity development (in-service training and technical assistance), innovation (exemplary service demonstration), and dissemination (publication and communication to the larger community). A more detailed description of these areas of activity will be presented in the following section.
The establishment of a new School at UMB that will focus on global inclusion and social development is facilitated by the already significant number of activities that are present on the campus in our colleges, departments, institutes, and centers. There is considerable expertise already at UMB in the areas of public policy, health and wellness, understanding societies and cultures and developing leadership capacities. This expertise includes instructional capacity as well as ongoing research and areas of interest at the individual faculty level, in the colleges and within the departments, institutes, and centers. See Appendix B: Graduate Program Competencies and Related UMB Course Offerings and Appendix C: Areas of Interest of UMB Institutes and Centers for more detail.

This new School will be successful only if it is viewed and performs in a collaborative fashion with these existing UMB activities, those that are in the greater Boston area and those that are aligned through our national affiliations (our partners as presented earlier). The new School will provide a common platform for faculty and staff in the colleges, departments, institutes, and centers to interact either in a more formal fashion as a collaborator or in an informal fashion as an interested party with the goal to promote global inclusion and social development. Additional formal affiliations will be developed with other institutions of higher education in the greater Boston area and beyond with the goal of having a School that builds on the many talents that are already present within and beyond UMB engaging all in the mission of the School.

The following sections of the report outline some of the key elements of the new School: (B) evolutions in perspectives and practices that provide a focus for the School and its activities; (C) the core elements of the School (activities and leadership competencies); (D) the structure and governance of the School; (E) faculty and staff needed, (F) students to be served, (G) local, regional, and national factors to be considered in the development of the School, (H) a summary of the resources needed, (I) a business plan for the School, (J) a sequence and timelines, (K) a summary of the income and expenses for a five-year period, (L) relationships that may be developed by the School, and (M) areas of potential collaboration for the School.

**B. Evolutions in Perspectives and Practices**

*a. International Trends and Perspectives.* There has been a growing interest in recent decades in ensuring that people and populations are included and that society is supportive of the equality of its members and the chance for prosperity for all. The terms *social inclusion / exclusion, social development,* and *globalization* capture the views of these key areas that many countries individually and collectively are attempting to understand. A better understanding of how these terms are being interpreted nationally and internationally is key to defining the mission and scope of opportunity for this new School. See Appendix A: Definition of Social Inclusion/Exclusion, Social Development, Globalization, Health and Wellness for a description of these terms.

*i. Social inclusion/exclusion:* The term “social inclusion” has been conceptualized as a process, a state of being included, and a method for integrating those excluded or at risk of being excluded into society. The Programme for Action of the 1995 UN World Summit for Social Development describes an inclusive society as “a society for all,” in which every individual, each with rights and responsibilities, has an active role to play” (UN, 1995a). Definitions of social inclusion—
because of the nature of the concept—often reference the term “social exclusion,” which allows for a more specific identification of the dimensions of disadvantage that those excluded or at risk of being excluded face. The concepts of social inclusion/exclusion are key to the social-policy agenda of the European Union (EU). Sen (2000) and others have argued that the concept of social exclusion, despite its European roots, is applicable to the US, where social problems have been more narrowly defined in terms of poverty.

ii. Social development: In development studies, the term “social development” captures the idea of improving people’s well-being and quality of life, and is often defined in reference to particular social problems. It is the focus on the population as a whole or the inclusive focus, among other things, that distinguishes this concept from how it is used in other disciplines (such as developmental psychology). Pawar and Cox (2010) define social development as “a comprehensive and integrated approach to societal development” (p. 224) that is multidimensional, multilevel, and value-based. Social development, particularly local-level development, has over the last decades received more attention by international organizations such as the UN, that have pushed the concept to the forefront of their development agenda. For example, a social-development perspective informed the development of the UN Millennium Development Goals (MCGs) that member states adopted in 2000 (DESA/UN, 2010).

iii. Globalization: Globalization is the process of interaction and integration among economies, societies, and cultures across the globe through forces such as international trade and transport and advances in communication technology. The term captures the consequences of these forces, both positive and negative. Several definitions emphasize the economic dimension of globalization as being key to this process. The UN has been advocating for a more balanced approach to globalization—one that promotes its benefits but also addresses its harmful effects, particularly on the developing world. The MCGs rely upon implementing a fair and inclusive globalization that is monitored and regulated to ensure that it improves the lives of socially marginalized groups around the world. International financial agencies such as the International Monetary Fund and the World Bank have given more attention to the social dimension of development in the context of globalization and are contributing to achieving the MCGs.

b. National Trends and Perspectives: There are some parallel domestic activities that help to further define the scope of the opportunity for this new School. The concept of creating an inclusive community forms the basis of the political structure in the US. Equality is a cornerstone of the Constitution, yet true equality of opportunity and full inclusion remains elusive at times for certain segments of the US population. In the early days of serving people with disabilities, the concept of isolation and development of segregated and specialized programs based on the assumption of better service led to the development of large congregate-care environments and institutions, that in later years were closed or are being closed. Federal litigation (Penhurst Class Action Suit), court decrees (Olmstead decision), and legislation (Americans with Disabilities Act, the Rehabilitation Act, and Workforce Investment Act or WIA) have called for the inclusion of people with disabilities, reinforcing the belief that separate is never equal.

In the education arena similar experiences are being realized as the education for students with disabilities as well as those from diverse cultures is no longer segregated but inclusive with other students in all academic settings. The focus on educators educating all students has also led to
the development of personnel-preparation programs that prepare teachers to educate all students and the development of curricula that are universal in their application and relevance. Universal Design for Learning (UDL) calls for curricula that can support all learners. The changes in education are being driven by both research and family concerns about the learning and development of children of all cultures and capacities.

There has been a growing interest at the federal level in establishing a more integrated employment and training system—one able to serve all job seekers, including those with disabilities. More recently, the Workforce Investment Act (WIA) merged several pieces of federal legislation such that at the local level there could be a single entity called a “One Stop Career Center” available to serve job seekers. The intent was both to create a more streamlined and clear system or pathway to employment and also to reduce duplication of effort created in the past by having disparate employment and training services for clusters or groups of job seekers. The legislation was intended to create an employment and training system that was fair and equitable for all.

Parallel efforts in the area of health care and the development of a local universal system of care are reflected in the passage of national health insurance (Affordable Care Act). The intent is to have an ability to provide health care to all citizens regardless of their health condition, ethnic or cultural background, economic means, or geographic location. A significant component of this legislation is the recognition that wellness and prevention are central to creating a healthy society for all. See Appendix A: Definition of Social Inclusion/Exclusion, Social Development, Globalization, Health and Wellness for a description of the terms health and wellness. This perspective is consistent with Life Course Theory that points to the broad social, economic, and environmental factors as underlying causes of persistent inequities in health and social well-being across population groups (Fine & Kotelchuck, 2010). While this theory focuses more on health and wellness, it is clear that health, wellness, and social development are complex multidimensional factors and that these factors must be considered when looking at populations (Fine & Kotelchuck, 2010).

c. Local Trends and Perspectives: The University has a strong urban mission, one that recognizes its roots as well as acknowledges that it will continue to have a role in supporting those individuals who reside in urban settings in the greater Boston area, the state, the region, the nation, and internationally. A clear and strong set of values serve to guide this mission including: inquiry, creativity and discovery; transformation; diversity and inclusion; engagement; environmental stewardship and sustainability; economic and cultural development; and an urban commitment (UMB, 2010). These values offer clear guidance in the establishment of this new School.

At the heart of any school is inquiry and creativity. It is the embracing of open and critical inquiry that will serve this new School as it seeks out partnerships, relationships, and affiliations in the global communities. We must be open and view the perceptions, beliefs and policies of others as having substance, and offer all a chance to examine and debate the efficacy of such policies, if we are to be inclusive and focus on populations that stress social development. As a transformative University, the development of a School that embraces inclusion and social development will broaden our students’ experiences and exposures and our faculty’s inquiry
through research, training, and technical assistance, and affiliations with other institutions of higher education outside of UMB, outside of Boston, outside of New England, and outside of the United States. Such a school can be a central player in the transformation of not only our students, faculty, and staff but those in other institutions of higher education across the world.

As a diverse and inclusive School, we are developing learning environments that nurture respect for difference, excite curiosity, and embody civility. The new School will expand our areas of inclusion to many cultures and communities that are not within or adjacent to our University physically, but do share the desire to be accepting, engage and respect diversity, seek equality for all and look to a global environment that can be a laboratory of learning for all students.

Central to the development of this new School will be the value of engagement that is expressed by the University. Engagement calls for us to address critical social issues both locally and globally. This is at the heart of the new School, yet the focus is more on the global factors and the engagement of our students, faculty, and staff in understanding and supporting the inclusion and social development of communities here and in other countries. Our inquiry will reflect a better understanding of inclusion and social development in a global context and recognize that, while some communities are afar, their social and economic needs are near from a research and public-policy perspective.

The School will focus on the development of leaders who will be knowledgeable of different cultures and communities, versed in the strategies of economic development, and skilled in supporting the needs and interests of local communities and cultural groups. The School’s programs of research, training, and technical assistance will require an understanding of many disciplines and how these disciplines can be brought together in a transdisciplinary framework to develop a comprehensive strategy to support inquiry, knowledge generation, capacity development, and model demonstration. By creating a transdisciplinary environment, the new School will call upon the resources of scholars from academic and non-academic settings reflecting many individual disciplines to join together to examine, develop and implement programs and services that are responsive to the needs of diverse communities and cultures. The strong emphasis on transdisciplinary activities will require that the new School have many relationships across many departments, disciplines, colleges, universities and non-academic participants locally, regionally, nationally, and internationally.

**C. Core Elements of the School**

The range of activities that the school will undertake will be broad in that it will link the instruction (graduate-degree and certificate programs) with the other elements including research, capacity development (technical assistance and in-service training), innovation (exemplary service demonstration), and dissemination (publication and communication to the larger community). The model that is proposed for the School will be comprehensive, multidimensional, and dynamic. It will seek to integrate the instruction and research with the application of findings and skills into typical community settings. The applied nature of the school will require that students are actively engaged in the research of the School and also be soundly based in the translation of research into practice at the local community level. While having knowledge of policy development, the true expertise of the graduates of this program will
be their ability to demonstrate leadership in the application of evidence-based practices in diverse settings, addressing the key issues of global inclusion and social development.

a. Teaching: The core of the instructional activities of the new School will be reflected in the development of the master’s and doctoral programs in global inclusion and social development. These programs will distinguish themselves from those that are already on campus in that they will have as their guiding principle the integration of health, wellness, economic and social development in communities that are striving to be fully inclusive. The emphasis will be on addressing the consequences of exclusion reflecting issues of disability, ethnic and cultural bias, economic and social reasons and any other factors that lead to exclusion. The emphasis will be on the rapid translation of research and evidence-based practices into programs in local and regional communities. The master’s and doctoral programs will reflect a core set of courses directed at developing skills in leadership, communication, ethics and professionalism, cultural competency, transdisciplinary practice, program and community development, research and evaluation, and systemic change.

Overview of Program Sequence and Sample of Proposed Curriculum: The curriculum of the proposed program will consist, in part, of a core of 6 courses (18 credits) as well participation in an Innovations Seminar (a two semester 4 credit [2 credits per semester] special lecture series that will meet every other week). The core course offerings will require all students to take three base courses and then have a choice of one of two courses for each of the three remaining core courses (there will be a total of nine core courses available).

In addition to the core courses and seminar there will be a series of tracks developed (two by year two, two additional by year five and eventually up to ten tracks) that will require the student to complete four courses (possibly more in certain tracks) in selected areas of study. These tracks will address major areas of knowledge development, inquiry or service delivery. Each track will include 12 credits (and in a few instances 15 credits) and reflect an area in which the student has undertaken a more concentrated area of learning. The core courses and Innovations Seminar (22 credits) plus the tract (12 credits) will be rounded out by the selection of one elective that is related to the students individually developed study plan. The 37 credit MA in Global Inclusion and Social Development will be awarded to students who have completed the core requirements and 15 additional credits. If students do not chose a track they may select up to 5 courses that will form their area of study. It is however assumed that most students will select a track to pursue and will complete their masters reflecting the completion of a track of study that will be noted on their University records.

A typical sequence for the MA student in the one year (12 month) program would be: Semester I three core courses, one track (or one elective) course and the Innovations Seminar; Semester 2, two core courses, two track (or two elective) courses and the Innovations Seminar and in the summer session one core courses, one track and one elective (or two electives) and a comprehensive exam (see Table C1 below). For the student in the 24 month MA program a typical course sequence would be: Semester 1, two core courses and the Innovations Seminar; Semester 2, two core courses and the Innovations Seminar; Summer Semester, one core course and one track (or elective); Semester 4 (fall year two), one core course and one track (or elective)
course; Semester 5, two track (or elective) courses; Year two Summer Semester, one elective and a comprehensive exam (see Table C2 below).

Table C1: One Year Sample Course Sequence for MA in Global Inclusion and Social Development

<table>
<thead>
<tr>
<th>One Year Program</th>
<th>Semester 1</th>
<th>Semester 2</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses Taken</td>
<td>-Core 1 (3 Credits)</td>
<td>-Core 4 (3 Credits)</td>
<td>-Core 6 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Core 2 (3 Credits)</td>
<td>-Core 5 (3 Credits)</td>
<td>-Track 4 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Core 3 (3 Credits)</td>
<td>-Track 2 (3 Credits)</td>
<td>- Elective 1 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Track 1 (3 Credits) Innovations Series (2 Credits)</td>
<td>-Track 3 (3 Credits) Innovations Series (2 Credits)</td>
<td>Comprehensive Exam</td>
</tr>
<tr>
<td>Credits earned</td>
<td>14 Credits</td>
<td>14 Credits</td>
<td>9 credits</td>
</tr>
</tbody>
</table>

Table C2: Two Year Sample Course Sequence for MA in Global Inclusion and Social Development

<table>
<thead>
<tr>
<th>Two Year Program</th>
<th>Semester 1</th>
<th>Semester 2</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses Yr. One</td>
<td>-Core 1 (3 Credits)</td>
<td>-Core 3 (3 Credits)</td>
<td>-Core 5 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Core 2 (3 Credits) Innovations Series (2 Credits)</td>
<td>-Core 4 (3 Credits) Innovations Series (2 Credits)</td>
<td>-Track 1 (3 Credits)</td>
</tr>
<tr>
<td>Credits earned</td>
<td>8 Credits</td>
<td>8 Credits</td>
<td>6 Credits</td>
</tr>
<tr>
<td>Courses Yr. Two</td>
<td>-Core 6 (3 Credits)</td>
<td>-Track 3 (3 Credits)</td>
<td>-Elective (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Track 2 (3 Credits)</td>
<td>-Track 4 (3 Credits)</td>
<td>Comprehensive Exam</td>
</tr>
<tr>
<td>Credits earned</td>
<td>6 Credits</td>
<td>6 Credits</td>
<td>3 Credits</td>
</tr>
</tbody>
</table>

For the doctoral students participation in the course offerings in the core as well as the track will be required with additional responsibilities for the doctoral students in the areas of research, innovation and policy/practice activities. For those students in the PhD program there will be additional requirements for the participation in the Innovations Seminar and their involvement in the development of this seminar for both the master and doctoral students. Additionally, doctoral students will be required to enroll in a Transdisciplinary Research to Practice group (a two year 6 credit per year course offering). It should also be noted that all full time doctoral students will be offered a graduate assistantship from year one through year four. The activities of this assistantship will be in addition to the course and seminar requirements. Limited GAs will be available for part time doctoral students.

Doctoral students will learn research and practice methods and implementation by taking at least 2 additional research, policy or management courses (6 credits) and understand the application of research to practice by participating in the Transdisciplinary Research to Practice groups.
attached to the research or practice activities of the ICI, part of the research activities of faculty associated with the School or through special arrangement with faculty who are engaged in relevant research or practice activities in other Departments of UMB, related Institutions of Higher Education affiliated with the School or in related research centers in other countries.

The Transdisciplinary Research to Practice group will be centered on the research, consultation and/or technical assistance activities available through the ICI, other programs on campus or through the affiliated programs of the School. These internships will be substantive in nature and be considered three credit course offerings per semester in years two and three of the student’s plan of study. The likely sequence for the doctoral students will be similar to the two year masters student with two additional courses in research, policy or management taken in year three as well as the structured Transdisciplinary Research to Practice internship in years two and three. The doctoral student will also be required to enroll in a dissertation seminar in years four and five (this will be a 10 credit seminar). The total doctoral program will be 65 credits: 37 credits as part of the masters (18 in the core areas, 4 in the Innovations Seminar, 12 in the track area, 3 in the electives for the masters) as well as 6 in the research, policy or management area, 12 in the Transdisciplinary Research to Practice Internship Group and 10 in the dissemination seminar (see Table C3 below). The part time doctoral student will take the same courses as the full time but will extend their time of completion by two years to an average of seven years to completion for these students.

Table C3: Sample Course Sequence for PhD in Global Inclusion and Social Development

<table>
<thead>
<tr>
<th>Two Year Program</th>
<th>Semester 1</th>
<th>Semester 2</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses Yr. One</td>
<td>-Core 1 (3 Credits)</td>
<td>-Core 3 (3 Credits)</td>
<td>-Core 5 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>-Core 2 (3 Credits)</td>
<td>-Core 4 (3 Credits)</td>
<td>-Tack 1 (3 Credits)</td>
</tr>
<tr>
<td></td>
<td>Innovations Series (2 Credits)</td>
<td>Innovations Series (2 Credits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-GA Activities (full time)</td>
<td>-GA Activities (full time)</td>
<td></td>
</tr>
<tr>
<td>Credits earned</td>
<td>8 Credits</td>
<td>8 Credits</td>
<td>6 Credits</td>
</tr>
<tr>
<td>Courses Yr. Two</td>
<td>-Core 6 (3 Credits)</td>
<td>-Track 3 (3 Credits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Track 2 (3 Credits)</td>
<td>-Track 4 (3 Credits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Transdisciplinary Research to Practice (3 credits)</td>
<td>-Transdisciplinary Research to Practice (3 credits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-GA Activities (full time)</td>
<td>-GA Activities (full time)</td>
<td></td>
</tr>
<tr>
<td>Credits earned</td>
<td>9 Credits</td>
<td>9 Credits</td>
<td>3 Credits</td>
</tr>
<tr>
<td>Courses Yr Three</td>
<td>-Research, Policy or Management Course (3 Credits)</td>
<td>-Research, Policy or Management Course (3 Credits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Transdisciplinary Research to Practice (3 credits)</td>
<td>-Transdisciplinary Research to Practice (3 credits)</td>
<td></td>
</tr>
<tr>
<td>Credits earned</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Doctoral students will take two comprehensive examinations, one on material in the core, the other on their track. They will also demonstrate research and or practice competence in a language other than English. Each student, under the direction of a primary advisor, will complete a dissertation and, upon completion, will be examined on the dissertation by a committee that will include the advisor, at least two other members of the faculty and one external member.

A sample of the brief descriptions of the core courses as well as the tracks to be offered is presented in Appendix J: Representative List of Graduate Core and Track Course Descriptions. These are intended to offer a sense of the nature of the course offerings that will be developed should the concept of the School for Global Inclusion and Special Development be approved. As was presented in Appendix B there are a number of current course offerings at UMB that may be able to be considered as a core, track or elective course offering. In the development of the details of the core and track courses a much more comprehensive review of current courses, the engagement of a wider range of faculty and the review of related courses available at other University of Massachusetts campuses or related Institutions of Higher Education affiliated with the School will be undertaken. A more detailed course outline and syllabi will be developed for all of the courses to be offered as part of the masters or doctoral programs at the School. All courses will be submitted for review and approval through the standard processes at UMB.

Master’s program enrollment: We will offer two program sequences: a 12-month full-time intensive sequence with students graduating in the following year, and a 24-month part-time sequence with students graduating two years after program enrollment. We will enroll a total of 10 students (four full-time and six part-time) in Year 1 (2012–2013). Starting in Year 2, we will enroll a total of 32 students (ten full-time and 22 part-time). We expect to award the first master’s degrees in Year 2 (2013–2014). The program will reach 46 students in Year 7 and will stabilize at that number going forward. GA support will be available for full-time students.

Appendix L: Outline and Development of the Degree Programs of the New School (Table 2) describes the projected student enrollment, attrition, and completion rate for this program in detail. Strategies for US and international student outreach, recruitment, and support are also described.
**Master’s program expansion and Certificate options:** The projections mentioned earlier are for the development of only one generic master’s program. We will consider building from this master’s program a number of tracks with the first two tracks established in year two and a two additional tracks in year five. The four initial tracks would be developmental disabilities, transition from school to adult life, Autism Spectrum Disorders and technology. Other possible tracks may include vision studies (already existing nationally accredited track), management of programs and services addressing social inclusion service delivery, disability studies, rehabilitation counseling in emerging countries and development of not-for profits (NGOs). These tracks may be included as areas of specialization in a master’s degree in social development and global inclusion or as a free standing certificate for students not interested in seeking a master’s degree but rather a certification in one of the track areas. Beyond the master’s and certificate options these course offerings will also be made available to other programs on campus as electives in related master’s degree courses of study at UMB.

**Doctoral program enrollments:** We will enroll a total of five students (three full-time and two part-time) in Year 1. Starting in Year 2, we will double enrollment, totaling 10 students per year (six full-time and four part-time). We expect to award the first doctorates in Year 5 (2017–2018). The program will stabilize at around 37 students in Year 7 (2019–2020). We intend to provide assistantships for all full-time doctoral students for four years. **Appendix L:** Outline and Development of the Degree Programs of the New School (Table 1) describes the projected student enrollment, attrition, and completion rate for this program in more detail. Strategies for US and international student outreach, recruitment, and support are also described.

In addition to the master’s and doctoral programs in global inclusion and social development, there will be an opportunity to include the three master’s programs in vision studies — Teachers of the Visually Impaired (TVI), Orientation and Mobility (O&M), and Vision Rehabilitation Teaching (VRT) — with consideration of the master’s or certificate program in Rehabilitation Counseling (RC) to the new School, once it has been established, should all be in agreement to this change. The goal would be to increase the national and international research of the vision programs and to improve enrollment rates and ensure sustainability of the Rehabilitation Counseling program. **Appendix L:** Outline and Development of the Degree Programs of the New School (Table 3) provides some background about these programs and describes the rationale for relocating them to the new School.

**b. Research:** The research activities of the new School will be broad in scope as well as in methodology. The inquiry and knowledge-development activities of the School will consider issues related to health, wellness, economic and social development in the applied and translational areas. The range of topics will be driven to some extent by the needs that are identified through our partnerships as well as reported in the literature but will have in all instances an applied nature. The faculty and staff of the new School will be encouraged to develop research activities that address issues of global inclusion and social development and to consider the applied and translational nature of these efforts. All students will be actively engaged in the research agenda of the School. There will be an aggressive pursuit of external resources to support the research agenda of the School with a specific engagement of those public and private resources that consider issues of health, wellness, economic and social engagement as their focal areas.
c. **Technical assistance:** The technical assistance (TA) efforts of the new School will be closely aligned to both the mission and the research activities of the School. There are a number of TA activities that are part of the ICI that will be aligned with the activities of the School. The TA efforts will be both local and global in nature with a strong emphasis on the application of evidence-based model development and a clear interest in systemic change. The School will have the capacity to engage other communities at the local, state, regional, national, and international levels in developing new ways of supporting public, not-for-profit, and private entities in more effectively implementing programs and services that are inclusive and focusing on enhanced social and economic development. The TA will be directed at increasing the ability of these entities to better support the communities that they are serving and addressing ways to more effectively include all people in services and programs that lead to increased economic opportunity and quality of life.

d. **In-service training:** The in-service training activities of the new School will again be linked to several of the in-service training efforts of the ICI. In-service training will include a strong emphasis on capacity development by increasing the skills and knowledge of the staff and programs serving specific communities at a local level. Training can be short-term, as in the case of presentations at meetings or events, or long-term, where there is a formal and ongoing relationship with a program or a system and the development of curricula for people who are working in a specific setting or community. The in-service training activities will typically be externally funded and will provide a base for faculty, staff, and students to offer immediate assistance and also apply new information or strategies in local communities. In some instances the in-service training will be focused upon the development of individual skills, while in others it will be on increasing the general knowledge about a policy, practice or procedure that has relevance in a community setting. The ranges of the in-service training, as in the case of research, will be broad and address a wide array of needs. The topics will typically be identified by public, not-for-profit or community entities.

e. **Innovations:** Innovation will be defined by the School as the development of new or more progressive approaches that demonstrate evidence-based or promising practices in the areas of health, wellness, economic and / or social development. Such activities will be contracted services of the School or its partners and will seek to develop a new service or practice in collaboration with local resources. Innovation efforts will reflect areas where a community has sought out the expertise of the School and has made a specific request to develop a new way of supporting inclusion or a new program that will enhance the wellness and well-being of its members. In most instances the development of innovative services and programs will be funded externally (through grants, contracts or fee for service) and will have a longer-term relationship with a community. Innovation programs are typically discrete efforts that have a very specific focus, such as the development of a new or different approach in a specific school setting, a new way of supporting increased economic engagement of a selected group (those hard to employ, socially isolated and on public assistance), or a way of engaging members of a community in a wellness effort (nutrition and exercise in a local community). Typically, an innovation offers a chance for the students and faculty to have a longer-term relationship in the development of a program and the evaluation of its impacts over time.
f. Dissemination: As is the case with the ICI, the School will have a robust dissemination strategy including the use of print, video and multimedia presentations, multiple websites, online portfolios, learning management systems for online course offerings, e-mail updates and an internal newsletter. Many of the dissemination activities of the new School will be supported through the existing expertise of the ICI’s Marketing and Communications group and done in collaboration with the activities of the University College (when appropriate). The activities covered under dissemination will be broad-based and diverse, with products and materials distributed locally, statewide, regionally, nationally, and internationally through a variety of websites, print, video and electronic communication strategies (see Appendix D: ICI Publications from 2000 to 2010). By the very nature of the School and the breadth of its mandate, there is a need to have a range of metrics that document the outputs and outcomes of the School’s activities across the areas of research, training, technical assistance, innovation, and dissemination. Many of the products of the School will be developed and disseminated through the usual vehicles such as journals, white papers, special reports (research briefs, policy briefs, research-to-practice reports, case studies, program-evaluation studies and reports, and testimonies in public arenas) and web documents (e-mails, online documents, and alerts). (See Appendix M: ICI Projects and Activities 2004-2010.)

g. Core competencies: A central element of the new School is the development of a set of core competencies that will serve to frame the instruction and clearly identify the skills and abilities that the School will anticipate its students will develop as part of their pre-service training experience. The emphasis on leadership will be central to the goals of the School for its students. As part of the framing of the school, it is critical that there be a clear base for the development of these leadership skills.

Effective leaders in inclusion and social development in a globalized world need to be passionate about the world surrounding them, both on a large scale (international) and small scale (local communities). They must be confident and capable in their ability to communicate and work well with others while maintaining a sense of self-awareness and self-reflection. Leaders acknowledge their weaknesses and strengths on a continual basis that creates impetus for seeking new knowledge and improving skills and translational abilities central to their leadership roles.

Leading in inclusion and social development in a global world requires flexibility, heightened perception, and the ability to think critically and creatively in order to adapt and respond to changes in politics, science, economics, health care, education, policy, demographics, and other areas. Further, the ever-changing landscape of societies in the global world necessitates transdisciplinary collaboration and diversity. A more narrowly focused perspective falls short of meeting the full diversity of needs.

Leadership embodies twelve competencies that satisfy the expectations listed above. The competencies have been adapted from a set of competencies for leaders in the field of maternal and child health developed by the Maternal and Child Health (MCH) Leadership Competencies Workgroup (2009). The leadership competencies in inclusion and social development are:

1. Knowledge Base in Inclusion, Social Development, and Globalization
2. Self-Reflection and Leadership
Underlying assumptions about accomplished leadership thread a common focus through these competencies resulting in such a leader. One assumption is that leadership in global inclusion and social development is contextual in nature, and thus leaders need to be prepared to address a variety of issues as they arise within different contexts. Another assumption is that leadership is a developmental process that has several dimensions, including the self, others, and the wider community, and that leaders develop through learning and experiences in each of these dimensions. Competencies 1 through 4 relate to the self dimension of leadership, competencies 5 through 10 focus on others, and competencies 11 and 12 involve the wider community. These assumptions will be found throughout the twelve competencies described below. Appendix B: Graduate Course Competencies and Related UMB Course Offerings provides more detailed information about each competency, including a definition, knowledge areas and skills, and relevant graduate-level courses currently offered at UMB. This set of competencies will be translated into teaching and training objectives for the master’s and doctoral programs that the new School and partners will develop and implement over the next five years.

A knowledge base related to social inclusion, social development, and globalization includes concepts of, perspectives on, and approaches to social inclusion and development as well as economic development. This knowledge base enables leaders to recognize links between health, wellness, social and economic development, and their impact on people with disabilities and other disenfranchised groups. Leaders also hold an awareness of US and international policies and practices related to the field. Beyond this knowledge base, leaders recognize the value of self-reflection and utilize it to examine the impacts and resulting biases of their personal values, beliefs, styles of communication, experience, and upbringing on their leadership style. This self-reflection allows leaders to be aware of their ethics and professionalism by being mindful of accepted moral principles and values in general, but also specifically within their profession and in working with fellow human beings.

Leadership requires the ability to critically and creatively think and to translate this ability into effective practice. This involves identifying an issue, dilemma, or problem and exploring relevant information through research in order to reach, or develop, an answer. While able to think at a critical and creative level, leaders are also capable of efficient communication in oral, non-verbal, and written modes. They recognize the diversity of the intended receivers and, in response, communicate in an appropriate manner. Leadership also involves the need for negotiation and conflict/dispute resolution. By recognizing the characteristics of conflict and examining its source in relation to the contending sides’ traits, leaders can use a cooperative
A main responsibility of leaders is to develop others through teaching and mentoring through a variety of teaching strategies including the design of learning environments, the provision of related resources, and the evaluation of learning outcomes. Leaders will also act as advocates, coaches, teachers, guides, role models, and resources to positively influence the career development and satisfaction of their colleagues and students. In teaching and mentoring, leaders utilize transdisciplinary practice and team building to provide a supportive environment where the skills and expertise of team members from diverse disciplines are recognized as essential and synergistic. To create an effective team, leaders work to enhance teamwork, manage team dynamics, and identify the stages of team development. Beyond this team, leaders work with communities, organizations, and systems. To do this well they must understand the basic features and issues of systems, be able to think systemically about the complexity of policy, practice, and research challenges, and be aware of how the infrastructure of organizations and businesses works.

Leaders have knowledge of policy and advocacy and put this knowledge into practice. Understanding public policy at local, state, national, and international levels in relevant areas of health, wellness, social and economic development allows leaders to address a given problem, or set of problems, affecting a large number of people. Likewise, leaders’ ability to inform policymakers about people’s needs further widens their scope of influence. Rounding out leaders’ competencies is a working knowledge of research, evaluation, and policy analysis. Employing their comprehension of research methods, statistics, evaluation methods, and policy analysis, leaders are able to gather data, the findings of which they can then translate into practice. The combination of these twelve competencies creates leaders who are capable of aiding people near and far in regards to their specific needs in an efficient, appropriate, informed, respectful manner as an aware individual who works as part of a team, a community, and a world at large.

D. Structure and Governance
The structure and processes for governing the new School have been modeled after those of the College of Education and Human Development and are consistent with University Regulations. Figure 1 on page 20 includes an organizational chart of the School. The chief executive officer of the new School will be the Dean. The Dean will be supported by the School Senate—the governing body that will represent the members of the School (faculty, staff, and students), and that will have jurisdiction over all matters affecting the School, consistent with the Constitution of the Faculty Council. These matters include, but will not be limited to: curriculum, admissions, administrative appointments, budget and administrative operation, planning, emergencies, faculty policies and procedures, and bylaws. An Executive Committee will be established consisting of a Chair with Senate membership and four additional members with one half being elected on an annual basis and the term on the Senate being two years in duration.
The Senate’s primary function will be to make recommendations to the Dean. Senate recommendations will be regarded as the official actions of the School, unless the Dean notifies the Senate within thirty days of issuing the recommendations that these require further consideration. Senate members will meet at least once a month during the school year. Sixty percent of voting members will have to be present at a meeting to pass any recommendation. The meetings and their minutes will be accessible to the public. Further specifications about the Senate’s composition, organization, and procedures will be laid out in the School’s constitution and bylaws.

The Senate will establish four standing committees that will support Senate members in their decision-making. Each committee will have specific responsibilities in one or more particular areas of School life. The committees will include a School Personnel Committee (SPC), an Academic Affairs Committee (AAC), a Budget and Long-Range Planning Committee (BLRPC), and a Professional Education Coordinating Committee (PECC). The first three committees are required by University Regulations, with the fourth serving as a coordinating group for affiliated members and partners. In addition to these committees, the Senate may establish ad-hoc committees as needed.

The SPC will consult to the Senate on personnel issues concerning faculty and staff. The AAC will be responsible for reviewing and evaluating proposed academic programs (except professional education programs), curricula, and courses, and will make appropriate recommendations to the Senate. Both the AAC and the PECC will share responsibility for coordinating teaching and training activities across academic units, institutes, and centers within the School, but also with other University entities (colleges, institutes, and centers) and non-University entities (e.g., Children’s Hospital Boston). The BLRPC will focus on developing and reviewing School procedures for budgeting and long-range planning, and will consult to the Senate and the Dean on these issues. The committees will include faculty and staff representation from all academic units, institutes, and centers of the School. Each committee will designate a Chairperson who will serve as a non-voting member on the Senate. He/she will report on the status and progress of committee activities at monthly Senate meetings. With the exception of the SPC, all committee meetings and their minutes will be open to the public. Further specifications about the committees’ composition, organization, and procedures will be laid out in the constitution and bylaws of the School.

In addition to these structures, the School will establish two Graduate Program Director (GPD) positions: one for the master’s program and another for the doctoral program. Each GPD will have overall responsibility for his / her respective graduate program. GPD positions are three-year appointments and subject to annual performance reviews conducted by the AAC. The GPDs’ responsibilities, as specified in University Regulations, 2 focus on student recruitment, admissions, and registration; advising and problem resolution; graduate assistantships; curriculum; scheduling and course evaluation; and completion of degrees or certificates. The GPDs will work closely with the AAC and the PECC, as well as with the University’s Graduate Studies Office.

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2 Source: University of Massachusetts Boston, Graduate Studies website:  
http://www.umb.edu/academics/graduate/faculty/ (“GPD Roles and Responsibilities” and “Appointment of GPDs”)
E. Faculty and Staff

The University will allocate tenure and tenure-track lines to support the development, instruction, and expansion of the new School. This will include: a) a tenured Professor line for the Dean of the School, b) seven tenure-track lines for the School to be phased according to the planned timetable for activities of the School as well as administrative staff (see Appendix F: Projected Timelines for the Development of the Instructional and Other Activities of the New School), c) assignment of the current tenure-track line in vision studies to the School and the movement of the master’s pre-service training program to the School once the School has been established (not part of the seven FTE tenure track positions noted above).

With the University’s interest in supporting closer relationships between its colleges, institutes, and centers, the School will explore greater utilization of joint appointments in the colleges, institutes, and centers as well as staff at the ICI. The joint appointment option for faculty in the School will include both course instruction as well and serving on committees for students in the master’s and doctoral programs of the School. In a reciprocal fashion, faculty and staff of the
School will be eligible and encouraged to seek joint appointments in related colleges and departments on campus. The expanded emphasis on pre-service training will also serve as a strong platform for the development of joint appointments as the training activities will be of a transdisciplinary nature. The AAC and the PECC will be responsible for coordinating teaching and training activities both within the School and with related colleges and departments on the University campus.

In addition to tenure-track lines and research appointments, the School will use several mechanisms to build teaching and training capacity as an integrated part of its research and development. For example, the School will host a *Faculty Scholars Program* for University faculty that will be supported through ICI resources. The program intends to develop closer working relationships between other University entities (colleges, institutes, and centers) and the School by providing faculty with opportunities to work with ICI staff on the development of research applications and research projects, the implementation of these projects, and the publication of relevant findings in refereed journals and other scholarly publications.

Between three and five faculty members will be awarded mini-scholarships to spend one day a week at the ICI for a period of one academic year. These Scholars will be engaged in a formal training program and will also be assigned an ICI mentor who will guide them through their learning process. Implementation of this effort will be coordinated with the Office of Research and Sponsored Programs and the host college with the goal to increase faculty skills and capacities and to build the number of grant and contact resources at the University. It should also be noted that with the establishment of the new School the ICI will seek to take greater advantage of the research faculty positions that are available. A total of 24 ICI staff that have terminal degrees or advanced degrees may be eligible to seek research appointments based upon their experience and expertise (see *Appendix N*: ICI Staff biographies). The use of the research positions will provide an additional avenue for linking qualified ICI and partner staff to the new School.

Additionally, the School will develop a *Visiting Senior Scholars Program* funded with ICI resources. The goal will be to support two Visiting Senior Scholars, one from the US and one international scholar, who will be supported for a twelve-month period through ICI resources to complete a scholarly project and publication addressing an issue related to global inclusion and social development. Visiting Scholars will be supported in the form of a one-year paid experience at the School.

**F. Students**

Establishment of the master’s and doctoral programs in global inclusion and social development will require offering as many as 30 *Graduate Assistantship (GA) positions*, once both programs have stabilized. See *Appendix L*: Outline and Development of the Degree Programs of the New School as well as Table 1 and Table 2 for more detail. The School will commit to supporting eighty-five percent of the costs for between 30 and 35 GA positions each year with resources from grants and contracts as well as ICI / UMB funds.

GAs will be expected to be substantially engaged in ICI projects (research, training, evaluation, policy development) and also to participate in the *GA Training Program* of the ICI, including
monthly seminars, special colloquiums of the ICI, and community programs sponsored or hosted by the ICI. All GA opportunities will be advertised through the Graduate Studies Office and students will be selected through a structured interview process. Note that students enrolled in the School’s doctoral degree programs will be preferred in the application / selection process as will doctoral students in other programs at UMB. The remaining positions will be available to any UMB student who fulfills the requirements of the position.

In the coming two years, the School will develop a Post-Doctoral Fellow Program to provide a formal training experience in the focal areas of the School for up to six such fellows interested in research. The post-doctoral fellows will be required to work on an ICI research project, have a senior staff member as a mentor, and develop at least one publishable article in a selected research area. Fellows will be supported in the form of a one-year (twelve month) paid experience at the School funded with resources from ICI funds.

G. Local, Regional, and National Factors To Be Considered
The following presents key findings of a market analysis for a new School, particularly its master’s and doctoral programs in global inclusion and social development. Local, regional, as well as national factors were considered in this analysis. See Appendix E: Activities of Institutions of Higher Education and Other Centers Locally, Regionally and Nationally for more detail. This is followed by an analysis of the labor-market demand for graduates of the new School and other globally focused programs at the local and national levels. This analysis was completed in March, 2011 and it is assumed that some additional options will have entered the global arena between that time and now and, additionally, that the review was done through web sources so some developing programs may not have been identified.

a. Local: A review of the websites of all UMass campuses—Lowell, Amherst, Worcester, and Dartmouth—suggests a limited program offering in global inclusion and social development through UMass. Lowell is the only campus with a master’s degree in Economic and Social Development of Regions with a concentration in Global Development. However, this concentration does not focus on health, wellness, economic and social development in an integrated way. In the current semester, the John W. McCormack Graduate School of Policy and Global Studies both changed its name and has added a new doctoral program in global studies. Other international pre-service doctoral programs are also being considered at UMB and most assuredly in other University of Massachusetts entities.

b. Regional: A review of the websites of all major universities in the New England region suggests that several private universities offer programs that focus on global issues with a concentration in health or economic development. The exception is Boston University, which offers two master’s programs in Global Development that integrate a focus on health and economic development within a development context. Two other universities—Harvard University and Brandeis University—offer graduate programs in health systems and international health / development respectively; these programs include a focus on economics.

c. National: Several programs that offer graduate degrees that focus on global health and (economic) development can be found nationally. We cross-referenced two lists in order to select programs for inclusion in this proposal. The lists included: the Global Health Programs in US
Universities and the US News and World Report Ranking of Public Health Programs. The programs summarized in Appendix E: Activities of Institutions of Higher Education and Other Centers Locally, Regionally and Nationally are not intended to be a comprehensive representation of nationwide programs, but rather a snapshot of what is available. Overall, these programs are driven towards a focus on global health without a particular focus on economic development.

d. Local, national, and international labor needs: Employment forecasts and research indicate a need for education and training in (global) health, wellness, economic and social development at the local, national, and international level. The graduate-degree and certificate programs offered by the new School directly respond to: a) an increased labor-market demand for leadership professionals knowledgeable about health, wellness, and economic development in Massachusetts and the US, b) a shortage of trained social-development personnel in developing countries, and c) an increased student demand for global-health and wellness education and training programs. The new School with its comprehensive focus on health, wellness, economic and social development clearly addresses the increase in student demand for global-health education and training. Developing such a School at UMB becomes even more critical considering both the limited program offerings in global health at public universities in the state and the region, as well as the narrow focus on public health by many of these programs.

The limited number of public institutions of higher education addressing global health was documented by the Center for Strategic and International Studies (CSIS) when it identified 52 universities in the US and Canada that, as of 2009, were engaged in global-health activities (Merson & Page, 2009). “Global-health activities” included alliances, centers, departments, institutes, initiatives, offices, programs, and schools. The majority of these universities were located in the US (46), including 14 in the Northeast, 13 in the South, eight in the Midwest, eight in the West, and three in Washington, DC (Merson & Page, 2009). Only one of the 14 northeast universities in the Northeast was a public institution (University of Pittsburgh). Six of the 14 northeast universities engaged in global health were in New England (Dartmouth College in NH, Brown University in RI, Yale University in CT, Princeton University in NJ, and Boston University and Harvard University in MA). This included two universities in Massachusetts, both of which are private institutions. Given this situation, there is a unique opportunity for a public university such as UMB to offer a School that has as its focus global inclusion and social development.

H. Resources Needed
The establishment of a new School will require the allocation of resources in the areas of tenured and tenure-track faculty, administrative staff, external funding, innovations, space and equipment. Through affiliations and agreements with colleges, institutes and centers, the costs associated with the development of a new School can be contained in that a portion of the School will draw upon the current interest and resources existing in other colleges, departments, institutes, and centers.

With the proposed timelines (see Appendix F: Projected Timelines for the Development of the Instructional and Other Activities of the New School), it is clear that a number of faculty and staff lines will need to be allocated to get the new School established. It is estimated that in the
first two years five faculty lines and one administrative line will be needed as well as a tenure professorship line for the Dean of the new School. In the first year and one half, course outlines for both the master’s and doctoral programs will be developed, detailed, and presented for academic review. The new tenure lines, in collaboration with current interested faculty and staff of UMB, allocated to the School will provide academic resources that can frame the master’s program in Year 1 and begin the recruitment and instructional processes in Year 2 and Year 3. Simultaneously, the doctoral program will begin development with a new faculty line as well as interested faculty and staff of UMB assigned to develop the course outline and structure of the doctoral program in Year 1 and early Year 2. Activities to develop both the master’s and doctoral program will begin simultaneously with the completion deadlines differing slightly due to the complexity of the design of the two degree programs. At the end of Year 1, the new master’s program will be completed and finished the review process, while at the middle to the end of Year 2 the doctoral program will be competed and reviewed.

Once the course outlines are organized and approved (at the middle and end of Year 2), two additional staff lines will need to be allocated to the project (halfway through Year 2 for posting and hiring for the beginning of academic Year 3). From the middle of Year 2 to the beginning of Year 3, the new School will be beginning its second year of a new master’s program as well as recruiting, enrolling, and supporting its first cohort of students for the doctoral program. At this point the School will have filled its seven new lines and one administrative line for the School with a second to be added in Year 5. Additional lines will be added as the student enrollment grows, with one new faculty member added per 18 new master’s-level students enrolled, and one new faculty member added per five to seven new doctoral-level students enrolled. Once there is a critical mass of students in these programs, these start-up ratios will be reviewed and if necessary adjusted. (See Appendix G: Proposed Five-Year Budget for the New School).

Essential to the full implementation of the new School will be an aggressive outreach and recruitment of external funds from the public and private sectors. Grant applications will be submitted along with task orders and contracts to federal, state, and private resources. Currently, the ICI has more than 62 grants, contracts or fee-for-service agreements (see Appendix M: ICI Programs and Activities 2004-2010). With the movement of the ICI into the School, it is anticipated that the growth of the ICI in the area of external funds will continue. We anticipate that, on average, the ICI will continue its ten-year growth rate of 12 to 15 percent per year, with the overall level of external funding to the new School through the ICI and other college, department, institute, and center affiliations approaching $35M annually by 2015. These projects will address a range of School activities including graduate-degree and certificate programs, research, in-service training, technical assistance, innovations and fee-for-service contractual agreements. Funding for support of students as well as research efforts will be a top priority for the ICI in its first five years as part of the new School. It is anticipated that through external resources support will be available for 30 GAs annually (an additional 5 GAs will be supported through the Graduate Studies Office), five visiting faculty (at FTE .2 per faculty), four to six doctoral and post-doctoral positions, and two visiting scholar positions annually (one international and one domestic fellowship). All of these efforts will be supported though external funding resources or paid for through the return of indirect revenue from the University to the ICI.
A benchmark of the new School will be its ability to develop partnerships within the UMB community; institutions of higher education in Boston, New England, and beyond as well as the business sector. It is proposed that the new School will have a clear link to the activities of the Venture Development Center (VDC) at UMB as well as technology areas in health, wellness, economic and social development. The advances in technology and the innovations that are being developed within the VDC on campus offer an opportunity for the new School to bring technology that is cutting edge into other countries addressing the areas of health, wellness, economic and social development. This affiliation will include the establishment of an innovations team at the School that will include the VDC staff and companies in the VDC as a way for the UMB system to be part of the early implementation of the technologies that are being developed by innovators on campus.

A concern with the development of a new School on campus is the location of such a school. While the initial footprint to the new School will be small, in Year 1 through Year 3 as the school develops its graduate-degree and certificate programs, the demand for office space, meeting rooms, classroom space and equipment will grow. With the ICI becoming part of the new School, the demand for space on the campus becomes considerable. The details of the space needs of the new School and the ICI and other partners will need to be considered but space must be included for the new School in the UMB master plan as it is developed.

I. Business Plan
The development of the School will progress through three different stages: (a) the transition of the ICI to the new School, (b) the development of the affiliations and partnerships relating to the mission of the School, and (c) the outline and development of the master’s and doctoral programs in global inclusion and social development including certificate options. Appendix G: Projected Five Year Budget for the New School offers a forecast as to the income and expenses of the new School over the initial three to five years. Appendix F: Projected Timelines for the Development of the Instructional and Other Activities of the New School describes the timelines that includes the three stages.

a. The transition of the ICI to the new School: This will be accomplished smoothly as it is anticipated that all of the activities, the administrative structure and the grant and contract projects of the ICI will be moved to the new School. The change in the indirect recovery will occur with the transition of the ICI to the School. With this transition the ICI will begin to establish the recruitment of the 35 GAs annually (85 percent or 30 GAs supported through ICI sources), five visiting faculty (at FTE .2 per faculty member), four to six doctoral and post-doctoral positions, and two visiting scholar positions annually (one international and one domestic fellowship). The recruitment for the visiting faculty as well as the doctoral fellows and visiting scholars will begin in the first twelve months, but the actual awarding of the fellowships, visiting faculty positions, and scholar positions will not occur until the beginning of the academic year following the first twelve-month period.

b. Development of affiliations and partnerships: Simultaneously to the transition of the ICI to the new School, the Dean and faculty of the School as well as some of the staff of the ICI will begin outreach to faculty on the campus who may be interested or have expressed an interest in having a formal or informal relationship with the School. The nature of these relationships can range from joint appointments for faculty in the master’s or doctoral programs, to membership on one
of the projects of the ICI, to development of a new project that is consistent with the mission of the new School and will be located in the School. These affiliations may include faculty from a college at UMB or from one of the institutes or centers. Joint appointments will only be established with faculty from an academic unit of the University, while affiliated appointments will be developed with staff who may be engaged in institute and center activities on the campus but not based in an academic unit, as well as those faculty and staff who are part of the partnerships with institutions of higher education or external centers and programs that will be developed. The details of the affiliated appointments will be developed in the first year of the new School’s operation.

Other affiliations will include the development of agreements between the School and the Center for Global Pediatrics (CGP) at Children’s Hospital Boston. This affiliation will bring into the School the activities of the CGP and the many outreach and research projects that are sponsored by the CGP through Children’s Hospital Boston. Additional affiliations will include the continuation of the ICI membership on the International Council of the Association of University Centers on Disabilities (AUCD) and on the United States International Council on Disabilities (USICD). Outreach will also be made to the other New England institutions of higher education as a way of expanding the reach of the new School into areas of health care and wellness (see Appendix E: Activities of Institutions of Higher Education and Other Centers Locally, Regionally, and Nationally). These affiliations will be defined by the nature of the programs that we are reaching out to as well as the areas where there is an opportunity for shared teaching (pre-service), training (in-service), research, and technical assistance.

c. Outline and development of the master’s and doctoral programs in global inclusion and social development: Appendix L: Outline and Development of the Degree Programs of the New School as well as Tables 1, 2 and 3 offers a description of the degree-programs to be developed, strategies for outreach to and recruitment of potential students, projected students enrollment, as well as strategies for student support. A more detailed review of potential course offerings, likely sequences for students and brief descriptions of core and track courses was presented in Section C.a teaching on page 14 above.

J. Sequencing School Activities and Timelines
This School will offer graduate training initially at the master’s and subsequently doctoral levels including certificate options in the areas of global inclusion and social development with a focus on the interrelationship of health, wellness, economic and social development in global communities. The core of the School will be structured so that it is well integrated into the current and future activities of UMB; other institutions of higher education in the region, nationally, and internationally; and organizations and associations that have a focus on global inclusion and social development. The faculty will represent a range of disciplines with the course offerings reflecting their transdisciplinary input.

The School curricula will be closely integrated with the curricula offered in the McCormack Graduate School of Policy and Global Studies, the School of Nursing and Allied Health, the College of Education and Human Development, the College of Public and Community Service and the School of Management. The School will also work with selected departments in the College of Liberal Arts as well as the College of Science and Mathematics. It is anticipated that
the new School will work closely with the University College in the development of distance capacity and in responding to needs for online instruction from interested parties. The graduates will be well-prepared to assume leadership roles in the areas of industry, human services, education, and public service. Selected programs in these colleges will be closely linked to the graduate programs to be offered through the new School; including those currently delivered by ICI-supported staff and Graduate College of Education and Human Development faculty in vision studies. The School will also utilize existing related course offerings in other colleges and departments as components of the graduate programs, most likely as electives, but potentially in some cases as core course requirements.

In addition to graduate-level programs, the School through its partners (including the ICI; other UMB colleges, departments, institutes, and centers; and external partners) will offer research, community capacity development (in-service training and technical assistance to key constituent groups), model demonstration, and dissemination. These activities will directly relate to the efforts, activities, and projects of the institutes and centers at the University and other UMB partners, as well as a myriad of institutions of higher education in the greater Boston area, nationally, and globally.

Appendix F: Projected Timelines for the Development of the Instructional and Other Activities of the New School presents in some detail the activities and time frames for the instructional efforts of the School. Other activities including research, capacity development (in-service training and technical assistance), public policy formulation, and dissemination efforts will be occurring simultaneously to the development of these graduate-degree programs. It should be noted that the timelines are dependent on the actual date for the establishment of the new School. It is anticipated that the process of developing the master’s and doctoral programs will take at least 12 to 18 months from initial development to approval and student recruitment / enrollment.

K. Income and Expenses

The overall budget of the new School is estimated for the first five years (see Appendices G.1 and G.2: Proposed Five-Year Budget for the New School). This budget anticipates the progressive allocation of seven tenure-track faculty lines (excluding the tenure position for the founding Dean) and the administrative lines (one in Year 1 and a second in Year 5), as well as income from students who will be entering the master’s and doctoral programs. The budget also considers the support of GAs (85 percent of GAs will be supported by the ICI with the remainder [15%] supported by the University), visiting scholars, visiting faculty and the post-doctoral support that will be provided by the ICI through grant income as well as its portion of the RTF as a result of a return of indirect to the ICI. The budget does not consider income and expenses related to a possible transition of the master’s programs in vision studies along with the tenure-track position associated with those programs now located in the College of Education and Human Development. The following outlines the assumptions that have been made in the development of both the income and expense projections for this new School. These projections are represented in the calculation of income and expenses presented in Appendices G.1 and G.2: Projected Five Year Budget for the New School.

A number of assumptions are made in the development of the five-year projected budget, including:
- the assignment of tenure lines to the school including in Year 1 the tenure line for two faculty, in Year 2 an additional three faculty, and in Year 3 an additional two faculty (an average of $80,000 is used for each faculty line, with the exception of the tenure position for the Dean to be covered by the University),
- the assignment of a staff line in Year 1 and a second in Year 5,
- the securing of part time or adjunct faculty in years three through five and beyond with an estimated 10 courses or sections in year 3, 15 in year 4 and 20 in year 5,
- graduate assistantships are forecasted for the doctoral program according to Table 1 (in Appendix L: Outline and Development of the Degree Programs of the New School) with five students in year 2 and in subsequent years three through five 13, 20, and 27 graduate assistants (estimated support for each GA is $22,650 annually; higher than the current year costs but anticipating an average annual cost of $22,650 over a five year period). It should be further noted that doctoral GA support will be available for doctoral students in other programs at UMB based upon availability and the focus of their work and its consistency with the activities of the School,
- graduate assistantships are forecasted for the master’s program according to Table 2 (in Appendix L: Outline and Development of the Degree Programs of the New School) with four students in Year 1 and a total of eight in each subsequent year (estimated support for each GA is $22,650 annually; higher than the current year costs but anticipating an average annual cost of $22,650 over a five year period),
- faculty scholars will be enrolled at a reduced rate initially with three in Year 1 at FTE .2 each and then five in each of the following years (annual salary costs to the school of $80,000 per FTE 1.0),
- senior visiting scholars will be introduced at a phased-in rate of one in Year 1 and then two in each of the following years (with an honorarium of $55,000 per scholar per year),
- the post-doctoral fellowships will be phased in with one in Years 1 and 2, four in Year 3, and six in Year 4 and going forward,
- support for the graduate assistantships will be provided through ICI resources for an average 85 percent of all assistantships in the new School annually (the remaining 15 percent will be provided by the University),
- support for the post-doctoral position, scholar positions, and visiting scholars will be provided through ICI resources, and
- tuition is calculated at the in-state rate of $18,500 per student per year (adjustments are made for full- and part-time status of all students, summer tuition and the rate selected reflecting a mix of in-state and out of state student participation), with an estimate of seven students in Year 1 and in the subsequent years 32, 54, 72 and 100 students (full-time equivalent) enrolled and paying or receiving support for tuition.

The projections, as noted in Appendices G.1 and G.2: Projected Five Year Budget for New School, show that over a five-year period, given the new staff as well as the student enrollments, income will exceed expenses in Year 3 of the new School’s operations. Projections for the new School show a five-year total of income over expense of $743,372 or on an average annual basis a net income over expense of $148,674. ICI support to the new School activities in the first five years will be approximately 55% of the total estimated expense over that time period. Additionally, it should be noted that the income from tuition will cover all of the faculty salaries and related expenses beginning in year three and continue to grow so that in year five the income
to the program will exceed all expenses (including faculty salaries for tenure, tenure track, part
time faculty, professional staff, GA support and equipment expenses) by $527,368.

It should be noted that any changes in these assumptions will require adjustments of the
estimated income and expenses that are presented in the five year budget projections. It should
be further noted that the cost of the tenured professor position for the founding Dean is not
calculated into the five-year income and expense plan.

L. Relationships of the New School
The establishment of the new School will require that there be a number of formal and informal
affiliations established. The new School will reach out to faculty and staff in the colleges,
institutes and centers, seeking to engage those interested in global inclusion and social
development so that they consider affiliating with the School. The nature of the relationships will
vary depending upon the interest, the time availability, and the goodness of fit between the
faculty or staff member with the focus of the new School. The use of formal agreements with
faculty may include joint appointments, shared course instruction (in the School’s core areas as
well as in elective course offerings that may be in other colleges and schools), shared research
endeavors, joint grant development, mutual work on the provision of in-service training and / or
technical assistance, and development of products for dissemination. All of these are strategies
that could lead to joint appointments between faculty and staff from other colleges, institutes,
and centers at UMB with the new School. All such appointments will be done according to
relevant University guidelines.

a. ICI Relationship with the School: Many of the areas of relevance for the School are directly
related to activities and interests of the ICI (see Appendix M: ICI Projects and Activities 2004-
2010). A close working relationship between the ICI and the School will be essential. The
activities of the ICI can serve as a platform for the students who will be engaged in the master’s
and doctoral-level course offerings, providing a location for students to serve in graduate
assistant capacities as research assistants, or on projects developing innovation strategies or in-
service training.

The instructional activities as well as the formal academic appointments will remain within the
School, while community and national as well as international relationships can be linked to the
ICI and / or the School. Staff of the ICI will be eligible for and encouraged to consider
appointments in the new School through its ability to embrace non-tenure track research
positions as well as to have its own tenure and tenure-track faculty lines that will be linked to the
graduate degree programs in global inclusion and social development. Conversely, faculty of the
school will be encouraged to seek joint appointments with the ICI where they may engage in
research, community capacity development, in-service training, and dissemination activities as
part of their academic workload. Such affiliations will include the allocation of an appropriate
level of faculty and staff financial support by both entities to reflect the true level of effort of the
faculty and staff that are on joint appointments. All academic positions at the School as well as
those appointments that are shared by the School and the ICI (or any other entity on campus) will
be subject to the same procedures for faculty recruitment, advancement, and retention that are required for all colleges at UMB.

b. Other UMB colleges, institutes, and centers: The new School will have a close relationship with a number of the colleges at UMB including, but not limited to, the College of Management, the McCormack School of Policy and Global Studies, the College of Education and Human Development, the College of Nursing, and the University College. The nature of the affiliations, while each will be unique, will include the development of course offerings that can be included as part of the core courses in the master’s and doctoral courses of study and certificate options in the new School as well as the accessing of courses that can be part of a student’s course of study as electives. A sample of possible course offerings that have a potential interrelationship with the new School are included in Appendix B: Graduate Course Competencies and Related UMB Course Offerings. These course offerings are presented in tabular fashion and link the core competencies, knowledge areas, and skills that have been identified as forming part of the portfolio of skills and abilities that the graduates of the master’s and doctoral programs will develop through their approved course of studies.

The list of relevant UMB graduate course offerings included in Appendix B: Graduate Course Competencies and Related UMB Course Offerings is a suggested list and is not intended to be exhaustive but rather representative of the areas where the graduate degree programs of the new School may intersect with programs and courses offered in other UMB colleges, departments, institutes, and centers. A more complete review of the relevance of these courses as either electives or core courses in the master’s or doctoral studies in global inclusion and social development will be completed and included in a separate application for the establishment of an approved master’s and doctoral course of studies as approved formal programs within this new School. The relationship of the new School to other colleges at UMB will be defined in more detail as the School is launched but the logical areas for collaboration include shared course instruction, shared faculty for selected course offerings, transdisciplinary project development in the areas of research and technical assistance, and the sharing of students in elective and core-course participation. Doctoral level support will focus on the students in the School but will also be available to other doctoral students who are matriculated in programs at UMB. The transdisciplinary nature of the school reinforces the sharing of doctoral students across programs at UMB. To facilitate that sharing the new School will support selected doctoral students who work on project at the School but are enrolled on other doctoral programs on the campus.

As in the case of the relationship of the new School to other colleges at UMB, similar outreach will be made to the institutes and centers on the campus. The nature of the relationship may be somewhat different in that the logical areas for interaction will most likely be in content areas and through the development of research projects, in-service training, technical assistance and innovation development between the School and individual institutes and centers. Utilizing information collected from the UMB website, Appendix C: Areas of Interest of UMB Institutes and Centers shows the links to each of the institutes and centers as well as a list of the themes or topical areas that may be explored as these relationships are developed. Some of the interactions between the institutes and centers will be developed through the activities of the ICI, while others may evolve as a result of the efforts of the School in the area of global inclusion and or social development.
In addition to UMB’s institutes and centers, the new School will work closely with the UMB Office of International and Transnational Affairs (OITA) on reaching out and recruiting potential international students, faculty, scholars, and research staff and on supporting them during their stay in Boston. The many new activities of OITA will be of considerable value to both the outreach and student recruitment activities of the School and also assist in the expansion of existing and development of new international links that are present through OITA. Other international activities that are ongoing through the colleges, departments, centers, institutes and faculty will also serve as a basis for expansion of the Schools activities in other countries. See Appendix L: Outline and Development of the Degree Programs of the New School for more details.

c. Other relationships and partnerships: Other institutions of higher education and teaching and/or academic research and service organizations will also have relationships with the new School. Children’s Hospital Boston has established a Center for Global Pediatrics (CGP) as part of its international health outreach efforts (see Center for Global Pediatrics at Children’s Hospital Boston, www.chglobalhealth.org/aboutus.htm). This international center will have some very direct links to the School as well as to the areas of health and wellness that will be addressed in the School. The CGP currently has projects addressing primarily health and wellness issues of underserved populations. Some of the outreach programs include activities in Asia (Mumbai, Bangalore, Thailand, Indonesia), South America and Latin America (Chile, Dominican Republic, Haiti, El Salvador), Eastern Europe (Czech Republic, Romania, Turkey) and Africa (Kenya, Liberia, Tanzania, Congo, Rwanda).

Directed by Dr. Judith Palfrey, the CGP is emerging as Children’s Hospital Boston’s main outreach channel in child health and disabilities. Through the ICI, a joint program of UMB and Children’s Hospital Boston, the activities of the CGP and the activities of health and wellness can be linked to the activities of the new School. Other potential institutions of higher education, as well as academic-service and research-center affiliations are listed in Appendix E: Activities of Institutions of Higher Education and Other Centers Locally, Regionally, and Nationally.

While much of the effort that is reported by these programs addresses public health and health issues, there are clearly some opportunities to link the interests of the new School with the issues of wellness, economic and social development in the coming years.

The new School will also have an opportunity to develop other affiliations and associations with national organizations and programs interested in issues related to global inclusion and social development. At the present time, the ICI has membership on the International Council of the Association of University Centers on Disabilities (AUCD) which will link the efforts of the School to those that are underway through individual members of the 67 University Centers on Excellence in Disabilities (UCED). There is one such UCED in each state with some having links to activities that are underway in other countries. Additionally, there are five international affiliate members that belong to AUCD located in Israel, Wales, Spain, Ireland and Australia (see Appendix O: Letters of Intent to Affiliate and/or Support). The ICI is also a member of the US International Council on Disabilities (USICD) and as a member has access to a number of programs that are interested in issues of inclusion and equality for people with disabilities in the United States and internationally. Beyond these affiliations, the ICI has had over the past two
decades long-term projects in nine countries (Turkey, Saudi Arabia, Dubai, Guam, Taiwan, Czech Republic, Slovak Republic, Poland and Italy) addressing issues of disability, inclusion, and economic development.

M. Areas for Potential Collaboration with the New School
There are many opportunities for collaboration with the new School. For example, there are a number of master’s and doctoral programs that are being developed, some of which may have a potential to link with the new School’s activities with a specific emphasis on developing degree programs. Most notable is the emergence of the PhD program in Transnational, Cultural and Community Studies (TCCS) that has been under development for several years with a great deal of investment by several faculty at UMB. Some of the possible relationships with existing and new graduate-degree programs such as the TCCS program could involve the sharing of course offerings, development of joint course offerings, shared instruction, and development of joint appointments.

There are also opportunities for the School to work closely with the McCormack Graduate School of Policy and Global Studies, the College of Public and Community Service (CPCS), and the College of Management in the development of a program that would look at the expansion of the non-governmental organizations or not-for-profit delivery system nationally as well as internationally addressing issues of economic development, management, and public policy. Such a shared program, like other possible options, could be a joint program of the new School and a single college or more than one college or department.

The ICI for the past fifteen years has had a significant investment in the development of community-based minority organizations, from both an organizational and a service-delivery perspective, supporting members of those cultures and communities who may have a disability. The ICI has had considerable interaction with a range of culturally diverse community organizations, including but not limited to the Somali Development Center, Haitian Public Health Initiative, Urban PRIDE, Boston Chinatown Neighborhood Center, Ethiopian Community Mutual Assistance Program, Congolese Women’s Alliance, Eritrean Community Center, International Institute of Lowell, and Adgar (Ethiopian Women’s Alliance). Many of these organizations have served as training areas and internship options for our long-term trainees through the Children’s Hospital Boston portion of the ICI, as well as several projects of the ICI based at UMB. An expansion of the investment in these community-based minority organizations through collaborative activities between the School and UMB and non-UMB entities will serve to recruit students, create opportunities for community-based internships, and develop shared research around culturally sensitive areas of inquiry.

The development of more formal agreements with the Children’s Hospital Boston Center on Global Pediatrics and the new School can create a true opportunity for collaborative research in the areas of health and wellness serving as a potentially strong bridge to the research interests and activities of the College of Nursing. The ICI also is part of the International Council of the Association of University Affiliated Programs (AUAP) and in doing so has links to the more than 67 University Centers for Excellence in Disabilities (UCED) nationally. There is one such center in every state with many located at land-grant institutions of higher education such as UMB. This affiliation will open up opportunities for both training and curricula sharing as well
as research in the areas of disability studies, health, wellness, and systemic change. The ICI
developed the link to Guam and the islands through the AUCD affiliation and has also had
interaction with three UCEDs internationally in Spain, Ireland and Australia.

With the growing interest in early education and the current practices in early education, there is
an opportunity for UMB to take a leadership role in early-education training at both the
certificate and degree levels. The College of Education and Human Development (CEHD) has in
the past five years with assistance from the ICI been able to develop both an undergraduate and a
graduate training program in early education. Recent faculty hires in the CEHD have
considerably increased its expertise and capacity in this area. While the CEHD has a focus on
degree programs in early education, the ICI has been involved in the development of certificate
and non-degree programs in early education. The use of online instruction, while somewhat new
in early education, may have some potential, and the growing interest in early education and
inclusive education in many countries provides a potential platform for certificate and in-service
training in the early-education areas for the new school. This would be a joint program with
CEHD, the University College, and the new School, where curricula developed at the degree
level can be modified to support certificate and non-degree training in early education.

In the United States as well as several other countries, there is an increasing recognition that
inclusive education (as opposed to separating general and special education) is more effective for
most, if not all, students. States are now considering dual certification as well as adopting
practices at the pre-service training levels in education to develop curricula that prepare all
teachers to educate all students. Initial research on the effectiveness of the creation of curricula
that address all students’ learning styles (Universal Design for Learning) is advancing, as is the
understanding that there is a need to re-conceptualize special education. The ICI was involved
with the Ministry of Education in Dubai in the creation of fully inclusive education for all
students. Such a movement would create a natural area for collaboration between the new School
and the CEHD in reframing teacher preparation, and would also create an area of inquiry about
effective and evidence-based educational practices. The potential for joint program development
in non-degree, certificate, and degree-based training in education could serve as a strong way to
integrate the interests of the CEHD with the new School.

The opportunities for alternative instruction strategies and methodologies can create some
interesting areas for collaboration and innovation for the new School. The in-service training and
technical assistance that can be offered in the areas of education, wellness, workforce
development, and human services can lead to the development of a series of leadership institutes
for mid-level to senior managers and public officials on systemic change, policy development
and innovations. One- and two-week institutes for senior managers may be an effective strategy
for engaging leaders and policy makers in this country as well as other countries. These types of
staff development and certificate programs could be developed along the lines of the areas of
emphasis for the School in the coming years. Such efforts could be closely linked to current
interests in the McCormack Graduate School of Policy and Global Studies as well as the College
of Management.

The above offers but a few of the areas for potential collaboration by the new School with
faculty, departments, institutes, centers, colleges and outside institutions of higher education in
the coming years. The models that will be developed will utilize both traditional and non-traditional learning approaches, focus on new as well as senior learners, and create a range of alternative learning opportunities for a variety of professionals interested in health, wellness, social and economic development in this country and globally.

IV. Summary

As the focus on globalization continues to increase, it is clear that the emphasis on global inclusion and social development as defined in this report will address some of the major issues that we will face as the interrelationship between countries, cultures, and individuals evolves. There is an imperative to understand the significant as well as nuanced differences between countries, the needs of cultures, and the engagement of individuals to address the issues associated with acceptance and quality of life for all individuals. The proposal to establish a new School that addresses the major factors relating to global inclusion and social development recognizing the differences across cultures in areas of health, wellness, economic and social development will be a daunting task. It will require the engagement of multiple disciplines in examining, understanding, building capacities, and replicating effective and evidence-based practices locally, regionally, nationally and internationally.

The University of Massachusetts Boston, through the establishment of this new School and the integration of the many related activities that are already underway individually and collectively in our colleges, departments, institutes, and centers, is well positioned to address the core issues of global inclusion and social development. Building upon a platform that is transdisciplinary in nature, accessing the expertise of the faculty and staff at the University, and creating new partnership with like-minded institutions of higher education as well as associations and organizations interested in equality of opportunity for all, the students and graduates of this School will be well-positioned to assume leadership roles in the public, not-for-profit, and private sectors addressing inclusion and social development locally, regionally, nationally, and internationally. Additionally, the School’s strong emphasis on graduate education, research, capacity development, and dissemination of knowledge and information to a variety of interested parties will serve to enrich the students of this new School, the faculty and staff of the University of Massachusetts Boston, partner faculty and staff, and the general public.
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Executive Summary

School for Global Inclusion and Social Development

This report proposes the establishment of a new School for Global Inclusion and Social Development at the University of Massachusetts Boston (UMB). The School will expand the University’s teaching and research base by integrating a focus on health, wellness, social and economic development, targeting groups of individuals who are excluded from communities here and abroad due to disability or other reasons and conditions. This will be achieved through graduate-degree and certificate programs, applied and translational research, professional development and in-service training, innovation, as well as information dissemination. Establishing such a school reinforces and helps realize UMB’s ambitions to be a world-class teaching and research university in the 21st century.

The Institute for Community Inclusion (ICI), the largest think-tank within UMB that focuses on disability and related issues, will lead the effort to establish this School and partner with UMB colleges, institutes, and centers to leverage expertise and resources. Specifically, the School will engage faculty, students, and staff of the University through the use of joint appointments; collaborative teaching; shared research efforts; shared project development; graduate assistance options; and integrated programs in teaching, research, and capacity development that cross college, department, institute, and center boundaries in a collaborative fashion. Partnering with other institutions of higher education in the region, nationally, and internationally and organizations that have a focus on global inclusion and social development will be equally important.

The School addresses a need for leadership personnel, research, training, and capacity development in health, wellness, social and economic development in excluded populations, thereby responding to an increasing labor-market demand for professionals knowledgeable about these issues in Massachusetts and the United States (BLS, 2009). There is also a demand for trained social-development personnel in developing countries (Pawar & Cox, 2010). Additionally, the School will start filling an existing gap in the provision of affordable and publically sponsored programs of study in global inclusion and social development offered by institutions of higher education (rather than typically only by private universities) in the state and the New England region (Merson & Page, 2009).

At the core of the school and all of its activities will be its reliance on a transdisciplinary approach to teaching, learning, knowledge generation and dissemination. Initially the School will establish one master’s and one doctoral degree program in global inclusion and social development. Once fully developed this master’s program will offer students several concentration areas, including but not limited to one in autism, transition and another in developmental disabilities; these will also be available for non-master’s students as electives or
certificate options. Through these programs, the School will graduate leadership professionals whose qualifications, skills, and competencies will meet local, state, national and international labor-market needs. In addition, the School with its partners (including the ICI, UMB entities, and external partners) will offer research, community capacity development (training and technical assistance), innovation (model demonstration), and information dissemination.

The School will make a major contribution to student learning. With its emphasis on the global needs of excluded persons and communities, the School will provide students opportunities to acquire the essential skills of a leader able to translate research into practice, and to integrate policies, procedures and practices into programs in communities with the goal of fostering local ownership, investment in inclusion and social development opportunities for all. Students will be exposed to a learning and research environment that is reflective of multiple perspectives and based on the application of such learning in both the academic and non-academic sectors. Research and teaching graduate assistantships and post-doctoral fellowships will be available to qualified and interested students not only in this School but throughout the University with a specific emphasis on doctoral GA supports available to the full range doctoral study programs on campus.

The School will also contribute to faculty teaching, research, and development. Through joint teaching and research appointments and formal collaborative agreements with colleges, departments, institutes, and centers at UMB, faculty interested in the content areas of the new School will have opportunities to design, develop, and implement teaching curricula, research and other projects. There will also be opportunities for faculty at UMB and other institutions of higher education nationally and internationally to work at the School as visiting fellows, guest lecturers, and research staff. Integrating the transdisciplinary nature of the school, outreach to and engagement of faculty and staff at UMB and other institutions of higher education will broaden the reach of the School regionally, nationally, and internationally and the quality of its instructional and research activities.

The School will initially benefit the state through the research, training and technical assistance activities associated with the ICI. As these activities are expanded within the School, additional activities in these areas will be developed and fostered through the faculty, staff, and partners of the School. Some of the activities will address issues of health, wellness, social and economic development through contracts to develop and/or evaluate programs, policies and or practices with state agencies in the health, education, and human service areas. The School will use a similar approach to contribute nationally by building on the ICI’s national reputation as the leading national center on adult services and supports addressing employment, education, national services, systemic change, and policy development for persons with disabilities.

Internationally the School will work closely with the Office of International and Transnational Affairs (OITA), the Office of Graduate Studies, faculty and staff at UMB and its partners in the development of the research, training, and outreach efforts in other countries; the sharing of effective practices in selected areas across countries; and the development of learning opportunities for students and faculty from those countries. The School will extend ICI’s current relationships in seven countries focused on supporting persons with disabilities. Through the ICI’s affiliation with the Center on Global Pediatrics at Children’s Hospital, the School will have
access to an additional 15 counties with many activities focusing on children, child health, wellness, and inclusion. Formal affiliations with other institutions of higher education through the Association of University Centers on Disabilities (AUCD) are also being developed.

By adopting national and international perspectives on inclusion (a society for all) and social development (improving people’s well being and quality of life), it is clear that the focus of the new School is one that will be consistent with the mission and values of the University, while addressing some of the growing needs in this country as well as internationally in global inclusion and social development. As was noted above, such a school by its nature will have a **transdisciplinary focus** (one that crosses disciplinary, academic and non-academic boundaries) **as well as a transnational focus**. These foci will drive the design of the School in the areas of instruction, research, capacity development (in-service training and technical assistance), innovation (model demonstration), as well as information dissemination.

The School curricula will be integrated with the curricula offered in the John W. McCormack Graduate School of Policy and Global Studies, the College of Nursing and Health Sciences, the College of Education and Human Development, the College of Public and Community Service and the College of Management. Specific departmental relationships with other Colleges (College of Liberal Arts and College of Science and Mathematics) will assure that there is a link to those content areas that can enhance the expertise of the school in all of its activities. The School will work closely with the University College in the development of distance capacity and in responding to needs for online instruction from interested parties. Selected programs in these colleges (such as programs in vision studies and rehabilitation counseling) will be linked to the graduate programs of the new School. The School will also utilize existing related course offerings in other colleges as components of the graduate programs, most likely as electives, but potentially in some cases as core course requirements.

The structure and processes for governing the new School are modeled after those of the College of Education and Human Development and are consistent with University Regulations. The chief executive officer of the new School will be the Dean. The Dean will be supported by the School Senate including four standing committees with specific responsibilities in one or more particular areas of School life. This includes: a School Personnel Committee, an Academic Affairs Committee, a Budget and Long-Range Planning Committee, and a Professional Education Coordinating Committee. In addition to these structures, the School will establish two Graduate Program Director positions: one for the master’s program and another for the doctoral program.

The School will be supported through UMB resources for faculty and staff as well as some support for GAs and supplies. The resources of the ICI will support the majority of the costs associated with the doctoral and masters GAs (85% of all costs), postdoctoral fellowships, senior visiting scholars, faculty scholars, marketing and supplies. The support for the school over a five year period reflectors 45% from UMB and 55% from ICI sources. In year three the revenues from tuition will exceed all faculty and staff expenses incurred by the University with the School showing a net fund balance in this year of $72,973 and over a five year period a total fund balance of $743,372, or an average annual fund balance of $148,674.
The considerable reputation of the ICI nationally and internationally as the premier center in the field of employment and training and school inclusion for students with disabilities brings to the School strong credibility with local, state, regional, national, and international funding resources. In addition to leading the effort to establish this School, the ICI will serve as a supportive fiscal resource through the shared funding of the graduate assistants, post-doctoral fellowships, and visiting faculty and scholars, all of whom will be supported through grant, contract, and other ICI resources. The School will also capitalize on the significant grant development expertise of the ICI.
Appendix A: Definition of Social Inclusion/Exclusion, Social Development, Globalization, Health and Wellness

**Social Inclusion/Exclusion**

**a. Definition of Terms**

As modern society has evolved, the question of what constitutes full participation in all aspects of community life has become more and more complex. The term “social inclusion” has been conceptualized as a process, a state of being included, and a method for integrating those excluded (or at risk of being excluded) into society. The concepts of social inclusion/exclusion are closely related. Social exclusion is often equated with poverty, lack of adequate social participation, and/or lack of social integration.

**Social Inclusion:** Social inclusion is a term that is often used, but its meaning is not always made explicit. The Programme for Action of the 1995 United Nations (UN) World Summit for Social Development describes an inclusive society as “a society for all,” in which every individual, each with rights and responsibilities, has an active role to play (UN, 1995a). Some authors see social inclusion as a situation or a state of being included; others have conceptualized social inclusion as a process. For example, the European Council (2004) in its Joint Report on Social Inclusion defines it as:

- a process which ensures that those at risk of poverty and social exclusion gain the opportunities and resources necessary to participate fully in economic, social and cultural life and to enjoy a standard of living and well-being that is considered normal in the society in which they live. It ensures that they have greater participation in decision-making which affects their lives and access to their fundamental rights. (p. 8)

Several definitions including the one developed by the European Council suggest that it is through participating in “normal activities” of life that individuals are included in society. However, these definitions often leave open the question of what constitutes “normal activities” (Burchardt, Le Grand, & Piachaud, 1999). Another much-debated issue concerns voluntary participation in activities and whether people who choose not to participate are socially included or not (Burchardt, Le Grand, & Piachaud, 1999). There is also the notion of preventing social exclusion by specifically targeting those at risk of poverty for intervention and support. It should be noted that the European Council definition of social inclusion greatly reflects the western European welfare tradition, including a role for government in ensuring the well-being and social protection of its citizens.

From a sociological perspective, social inclusion is often conceptualized as a means or mechanism to achieve social integration. Modern society has evolved into a complex network of interrelated functions where individuals, in order to participate in society’s institutions (such as the economy and the educational system) need to have appropriate resources (such as knowledge, skills, capacity, health, money, and power) relevant to these institutions (Strobl, 2007). If they do not have access to these resources, they are likely to be excluded or reduced to social problems. Strobl (2007) states:

As participation in function systems [institutions] is essential in modern societies, there
are instruments to improve the abilities and resources of disadvantaged and excluded individuals. In particular, the institutions of the welfare state can be conceived as a means to safeguard against exclusion and to re-include the excluded.

In this context, social inclusion refers to social policy instruments that are intended to remove barriers to participation by providing those excluded or at risk of being excluded with access to the necessary resources, such as education, training, healthcare, and housing. In doing so, social inclusion contributes to a more integrated modern society.

**Social Exclusion:** Definitions of social inclusion—because of the nature of the concept—often reference the term “social exclusion.” Indeed, there seems to be a preference for the term “social exclusion” in European social policy debate. This may be because the term allows us to more specifically identify the dimensions of disadvantage that those excluded or at risk of being excluded face—dimensions that become the focus of intervention. The European Council (2004) defines social exclusion as:

a process whereby certain individuals are pushed to the edge of society and prevented from participating fully by virtue of their poverty, or lack of basic competencies and lifelong learning opportunities, or as a result of discrimination. This distances them from job, income and education opportunities as well as social and community networks and activities. They have little access to power and decision-making bodies and thus often feel powerless and unable to take control over the decisions that affect their day-to-day lives. (p. 8)

This definition identifies the many dimensions of disadvantage (related to jobs, income, education, and social and community life) that those excluded or at risk of being excluded may experience. It also makes explicit that social exclusion may not only be the result of lack of resources, competencies, and opportunities, but may also result from discrimination, that is, society’s adversarial treatment of those who lack these necessities or differ in any other aspects from the majority or mainstream (for example, in terms of race, ethnicity, age, gender, disability, and other aspects). However, what is not clear from this definition is whether disadvantages such as unemployment, poverty, lack of education, and poor health are social exclusion in themselves, or whether they lead to social exclusion (Burchardt, Le Grand & Piachaud, 1999). Levitas et al. (2007) conducted a literature review on social exclusion and developed a working definition of the term. This effort was part of a study that the authors conducted for the British government’s Social Exclusion Task Force. The authors define social exclusion as:

A complex and multi-dimensional process. It involves lack or denial of resources, rights, goods and services, and the inability to participate in the normal relationships and activities, available to the majority of people in a society, whether in economic, social, cultural or political arenas. It affects both the quality of life of individuals and the equity and cohesion of society as a whole. (p. 9)

Similar to the European Council, the authors emphasize that social exclusion involves disadvantage in multiple dimensions (multi-dimensionality). It often involves disadvantage in more than one dimension (degrees of severity), which Levitas et al. term “deep exclusion,” arguing that it can severely impact not only individuals but also society. Fremstad (2005) emphasizes that social exclusion is as much a state of being excluded from society’s key
Appendix A:
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functional areas and institutions, as it is a process that leads to that state. Fremstad identified the
following key functional areas or institutions: employment; education; market institutions; public
services, benefits, and institutions; political and civic participation; and informal social
associations (such as friendships).

b. Current Perspectives on and Approaches to Social Inclusion/Exclusion

The concepts of social inclusion/exclusion are key to the social policy agenda of the
European Union (EU), where they provide a framework for developing national strategies
to combat poverty and for coordinating the implementation of these strategies across the
EU. The concepts have received little attention in the US, where social issues tend to be
more narrowly defined in terms of poverty. Application of the social exclusion concept to
social problems in the US provides the potential for better understanding and addressing
these issues.

European Perspective and Approach: The modern use of the concept of “social
exclusion” in social policy debate is often associated with Rene Lenoir, a French government
official, who used the term in the 1970s to describe those who were excluded from the French
social insurance system (Hayes, Grady, & Edwards, 2008). Since then, the concept has not only
dominated social policy debate in France but has been adopted by the European Union (EU) as a
key concept in social policy partially replacing the concept of poverty. In March 2000 in Lisbon,
Portugal, the European Council urged its member states to take steps toward combating and
eradicating poverty and social exclusion by 2010 (European Council, 2004). Note that the terms
poverty and “social exclusion” are often used together in European social policy debate.

Specifically, the council asked member states to coordinate their social policies using an
Open Method of Coordination (OMC)—also referred to as the EU Social Protection and Social
Inclusion Process—based on common objectives, national action plans, and common indicators.
This effort was part of a ten-year comprehensive strategy (also known as the Lisbon Strategy) for
the EU “to become the most competitive and dynamic knowledge-based economy in the world
capable of sustainable economic growth with more and better jobs and greater social cohesion”
(European Parliament, 2000). Later that year in Nice, France, the European Council adopted four
common objectives to guide the implementation of this strategy. These objectives have since
been revised to further strengthen the implementation of the OMC. Currently, the guiding
objectives include: a) social cohesion, equality between men and women and equal opportunities
for all through adequate, accessible, financially sustainable, adaptable and efficient social
protection systems and social inclusion policies; b) effective and mutual interaction between the
Lisbon objectives of greater economic growth, more and better jobs and greater social cohesion,
and with the EU’s Sustainable Development Strategy; and c) good governance, transparency and
the involvement of stakeholders in the design, implementation and monitoring of policy
(European Commission, n.d., a)

The National Action Plans (NAPs) are key to achieving these objectives as they provide
vehicles for translating them into national policies and actions. Every three years member states
submit a progress report to the European Council. Member states submitted preliminary NAPs to
the council in 2001 that provided the basis for developing common indicators for monitoring and
measuring progress in combating poverty and social exclusion. In December 2001 in Laeken,
Belgium, the European Council adopted 18 common indicators (also known as the Laeken Indicators) that covered key dimensions of social exclusion: financial poverty, employment, education, and health (European Council, 2004). The indicators have been revised several times since then. This in part had to do with the enlargement of the EU in 2004 that brought in a number of countries whose incomes were (significantly) below those of existing members, which made the application of several common indicators challenging (UN, 2010). Currently, there are 14 indicators complemented by more specific indicators related to poverty and social exclusion, pension, and health and long-term care (European Commission, n.d., b). A report by the UN Department of Economic and Social Affairs (DESA/UN, 2010a) entitled Analyzing and Measuring Social Inclusion in a Global Context suggests that the OMC approach to developing common indicators of social exclusion provides a template for developing a more global set of indicators.

**United States Perspective:** The concepts of social inclusion/exclusion have received little attention in the US (Hayes, Grady, & Edwards, 2008). However, Sen (2000) and others have argued that the concept of social exclusion, despite its European roots, is applicable to the US, where social problems have been more narrowly defined in terms of poverty. Sen (2000) points to the limitations of such an approach in that “no concept of poverty can be satisfactory [and thus effective] if it does not take adequate note of the disadvantages that arise from being excluded from shared opportunities enjoyed by others” (p. 44). Using a social exclusion perspective to discuss and analyze social problems in the US could lead to a more comprehensive understanding of poverty and deprivation and to better-informed social policy actions. According to Sen (2000), “the nature of poverty analysis can […] substantially benefit from the insights provided by the perspective of social exclusion. Its forceful pointer to the multidimensionality of deprivations and its focus on relational processes are both quite important” (p. 45).

Fremstad (2005) adds that a social exclusion perspective could help reinvigorate the social policy debate in the US while also providing a common language for understanding the negative and exclusionary effects of globalization more broadly (see also Labonte, 2004). Sen (2000) concludes:

The real issue is not whether the idea of ‘social exclusion’ deserves a celebratory medal as a conceptual advance, but whether people concerned with practical measurement and public policy have reason to pay attention to the issues to which the idea helps to draw attention. The answer, I believe, is in the affirmative… (p. 47)

**Social Development**

a. Definition of Term

In development studies, the term “social development” captures the idea of improving people's well-being and quality of life, and is often defined in reference to particular social problems. Social development has been conceptualized as a process, a method to bring about social change, and an outcome. It has been characterized as multidimensional, multilevel, and value-based. The United Nations considers the social, economic, and environmental dimensions of development key to sustainable growth.
“Social development” is conceptualized differently depending on the academic discipline and the nature of inquiry. In developmental psychology, for example, the term “social development” refers to the developmental stages individuals experience throughout their lifespan. Developmental psychologists focus on changes in individuals’ behavior using a biopsychological perspective.

Social development is conceptualized differently in development studies, where it broadly refers to the advancement of societal well-being and quality of life (Midgley, 1995; Pawar & Cox, 2010a). This concept will be used in this proposal. It is the focus on the population as a whole or the inclusive focus, among other things, that distinguishes this concept from how it is used in other disciplines. Pawar and Cox (2010b) define social development as “a comprehensive and integrated approach to societal development” (p. 224). They characterize this approach as multidimensional (economic, social, political, cultural and ecological), multilevel (local, national and international), and value-based (reflecting the values of equity, equality, social justice and other values inherent in a human-rights perspective).

The term “social development” is often used, but its meaning is not always made explicit. This even applies to the Copenhagen Declaration on Social Development (DSPD/UN, n.d.; Pawar & Cox, 2010b). Signed by 117 UN member states at the 1995 World Summit, the declaration intends to “put people at the center of development” (UN, n.d.). According to the UN Division for Social Policy and Development (DSPD/UN, n.d.), in some parts of the declaration social development is seen as encompassing the whole complexity of social dynamics, whereas in other parts social development is regarded in more traditional terms as adding social issues and concerns to the development agenda. The value-laden nature of social issues and concerns makes defining social development a challenging task. Therefore, most definitions define social development in reference to specific social problems, such as poverty, unemployment, social exclusion, and inequality.

Similar to the concept of social inclusion, social development can be a process and an outcome, and various definitions emphasize one and/or the other. Midgley (1995), for example, defined social development as a “process of planned social change designed to promote the well-being of the population as a whole in conjunction with a dynamic process of economic development” (p. 25). According to the author, “process” denotes progressive growth and change. He also regards the social development process as interventionist, implemented using various strategies that may be based on different beliefs and ideologies. Pawar and Cox (2010c) reviewed several definitions of social development and grouped them into three categories: one category emphasizes the social-planning aspect of social development and its link to economic development; the second focuses on structural changes as a key element or outcome of social development; and the third emphasizes social development’s intention of “realizing human potential” and improving people’s well-being and quality of life (p. 15). The authors also point out that these definitions and concepts are rather unclear about the practical aspects and implementation of social development, that “they do not cover the ‘how’ and ‘how long’ of development and social development” (p. 17).

The link between social and economic development is interesting because it points to the historical roots of the term “social development” but also captures an ongoing debate about how
to integrate the various aspects of the development process (e.g., economic, social, environmental). There is much debate about balancing social and economic development and the implications of prioritizing one (economic) over the other (social), potentially resulting in distorted development or inequality (Mapp, 2007; Pawar & Cox, 2010b). According to Midgley (1995), the link between social development and economic development is what distinguishes this approach from other approaches (such as the welfare approach), because it locates the implementation of policies and programs intended to promote and enhance social welfare within a development process.

The UN concept of development encompasses social and economic development as well as environmental protection; these are regarded as “interdependent and mutually reinforcing components of sustainable development, which is the framework for [the UN] efforts to achieve a higher quality of life for all people” (UN, 1995b). According to the UN Division for Social Policy and Development (DSPD/UN, n.d., b), frameworks have been developed to more globally address economic and environmental issues, but not social issues. “The global social development agenda essentially focuses on poverty eradication. Social policy issues are approached from a micro-perspective within the context of technical cooperation, or on a purely sectoral basis” (ibid). The division identifies a need for developing a broader and more comprehensive approach to social development through a process that engages the diverse range of stakeholders (see also Pawar and Cox, 2010b, c).

b. Current Perspectives on and Approaches to Social Development

Social development, particularly local-level development, has over the last decades received more attention by international organizations such as the United Nations (UN), who have pushed the concept to the forefront of their development agendas. A social development perspective informed the development of the UN Millennium Development Goals to be achieved by 2015, although the recent global economic crisis and other factors have stifled progress towards achieving these goals. Research has also identified a shortage of trained social-development personnel, particularly at the local level, an area that needs to be addressed in order for social development to be effective.

The origins of the concept of “social development” go back to British colonialism in the 1940s and 1950s. British colonial administrators used the term to describe their efforts to combine welfare and economic activities in order to promote markets in countries under British rule (Midgley, 1995). The United Nations charter has specifically promoted social development since the 1940s; Article 55 in Chapter IX of the charter mandates the UN to “promote higher standards of living, full employment, and conditions of economic and social progress and development” (UN, 1945). In the 1950s, the UN approach to social development focused mainly on providing remedial social-work services (Midgley, 1995). This approach broadened in the 1960s to include several research studies about social development.

In the 1970s, international organizations such as the UN mainly targeted governments and government agencies in their social-development efforts (Midgley, 1995). Advocates of community-based development strategies criticized this top-down approach; in response to these reactions, the UN and other organizations such as the World Health Organization (WHO) started to pay more attention to the local dimension of social development. The International Labor Organization (ILO) and the World Bank also began to incorporate a social-development
perspective into their policies. Progress made during the 1970s came to a halt in the 1980s, a time of global economic recession and of governments in the US and Britain that favored limited social spending (Midgley, 1995).

The World Summit on Social Development, held in Copenhagen in 1995, revived interest in social development. One hundred seventeen UN member states signed the Copenhagen Declaration for Social Development, committing to “mak[ing] the conquest of poverty, the goal of full employment and the fostering of social integration overriding objectives of development” (UN, 1995b). The summit also informed the Millennium Development Goals that member states adopted in 2000, intending to achieve most of these goals by 2015. These goals include: 1) eradicating extreme poverty and hunger, 2) achieving universal primary education, 3) promoting gender equality and empowering women, 4) reducing child mortality, 5) improving maternal health, 6) combating HIV/AIDS, malaria, and other diseases, 7) ensuring environmental sustainability, and 8) developing a global partnership for development (DESA/UN, 2010b).

While some progress toward these goals has been made, much work remains to be done (ibid). The 2010 Global Monitoring Report, jointly produced by the World Bank and the IMF (2010), suggests that the recent global economic crisis will adversely impact progress toward these goals up to and beyond 2015. The situation is compounded by a shift in member states’ focus from social development to dealing with issues such as uncontrolled financial markets and climate change (Pawar & Cox, 2010c). There is also a shortage of trained development personnel, especially at the local level. This has to do with the work being challenging and not very well paid, and with social development not being a clearly defined area of practice or an established profession (Cox & Pawar, 2010).

Given the limited progress in global social development made so far and shifts in member states’ focus on and commitment to social development, is social development still relevant? Pawar and Cox (2010d) provide several reasons that attention to social development is of greater necessity now than ever before. One reason is globalization that creates a more connected and interactive global community, and also makes explicit the global dimension of the challenges that we face (such as climate change). Another reason concerns the continuous challenge of social development at the national level, particularly in countries affected by conflict/war, political corruption/lack of democracy, and other factors. Yet another reason has to do with a change in perception about the potential of local-level development to make an impact. There has been a growing realization that local-level development is important in its own right, and also can contribute to national-level development. Overall, the authors conclude that social development in the 21st century continues to be relevant and practical, and that its goals are achievable; for social development to be effective, it needs to get more attention and needs to be a part of decision-making at the local, national, and international levels.

Globalization

a. Definition of Term

The term “globalization” captures a complex and multi-faceted concept. Put simply, globalization is the process of interaction and integration among economies, societies, and cultures across the globe through forces such as international trade and transport and advances in communication technology. Globalization also captures the consequences of
these forces, both positive and negative. Several definitions emphasize the economic dimension of globalization as being key to this process.

“Globalization” is a complex and multifaceted concept that has been defined in a variety of ways by different disciplines using different perspectives. Al-Rodhan and Stoudmann (2006), based on a comprehensive review of these definitions, define it as “a process that encompasses the causes, course, and consequences of transnational and transcultural integration of human and non-human activities” (p. 5). “Human activities” are the economic, social, political, cultural, linguistic, and other aspects of human life; “non-human activities” refers to events over which we might have limited control (such as the spread of bacteria and non-human diseases and natural disasters). This definition not only views globalization as a continual process but also takes into account its trajectory over time as well as the outcomes associated with it. It avoids attaching a negative or positive connotation to globalization and is broad enough to allow for the term to be conceived as both potentially beneficial and potentially detrimental to human development.

Globalization has been conceptualized as a process, a cause, and consequence. For example, the definition of globalization in the Copenhagen Declaration on Social Development of the United Nations focuses more on the consequences of globalization, particularly its impact on social development, than on the process by which it creates these outcomes. In the declaration, globalization is defined as:

A consequence of increased human mobility, enhanced communications, greatly increased trade and capital flows, and technological developments, [that] opens new opportunities for sustained economic growth and development of the world economy, particularly in developing countries […] At the same time, the rapid processes of change and adjustment have been accompanied by intensified poverty, unemployment and social disintegration. Threats to human well-being, such as environmental risks, have also been globalized. Furthermore, the global transformations of the world economy are profoundly changing the parameters of social development in all countries. The challenge is how to manage these processes and threats so as to enhance their benefits and mitigate their negative effects upon people. (UN, 1995b)

In this definition, the consequences that affect the daily lives of human beings, stemming from, but in no way limited to, economic activity, are key to the definition of the term. New economic opportunities resulting from globalization do not serve to overshadow the realities of poverty, unemployment, social disintegration, and existing environmental risks. While recognizing the various dimensions of globalization, the UN does not concern itself so much with how it is happening or why, but rather with what can be done to ensure that this does not further aggravate existing global inequalities, and that the benefits globalization can yield are reaped by all.

Some definitions, including the one by the UN, attempt to provide a balanced view of globalization in terms of its benefits and disadvantages. Other definitions, however, emphasize one over the other—an inconsistency that highlights the complex, sometime contradictory, and ambiguous nature of the concept of globalization. Kellner (2001) reflects on this issue:
Indeed, globalization is one of the most hotly debated issues of the present era […] Its defenders present globalization as beneficial, generating fresh economic opportunities, political democratization, cultural diversity, and the opening to an exciting new world. Its critics see globalization as harmful, bringing about increased domination and control by the wealthier overdeveloped nations over the poor underdeveloped countries, thus increasing the hegemony of the “haves” over the “have-nots.” (p. 286)

Kellner’s perspective does not reduce the term to absolutes, as being either positive or negative, but as being layered and complex. He acknowledges that globalization can be liberating and empowering but also limiting and oppressing (see also Khor, 2001).

Several definitions emphasize the economic aspects of globalization. Al-Rodhan and Stoudmann (2006) reviewed 114 definitions of globalization, 67 of which made reference to its economic dimensions. David Dollar, Director of Development Policy at the World Bank, defined globalization as “the growing integration of economies and societies around the world resulting from increased flows of goods, services, capital, technology, and ideas” (World Bank, n.d.). Dollar does not discuss globalization as a threat to human well-being, but instead as a way of promoting it by reducing poverty and increasing literacy (see also Collier & Dollar, 2002). His view of globalization supports the potential for increased economic success for all countries, which in turn has important social and political implications. Similarly, the International Monetary Fund (IMF, 2008) defines globalization as:

The increasing integration of economies around the world, particularly through the movement of goods, services, and capital across borders. The term sometimes also refers to the movement of people (labor) and knowledge (technology) across international borders. There are also broader cultural, political, and environmental dimensions of globalization.

This definition also attempts to encompass, though as secondary forces, the non-economic implications of the process. Most views of globalization rooted in economic activity differ in the degree to which they address the multifaceted nature and consequences of global economic relationships outside of economic realities.

b. Current Perspectives on and Approaches to Globalization

The United Nations (UN) and other entities of the UN system have been advocating for a more balanced approach to globalization—one that promotes its benefits but also addresses its harmful effects, particularly on the developing world. The Millennium Development Goals (MDGs) rely upon implementing a fair and inclusive globalization that is monitored and regulated to ensure that it improves the lives of socially marginalized groups around the world. International financial agencies such as the IMF and the World Bank have given more attention to the social dimension of development in the context of globalization and contribute in various ways to achieving the MDGs.

Several international organizations with varying interests, goals and objectives have undertaken policies and programs, often in conjunction with other entities, to promote the positive elements of globalization, while working towards diminishing its harmful effects on the developing world. The UN and other entities that are part of the UN system, such as the
International Labor Organization (ILO), have played an important role in promoting a more balanced approach to globalization—one that mediates between the benefits and consequences of unrestricted global economic activities.

In 2008, 182 member-states of the ILO (including representatives of governments and of employers’ and workers’ organizations) adopted the Declaration on Social Justice for a Fair Globalization at the International Labour Conference in Geneva (ILO, 2008). “The Declaration comes at a crucial political moment, reflecting the wide consensus on the need for a strong social dimension to globalization in achieving improved and fair outcomes for all,” said Juan Somavia, ILO Director-General (ILO, 2008, p.1). The ILO intends to achieve this goal by implementing a Decent Work Agenda based on four objectives: 1) promoting employment by creating a sustainable institutional and economic environment, 2) developing and enhancing measures of social protection, 3) promoting social dialogue and tripartism (government, employers’ and workers’ organizations), and 4) respecting, promoting and realizing the fundamental principles and rights at work. The ILO regards these objectives as “inseparable, interrelated and mutually supportive,” reinforcing the role of international labor standards in achieving these goals.

Prior to the declaration, the ILO established an independent commission—the World Commission on the Social Dimension of Globalization—to look into social issues caused by and public perceptions of globalization and to make recommendations for ways to better combine economic, social, and environmental objectives. The commission’s report, A Fair Globalization: Creating Opportunities for All (2004), calls for productive and equitable markets governed by fair rules; greater accountability on behalf of the public and private sectors; dialogue, partnership and solidarity between all stakeholders; and a more effective UN. In an attempt to bring about tangible changes, the ILO offers new models for enacting policies at the international level to address the issue of globalization:

Policy Coherence Initiatives should be launched by the relevant international organizations to develop more balanced policies for achieving a fair and inclusive globalization. The objective would be to progressively develop integrated policy proposals that appropriately balance economic, social, and environmental concerns on specific issues. The first initiative should address the question of global growth, investment, and employment creation and involve relevant UN bodies, the World Bank, the International Monetary Fund (IMF), the WTO, and the ILO. Priority areas for other such initiatives include gender equality and the empowerment of women; education; health; food security; and human settlements. (ibid, p. xiv)

The report calls for additional cooperation and action at the global level, through for example, the creation of a UN “Global Policy Forum,” where participating organizations would produce periodic reports on the current state of globalization. Both the commission’s report and the subsequent declaration build on and expand the objectives of the UN World Summit for Social Development in Copenhagen in 1995.

The UN takes a similar stand on the benefits and consequences of globalization, advocating for the voice of the developing world to be recognized internationally. Achievement of the Millennium Development Goals (MDGs) relies upon implementing a fair and inclusive globalization that is monitored and regulated to ensure that it improves the lives of socially
marginalized groups around the world. In its attempts to reduce poverty, hunger, and child mortality and other development goals the UN does not overlook how globalization has both hindered and helped these goals from taking shape. In 1998, the UN began passing several resolutions and reports on the issue of globalization, with the latest in 2008, stressing that the UN plays “a central role in promoting international cooperation for development and in promoting policy coherence on global development issues, including in the context of globalization and interdependence […] and to ensure that globalization becomes a positive force for all the world’s people” (UN, 2008, p. 2). Aware of how globalization can be instrumental in reaching the MDGs, but attuned to how it has stifled development in many nations, the UN has been reaffirming its stance that global economic ventures must be regulated so that the positive effects of globalization will be felt by all.

International financial agencies that are part of the UN system, such as the IMF and the World Bank, also contribute to the MDGs. Together, these two organizations regularly assess and monitor the effectiveness of policies and actions aimed at reaching the MDGs. Despite the IMF’s World Bank’s understanding of globalization as primarily an economic process, its collaboration with entities such as the UN requires that they understand how policy, institutions, social structures, and other non-economic facets of development are crucial to reaching the MDGs. Toward that end, the World Bank established its own social development strategy. In 2005, the Social Development division of the World Bank produced a report, *Empowering People by Transforming Institutions: Social Development in World Bank Operations*, which reinforces existing agendas that address the issue of social development internationally. The report states that:

At the start of the 21st century, while many people around the world benefit from increased flows of goods, capital and information, too many others confront seemingly intractable challenges. To reduce poverty and reach the Millennium Development Goals, the World Bank adopts a comprehensive approach that promotes economic growth, improves services and strengthens institutions. Social development is a crucial component of this approach. With the goal of empowering poor and marginalized women and men, social development is a process of transforming institutions for greater inclusion, cohesion and accountability. (World Bank, 2005, p. v)

Echoing what the ILO and the UN have put forth in their own reports, the World Bank also acknowledges the need for integrating effective policies and institutional reforms to promote social inclusion and development in the face of globalization. It does so by adhering to three strategic priorities: a) supporting countries in incorporating social development into their poverty reduction or development strategies; b) promoting local-level involvement in achieving these social development goals, and in monitoring and evaluating progress and outcomes; and c) improving research, capacity-building, and partnerships related to social development, particularly focused on the local level (ibid).

**Health and Wellness**

Health is a broad general concept that has many components, one being wellness. The term “wellness” is commonly used by health practitioners, health educators, and the general public; however, its meaning varies depending on the context and there is no universally agreed
definition of what the term describes and how it can be attained (Bates & Eccles, 2008).
According to Miller (2005), the wellness concept originated in the intellectual and religious movements of 19th century North America. Beginning in the 1950s in North America, wellness came to be associated with strategies to actively promote health, mostly through changes in one’s lifestyle. This contrasts with the European use of the term “wellness” where it is associated with alternative or non-medical treatments and their therapeutic benefits.

In an effort to move toward a universal definition, Corbin and Pangrazi (2001) define wellness as “a multidimensional state of being describing the existence of positive health in an individual as exemplified by quality of life and a sense of well-being” (p.1, emphasis added). Key dimensions of wellness are: physical, social, intellectual, emotional (mental), spiritual, vocational and environmental (though the last two dimensions are not personal in nature). Corbin and Pangrazi’s wellness definition emphasizes the positive aspects of health, building on the World Health Organization’s (1974) broad definition of health that moves beyond illness, disease, and debilitating conditions. The authors highlight the personal aspect or role that individuals play in terms of their wellness, while also acknowledging the potential impact of individuals’ working and physical environments on their wellness.

Bates and Eccles (2008) conducted a review of Canadian and international literature on definitions of wellness. They identified several common themes in addition to those already captured in Corbin and Pangrazi’s definition (i.e. wellness is multidimensional, a state of being, and results from intentional behaviors and life choices). One theme related to the active or dynamic nature of the processes and strategies used to attain wellness; another theme focused on wellness or attaining wellness as a strategy to promote personal growth and enhance overall quality of life and well-being. Since 1979, the US Department of Health and Human Services (USDHHS) has been investing in initiatives to improve the nation’s health by focusing on health promotion and disease prevention. In December 2010, the Department launched a new initiative, Healthy People 2020, that aims to “promote quality of life, healthy development, and healthy behaviors across all life stages” (USHHS, 2010, p.1), among other objectives. Quality of life and well-being, key descriptors of wellness, are key to this initiative, which intends to test and further improve measures of these descriptors (USDHHS, n.d.).

Health and wellness are linked to workforce and economic development. As mentioned before, one dimension of wellness is vocational (also referred to as occupational, workplace, or career wellness). According to the National Wellness Institute (NWI, n.d.), occupational wellness is about “personal satisfaction and enrichment in one's life through work … [and is based on] the premise that occupational development is related to one's attitude about one's work.” Indeed, a body of literature has accumulated on how employers can promote wellness in the workplace to improve employee health and productivity, with the World Health Organization playing a key role in working with the business community in developing incentives, strategies, and practices around wellness (c.f. Leurent et al., 2008). The fact that wellness is also an important factor in economic development is exemplified most recently by the passing of the American Recovery and Reinvestment Act by President Obama in 2009, which made an investment of one billion dollars into prevention and wellness initiatives (also referred to as Prevention and Wellness Fund).
References:


http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008DC0418:EN:NOT

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008DC0418:EN:NOT


World Commission on the Social Dimension of Globalization (2004). *A fair globalization:

## Appendix B: Graduate Program Competencies and Related UMB Course Offerings

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<tr>
<th>Core Competency</th>
<th>Definition of Competency</th>
<th>Knowledge Areas</th>
<th>Skills</th>
<th>Relevant UMass Boston Graduate Course Offerings</th>
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<tbody>
<tr>
<td>1. Knowledge Base Related to Social Inclusion, Social Development, and Globalization</td>
<td>• <strong>Social Inclusion</strong>: Full participation in all aspects of community life i.e. economic, social, cultural, and political. • <strong>Social Development</strong>: Improvement of people’s wellbeing and quality of life. • <strong>Globalization</strong>: Process of interaction and integration among economies, societies, and cultures across the globe through international trade and transport and advances in communication technology.</td>
<td>• Concepts of, perspectives on (historical, current, US, international), and approaches to on social inclusion, social development, and economic development • Linkages between health, wellness, and economic development in a development context and impact on people with disabilities and other marginalized groups of people • Policies and practices (US and international) intended to achieve social inclusion and development and specifically addressing health, wellbeing and economic aspects</td>
<td>• Apply concepts, perspectives, and approaches to policy, practice, and research at the local, state, national, and international level • Consider global context when assessing social problems and developing responses through policy, practice, and research</td>
<td>Health and Wellbeing: • See competency Policy &amp; Advocacy Economic Development: • PPOL G 743 Community Political and Economic Development • PAF G 635 Globalization and Intl. Development • PAF G 636 Political Economy of Regional Systems • MBA AF 603 (FIN) Massachusetts in the Global Economy</td>
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<tr>
<td>2. Self-Reflection and Leadership</td>
<td>• Examining the impact of personal values, beliefs, styles of communication, and experiences (self-reflection). • Developing a deeper understanding of one’s culture, personal and cultural biases, experiences, and beliefs that may influence future action and learning (self-reflection). • Motivating a group of people to work together to achieve a common goal (leadership).</td>
<td>• Value of self-reflection • Impact of beliefs and past experiences on negotiation and leadership styles • Characteristics and utility of different leadership styles • Sources of personal reward and rejuvenation and signs of stress / fatigue</td>
<td>• Asses one’s leadership style and understand factors that influence style • Use self-reflection and self-improvement techniques to build leadership skills • Use these techniques for program and organizational development, relationship-building, and scholarship</td>
<td>[MGT 421: Skills in Leadership and Teamwork, undergraduate course] • ADM G 645 Leadership Development • MBA MGT 683 (MGT) Leadership in the 21st Century • PAF G 615 Public Leadership</td>
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<tr>
<td>3. Ethics and Professionalism</td>
<td>• One’s conduct is congruent with generally accepted moral principles and values incl. prof. guidelines that are based upon those principles and values.</td>
<td>• Principles, values, and ethical behaviors that underlie prof. conduct in systems and that guide practice • Institutional Review Board (IRB) processes and criteria</td>
<td>• Identify and address ethical issues in theory, research, and practice related to health, wellness and economic development incl. implications • Develop IRB applications</td>
<td>PPOL G 719L Biomedical Ethics (CRC RTH 619L) • HMS G 602 Ethics in Human Services • [MGT 331: Managerial Ethics and Social Issues,</td>
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<td>Core Competency</td>
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<td>4. Critical and Creative Thinking, and Translation to Practice</td>
<td>Identifying an issue, dilemma, or problem; framing it as question; exploring and evaluating relevant info; using info and creativity to develop answer; and translation to practice.</td>
<td>Cognitive hierarchy of critical thinking: knowledge, comprehension, application, analysis, syntheses, and evaluation</td>
<td>Assess issue, dilemma, or problem, and formulate policy, practice, or research question.</td>
<td>CR CRTH 601 Critical thinking</td>
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<td>Basic approaches to research, methods, and engagement</td>
<td>Design strategy to answer question and translate answer to practice.</td>
<td>CR CRTH 602 Creative Thinking</td>
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<td>Quality and levels of evidence</td>
<td>Use research to answer question and translate research findings to practice (research and translation skills)</td>
<td>CR CRTH 616 Dialogue Processes</td>
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<td>CR CRTH 618 Creative Thinking, Collaboration, and Organizational Change</td>
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<td>CR CRTH 651L (PSYCH 550L) Cognitive Psychology</td>
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<td>CR CRTH 692 Processes of Research and Engagement</td>
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<td>CR CRTH 693 Action Research for Educational, Professional, and Personal Change</td>
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<td>See also Negotiation and Conflict / Dispute Resolution.</td>
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<td>5. Communication</td>
<td>Verbal, nonverbal, and written sharing of info.</td>
<td>Principles of communication for each modality – verbal, written, and nonverbal</td>
<td>Speak and write clearly and effectively</td>
<td>MBA ACM 682 (ACM) Oral Communication for Managers</td>
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<td>Challenges to communication (contextual mediators, literacy levels, cultural meanings, professional terms) and strategies to overcome those</td>
<td>Identify nonverbal communication cues</td>
<td>MBA ACM 681 (ACM) Analytical Writing in Mgt.</td>
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<td>Impact of culture and disability on communication</td>
<td>Listen attentively and actively</td>
<td>INS DSG 614 Writing for the Business Professional</td>
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<td>Principles of universal design in communication</td>
<td>Tailor info to diverse audiences</td>
<td>MBA MKT 763 (MKT) Marketing Communications</td>
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<td>Employ a repertoire of communication skills</td>
<td>INS DSG 608 Information Design and Visual Literacy</td>
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<td>Apply cultural competency to communication</td>
<td>See also Cultural Competency.</td>
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<td>Apply universal design principles to communication</td>
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<td>6. Negotiation and Conflict / Dispute Resolution</td>
<td>Using a cooperative process to find a solution that meets the needs of all parties involved (negotiation).</td>
<td>Characteristics of conflict and its manifestation in organizational context</td>
<td>Apply approaches / strategies / practices of effective negotiation and conflict / dispute resolution</td>
<td>DIS RES 623 Intro. Theory</td>
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<td>Resolving or managing a conflict / dispute by sharing</td>
<td>Apply cultural competency to negotiation and conflict / dispute resolution</td>
<td>DIS RES 621 Negotiation</td>
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<td>Sources of conflict in interdisciplinary settings</td>
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<td>DIS RES 603 Advanced Negotiation and Mediation</td>
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<td>Role of culture in conflict</td>
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<td>DIS RES 622 Ethical, Prof., and Policy Issues in Dispute</td>
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<td>Core Competency</td>
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| 7. Cultural Competency | • Working across cultures effectively by understanding, appreciating, honoring, and respecting cultural differences and similarities within and between cultures. | • Influence of personal biases and assumptions on individual and org. behavior  
• Influence of cultural, ethnic, socio-economic factors on access to services, programs, and resources  
• Impact of culturally-competent practices at the individual, program, and org. levels | • Conduct personal and org. self-assessment of cultural competence  
• Apply culture competency in communication, relationship-building, negotiation, and conflict / dispute resolution  
• Integrate cultural competency into policy, programs, research, scholarship, teaching, and training related to health, wellness, and economic development | Resolution  
• DIS RES 624 Cross-Cultural Conflict  
• DIS RES 625 Conflict Resolution Systems for Organizations  
• DIS RES 633 Alternative Dispute Resolution in the Workplace  
• [HMS G 630 Race, Culture, and Ethnicity in Human Services] |
| 8. Developing Others Through Teaching and Mentoring | • Designing learning environments, providing resources to facilitate learning, modeling the process of effective learning in the subject model, and evaluating learning outcomes (teaching).  
• Influencing career development and satisfaction of a colleague by acting as an advocate, coach, teacher, guide, role model, resource, etc. (mentoring).  
• A variety of teaching strategies  
• Principles of adult learning  
• Characteristics of positive mentoring and responsibilities of both mentee and mentor in the mentoring relationship | • Recognize and create learning opportunities for others  
• Participate in mutually beneficial mentoring relationships  
• Teach audiences of different sizes, backgrounds, and settings  
• Apply cultural competency to teaching and mentoring | Resolution  
• INS DSG 612 Instructional Strategies and the Adult Learner  
• INS DSG 622 Curriculum Design (in Organizations)  
• HMS G 613 Training Human Services Workers (?)  
• INS DSG 630 Managing the Training Function (?) |
| 9. Transdisciplinary Practice and Team Building | • Providing a supportive environment in which the skills and expertise of team members from different disciplines incl. stakeholders are seen as essential and synergistic.  
• Team building concepts incl. stages of team development, practices to enhance teamwork, managing team dynamics  
• Various approaches to practice (from multidisciplinary to interdisciplinary to transdisciplinary practice) | • Identify and assemble team appropriate to a given task  
• Develop and articulate shared vision, roles, responsibilities  
• Facilitate group processes for team-based decisions  
• Apply cultural competency to team building and functioning | Resolution  
• INS DSG 620 Interpersonal Skills and Group Dynamics  
• [MGT 421: Skills in Leadership and Teamwork, undergraduate course]  
• INS DSG 632 Organizational Development  
• HMS G 620 Leadership and Org. Development |
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|                 |                          | • Roles and competencies of individual disciplines | • Share leadership by capitalizing on team members’ strengths | Systems, Systems Thinking, and Systems Change:<sup>iv</sup>  
• SOCIOL 601 Complex Organizations  
• PAF G 612 Org. Behavior  
• MBA MGT 653 (MGT) Org. Diagnosis and Change Planning, Operations, and Development:<sup>v</sup>  
• HMS G 626 Strategic Planning for Public and Non-Profit Organizations  
• MBA MS 635 Operations Mgt.  
• PPOL G 780 Policy Planning and Program Development I  
• PPOL G 781 Policy Planning and Program Development II  
Funding and Budgeting:<sup>vi</sup>  
• PAF G 625 Public Budgeting and Financial Mgt.  
• HMS G 626 Public Sector Budgeting  
• HMS G 623 Financial Mgt. of Non-Profit Orgs.  
Management incl. HR Mgt..<sup>vii</sup>  
• PAF G 610 Public Mgt: Theories and Principles  
• MGT 303: Managing Organizations  
• PAF G 615 HR Mgt. |
| 10. Working with Communities, Organizations, and Systems | • Thinking systemically about the complexity of policy, practice, and research challenges (systems thinking); also involves collaboration and constituency building. | • Basic features and issues of systems  
• Relationship between org. mission, vision, and goals to org. strategic planning, operations, and the community  
• Principles of systems thinking  
• Principles of constituency and collaboration building  
• Basic business and admin. principles related to planning development, funding, budgeting, staffing, and managing organizations and systems | • Participate in strategic planning processes  
• Develop agendas and effectively lead meeting  
• Identify and engage stakeholders  
• Interpret situations and challenges systemically and identify appropriate responses (incl. systems change)  
• Manage projects effectively and efficiently  
• Apply cultural competency to managing projects |  
|                 |                          | • Systemic thinking about complexity of policy, practice, and research challenges  
• Collaboration and constituency building |  |  |
| 11. Policy and Advocacy | • Decision designed to address a given problem or set of inter-related problems affecting a large number of people (policy).  
• Activities carried out on behalf of policies or constituencies with the purpose to influence outcomes affecting peoples’ | • Public policy at local, state, national, and international levels related to health, wellness, and economic development  
• Current public-sector policies and private-sector initiatives related to health, wellness, and economic development | • Frame problems based on key data incl. economic, political, social trends  
• Use data, levels of evidence, and evaluative criteria in proposing policy change  
• Identify diverse stakeholders influencing policy change  
• Formulate strategies to |  
|                 |                          | • Systemic thinking about policy, practice, and research challenges  
• Collaboration and constituency building |  |  |
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<td>lives (advocacy)</td>
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12. Research, Evaluation, and Policy Analysis
- Process of systematically collecting and analyzing info to increase understanding of a particular phenomenon (research).
- Process of systematically collecting and analyzing info about a program to judge its effectiveness, improve its effectiveness, inform future programming, and/or increase understanding (evaluation).
- Process of systematically analyzing policies/policy alternatives/policy choices with respect to achieving a given set of goals (policy analysis).

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<tr>
<td>Appropriate methods for informing and educating policymakers about needs and impacts of policies on population groups (advocacy)</td>
<td>balance interests of diverse stakeholders consistent with desired policy change</td>
<td>• HMS G 610 Human Services Policy</td>
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<td></td>
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<td>• HMS G648 Comparative Social Policy and Practice Other relevant courses.iii</td>
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</table>

Note:
- MBA & MKT graduate courses (Business Administration and International Marketing), and MGT & BC undergraduate courses offered by the College of Management
- PPOL & PAF graduate courses (Public Policy and Public Affairs), and DIS graduate courses (Dispute Resolution) offered by the McCormack Graduate School of Global Policy Studies
- COUREH graduate courses (Rehabilitation Counseling), CCT graduate courses (Critical and Creative Thinking), NS graduate courses (Instructional Design), and ADM graduate courses (Educational Administration) offered by the College of Education and Human Development
- HMS graduate courses (Human Services) offered by the College of Public and Community Services
- SOCIOL graduate courses (Applied Sociology) offered by the College of Liberal Arts

i These competencies including definitions, knowledge areas, and skills, were adapted from a list of competencies developed by the Maternal and Child Health Bureau (MCHB) Leadership Competencies Workgroup (2009).
iii Other related courses (in economics / economic analysis): PPOL G 601 Political Economy I; PPOL G 602 Political Economy II

Other relevant courses: HMS G 630 Human Services Planning; HMS G 634 IT for Mgt. and Planning; and HMS G 649 Program Development.

Other relevant courses: MBA AF 627 (FIN) Health System Financial Mgt.; and HMS G 633 Fund Raising and Grant Seeking.


Other relevant courses: PAF G 619 WPPP: Contemporary American PP Issues; SOCIOL 641 Social Policy I; SOCIOL 642 Social Policy II; PPOL G 743 Social Welfare Policy; and PPOL G 748 Topics in Health Policy.

Similar courses offered by other departments: SOCIOL 650 Methods of Research I; SOCIOL 651 Methods of Research II; SOCIOL 655 Evaluation Research; HMS G 606 Research Methods; HMS G 632 Evaluation Research; HMS G 631 Human Services Needs Assessment; HMS G 627 Performance Monitoring and Evaluation; PAF G 620 Analytic Skills I: Skills for Policy Analysis; PAF G 621 Analytic Skills II: Research Methods; and PAF G 626 WPPP: Case Study Methodology for Policy Analysis.
Appendix C: Areas of Interest of UMB Institutes and Centers

1. McCormack Graduate School of Policy and Global Studies

**Center for Civil Discourse**
*Specialties:* Debating policy issues important to the American public while advancing the voices of reason.

**Center for Community Democracy and Democratic Literacy**
*Specialties:* Examining the work of community-based organizations to ascertain their success in expanding or capacity to expand democratic participation and to engage in community change efforts.

**Center for Governance and Sustainability**
*Specialties:* Linking analytical rigor and policy action in environmental, development and sustainability governance globally through state-of-the-art research, interactive dialogue, and comprehensive training for innovative leadership.

**Center for Peace, Democracy and Development**
*Specialties:* Promoting conflict resolution, democracy, economic development, education building, media development, and legal and judicial reform through partnerships and training programs across the globe.

**Center on Media and Society**
*Specialties:* Advancing university-community partnerships in the professional world of journalism and politics.

**Center for Rebuilding Sustainable Communities after Disasters**
*Specialties:* Conducting innovative research on various disaster-related topics; offering professional training programs; and providing expert advice to communities devastated by disasters.

**Center for Social Policy**
*Specialties:* Conducting poverty policy research and evaluation to reduce social and economic inequities in Massachusetts and the nation.

**Center for Women in Politics and Public Policy**
*Specialties:* Promoting women's political leadership through quality education and policy research.

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Collaborative Institute for Oceans, Climate and Security
*Specialties:* Developing and communicating technical, intellectual, and political expertise to manage the challenges presented by global climate change, impacted coasts, and evolving security needs.

Edward J. Collins, Jr. Center for Public Management
*Specialties:* Providing professional services to improve the efficiency and effectiveness of government.

Gerontology Institute
*Specialties:* Conducting basic and applied social and economic research on income security, health (including long-term care), productive aging, and basic social and demographic research on aging.

Osher Lifelong Learning Institute
*Specialties:* Enriching the intellectual, social, and cultural lives of adults aged 50 and over who share a love of lifelong learning.

Pension Action Center
*Specialties:* Conducting research on pension policy and offering assistance and referrals to individuals having trouble understanding or accessing their pension benefits.

2. College of Education and Human Development

New England Resource Center for Higher Education
*Specialties:* Supporting administrators, faculty, and staff of higher education in becoming more effective practitioners and leaders as they navigate the complexity of institutional innovation and change.

Adult Literacy Resource Institute
*Specialties:* Providing a staff development center for instruction in adult literacy/basic education and English for speakers of other languages.

Center for Technical Education
*Specialties:* Educating prospective vocational educators through courses leading to vocational education and vocational special needs approval as well as courses in technical education.

Center of Science and Mathematics in Context
*Specialties:* Advancing high quality teaching and learning in science and math for all students at K-12, university undergraduate, and graduate levels through support and professional development for teachers, development of curriculum standards, raised awareness of related careers, and beneficial research and partnerships.

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Institute for Learning and Teaching  
*Specialties:* Collaborating between universities, schools, and community-based programs with an emphasis on urban education and multicultural concerns with the purpose of whole-school improvement, narrowing the Achievement Gap, and dropout prevention.

New England Regional Center for Vision Education  
*Specialties:* Improving education for individuals with visual impairments through preparing teachers of students with visual impairments, orientation and mobility specialists, and vision rehabilitation therapists.

3. College of Liberal Arts  

Fiske Center for Archaeological Research  
*Specialties:* Building a highly integrated archaeology that embraces the multiplicity of methodological and theoretical approaches the field offers.

4. College of Management  

Center for Collaborative Leadership  
*Specialties:* Identifying and developing leaders who are diverse and reflect the changing demography of Boston and who practice collaborative leadership and are civically engaged.

Center for Sustainable Enterprise and Regional Competitiveness  
*Specialties:* Promoting the transition to a clean, sustainable, and prosperous economy through mobilizing the business community and its financial, technological, and organizational resources.

Entrepreneurship Center  
*Specialties:* Providing breadth and depth to the singular Entrepreneurship Specialization at UMB.

5. College of Nursing and Health Sciences  

GoKids Boston Youth Fitness Research and Training Center  
*Specialties:* Providing kids personalized instruction and support to become more physically active, improve fitness, eat nutritiously, and gain self-confidence.

6. College of Public and Community Services  

Labor Resource Center  
*Specialties:* Providing educational and research programs to workers and to labor and community organizations

Taylor Center for Media, Arts and Technology  
*Specialties:* Providing both a teaching facility and a multimedia production center.
7. **College of Science and Mathematics**

**Center for Green Chemistry**  
*Specialties:* Providing a Green Chemistry Track in the Chemistry Ph.D. Program at UMB.

**Collaborative Institute for Oceans, Climate and Security**  
*Specialties:* Focusing on the intersections of oceans, climate and security, and its resulting policy and management significance.

8. **Institutes and Centers Administered by the Office of the Provost and Vice Chancellor for Academic Affairs**

**Center for Social Development & Education**  
*Specialties:* Promoting the social development of children with disabilities and increasing their success in school and the community, while simultaneously working to eliminate the attitudinal barriers that limit opportunities for their full participation in society.

**Center for Survey Research**  
*Specialties:* Supporting public and private agencies and university scholars in carrying out high quality policy-related research by conducting basic and applied research that contributes to knowledge and understanding of important social issues.

**Institute for Asian-American Studies**  
*Specialties:* Conducting research on Asian Americans to strengthen and further Asian American involvement in political, economic, social, and cultural life and to improve opportunities and campus life for Asian American faculty, staff, and students and for those interested in Asian Americans.

**Institute for New England Native American Studies**  
*Specialties:* Developing collaborative relationships, projects, and programs between Native American tribes of the New England region and all of the UMass campuses.

**Massachusetts Office of Public Collaboration**  
*Specialties:* Providing services that support conflict management and collaborative governance including conflict assessment, consensus building/collaborative problem-solving, deliberative dialogue, dispute systems design, evaluation, facilitation, joint fact-finding, mediation, public participation, regulatory negotiation, training, and workplace climate assessment.

**Mauricio Gastón Institute for Latino Community Development and Public Policy**  
*Specialties:* Informing policy makers about issues vital to the Latino community and providing this community with the information and analysis necessary for effective participation in public policy development.

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Urban Harbors Institute
Specialties: Providing technical assistance and advisory services in fields such as urban planning, coastal and harbor planning, natural resource management, marine industry master planning, water transportation and geographical information systems.

Venture Development Center
Specialties: Incubating promising, early stage technology and life science companies.

William Joiner Center for the Study of War and Social Consequences
Specialties: Promoting research, curriculum development, public events, and educational, cultural, and humanitarian exchanges, which foster greater understanding and innovative means of addressing the consequences of war.

William Monroe Trotter Institute for the Study of Black Culture
Specialties: Addressing the needs and concerns of the Black community and communities of color in Boston and Massachusetts through research, technical assistance, and public service.

9. Federally Funded Collaborative Initiatives

The Edward M. Kennedy Institute for the United States Senate
Specialties: Educating the public about our government, invigorating public discourse, encouraging participatory democracy, and inspiring the next generation of citizens and leaders to engage in the public square.

University of Massachusetts Center for Clinical and Translational Science
Specialties: The Center is part of a national Clinical and Translational Science Award (CTSA) consortium created to accelerate laboratory discoveries into treatments for patients. The CTSA program is led by the National Institutes of Health's National Center for Research Resources.

HORIZON Center
Specialties: Funded by the National Institutes of Health’s National Center on Minority Health and Health Disparities.

UMass Boston-Dana Farber / Harvard Cancer Center U56 / U54 Cancer Partnership
Specialties: The U54 Minority Institution / Cancer Center Partnership Grant allows UMB and DF/HCC to collaborate on research aimed at addressing issues of cancer health disparities in disenfranchised populations.

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Boston Teacher Quality Partnership
Specialties: Increasing the number of effective teachers the Boston Teacher Residency Partnership (BTRP) prepares to teach in Boston Public Schools (BPS).

10. Other Centers and Institutes

Center for Coastal Environmental Sensing Networks
Specialties: Bringing together University researchers, Massachusetts business and industry leaders, and state and federal decision-makers, to provide an integrated framework for developing environmental sensor networks, especially in coastal areas.

Center for Personalized Cancer Therapy

Center for the Study of Gender, Security, and Human Rights
Specialties: Providing knowledge about gender and security to bear on the quest to end armed conflicts and build sustainable peace.

Developmental Sciences Research Center

Massachusetts Small Business Development Center
Specialties: provides entrepreneurs a network of resources to help them meet business challenges.

Research Center for Urban Cultural History
Specialties: Focusing on interdisciplinary and collaborative research and teaching in urban cultural history.

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Appendix D: ICI Publications and Materials, 2000-2011

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Journal Articles


Butterworth J., Fesko S.L., Ma V. (2000). Because it was the right thing to do: Changeover from facility based services to community employment. Journal of Vocational Rehabilitation, 14(1), 23-35.


**Journal Articles**

**Children’s Hospital Boston 2008-2011**


Books, Book Chapters


Books/Review/Chapters/Editorials
Children’s Hospital Boston

BOOKS


CHAPTERS/other


Doctoral Dissertations


Resource Guides and Reports


Leadership Network—Institute for Community Inclusion, University of Massachusetts Boston, and the National Association of State Directors of Developmental Disabilities Services


Fesko, S. Employment for Older Workers with Disabilities in the USA. KEPAD Internal Symposium—Employment of People with Disabilities in an Ageing Society


Marrone, J. (2009). Working Together To Integrate Employment Services And Supports Within A Recovery Oriented System Of Care As Well As Provide Better Vr Services To This Group Of Alaskan Citizens With Disabilities. Technical report for the Alaska Behavioral Health Division, Alaska DVR, Alaska Governor’s Commission on Disabilities, and the University of Alaska UCEDD.


Curriculum

ICI informational briefs

DataNote Series

Issue 32 (2011)
Job Seekers with Disabilities at One-Stop Career Centers: An Examination of Registration for Wagner-Peyser Funded Employment Services, 2002 to 2009.

Issue 31 (2011)
Students with Autism: Setting Higher Expectations for Postsecondary Education.

Issue 30 (2011)
Examining Collaboration between State Intellectual and Developmental Disabilities Agencies and State Vocational Rehabilitation Agencies.

Issue 29 (2011)

Issue 28 (2010)
Measuring the Outcomes of Job Seekers with Intellectual or Developmental Disabilities in the Vocational Rehabilitation Program.

Issue 26 (2010)
Vocational Rehabilitation Employment Outcomes for Transition-age Youth with Autism and Other Disabilities

Issue 25 (2009)
Job Seekers with Disabilities at One-Stop Career Centers: An Examination of Registration for Wagner-Peyser Funded Employment Services from 2002 to 2007

Issue 24 (2009)
Patterns of State, County, and Local ID/DD Funding Allocation

Issue 23 (2009)
Work Incentives and SSI Recipients with Intellectual Disabilities

Issue 22 (2009)
Indicators of Labor Market Success for People with Intellectual Disabilities

Issue 21 (2009)
Postsecondary Education and Employment Outcomes for Youth with Intellectual Disabilities
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Issue 20 (2008)
Tracking Employment and Day Support Participation and Outcomes in State Intellectual Disability and Developmental Disability Agencies

Issue 19 (2008)
WIA Employment Outcomes and Trends

Issue 18 (2008)
Employment rates in the general population and VR Rehabilitation rates

Issue 17 (2008)
Persons Served in Community Mental Health Programs and Employment

Issue 16 (2008)
State Mental Retardation and Developmental Disabilities Agencies Expenditures for Integrated Employment Services

Job Seekers with Disabilities at One-Stop Career Centers: An Overview of Registration for Wagner-Peyser Funded Employment Services

Issue 14 (2008)
Timeframe from Application to Closure in Integrated Employment for Vocational Rehabilitation Customers with Developmental Disabilities

Issue 13 (2007)
Disability and Occupation

Issue 12 (2007)
SSI recipients with disabilities who work and participation in 1619b

Issue 11b (2007)
National Day and Employment Service Trends in MR/DD Agencies

Issue 11 (2007)
VR Rehabilitation Rates of People with Mental Retardation/Developmental Disabilities (MR/DD) in 2005

Issue 10 (2007)
Employment Rates for People With and Without Disabilities

Issue 9 (2006)
The Relationship Between Supported Employment Status and Minimum Wage for Vocational Rehabilitation Integrated Employment Closures in 2004

Issue 8 (2006)
Relationship Between Integrated Employment and State Unemployment Rates for MR/DD Consumers

Issue 7 (2006)
Relationship Between MR/DD Consumers in Integrated Employment and Working SSI Recipients

Issue 6 (2006)
WIA Employment Outcomes

Relationship Between SSI Recipients Who Work and State Unemployment Rate

VR Outcomes for People with Spinal Cord Injury

Issue 3 (2005)
SSA Work Incentives Enrollment, 1990-2004

Issue 2(2005)
Employment Outcomes for People with Diabetes in the Vocational Rehabilitation System

Issue 1 (2005)
What Do Vocational Rehabilitation (VR) Services Cost?

State Employment Leadership Network Data Note 1
An Introduction to StateData.info
Research to Practice Series

Issue 50 (2011)
Collaboration between State Intellectual and Developmental Disabilities Agencies and State Vocational Rehabilitation Agencies: Results of a National Survey

Issue 49 (2011)
The Influential Role of the Job Developer: Increasing self-determination and family engagement during the job search.

Issue 48 (2010)
Vocational Rehabilitation Services Received by Youth with Autism: Are they Associated with an Employment Outcome?

Issue 47 (2008)
Comparison of VR Outcomes for Clients with Mental Illness across System Indicators

Issue 46 (2006)
Postsecondary Education Options for Students with Intellectual Disabilities

Issue 44 (2006)

Issue 43 (2006)
Trends and Emerging Issues Regarding SSA/VR Reimbursements for SSI/SSDI Recipients

Issue 42 (2006)
Community-Based Non-Work Services: Findings from the National Survey of Day and Employment Programs for People with Developmental Disabilities

Issue 41 (2006)
The National Survey of Community Rehabilitation Providers, FY2002-2003 Report 3: Involvement of CRPs in the Ticket to Work and the Workforce Investment Act

Issue 40 (2005)
Employment Services and Outcomes of People Receiving Welfare Benefits and Vocational Rehabilitation Services

Issue 39 (2005)
Innovations in Employment Supports: Colorado’s State Division of Developmental Services

Issue 38 (2005)
Diabetes and Vocational Rehabilitation Employment Services and Outcomes
Issue 37 (2005)
Job Networking in Diverse Communities


State Agency Systems Collaboration at the Local Level: Gluing the Puzzle Together, The Staff Perspective

Issue 34a (2003)
Local Vocational Rehabilitation Interagency Agreements for Employment: Partners, Collaborative Activities, and Impact

Issue 33a (2003)
Innovations in Employment Supports: Washington State’s Division of Developmental Disabilities

Medicaid Involvement in Employment-Related Programs- Findings from the National Survey of State Systems and Employment for People with Disabilities

High-Performing States in Integrated Employment

Issue 31 (2002)
Collaboration Between Medicaid and Other State Agencies- Findings from the National Survey of State Systems and Employment for People with Disabilities

Issue 30 (2001)
The Extent of Consumer-Directed Funding by MR/DD State Agencies in Day and Employment Services

Issue 29 (2001)
Postsecondary Education as a Critical Step Toward Meaningful Employment: Vocational Rehabilitation’s Role

Issue 28 (2001)
National Day and Employment Service Trends in MR/DD Agencies

Issue 26 (2001)

Issue 25 (2000)
Work Status Trends for People with Mental Retardation, FY 1985 to FY 1998

Issue 24 (2000)
Time Limits, Exemption, and Disclosure: TANF Caseworkers and Clients with Disabilities

Issue 23 (2000)
Self-Determination and Struggle in the Lives of Adolescents

Issue 22 (2000)
Building a Future: Working with the Post-High School Expectations of Students & Parents

Issue 21 (1999)
Working It Out: Workplace Experiences of Individuals with HIV and Individuals with Cancer

Issue 20 (1999)
The Successes and Struggles of Closing a Facility-Based Employment Service

Issue 19 (1998)
Barriers to Transition Planning for Parents of Adolescents with Special Health Care Needs

Issue 18 (1998)
Employing People with Disabilities: Small Business Concerns and Recommendations

Issue 17 (1998)
Grant Development and Decision-Making: Comparison of Funding Agencies and Community-Based Minority Organizations

Issue 16 (1998)
Disability Organizations’ Perspectives on the Needs of Youth with Disabilities Who Are Runaway or Homeless

Building Authentic Visions: How to Support the Focus Person in Person Centered Planning

Issue 14 (1998)
The Most Important Member: Facilitating the Focus Person’s Participation in Person Centered Planning

Issue 13 (1997)
Unrealized Potential: Differing Outcomes for Individuals with Mental Retardation and Other Disability Groups
Issue 7 (1997)
Responding to the Needs of Youth with Disabilities Who Are Runaway or Homeless

Issue 4 (1996)

Issue 3 (1996)
Multiple Perspectives on Implementing the Rehabilitation Act Amendments of 1992

Issue 2 (1996)
Shared Responsibility: Job Search Practices from the Consumer and Staff Perspective

Issue 1 (1995)
Consumer and Family Perspectives on the Meaning of Work
Institute Brief Series

Issue 27 (2009)
Advancing Parent-Professional Leadership: Effective Strategies for Building the Capacity of Parent Advisory Councils in Special Education

Issue 26 (2009)
Access for All Customers: Universal Strategies for One-Stop Career Centers

Issue 25 (2008)
Supporting Individuals with Autism Spectrum Disorders: Quality Employment Practices

Issue 24 (2008)
Effective Career Development Strategies for Young Artists with Disabilities

Issue 23 (2007)
Increasing Placement Through Professional Networking

Issue 22 (2007)
Minimum Wage Increase: A Guide for Disability Service Providers

Issue 21 (2005)
The 30-Day Placement Plan: A Road Map to Employment

Issue 20 (2005)
Making Networking Easier for Job Seekers: A Guide

Making Experiential Education Accessible for Students with Disabilities

Taking the Mystery Out of Customer Service

Issue 17 (2004)
When Existing Jobs Don’t Fit: A Guide to Job Creation

Issue 16 (2003)
More Than Just a Job: Person-Centered Career Planning

Achieving Quality Services: A Checklist for Evaluating Your Agency

Issue 14 (2001)
Developing Interagency Agreements: Four Questions to Consider
Appendix D

Issue 13 (2000)
WIA and One-Stop Centers: Opportunities and Issues for the Disability Community

Issue 12 (1999)
Recreation in the Community

Issue 11 (1999)
Quality Employment Services: Will You Know It When You See It?

Issue 8 (1994)
Employment Advisory Boards: The Ultimate Community Resource
Case Studies Series


Issue 16 (2008)
Pushing the Integrated Employment Agenda: Case Study Research in Tennessee

Pushing the Integrated Employment Agenda: Case Study Research in Washington State

Issue 14 (2005)
Pushing the Integrated Employment Agenda: Case Study Research in New Hampshire

Case Studies of Local Boards and One-Stop Centers: Underutilization of One-Stops by People with Significant Disabilities

Case Studies of Local Boards and One-Stop Centers: Strategies for Maximizing Staff Competence When Supporting Job Seekers with Disabilities

Creative Involvement of Community-Based Disability Organizations

Issue 10 (2004)
Case Studies of Local Boards and One-Stop Centers: Levels of Involvement of State VR Agencies with Other One-Stop Partners

Case Studies of Local Boards and One-Stop Centers: Tackling Fiscal Issues

Issue 8 (2003)
Case Studies on the Implementation of the Workforce Investment Act: Focus on Merging Cultures

Issue 7 (2003)
Case Studies on the Implementation of the Workforce Investment Act: Focus on Leadership

Issue 6 (2003)
Case Studies on the Implementation of the Workforce Investment Act: Focus on Accessibility

Case Studies on the Implementation of the Workforce Investment Act: Focus on Involving People with Disabilities

Case Studies on the Implementation of the Workforce Investment Act: Focus on Co-location

Issue 3 (2002)
Case Studies on the Implementation of the Workforce Investment Act: Spotlight on Maine

Issue 2 (2002)
Case Studies on the Implementation of the Workforce Investment Act: Spotlight on Minnesota

Issue 1 (2002)
Case Studies on the Implementation of the Workforce Investment Act: Spotlight on Kentucky
MassWorks series

Issue 6 (2008)
One-Stop Collaborations: The Key to Expanding Your Workforce Connections

Issue 5 (2007)
Quality Employment Services: Where Research and Practice Meet

Creating Effective Business Partnerships: What Businesses Want Human Service Agencies to Know

Issue 3 (2005)
CommonHealth

Issue 2 (2005)
Developing Community Partnerships to Reach Underserved Diverse Populations

Issue 1 (2004)
Massachusetts Launches the Disability Program Navigator Initiative

MassWorks blog

Several articles are published online only. Below is a list:

By David Hoff

Do We Really Know What Works?
By David Hoff

How is Massachusetts Doing? What does the Data Tell Us? (March 2008)
By David Hoff

Job Coaching: Experiences from the Field (April 2008) Video
By Rick Kugler

Job Coaching: Sometimes Less is More (June 2008)
By Diane Loud

Knowledge is the First Step Toward Financial Well-being (August 2008)
By Rick Kugler

Natural Supports: Higher Earnings, Lower Service Costs (June 2008)
By David Hoff
One-Stop Career Centers: Understanding Their Role (February 2008)  
By David Hoff

One-Stop Collaborations: The Key to Expanding Your Workforce Connections (April 2008)  
By Rick Kugler

Quality Employment Services: Where Research and Practice Meet (December 2007)  
By Rick Kugler

Why Bother Implementing Evidence-Based Practices in Supported Employment? (December 2007)  
By Rick Kugler
Promising Practices by State Agencies series

Implementation of priority policy goals
State ID/DD agency’s regulations, mission or goal statements around employment and activities related to the achievement of those goals.

- Mandatory Situational Assessments in Tennessee
- Employment First! Making Integrated Employment the Preferred Outcome in Tennessee
- Washington State’s Working-Age Adult Policy
- Washington: Promoting Public Sector Jobs for People with Intellectual and Developmental Disabilities
- Reaching Target Employment Goals: The Five-year Initiative from Florida’s Agency for Persons with Disabilities

Agency organization and operation
Practices or policies around the state ID/DD agency organizational structure (such as new departments, committees, or regional/local re-organization) with respect to the provision of employment

- Colorado’s Ad Hoc Committee on Employment and Community Participation

Funding and service contracting
Innovative and/or effective funding mechanisms, including development of rates, use of blended or braided funding, or use of funding incentives for providers who are successful in helping people with ID/DD find and maintain employment.

- Michigan’s Job Development Incentive
- North Carolina: Using an Outcomes-based Long Term Vocational Services Funding Model
- Shifting Resources Away from Sheltered Workshops in Vermont
- Oklahoma: Contracting with Industry for the Provision of Job Coaching Supports
- Oklahoma’s Outcomes-based Rate Setting System

Training and technical assistance
Formal training supported by ID/DD state agencies to help increase the use of innovative employment techniques.

- Maine’s Peer Support Training: Helping People with ID/DD Transition Out of Sheltered Workshops
- Integrated Employment Outcomes Through Person-to-Person Technical Assistance: New Hampshire
- Wisconsin’s Job Development Mentors Project
- Community Employment Training by and for Individuals with Intellectual and Developmental Disabilities in Tennessee

Collaboration
Practices that encourage formal and informal interagency relationships that more holistically support individuals with ID/DD in employment.

- Maryland: Collaborating to Promote Self-Employment for People with Intellectual/Developmental Disabilities
- Washington: Collaborating with a Community College and a Supported Employment Agency to Facilitate the Transition From High School to Community Employment
- Massachusetts: Using a Collaborative, Person-Centered Planning Approach to Think Creatively About Community Employment
- Practices that encourage formal and informal interagency relationships that more holistically support individuals with ID/DD in employment.
- The Tennessee Employment Consortium (TEC): A Statewide Collaboration for Change
- Delaware’s Early Start to Supported Employment Pilot Project
- Working Together to Convert the Last Sheltered Workshop in Vermont to Individualized Supports
- Working Together: Collaboration between Colorado’s Developmental Disabilities Division and Division of Vocational Rehabilitation
- Performance measurement, quality assurance, and program oversight
- Use of individual and provider level outcome data to assess progress and communicate the importance of employment.
- Using Employment Data to Create Area-specific Employment goals in Massachusetts

**Communication**

Practices that exemplify shared, multi-level communication as the norm, as well as timely and appropriate communication of core organizational values and message.

- New Hampshire: Translating Research into a Position Statement About Integrated Employment
- Nevada’s Regional Forums: Creating a Shared Responsibility for Improving Employment
- Oregon’s Employment Support Website: Communicating the Employment First Policy
- Pennsylvania’s Employment Newsletter: A Communication Strategy to Promote Employment
- Connecticut Showcases Creative Jobs with "Employment Idol"
Real People, Real Jobs: Stories from the Front Line

Ashley: Career development with the help of a mentor
Ken: Mastering a job within a growing company
Eric: Starting and maintaining a business through a circle of support
Emmitt: How hard work turned an unpaid internship into a paid job
David: Collaborating with a One-Stop Career Center to find employment
Andy: Family Initiative and Involvement
Briana: Using Vocational Rehabilitation and Self-Directed Funds for Job Development
Lisa: Natural supports at the YMCA
Reid: Creating a job with innovative and low-tech supports
Becca: Building a relationship with an employer for a successful job match
Nicole: Taking steps from part-time classroom assistant toward full-time childcare professional
Brenda: Carving out a job at Fitness Plus
Frankie: Funding the employer to provide on-the-job supports
Brian: Creating a job while filling a business need
Chad: Finding the perfect job match
Matt: Taking the time to plan for employment
John: Collaborating for community employment
Dusty: Tapping into personal resources to create her business
Brian: Using personal networks in the job search
Allison: Tailoring on-the-job supports to the individual and the workplace
Cody: Creating and adapting a job with the YMCA
Cindy: Creating a Career in Child Care
Carrie: Natural Supports at Work
Judy: Using a Job Developer’s Professional Networks
Michael: Supplementing Job Coaching with Natural Supports
Tools for Inclusion Series

Issue 25 (2011)
The Power of Friendship.

Issue 24 (2011)
The influence of families on the employment process.

Issue 23 (2009)
Disclosure of Disability Information at a One-Stop Career Center: Tips and Guidelines

Issue 22 (2007)
Self-Determination: A Fundamental Ingredient of Employment Support

Issue 21 (2007)
Minimum Wage Increase: What It Means for People with Disabilities

Getting the Most from the Public Vocational Rehabilitation System

Issue 18a (2004)
Moving On to High School: A Tip Sheet for Parents of Children on Individualized Education Plans

Four Strategies to Find a Good Job: Advice from Job Seekers with Disabilities

Issue 17 (2003)
Making It Easier to Go to Work: What the Changes at Social Security Mean to You

Issue 16a (2002)
A Common Path: Navigating Your Way to Successful Negotiations in the Workplace

Issue 16 (2002)
Evaluating Your Agency and Its Services: A Checklist for Job Seekers with Disabilities

Making Dreams a Reality: Using Personal Networks to Achieve Goals as You Prepare to Leave High School

Issue 14 (2002)
Starting with Me: A Guide to Person-Centered Planning for Job Seekers

Issue 13 (2001)
From Stress to Success: Making Social Security Work for Your Young Adult

Issue 12 (2001)
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Stories of Success: Using Networking and Mentoring Relationships in Career Planning for Students with Disabilities and Their Families

Issue 11 (2000)
People with Disabilities: Having a Voice in the Creation of the New Workforce Investment System

Issue 10 (2000)
One-Stop Centers: A Guide for Job Seekers with Disabilities

Issue 9 (1999)
Helpful Hints: How to Fill Out a Winning PASS Application

Issue 8 (1999)
Understanding the SSI Work Incentives

Issue 7 (1999)
Networking: A Consumer Guide to an Effective Job Search

Issue 5 (1998)
Americans with Disabilities Act (ADA) Title 1: Employment

Issue 2 (1998)
The Americans with Disabilities Act: General Overview
OneStops.info Briefs

Issue 3
OneStops.info: Equal Opportunity for People with Disabilities: Overview of Federal Requirements

Issue 2 (2002)
OneStops.info: One-Stop Career Centers and the New Ticket to Work and Self-Sufficiency Program

Issue 1 (2002)
OneStops.info: One-Stop Career Centers: Serving People with Disabilities

Think College Publications

Newsletters (A newsletter from the consortium for postsecondary education for individuals with developmental disabilities)

Think College Newsletter May 2011
Think College Newsletter April 2011
Think College Newsletter March 2011
Think College Newsletter February 2011
Think College Newsletter January 2011
Think College Newsletter November/December 2010
Think College Newsletter October 2010
Think College Newsletter September 2010
Think College Newsletter August 2010
Think College Newsletter June-July 2010
Think College Newsletter May 2010
Think College Newsletter April 2010
Think College Newsletter March 2010
Think College Newsletter February 2010
Think College Newsletter January 2010
Think College Newsletter December 2009
Think College Newsletter October-November 2009
Think College Newsletter September 2009
Think College Newsletter August 2009
Think College Newsletter July 2009


Fast Facts
Insight Briefs

Insight No. 7, April 2011 The Reauthorization of IDEA 2004 and Its Impact on Postsecondary Opportunities for People with Intellectual Disabilities

Insight No. 6, January 2011 Impact on Teacher Education Programs of Students with Intellectual Disabilities Attending College

Insight No. 5, 2010 Think, Hear, See, Believe College: Students Using Participatory Action Research to Document the College Experience

Insight No. 4, 2010 Students and Educational Coaches: Developing a Support Plan for College

Insight No. 3, 2010 Employment Activities and Outcomes of College-Based Transition Programs for Students with Intellectual Disabilities

Insight No. 2, 2010 What’s The Point? A Reflection About the Purpose and Outcomes of College for Students with Intellectual Disabilities

Insight No. 1, 2009 The Higher Education Opportunity Act of 2008: An Overview
Newsletter Articles/Other Publications


O’Day, B, Foley, S. What do we know, and not know, about women with disabilities in the workforce? IMPACT Newsletter, 21 (1), Summer/Fall 2008, p.33. Minneapolis: MN: Institute on Community Integration, University of Minnesota.


Timmons, Jaimie, Fesko, Sheila, & Hall, Allison (2009) From Diversity to Inclusion: Considering the Universally Designed Workplace. Published at Diversityinc.com August 04, 2009
Electronic Modules

Earnings & Benefits: Using Social Security Work Incentives
Coaching & Teaching Strategies
Employment Strategies for People with Psychiatric Disabilities
Employment Law and People with Disabilities: The ADA, Criminal Records and Beyond
Getting Everyone On Board: Working with Stakeholders
I've Got Too Much To Do: Time Management for Employment Staff
Where Do I Go from Here: Career Development for Employment Staff
Communicating with People with Disabilities for National Service and Volunteer Organizations
Effective Communication, Alternative Formats, and Web Accessibility for National Service and Volunteer Organizations
Inclusive Outreach and Recruitment for National Service and Volunteer Organizations
Physical and Programmatic Access for National Service and Volunteer Organizations
Understanding Disability Legislation for for National Service and Volunteer Organizations
Videos

John Kemp Interview - Employment Matters Now More than Ever - the Employer’s Perspective
Mike Callahan - Customized Employment
Making a Difference: Careers in Early Intervention
The Inclusive Concurrent Enrollment
John’s Story: Collaborating for Community Employment
Carrie’s Story: Natural Supports at Work
Laura Zirpolo Stout Interview
James Salzano Interview
Jennifer Lerner Interview
Felicia Nurmsen Interview
Oswald Mondejar Interview
Lois Cooper Interview
Work Without Limits employer summit
Employment Law: Course Introduction
Keith Jones Interview
Employment Law: Fran Fajana Interview
Employment Law: Tom Murphy Interview
Employment Law: Matt Mitchell Interview
Elisabeth Schaefer Interview
Shirley Fanchan Interview
Career Development for Employment Staff Online Training Introduction
Time Management for Employment Staff Online Course Introduction
Coaching and Teaching Strategies Online Course Introduction
Transition Assessment Interview
Recreation and Social Opportunities for Transition Age Youth
Gil Cote Interview
Sheila Fesko Interview
Robin Foley Interview
Debbie Gilmer Interview
Debbi Horvath Interview
Maria Husted Interview
Bill Kiernan Interview
Rick Kugler Interview
Karen Langley and Kobena Bonney Interview
Frank Smith Interview
Keith Westrich Interview
Wilson Interview
Jen’s Filing System
Ben’s Lunch
Star’s Star Song (Cee singing)
Job Developer’s Lunch
Returning to Work: Disability Benefits, Earnings & Issues
Amy Gelb with Lyn Legere, Director of Peer Education and Peer Support at the Transformation Center in Boston, Massachusetts.

“Employment for All” Boston Cable Program videos

Disability Management in the Workplace
Dr. Norm Hursh/Amy Gelb
12/17/07

Disability Navigator Program and the One-Stop Career Centers
Lisa Matrundola/Amy Gelb
12/5/07

Co-Occurring Issues and Employment
Rick Kugler/Amy Gelb
10/3/07

Assistive Technology
Cindy Thomas/Sue Cusack
9/12/07

Accessibility and Technology
Jeff Coburn/Amy Gelb
8/29/07

Networking
Cee Gandolfo/Amy Gelb
8/8/07

WIPA-work incentive Planning and Assistance, in MA
Brian Forsythe/Amy Gelb
7/27/07

Career Planning
Joy Gould/Amy Gelb
7/11/07

Disability Resource Management for employees within a hospital setting and HR/employer perspective on best practices in hiring within the Partners hospital system
Oswald Mondejar/ Betsy Pilsbury/Amy Gelb
6/13/07

Diabetes Research study
Doris Hamner/Amy Gelb
5/30/07

Ticket-To-Work
John Halliday/Amy Gelb
5/9/07

One-Stop Career Center Systems
David Hoff/Amy Gelb
5/2/07

Medicare Part D
Lyn Legere/Amy Gelb
4/14/07

Social Security Facts and Myths
Barbara Siegel/Amy Gelb
4/11/07

PFE/Housing Project
Melanie Jordan/Nuri/ Amy Gelb
3/14/07

Workplace Culture and clothing
Allison Fleming/John Lawson/Amy Gelb
3/7/07

Employers perspective on hiring people with disabilities
Diane Loud/ Danielle Dreillinger
2/21/07
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MRC
Neill McNeill/Amy Gelb
2/14/07

Workplace Accomodations
Alexis Gordon/Kim Cortez/Amy Gelb
1/31/07

Project Impact/MRC
Joe Reale/Amy Gelb
1/10/07

Peer Employment Benefits Network and ILC’s
Andy Forman/Amy Gelb
1/3/07

One-Stop Career Centers and the Navigator program
Jennifer Hinde/Danielle Dreillinger
12/27/06

Mental Health Systems and Employment
Joe Marrone
12/6/06/Amy Gelb

School to work
Michael Doyle
Maria Paiewonsky/Lara Enein Donovan
11/22/06

Workforce Retention
Rick Kugler/ Marianne Gilmore/Amy Gelb
11/8/06

Intro. to series
Kim Bisset/Amy Gelb
11/1/06
Websites
(.created during the period 2005-present)

New websites:
Think College (www.thinkcollege.net)
Real Work Stories (www.realworkstories.net)
TACE (www.TACENE.org)
State Agency Promising Practices (www.communityinclusion.org/)
Work Without Limits (www.workwithoulimits.org)
Boston Ready (www.bostonready.org)
NERCVE online brailer (www.nercve.org/brailer)
Opening Doors for Children and Youth with Disabilities and Special Health Care Needs (www.openingdoorsfor Youth.org)

Websites maintained and updated:
The main Institute for Community Inclusion website and portal (www.communityinclusion.org)
National Service Inclusion Project (www.serviceandinclusion.org)
For Employers (www.foremployers.org)
MassWorks (www.massworks.org)
New England Rehabilitation Continuing Education Program (www.nercep.org)
Northeast Regional Center for Vision Education (www.nercve.org)

Wikis
E-Newsletters

January 2008—present

June 2011
National Transition Conference

June 2011
DataNote 32

June 2011
TACE

May 2011
StateData book

May 2011
SELN

May 2011
National Conference on Volunteering and Service

April 2011
DataNote 31

April 2011
TACE

March 2011
SELN

March 2011
DataNote 30

February 2011
SELN

January 2011
SELN

January 2011
TACE
March 2010
National
ICI website satisfaction survey, ICI in social media

March 2010
MA
Caring, Collaboration, and Advocacy Through the Ages: From Novices to Heroes?

February 2010
Datanote 26
Vocational Rehabilitation Employment Outcomes for Transition-age Youth with Autism and Other Disabilities

January 2010
TACE
Help Individuals Understand Their Rights and Responsibilities in the Workplace, Two new online events: Job Creation and Ethics

December 2009
MICEO
Human Services Summit registration

November 2009
ICI Training
Co-occurring Mental Illness/Substance Abuse and Employment, Achieving Successful Employment for Youth with Disabilities, Person-Focused Career Planning Work Without Limits trainings

November 2009
Datanote 25
Job Seekers with Disabilities at One-Stop Career Centers: An Examination of Registration for Wagner-Peyser Funded Employment Services from 2002 to 2007

November 2009
MICEO
Governor Patrick MA Human Services Summit invitation

October 2009
National
ICI on Facebook and Twitter, ICI projects on Facebook

September 2009
TACE
TACE calendar announcement
September 2009
Datanote 24
Patterns of State, County, and Local ID/DD Funding Allocation

August 2009
ICI Training
Work Without Limits fall training series

July 2009
Datanote 23
Work Incentives and SSI Recipients with Intellectual Disabilities

July 2009
National
Real People, Real Jobs Announcement

June 2009
WWL: Concepts of Self-Employment, Employment Supports Training

June 2009
Datanote 22
Indicators of Labor Market Success for People with Intellectual Disabilities

June 2009
VR-RRTC Directors
Bobby Silverstein Powerpoint

June 2009
National
US & UK Routes to Employment: Strategies to Improve Integrated Service Delivery to People with Disabilities

May 2009
National
Access to Integrated Employment: State Agency Promising Practices

April 2009
Economic Stimulus MA
MassWorks: What Does the Economic Stimulus Mean for Employment of People with Disabilities?

March 2009
StateData Book Announcement

March 2009
Comm-PASS Solicitation

March 2009
National
US News & World Report News Coverage; Going to Work (2009), Institute Brief 25, Tools for Inclusion 23, Research to Practice 23 Announcement

February 2009
Datanote 21
Postsecondary Education and Employment Outcomes for Youth with Intellectual Disabilities

January 2009
ICI Training
Denise Bissonnette Training

December 2008
ICI Training
Best Practices in Employment Services for People with Co-Occuring Mental Illness/Substance Abuse, Motivational Interviewing for Supported Employment

December 2008
ICI Employment Data
StateData Update: State Intellectual/Developmental Disability Agency Survey Data, Vocational Rehabilitation Outcomes Data, US Census Bureau Data

November 2008
DataNote 20
Individual Employment Outcomes Based on FY2007 National Survey of Day & Employment Programs

November 2008
MA
It’s Just Good Business: A Conference for MA Job Developers

September 2008
ICI Employment Data
DataNote 19: Employment Outcomes for Individuals Served by One-Stop System

September 2008
NERCEP
TACE Announcement

September 2008
NSIP National News
Scholarships Available for the 2008 National Conference
September 2008
MA
Employment Service Provider Forum, New Opportunities for Service Providers in the Ticket to Work Program, Employment and Disability Summit, It's Just Good Business: Conference for MA Job Developers

August 2008
ICI Employment Data
Vocational Rehabilitation Outcomes Data, Workforce Development Outcomes Data, State Mental Health Agency Data all on StateData.info

July 2008
National
5th National Organizational Change Forum Announcement

July 2008
DataNote 18
Vocational Rehabilitation Program’s Role in Assisting People with Disabilities in Gaining Integrated Employment

July 2008
NERCEP
Still Time to Take Advantage of NEJDTP, and Job Developing and Self-Employment

June 2008
Datanote 17
Persons Served in Community Mental Health Programs and Employment

June 2008
NERCEP
Invitation to the NEJDTP program, Training on supporting workers with mental illness and cognitive impairments, Training for obtaining jobs for Deaf or hard of hearing job seekers

June 2008
MA
MassWorks.org introduction, Survey for best practices for engaging employers

May 2008
NERCEP
Comprehensive vocational assessment, 2-day workshop on Autism Spectrum Disorders and employment

April 2008
Datanote 16
Expenditures for Integrated Employment Services
April 2008  
NERCEP  
Registration for B/VI Employment Services conference, Moving On Up training

March 2008  
NERCEP  
Creative Job Development, Blind/Visual Impairment Services conference

March 2008  
MA  
MA Youth Leadership Forum on March 29

February 2008  
Datanote 15  
Registration for Wagner-Peyser Funded Employment Services

February 2008  
NERCEP  
Employment Services for People with Psychiatric Disabilities, Not just a job – a career training

February 2008  
National  
APSE 2008: The Winner’s Circle ... Everybody Works! Everybody Wins!

January 2008  
NERCEP  
Co-Occurring Mental Illness And Substance Abuse Training in Vermont, Training for new employment services staff

January 2008  
Datanote 14  
Application Timeframes for Vocational Rehabilitation Customers with Developmental Disabilities

January 2008  
National  
Working Life: Towards a Lifestyle of Employment For All training
Webinars

**National Service Inclusion Program (NSIP) Webinars**

Sharing Service Experiences: Senior Corps Volunteers (June 16 2009)

Inclusive Interviewing for National and Community Service Programs (May 20 2009)

Strategies to Dynamically Engage Volunteers Over 55 in Program Training (April 23 2009)

Integrating Service Learning into an Individualized Education Program (IEP) (March 19 2009)

Universal Design in Early Childhood Education (February 23 2009)

Association of Higher Education and Disability (AHEAD) (January 22 2009)

Volunteers with Disabilities Serving Internationally (December 17 2008)

Experiences of Program Staff that Supervise Service Members and Volunteers with Disabilities (December 5 2008)

Supervising Service Members and Volunteers with Disabilities: A Practical Approach (October 31 2008)

NSIP Fellows Share Promising Practices for Engaging People with ALL Abilities in National Service (September 9 2008)

US Veterans Serving as Mentors (August 26 2008)

Inclusive Intergenerational Mentoring (July 29 2008)

**State Employment Leadership (SELN) Webinars**

Marketing to Employers (May 2010)

Person-focused Career Approaches (April 2010)

Transitioning to Community Employment (March 2010)

Relationships and Networking (February 2010)
Person-focused Career Approaches (January 2010)

Importance of Employment (December 2009)

Relationships and Networking (November 2009)

New Employment-Focused Service Definitions (October 2009)

New Employment-Focused Service Definitions (September 2009)

Importance of Employment (September 2009)

The Economics of Supported Employment and How to Improve Them (June 2009)

I Manage an Agency or Employment Services! A Communication Plan? What Is It and Why Do I Need One? (April 2009)

What is a 30-Day Plan (April 2009)

What is a 30-Day Plan (March 2009)

Community-Based Discovery for Employment Services Professionals (March 2009)

**TACE**

Overview of E-Learning (3/12/10)

Successful Placements for Individuals with Asperger Syndrome will be open to TACE audience in New England (5/19/10)
### Appendix E: Activities of Institutions of Higher Education and Other Centers Locally, Regionally, and Nationally

<table>
<thead>
<tr>
<th>Institution</th>
<th>School/College/Department</th>
<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
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</thead>
<tbody>
<tr>
<td>UMass Lowell</td>
<td>College of Fine Arts, Humanities, and Social Sciences</td>
<td>Economic and Social Development of Regions (MA, BA/MA)</td>
<td>- Global Development</td>
<td>- Work, Technology, and Training</td>
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<tr>
<td>Lowell, MA</td>
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<td></td>
<td>- Research Methods in Economic and Social Development</td>
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<td>- Dynamics of Power Authority, Diversity and Inequality</td>
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<td>- Foundations of Comparative Regional Development</td>
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<td>- Organizational Dynamics in Regional Development</td>
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<td>- Master’s Thesis or Master’s Project</td>
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<td>Recommended courses:</td>
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<td>- Globalization, Work, &amp; Family</td>
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<td>- Comparative Environmental Studies</td>
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<td>- Development Principles for Developing Economies</td>
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<td>- Politics and Economics of Public Policy Social Movements and Empowerment</td>
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<tr>
<td>Harvard University</td>
<td>School of Public Health, Department of Global Health and Population</td>
<td>Public Health (MPH, MD/MPH)</td>
<td>- Global Health Interdisciplinary concentration:</td>
<td>Core requirements from the following areas of study:</td>
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<tr>
<td>Cambridge, MA</td>
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<td>- Epidemiology of Infectious Diseases</td>
<td>- Biostatistics</td>
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<td>- Women, Gender, and Health</td>
<td>- Epidemiology</td>
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<td>- Environmental Health Science</td>
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<td>- Health Services Administration</td>
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<td>- Social and Behavioral Science</td>
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<td>- Ethics</td>
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<tr>
<td>Harvard University</td>
<td>School of Public Health, Department of Global Health and Population</td>
<td>Health Systems (PhD)</td>
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<td>- Political Economy of Health Policy</td>
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<td>- Advanced Evaluation Methods and Applications</td>
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<td>- Health Systems Doctoral Seminar</td>
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<td>Required coursework in:</td>
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<td>- Health Sector Reform</td>
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<td>- Economic Analysis</td>
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<td>- Political Analysis</td>
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<td>- Evaluation and Political Economy</td>
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**Table Notes:**

- **Core Courses** column lists the required and recommended courses for each institution's program.
- **Recommended courses** are additional courses that may be taken by students.
- The table provides a comprehensive overview of the activities and educational programs offered by institutions in the field of higher education and other centers locally, regionally, and nationally.
<table>
<thead>
<tr>
<th>Institution</th>
<th>School/College/Department</th>
<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
</tr>
</thead>
</table>
| Northeastern University           | College of Professional   | Global Studies and International Affairs (MS)     |                                                                  | - Global Basics: Globalization and Global Politics and Economic Systems  
- Global Basics: Global Literacy, Culture, and Communication  
- Global Corporate and Social Responsibility  
- Basic Field Research Methods  
- Thesis  

Global Development required coursework:  
- Global Players: The Funders  
- Sustainable Development  

Plus one of the following:  
- Global Players: The Developers  
- Global Issues: Immigration and Labor  
- Global Issues: Poverty and Wealth  
- Global Focus: Resources and Markets  

Global Health (3 of the following):  
- Global Health Perspectives, Politics, and Experiences in International Development  
- Critical Issues and Challenges in the Practice of Global Health  
- Emerging Infectious Diseases and Health Impacts of Social and Environmental Changes  
- Health and Human Rights, and Ethical Issues in Global Health Futures |
| University                      | Studies                   |                                                    | - Global Development                                          |                                                                                                                                              |
|                                 |                           |                                                    | - Global Health                                               |                                                                                                                                              |
|                                 |                           |                                                    |                                                              |                                                                                                                                              |
| Boston University               | School of Management,     | Global Health and Management (MBA/MPH)            | - International Health                                        | MBA/MPH in Global Health and Management  
- 80 credits from the School of Management  
- 33 credits from the School of Public Health (22 from the International Health- Global Health Track for the concentration)  
- 3 elective credits                                                                                                                                 |
<p>|                                 | Health Sector Management  |                                                    |                                                              |                                                                                                                                              |
|                                 | Program &amp; School of Public |                                                    |                                                              |                                                                                                                                              |
|                                 | Health Management         |                                                    |                                                              |                                                                                                                                              |
|                                 | International Health      |                                                    |                                                              |                                                                                                                                              |
|                                 | Department                |                                                    |                                                              |                                                                                                                                              |</p>
<table>
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<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
</tr>
</thead>
</table>
| Boston University | Graduate School of Arts and Sciences, Department of International Relations | Global Development Policy Program (MA)                | - Governance and Political Economy                                                      | - Geography of Third-World Development  
- Introduction to International Relations  
- Poverty, Health, and Development  
- Global Economic and Development Policy  
- Global Development Capstone  

Governance and Political Economy required coursework:  
- Research Methods for International Relations Practitioners  
- International Institutions for Finance Development, and Trade  
- Globalization, Governance, and Development  

International Public Health required coursework:  
- Elementary Biostatistics  
- Biostatistics  
- Introduction to Epidemiology  
- The Organization, Delivery, and Financing of Medical Care Services  
- Program Evaluation  
- The Biology of Public Health |
| Boston University | Graduate School of Arts and Sciences, Department of Economics | Global Development Economics Program (MA)               | - None Offered                                                                           | - Global Development Policy core:  
- Current Issues in International Environmental Affairs  
- Introduction to International Relations  
- Poverty, Health, and Development  

Economics core:  
- Microeconomic Theory  
- Macroeconomic Theory  
- Statistics  
- Econometrics  

Electives  
- Capstone Course |
<table>
<thead>
<tr>
<th>Boston University</th>
<th>School of Public Health, Department of International Health</th>
<th>Public Health (MPH)</th>
<th>International Health</th>
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<td>- Meet school-wide core requirements</td>
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<td>- 16 credits in International Health</td>
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<td>- 8 of these 16 must from courses offered by the IH Department</td>
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<td>- At least one of the following (all four strongly recommended):</td>
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<td>- Skills in Critical Analysis and Evidence Based Writing for Public Health Professionals</td>
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<td>- Global Public Health: History, Approaches and Practices</td>
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<td>- International Public Health and Medical Care: A Systems Approach</td>
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<td>- Social and Behavioral Sciences in International Public Health</td>
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<td>Institution</td>
<td>School/College/Department</td>
<td>Graduate Program</td>
<td>Area(s) of Concentration</td>
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</table>
| Boston University   | School of Public Health   | Public Health (DrPH)             | International Health     | - Social and Cultural Factors Affecting the Health of Populations  
- Needs Assessment  
- Research Methods for Public Health Practice  
- Health Program Development and Management  
- Program and Policy Evaluation  
- Law and Ethics for Public Health  
- Leaders  
- Health Economics and Financial Management for Public Health  
- Cases in Public Health Management  
- Public Health Leadership Seminar  
- Public Health Practicum  
- Research Methods Elective  
- Seminars in International Health Policy Issues  
- Maternal and Child Health Policy Seminar  
- Advanced Intervention and Evaluation Research Seminar  
Plus one of the following:  
- Social Determinants: Impacts and Responses to the AIDS Pandemic  
- Controversies in Global Control and Eradication of Infectious Diseases  
- Global Trade, Intellectual Property, and Public Health |
| Boston College      | Graduate School of Social Work | Clinical and Macro Social Work (MSW) | Global Practice          | - Rights-Based Assessment and Capacity-Building in Global Social Work  
- Sustainable Development and Responses in Global Social Work  
- Global Policy Issues and Implications |
| Tufts University    | School of Medicine         | Public Health (MPH)              | Global Health            | - Research Methods in Global Health  
- Global Health Priorities and Approaches  
- Comparative Global Health Systems  
Plus two of the following:  
- Research Methods in Global Health  
- Global health Priorities and Approaches  
- Comparative Global Health Systems |
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<tr>
<th>Institution</th>
<th>School/College/ Department</th>
<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
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</thead>
</table>
| Brandeis University, Waltham, MA | Heller School for Social Policy and Management | International Health Policy and Management (MS) | - Management | Management Track required courses:  
- Managing Policy and Practice  
- International Health Systems  
- Financial Accounting  
- Organizational Behavior  
- World Health  
- Strategic Management  
- Operational Management  
- Cost Effectiveness  
Policy Track required courses:  
- Managing Policy and Practice  
- International Health Systems  
- Applied Regression Analysis  
- World Health  
- International Health Economics  
- Applied Econometrics  
- National Health Accounts  
- Cost Effectiveness |
| Brandeis University | Heller School for Social Policy and Management | Sustainable International Development (MA) | - None offered | - Threats to Development: Climate Change  
- Planning and Implementation  
- Poverty, Inequality, and Development  
Plus courses from the following areas of study:  
- Monitoring and Evaluation  
- Ecology  
- Economic  
- Gender  
- Rights-Based Approach  
- Professional Writing |
| Brandeis University | Graduate School of Arts and Sciences | Global Studies (MA) | - Culture and Globalization  
- Global and Regional Governance  
- Global Health | - Global Agents  
- Critical Global Issues  
- Global Economics requirement  
- Graduate-level methodology  
- Concentration electives  
- Master’s thesis  
- Language requirement (advanced training in a foreign language) |
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<th>Institution</th>
<th>School/College/Department</th>
<th>Graduate Program</th>
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<th>Core Courses</th>
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<tbody>
<tr>
<td>Brandeis University</td>
<td>Heller School for Social Policy and Management</td>
<td>Social Policy (PhD)</td>
<td>- Global Health and Development Policy</td>
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<td>Electives:</td>
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<td>- Social Theory Seminar: The Thought of Paulo Freire</td>
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<td>- International Health Economics</td>
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<td>- Topics in Sustainable Development: Cost-Effectiveness of Renewable Energy</td>
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<td>- Advanced Techniques of Cost-Effectiveness and Cost-Benefit Analysis</td>
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<td>- Quality and Performance Measurement in Health Care</td>
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<td>- Issues in National Health Policy</td>
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<td>- Management of Health Care Organizations</td>
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<td>- Payment and Financing of Health Care</td>
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<tr>
<td>Brandeis University</td>
<td>Heller School for Social Policy and Management &amp; Graduate School of Arts and Sciences</td>
<td>Dual Degree in Sustainable International Development and Coexistence and Conflict Dual Degree (MA)</td>
<td>- None offered</td>
<td>- Poverty, Inequalities, and Development</td>
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<td>- Dialogue and Mediation Skills</td>
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| John Hopkins         | Bloomberg School of Public Health | Public Health (MPH) | Global Environmental Sustainability and Health (GESH) | - The Global Environment and Public Health  
- Global Environmental Sustainability and Health Seminar  
- Energy Policy Choices and Public Health  
- Building, Land Use, Transportation, and Public Health  
Plus one of the following courses:  
- Food Production, Public Health & the Environment  
- Food, Culture, and Nutrition  
- Baltimore Food Systems: A Case Study of Urban Food Environments  
Plus one of the following courses:  
- Health Behavior Change at the Individual, Household and Community Levels  
- Introduction to Persuasive Communications: Theories and Practice  
Recommended courses:  
- Environmental & Population Health in Emergencies  
- Principles of Public Health Ecology  
- Food- & Water-borne Diseases  
- Tropical Environmental Health  
- Urban Health in Developing Countries |
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<th>Institution</th>
<th>School/College/Department</th>
<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
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<tr>
<td>John Hopkins</td>
<td>Bloomberg School of Public Health</td>
<td>Public Health (MPH)</td>
<td>- Health in Crisis and Humanitarian Assistance (HCHA)</td>
<td>- Introduction to Humanitarian Emergencies</td>
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<td>- Health Leadership and Management (HLM)</td>
<td>- Environment and Population Health in Emergencies</td>
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<td>- Managing Health Services Organizations</td>
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<td>- Approaches to Managing Health Service Organizations</td>
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<td>- Fundamentals of Budgeting and Financial Management</td>
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<td>- Foundations of Leadership</td>
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<td>Plus one of the following courses:</td>
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<td>- Case Studies in Management Decision-making</td>
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<td>- Organizational Behavior &amp; Management</td>
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<td>- Strategic Planning</td>
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<td>- Health Management Information Systems</td>
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<td>Plus one of the following courses:</td>
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<td>- Quality Assurance Management Methods for Developing Countries</td>
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<td>- Quantitative Tools for Managers</td>
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<td>- Quality of Medical Care</td>
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<td>- Pharmaceuticals</td>
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<td>- Management for Under-served Populations</td>
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<td>- Introduction to the U.S. Healthcare Systems</td>
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<td>- Comparative Health Insurance</td>
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<td>- Health Systems in Low- and Middle-Income Countries</td>
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<td>- Health Policy IV: Health Policy Analysis and Synthesis</td>
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<td>Plus two of the following courses:</td>
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<td>- Large Scale Effectiveness Evaluation of Health Programs</td>
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<td>- Using Summary Measures of Population Health to Improve Health Systems</td>
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<td>- Econometric Methods for Evaluation of Health Programs</td>
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<td>- Health Economics I</td>
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<td>Institution</td>
<td>School/College/Department</td>
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<td>Area(s) of Concentration</td>
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<tr>
<td>John Hopkins</td>
<td>Bloomberg School of Public Health, Department of International Health</td>
<td>Master of Science in Public Health (MSPH)</td>
<td>- Global Disease Epidemiology and Control</td>
<td>- Special Studies and Research Disease Control: Education Program Development</td>
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<td>- Global Disease Epidemiology and Control Seminar</td>
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<td>- Introduction to International Health</td>
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<td>- Global Disease Control Programs and Policies</td>
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<td>Plus select courses in the following areas:</td>
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<td>- Infectious Disease</td>
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<td>- Biostatistics</td>
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<td>- Epidemiology</td>
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<td>- Applied Epidemiology/ Randomized Trials</td>
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<td>- Vaccines</td>
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<td>- Environmental Health</td>
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<td>- Management Sciences</td>
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<td>- Practicum</td>
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<td>- Health Systems</td>
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<td>- Approaches to Managing Health Services Organizations</td>
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<td>- Special Studies and Research Health Systems</td>
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<td>- Introduction to International Health</td>
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<td>- Statistical Methods in Public Health</td>
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<td>- Principles of Epidemiology</td>
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<td>- Health Systems in Low and Middle Income Countries</td>
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<td>- Practicum</td>
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<td>Plus select courses in the following areas:</td>
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<td>- Core Applied Health Management</td>
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<td>- Environmental Health</td>
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<td>- Social &amp; Behavioral Sciences</td>
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<td>- Biological Science</td>
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<td>Institution</td>
<td>School/College/Department</td>
<td>Graduate Program</td>
<td>Area(s) of Concentration</td>
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<tr>
<td>John Hopkins</td>
<td>Bloomberg School of Public Health, Department of International Health</td>
<td>Doctor of Public Health (DrPH)</td>
<td>International Health</td>
<td>MPH core requirements in environmental health, public health, biology, management sciences, and social &amp; behavioral sciences&lt;br&gt;Plus select courses in the following areas:&lt;br&gt;- Ethics&lt;br&gt;- Epidemiology&lt;br&gt;- Biostatistics&lt;br&gt;- DrPH Seminar&lt;br&gt;- Leadership&lt;br&gt;- Health Policy&lt;br&gt;- Management Sciences&lt;br&gt;- International Health</td>
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<tr>
<td>John Hopkins</td>
<td>Bloomberg School of Public Health, Department of International Health</td>
<td>Doctor of Philosophy (PhD)</td>
<td>Global Disease and Epidemiology and Control (GDEC)</td>
<td>Special Studies &amp; Research GDEC: Education Program Development&lt;br&gt;- Public Health Perspectives on Research&lt;br&gt;- Doctoral Global Disease Epidemiology and Control Seminar&lt;br&gt;- Research Ethics&lt;br&gt;- Introduction to International Health&lt;br&gt;- Infectious Disease and Child Survival&lt;br&gt;- Global Disease Control Programs and Policies&lt;br&gt;Plus select courses in the following areas:&lt;br&gt;- Biostatistics&lt;br&gt;- Epidemiology&lt;br&gt;- Environmental Health&lt;br&gt;- Social &amp; Behavioral Sciences&lt;br&gt;- Nutrition&lt;br&gt;- Vaccines&lt;br&gt;- Population/ Family Planning&lt;br&gt;-</td>
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<tr>
<td>John Hopkins</td>
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<td>Master of Science in Public Health/ Peace Corps Master’s International Program (MSPH/MI)</td>
<td>- None offered</td>
<td>Nine months of coursework completed at the Bloomberg School, a comprehensive exam, and then enter the Peace Corps for two years of service&lt;br&gt;- During this two years, students complete 32 credits</td>
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<td>Institution</td>
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<tr>
<td>Columbia University</td>
<td>Mailman School of Public Health</td>
<td>Public Health (MPH, PhD, DrPH)</td>
<td>Six departments offer a MPH with a Global Health Track:</td>
<td>- Introduction to Global Health</td>
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<tr>
<td>New York, NY</td>
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<td>- Biostatistics</td>
<td>- Priorities in Global Public Health</td>
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<td>- Environmental Health Sciences</td>
<td>- Professional Development Seminar in Global Health</td>
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<td>- Epidemiology</td>
<td>- Global Health Pre-Practicum Seminar</td>
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<td>- Health Policy and Management</td>
<td>- Global Health Post-Practicum Seminar</td>
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<td>- Population and Family Health</td>
<td>- Advanced Topics in Global Health</td>
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<td>Sociomedical Sciences</td>
<td>- HIV and Health Systems</td>
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<tr>
<td>Columbia University</td>
<td>School of International and Public Affairs</td>
<td>Sustainable Development (PhD)</td>
<td>None offered</td>
<td>- Human Ecology</td>
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<td>- Politics of Sustainable Development</td>
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<td>- Environmental and Resource Economics</td>
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<td>- Comparative Development</td>
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<td>- Macroeconomic Policy and Sustainable Development</td>
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<td>- Microeconomic Analysis I &amp; II</td>
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<td>- Introduction to Econometrics I &amp; II</td>
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<td>- Quantitative Analysis</td>
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<td>- Environmental Science for Sustainable Development</td>
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</table>
| University of Washington Seattle, WA | School of Public Health, Department of Global Health | Public Health (MPH) | General Track | - Problems in Global Health  
- International Program Management and Evaluation  
- Global Health Seminar  
Select courses from the following areas:  
- Assessment  
- Biostatistics  
- Epidemiology  
- Environmental Health  
- Social & Behavioral Sciences  

- Health Metrics and Evaluation  
- Problems in Global Health  
- Global Health Challenges  
- Population Measurement  
- Research Methods  
Select courses from the following areas:  
- Biostatistics  
- Epidemiology  
- Environmental Health  
- Social & Behavioral Sciences |
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<th>Institution</th>
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<th>Graduate Program</th>
<th>Area(s) of Concentration</th>
<th>Core Courses</th>
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<tr>
<td>University of Washington</td>
<td>School of Public Health, Department of Global Health</td>
<td>Public Health (MPH)</td>
<td>Leadership, Policy, and Management</td>
<td>- Problems in Global Health</td>
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<td>- International Program Management and Evaluation</td>
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<td>- Leadership Development for Global Health</td>
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<td>- Organizational management for Global Health</td>
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<td>- Policy Development and Advocacy for Global Health</td>
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<tr>
<td>Emory University</td>
<td>Rollins School of Public Health, Hubert Department of Global Health</td>
<td>Public Health (MPH)</td>
<td>None offered</td>
<td>- Behavioral Sciences in Public Health</td>
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<td>Atlanta, GA</td>
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<td>- Social Behavior in Public Health</td>
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<td>- Statistical Methods I</td>
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<td>- Statistical Methods I Lab</td>
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<td>- Perspectives in Environmental Health</td>
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<td>- Fundamentals of Epidemiology</td>
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<td>- Epidemiologic Methods I</td>
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<td>- Introduction to the U.S Health Care System</td>
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<td>- Introduction to Health Care Management</td>
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<td>- Policies in Global Health</td>
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<td>- Evidence-based Strategies</td>
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| University of Pennsylvania Philadelphia, PA | School of Medicine | Public Health (MPH) | - Global Health | - Introduction to Global Health  
- Introduction to Biostatistics  
- Introduction to Principles and Methods of Epidemiology  
- Environmental and Occupational Health  
- Behavioral and Social Sciences in Public Health  
- Public Health Policy and Administration  
- Methods for Public Health Practice  
- Ethics, Law and Public Policy  
- Immersion Experience in Global Public Health  
- Global Health and Health Policy  
- International Human Rights  
- Population Processes I & II |
|------------------------------------------|--------------------|--------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| University of California-Berkeley Berkeley, CA | School of Public Health | Public Health (MPH, DrPH) | - 11 areas of concentration are offered including:  
- Health Policy and Management  
- Health Services and Policy Analysis  
- Global Health is a specialty area that any student can add to their concentration | Global Health Specialty:  
- Global Health Core Course  
Plus 6 units of course work with international content |
| University of California- San Francisco, CA | School of Medicine, Global Health Sciences | Global Health (MS) | - None offered | - Foundations of Global Health  
- Global Health Economics  
- Research Methods- Epidemiology and Biostatistics  
- Research Methods II: Mixed Methods  
- Global Health Practice Seminar  
- Communicable Diseases of Global Importance  
- Non Communicable Diseases of Global Importance  
- Foundations of Global Health: One Health, Migrant Health, Women’s Health  
- Socio-cultural and Behavioral Determinants of Health  
- Decisions and Cost Effectiveness Analysis  
- Policy and Development in Global Health |
Regional and National Factors to be Considered: The following presents a summary of the instructional (and research) activities that have relevance to the activities of the new School at the local, regional and national levels. This summary is followed by an analysis of the needs for graduates of the new School (i.e. the perceived demand from the labor market for these graduates) as well as other globally focused programs at the local and national levels.

a. Local (UMass System): Overall, degree-program offerings in global inclusion and social development through the UMass system are limited. Lowell is the only campus with a Master’s degree in Economic and Social Development of Regions with a concentration in Global Development. However, this concentration does not focus on health, wellness, and economic development in an integrated way.

We reviewed the websites of other UMass campuses, including Lowell, Amherst, Worcester, and Dartmouth, to see if they offer degree programs in areas (broadly) related to the School. These areas included: social development, development studies, international development, global health, and international health. Overall, we found that program and course offerings in global inclusion and social development through UMass are limited to one Master’s program in Development Studies offered at Lowell with a Global Development concentration.

The University of Massachusetts Lowell, College of Arts and Sciences has an Economic and Social Development of Regions Program with a master’s degree track. The program targets undergraduate students as well as professionals who are already working in economic and social development in the public or private sector. The program offers seven areas for concentration – one area being Global Development that focuses on “the globalization of economies, cultures, and ecosystem, and responses to globalization on the part of businesses, governments and non-governamental organizations, addressing both developing and industrialized countries.” Global Development core courses include: Globalization, Work, & Family; Comparative Environmental Studies; and Development Principles for Developing Economies. Other relevant courses include: Economics of Public Policy; Information Economy and Regional Development; and Social Movements and Empowerment. The new School’s integrated focus on health, wellness, and economic development will distinguish it from the master’s degree currently offered at Lowell.

The University of Massachusetts Amherst, School of Public Health and Health Sciences houses an Institute for Global Health (IGH) that focuses on international development with the purpose “to provide greater direction and support to faculty who conduct research and training programs in international health.” Founded in 2006, Institute projects focus on a variety of international health issues. However, there are no degree programs associated with the Institute. The University of Massachusetts Worcester, Medical School (UMMS) has an Office of Global Health (OGH) that was founded in 2009 with the purpose “to enhance and expand UMMS research and training programs in global health improvement and disease prevention.” The Office conducts several activities including a Global Health Scholars Program that provides

1 Economic and Social Development of Regions Program website: http://www.uml.edu/College/arts_sciences/RESD/Program/Academic_Program.html
2 Institute for Global Health (IGH) website: http://umigh.org/
3 Office of Global Health (OGH) website: http://www.umassmed.edu/globalhealth
opportunities for medical students to gain clinical, research, and field-work experience in global health while pursuing their residency or fellowships. The program, although it is linked to the master’s in Clinical Investigation Program, is not a self-standing graduate program. This combined with the program’s clinical focus do not make it a major competitor to the programs proposed by the School. A search of the website of the University of Massachusetts Dartmouth yielded no relevant information.

b. Regional (New England): A review of the websites of all major universities in the New England region suggests that several private universities offer graduate-degree programs that focus on development with a concentration in health or economic development. The exception is Boston University that offers two master’s programs in Global Development that integrate a focus on health and economic development within a development context, and thus could be a competition to the programs offered by the new School. Two other universities (Harvard and Brandeis) offer graduate programs in (international) health systems that include a focus on economics. Brief summaries of these programs and related activities for selected universities are presented next.

Boston University’s Graduate School of Arts and Sciences offers two master’s programs – one in Global Development Policy (GDP) and another one in Global Development Economics (GDE). The programs are highly interdisciplinary, implementation being coordinated across several departments, research centers, and institutes. Targeted at future “development policy practitioners” the GDP Program exposes students to an intensive three-semester research and training experience. The program, which is administered by the Department of International Relations, offers three areas for concentration: Governance and Political Economy; Environment and Development; and International Public Health. Students are required to take five core courses: three courses in development policy (Geography of Third-World Development; Introduction to International Relations; Poverty, Health, and Development; and Global Economic and Development Policy), one course in economics, and another course in statistics/methods. Upon graduation, students are expected to pursue careers in policy development in government, nonprofit institutions, international organizations, and the private sector.

Students pursuing a graduate degree in the GDE complete the same core development policy courses as their counterparts in the GDP Program. However, the remaining core and elective courses focus mainly on economics. This intensive three-semester program is administered by the Department of Economics. Upon graduation, students are expected to pursue careers in economic development, policy analysis and decision-making in government, nonprofit institutions, international organizations, and the private sector.

In addition, the School of Public Health’s Department of International Health offers graduate degree programs (MPH, MBA/MPH, and PhD) in Public Health with a concentration in International Health. A review of the list of core courses and electives shows little emphasis on

5 Global Development Economics (GDE) program website: http://www.bu.edu/gdp/global-development-economics/
economic development. Additionally, the School of Public Health houses the Center for Global Health and Development (CGHD) that “seeks to engage faculty from across Boston University to help solve the critical global health and social development challenges of our time” through multi-disciplinary and applied research. Though CGHD does not have its own graduate programs, staff teach in the Public Health/International Health graduate programs. Noteworthy is also Boston University’s membership is the Consortium of Universities for Global Health.

**Brandeis University’s** Heller School for Public Policy and Management offers two master’s degrees – one in *International Health Policy and Management*[^7] and another in *Sustainable International Development*.[^8] Students in the former program are taught to become effective health care policy makers and managers, selecting one of two tracks – policy or management. Core courses include a focus on international health systems and world health, as well as international health economics and cost effectiveness. Students in the *Sustainable International Development* program are led to become development practitioners through the coursework, research, and internship. The courses in the program are categorized into core competencies including: Monitoring and Evaluation, Ecology, Economics, Gender, Rights-Based Approach, and Professional Writing. In the second year students complete a practicum with an international organization or advanced research project. The Graduate School of Arts and Sciences offers a Master’s degree in *Global Studies*[^9] with concentrations in *Culture and Globalization, Global and Regional Governance,* and *Global Health.* Additionally, the Heller School for Public Policy and Management offers a doctoral program in *Social Policy*[^10] with a concentration in *Global Health and Development.* This program focuses on economics, political science, and sociology. Most recently, the Heller School introduced a dual program in *Sustainable International Development and Coexistence and Conflict*[^11] that primarily focuses on international relations and conflict resolution.

**Harvard University’s** School of Public Health, Department of Global Health and Population[^12] offers a Master’s degree in *Public Health* with a concentration in *Global Health* and two interdisciplinary concentrations: one in Epidemiology of Infectious Diseases, and another concentration in Women, Gender, and Health. Economic development is not a focus of this particular program. More recently, the Department introduced a doctoral program in *Health Systems*[^13] intended “to prepare top academics and future leaders in health ministries, international organizations and civil society organizations for the multidisciplinary tasks required to understand and strengthen health systems.” The program includes a focus on economics. In 2010 Harvard University’s Medical School, Department of Global Health and Social Medicine[^14]

[^7]: Master’s in International Health Policy and Management program website: http://heller.brandeis.edu/academic/sid/programs/programs-ms/index.html
[^8]: Master’s in Sustainable International Development program website: http://heller.brandeis.edu/academic/sid/programs/programs-ma/index.html
[^9]: Master’s in Global Studies website: http://www.brandeis.edu/programs/global-studies/
[^10]: PhD program in Social Policy website: http://heller.brandeis.edu/academic/phd/concentrations/ghd.html
[^13]: Doctoral Program in Health Systems website: http://www.hsph.harvard.edu/academics/health-systems/
[^14]: Department of Global Health and Social Medicine website: http://ghsm.hms.harvard.edu/
launched several research programs in *Global Health and Social Change*, all of which have a clinical focus. This includes: a Global Health Delivery Program, a Global Mental Health Program, and an International Child Mental Health Program.

**Northeastern University**’s College of Professional Studies offers a master’s degree in *Global Studies and International Affairs* that emphasizes “practice-oriented learning and global studies.” Students can specialize in four areas: one is *Global Development* and another area is *Global Health*. Global Development courses (including Global Issues: Poverty and Wealth; and Global Focus: Resources and Markets) intend deepen students’ understanding of economic development and related issues. In terms of Global Health, the program offers four courses: Global Health Perspectives, Politics, and Experiences in International Development; Critical Issues and Challenges in the Practice of Global Health; Emerging Infectious Diseases and Health Impacts of Social and Environmental Changes; and Health and Human Rights, and Ethical Issues in Global Health Futures. Despite the similarities in focus, the new School will differentiate itself from this master’s program by using an approach that combines a focus on health, wellness, and economic development for the purpose of studying global inclusion and social development.

**Tufts University**’s School of Medicine has a division of Public Health and Professional Degree Programs that offers a master’s in *Public Health* with a concentration in *Global Health* that intends “to provide students [with] an interdisciplinary set of skills; to prepare students to recognize biomedical, social, economic, and other factors that affect health; and to identify, design, monitor, and implement interventions that address health disparities.” Students complete three core courses (including Research Methods in Global Health; Global Health Priorities and Approaches; and Comparative Global Health Systems) as well as elective courses. A review of the core and elective courses indicates that there is little emphasis on economic development.

**Boston College**’s School of Social Work offers a master’s degree in Social Work with four concentrations. One of the concentrations is *Global Practice* intended to “lead the education of social workers whose passion it is to become part of initiating and sustaining change in the international arena.” Students complete core courses in their first year, followed by courses focused on global issues in the second year. Global Practice courses include: Rights-Based Assessment and Capacity-Building in Global Social Work; Sustainable Development and Responses to Global Social Work; and Global Policy Issues and Implications. The program does not focus on economic development. In addition to coursework, students also complete an international field placement.

c. National: Several programs that offer graduate degrees that focus on global health and (economic) development can be found nationally. We cross-referenced two lists in order to select programs for inclusion in this proposal. The lists included: the Global Health Programs in US Universities (in order of National Institutes of Health rankings) and the US News and World

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15Master’s in Global Studies and International Affairs program website: [http://www.cps.neu.edu/ms_global/](http://www.cps.neu.edu/ms_global/)
17Master’s in Social Work program / Global Practice concentration website: [http://www.bc.edu/schools/gssw/academics/msw/curriculum/gp-concentration.html](http://www.bc.edu/schools/gssw/academics/msw/curriculum/gp-concentration.html)
Report Ranking of Public Health Programs. These programs are not intended to be a comprehensive representation of nationwide programs, but rather a snapshot of what is available. Overall, these programs are driven towards a focus on global health without a particular focus on economic development. Brief summaries of these programs and related activities for selected universities are presented next.

**John Hopkins University**’s Bloomberg School of Public Health has a Master (MPH)\(^1\), a Master of Science (MSPH)\(^2\), a Doctor (DrPH)\(^3\), and a PhD\(^4\) degree programs in Public Health. The MPH program offers concentrations in *Global Environmental Sustainability and Health* (GESH), *Health in Crisis and Humanitarian Assistance* (HCHA), *Health Leadership and Management* (HLM), and *Health Systems and Policy* (HSM). The MSPH program offers concentrations in *Global Disease Epidemiology and Control* and *Healthy Systems*. The DrPH program offers a concentration in *International Health* and the PhD program offers a concentration in *Global Disease and Epidemiology and Control*. The goal of the Public Health programs is to prepare “students to become leading public health professionals capably of addressing current global public health problems.” Economic development is not a focus of any of the aforementioned concentrations. The Bloomberg School also offers a Master of Science in Public Health with a joint degree in Peace Corps Master’s International Program (MSPH/MI)\(^5\). The focus of this program follows the MSPH with an added two years of service to the Peace Corps.

**Columbia University**’s Mailman School of Public Health in conjunction with six departments (including biostatistics, environmental health sciences, epidemiology, health policy and management, population and family health, and sociomedical sciences) offers a master’s degree in Public Health\(^6\) with a Global Health track. The Mailman School also offers doctoral programs but global health is not an available concentration. Master’s students are “engaged in understanding health issues affecting population locally, nationally, and globally.” The program does not have an emphasis on economics or economic development. In addition, the School of International and Public Affairs offers a doctoral program in Sustainable Development\(^7\). This program “combines a traditional graduate education in the social sciences, particularly economics, with study in the natural sciences and engineering, to prepare scholars who are uniquely situated to undertake serious research and policy assessments in furthering the goal of sustainable development.”

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19 Master’s in Public Health program website: [http://www.jhsph.edu/academics/degreeprograms/mph/curriculum/F_CentersConcentrations_Customizing.html](http://www.jhsph.edu/academics/degreeprograms/mph/curriculum/F_CentersConcentrations_Customizing.html)
22 PhD in Public Health program website: [http://www.jhsph.edu/dept/ih/globalhealthdegrees/phd/](http://www.jhsph.edu/dept/ih/globalhealthdegrees/phd/)
24 Master’s in Public Health program website: [http://www.mailman.columbia.edu/academics/degree-offerings](http://www.mailman.columbia.edu/academics/degree-offerings)
25 PhD in Sustainable Development program website: [http://sipa.columbia.edu/academics/degree_programs/phd/index.html](http://sipa.columbia.edu/academics/degree_programs/phd/index.html)
University of Washington’s Department of Global Health housed in the School of Medicine as well as the School of Public Health offers a master’s in Public Health. The program focuses on the “social, economic, and political determinants of health, health systems, and international aid.” There are four available tracks of study that enable students to narrow their focus. These include: a general track, health metrics and evaluation, leadership, policy, and management, and a Peace Corps master’s international program. The focus within these concentrations closely follows the programs’ titles.

Emory’s Rollins School of Public Health offers a master’s of Public Health degree. Students must choose one of six departments when applying. One of these departments is the Hubert Department of Global Health. This department “seeks to understand and reduce global inequities in health and well-being.” Economic development is not a focus of this program.

University of Pennsylvania’s School of Medicine offers a master’s degree in Public Health with a concentration in Global Health. Students learn the skills they need to “enhance the health of human populations locally, nationally and around the world and assure the conditions for healthy living.” Specifically, the global health track provides a curriculum that “delivers core public health skills within a global context.” There is not an emphasis on economic development in this program.

University of California-Berkeley’s School of Public Health has a master’s of Public Health program and a PhD in Public Health program. Students enroll in one of eleven concentrations that include Health Policy and Management and Health Services and Policy Analysis as options. Global Health is a specialty area that students can add to their concentration allowing them “to explore issues in global health.” There is not an emphasis on economic development in the global health specialty.

University of California-San Francisco’s School of Medicine offers a master’s in Global Health. The program utilizes “an innovative team of educators, researchers and healthcare professionals […] to train global health leaders and build sustainable solutions to improve health and eliminate disease.” A Global Health Economics and Decisions and Cost Effectiveness Analysis course are included as requirements in the curriculum.

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26 Master’s in Public Health program website: http://globalhealth.washington.edu/students_programs/studeg_mph.php
27 Master’s in Public Health program website: http://www.sph.emory.edu/cms/academic_programs/degree_programs/mph.html
28 Hubert Department of Global Health website: http://www.sph.emory.edu/cms/departments_centers/gh/index.html
29 Master’s in Public Health website: http://www.publichealth.med.upenn.edu/MPHGlobalHealthTrack.shtml
30 Master’s and Doctoral Public Health website: http://sph.berkeley.edu/students/degrees/index.php
31 Global Health Specialty Area website: http://sph.berkeley.edu/students/degrees/areas/gh.php
32 Master’s in Global Health program website: http://globalhealthsciences.ucsf.edu/
Appendix F: Projected Timelines for the Development of the Instructional and Other Activities of the New School

The following outlines some of the activities and time-frames for the pre-service activities of the School. Other activities including continuing the development of the in-service training, research, capacity development, public policy formulation and dissemination efforts of the ICI will be occurring simultaneous to the development of these pre-service programs. It should be noted that the timelines are dependent upon the actual date upon which the new School is established.

It is anticipated that the process of developing the pre-service masters as well as doctoral program will take from 14 to 20 months from initial development to approval and student recruitment and enrollment. The following timelines are offered with the assumption that the new School is established prior to October, 2011 and that the development of the pre-service masters and doctoral programs will be initiated on that date. Should the actual start time for the New School change then the timelines presented below would be adjusted to reflect the change in the start date for the new School and correspondingly the start and completion dates for the tasks noted below.

Steps to be taken:

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
</table>
| 10/1/11 to 10/30/11 | -establish internal School development team and frame the elements of the School,  
                    | -outline scope of School,                                                |
|               | -begin market outreach,                                                 |
|               | -develop School exploratory committee (total of 10 with 5 from the campus, 3 from the ICI and 2 from other School partners), |
|               | -negotiate with Provost business structure for College (RTF reallocation adjustment to begin 10/1/2011 thru 9/30/16 [including an annual review of the agreement]: secure commitment for 2.0 FTE on state tenure track lines to be established in year one; year two 3.0 FTE tenure lines and year three 2.0 FTE tenure lines, |
|               | -establish one staff line (FTE 1.0) to be available year one and one more in year five, |
|               | -establish a tenured professor line for the Founding Dean of the School at the time of the establishment of the school, |
|               | -continue the development of the in-service training, research, capacity development, public policy formulation and dissemination, |
|               | -implement ICI business plan for 90/10 RTF split effective 10/1/11. |
| 10/30/11 to 6/15/12 | -identify and refine core competences for Master’s program, |
|               | -collect information on other training programs that may be related or viewed as competitive, |
|               | -outline core course offerings, |
**Appendix F:**

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Tasks</th>
</tr>
</thead>
</table>
| 11/15/11 to 4/15/12 | - identify and identify potential areas for collaboration of related courses available in other schools and colleges at UMB.  
- post GA positions for School and supported through the grant resources of the ICI (85% of GAs will be supported through ICI resources and 15% through the University [Graduate Studies]).  
- establish and convene review and curricula development team of ICI staff and other faculty at UMB (12/30/12).  
- Set up and recruit for UMB Research Scholar (N = 3 at FTE .2) to begin on 1/1/12.  
- define and post faculty positions (N=2) and set up recruitment and interview process,  
- define and post staff position (N=1) and set up recruitment and interview process, and  
- review and clarify research appointment process as well as JA appointment process and advertise opportunities in ICI and UMB. |
| 12/15/11 to 5/31/12 | - develop outreach to colleges and faculty to establish Joint Appointment interests  
- identify GAs and link to school (N = 20 to 30) with 85% supported through ICI grant and other resources and 15% from Graduate studies,  
- establish scope of UMB Research Scholars (N=3 at FTE .2 in year one),  
- frame visiting scholars procedures to be implemented in following academic year (with international visiting scholar recruited in following year). |
| 1/1/12 to 6/30/12 | - continue to advertise GAs and recruit/place at ICI,  
- secure UMB Research Scholar roles and set up for recruitment to begin on 1/1/12,  
- continue review and curricula development team of ICI staff and other faculty at UMB,  
- establish doctoral curricula development committee and staff through School staff,  
- begin framing course outlines and preparing for review process.  
- complete core courses and syllabi for core addressing identified competencies and begin the approval process for the masters program,  
- negotiate with other colleges for related or elective course offerings for students in program,  
- continue core courses and syllabi for core addressing identified competencies for doctoral program,  
- design and develop Joint Appointments for new School,  
- frame postdoctoral opportunities and establish one Post Doc in this coming academic years (years 1 and 2 N = 1; year 3 N = 4 and years 4 and beyond N = 6),  
- continue the development of the in-service training, research, capacity development, public policy formulation and dissemination, |
- advertise course offerings and masters in Global Inclusion and Social Development,
- begin recruitment of potential students and set up committee for acceptance of candidates,
- define and post faculty positions (N=3) and set up recruitment and interview process,
- continue research appointment process and recruit qualified candidates for joint appointments, and
- recruit part time faculty and instructors as needed.

| 7/1/12 to 6/30/13 | set up and recruit for UMB Research Scholar (N = 5 at FYE .2) to begin on 9/1/12,
|                   | complete course development and guide through review process for masters program,
|                   | advertise course offerings and doctoral in Global Inclusion and Social Development,
|                   | begin recruitment of potential students and set up committee for acceptance of candidates,
|                   | identify and or enroll 10 to 12 students as first year cohort year 2012,
|                   | complete first semester with two new course offerings each semester and commitment to integration of existing courses as part of the electives in the course of studies,
|                   | complete core courses and syllabi for core addressing identified competencies,
|                   | continue and complete the approval process for the doctoral program,
|                   | recruit new GAs, UMB scholars, postdoctoral fellows and visiting scholars (one US and one international),
|                   | continue the development of the in-service training, research, capacity development, public policy formulation and dissemination, and
|                   | define and post faculty positions (N=2) and set up recruitment and interview process. |

| 7/1/13 to 6/30/14 | advertise GAs (N = 30) and recruit/place in school or at ICI,
|                   | ongoing recruitment of students into the program,
|                   | recruit and enroll students for doctoral program (3 full time and 2 part time for first cohort),
|                   | select and enroll 35 GAs, UMB scholars and visiting scholars (one US and one international),
|                   | continue recruiting masters students and enrolling 28 to 47 per year in the masters and 10 to 12 per year in the doctoral program,
|                   | continue the development of the in-service training, research, capacity development, public policy formulation and dissemination and
|                   | recruit new GAs (N = 30 to 35), UMB scholars (N = 5), postdoctoral fellowships (N = 6) and visiting scholars (one US and one international) for coming year. |
| 7/1/14 to 6/30/15 | -continue masters efforts and develop new doctoral program  
- select doctoral student to be enrolled in program in September 2014,  
- select 35 GAs, UMB scholars and visiting scholars (one US and one international),  
- recruit students for both the masters and doctoral programs on an ongoing basis (see projected enrollment and retention rates for these programs as presented in Tables 1 and 2),  
- continue recruiting masters students and enrolling 28 to 43 per year in masters and 10 to 12 per year in the doctoral program,  
- continue the development of the in-service training, research, capacity development, public policy formulation and dissemination,  
- recruit new GAs (N = 30 to 35), UMB scholars (N = 5), postdoctoral fellowship (N = 6) and visiting scholars (one US and one international)  
- continue recruitment of part time faculty and instructors as needed, and  
- define and post staff position (N=1) and set up recruitment and interview process. |
## Appendix G.1

### Projected Five Year Budget for New School

#### UMB Projected Income and Expenses

<table>
<thead>
<tr>
<th>Income</th>
<th>Unit Rate</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition &amp; Fees (new students only)</td>
<td>$ 18,500</td>
<td>$ 129,500</td>
<td>$ 444,000</td>
<td>$ 814,000</td>
<td>$ 1,110,000</td>
<td>$ 1,480,000</td>
<td>$ 3,977,500</td>
</tr>
<tr>
<td><strong>Total Income Support (UMB)</strong></td>
<td>$ 129,500</td>
<td>$ 444,000</td>
<td>$ 814,000</td>
<td>$ 1,110,000</td>
<td>$ 1,480,000</td>
<td>$ 3,977,500</td>
<td></td>
</tr>
</tbody>
</table>

#### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>$ 80,000</td>
<td>$ 160,000</td>
<td>$ 404,800</td>
<td>$ 576,944</td>
<td>$ 594,252</td>
<td>$ 612,080</td>
</tr>
<tr>
<td>Staff</td>
<td>$ 55,000</td>
<td>$ 55,000</td>
<td>$ 56,650</td>
<td>$ 57,783</td>
<td>$ 59,516</td>
<td>$ 116,302</td>
</tr>
<tr>
<td>Part Time (Adjunct) Faculty</td>
<td>$ 5,000</td>
<td>$ 50,000</td>
<td>$ 56,650</td>
<td>$ 57,783</td>
<td>$ 59,516</td>
<td>$ 116,302</td>
</tr>
<tr>
<td>GAs UMB</td>
<td>$ 22,650</td>
<td>$ 22,650</td>
<td>$ 22,650</td>
<td>$ 45,300</td>
<td>$ 67,950</td>
<td>$ 113,250</td>
</tr>
<tr>
<td>Equipment</td>
<td>$ 5,500</td>
<td>$ 5,500</td>
<td>$ 11,000</td>
<td>$ 11,000</td>
<td>$ 11,000</td>
<td>$ 11,000</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$ 243,150</td>
<td>$ 489,600</td>
<td>$ 741,027</td>
<td>$ 807,719</td>
<td>$ 952,632</td>
<td>$ 3,234,128</td>
</tr>
</tbody>
</table>

Net Difference Income less Expense: 

\[ \text{Net Difference} = \text{Total Income} - \text{Total Expenses} \]

\[ \text{Net Difference Income less Expense} = \] (113,650) \quad (45,600) \quad 72,973 \quad 302,281 \quad 527,368 \quad 743,372

#### ICI Projected Income and Expenses

<table>
<thead>
<tr>
<th>Income</th>
<th>Unit Rate</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Support</td>
<td>$ 90,600</td>
<td>$ 294,450</td>
<td>$ 475,650</td>
<td>$ 634,200</td>
<td>$ 792,750</td>
<td>$ 2,287,650</td>
<td></td>
</tr>
<tr>
<td>ICI RFT Support</td>
<td>$ 163,500</td>
<td>$ 250,500</td>
<td>$ 346,000</td>
<td>$ 416,000</td>
<td>$ 416,000</td>
<td>$ 1,592,000</td>
<td></td>
</tr>
<tr>
<td><strong>Total Income Support</strong></td>
<td>$ 254,100</td>
<td>$ 544,950</td>
<td>$ 821,650</td>
<td>$ 1,050,200</td>
<td>$ 1,208,750</td>
<td>$ 3,879,650</td>
<td></td>
</tr>
</tbody>
</table>

#### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>RA Doctoral level</td>
<td>$ 22,650</td>
<td>-</td>
<td>$ 113,250</td>
<td>$ 294,450</td>
<td>$ 453,000</td>
<td>$ 611,550</td>
</tr>
<tr>
<td>RA Masters level</td>
<td>$ 22,650</td>
<td>$ 90,600</td>
<td>$ 181,200</td>
<td>$ 181,200</td>
<td>$ 181,200</td>
<td>$ 181,200</td>
</tr>
<tr>
<td>Post Doctoral Fellows</td>
<td>$ 30,000</td>
<td>$ 30,000</td>
<td>$ 30,000</td>
<td>$ 120,000</td>
<td>$ 180,000</td>
<td>$ 180,000</td>
</tr>
<tr>
<td>Visiting Faculty</td>
<td>$ 80,000</td>
<td>$ 48,000</td>
<td>$ 80,000</td>
<td>$ 80,000</td>
<td>$ 80,000</td>
<td>$ 80,000</td>
</tr>
<tr>
<td>Visiting Scholars</td>
<td>$ 55,000</td>
<td>$ 55,000</td>
<td>$ 110,000</td>
<td>$ 110,000</td>
<td>$ 110,000</td>
<td>$ 110,000</td>
</tr>
<tr>
<td>Marketing/recruitment</td>
<td>$ 15,000</td>
<td>$ 15,000</td>
<td>$ 15,000</td>
<td>$ 15,000</td>
<td>$ 25,000</td>
<td>$ 25,000</td>
</tr>
<tr>
<td>Equipment</td>
<td>$ 15,500</td>
<td>$ 15,500</td>
<td>$ 21,000</td>
<td>$ 21,000</td>
<td>$ 21,000</td>
<td>$ 21,000</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$ 254,100</td>
<td>$ 544,950</td>
<td>$ 821,650</td>
<td>$ 1,050,200</td>
<td>$ 1,208,750</td>
<td>$ 3,879,650</td>
</tr>
</tbody>
</table>
## Summary of Contributions (Expense) and Returns (Income)
### By Source and Total

<table>
<thead>
<tr>
<th>Contributions/expenses</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMB</td>
<td>$243,150</td>
<td>$489,600</td>
<td>$741,027</td>
<td>$807,719</td>
<td>$952,632</td>
<td>$3,234,128</td>
</tr>
<tr>
<td>ICI</td>
<td>$254,100</td>
<td>$544,950</td>
<td>$821,650</td>
<td>$1,050,200</td>
<td>$1,208,750</td>
<td>$3,879,650</td>
</tr>
<tr>
<td><strong>Total Contributions/expenses</strong></td>
<td><strong>$497,250</strong></td>
<td><strong>$1,034,550</strong></td>
<td><strong>$1,562,677</strong></td>
<td><strong>$1,857,919</strong></td>
<td><strong>$2,161,382</strong></td>
<td><strong>$7,113,778</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Percentage level of Contribution</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMB</td>
<td>49%</td>
<td>47%</td>
<td>47%</td>
<td>43%</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>ICI</td>
<td>51%</td>
<td>53%</td>
<td>53%</td>
<td>57%</td>
<td>56%</td>
<td>55%</td>
</tr>
</tbody>
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University of Massachusetts Boston
Institute for Community Inclusion
AQUAD Review Report
June 7 & 8, 2010

Committee Members:

David R. Johnson (Co-chair)
Felicia L. Wilczenski (Co-chair)
John Ciccarelli
Donna Haig Friedman
Marlene Kim
David Mank
Russell Schutt
Submitted: June 28, 2010

Introduction

The Academic Quality Assessment and Development (AQUAD) review team for the Institute for Community Inclusion (ICI) consisted of two external reviewers: David R. Johnson (co-chair), Director of the Institute on Community Integration and Associate Dean in the College of Education, University of Minnesota Minneapolis, and David Mank, Director of the Institute on Disability and Community, Indiana University Bloomington; and five University of Massachusetts Boston internal reviewers: John Ciccarelli, Associate Vice Chancellor for Government Relations and Public Affairs, Donna Haig Friedman, Director and Research Associate Professor, Center for Social Policy, McCormack Graduate School, Marlene Kim, Associate Professor, Department of Economics, College of Liberal Arts, Russell Schutt, Professor, Department of Sociology, College of Liberal Arts, and Felicia L. Wilczenski (co-chair), Professor and Associate Dean, College of Education and Human Development.

Provost Winston Langley charged the review team to answer four fundamental questions concerning the functions of the ICI and its relationship with the University. ICI provided the reviewers with a comprehensive self-study and appendices containing supporting documents. The work of the ICI in the field of disabilities clusters in four core areas: Education, Health Care, Employment, and Community Life, and ICI personnel representing each core area reviewed research projects and outcomes, teaching initiatives, and community engagement. One session focused on ICI supports and administration. All presentations allowed time for questions and discussions. During the course of the review, the team met independently with ICI’s Director, William Kiernan, to review ICI operations and the organization of the AQUAD. At the conclusion of the review, the team provided feedback to the entire ICI staff.

ICI Overview

The ICI is a recognized University Center for Excellence in Disabilities (UCED). Since its inception over 43 years ago, ICI’s mission as a multidisciplinary training program in intellectual and developmental disabilities has evolved to include interdisciplinary and disciplinary pre-service and in-service training programs; applied and translational research activities; exemplary clinical and program evaluation services; regional and national centers addressing policies and practices; models of organizational change at the local, state, and national levels; and dissemination to an ever-widening circle of influence reaching local, state, national, and international constituents. Central to the work of the ICI is the search for solutions to the pressing societal issues of poverty, isolation, and equality of opportunity that affect people with
disabilities across the lifespan. ICI’s mission statement clearly reflects the Institute’s values and activities:

*The Institute for Community Inclusion at UMass Boston supports the rights of children and adults with disabilities to participate in all aspects of the community. As practitioners, researchers, and teachers, we form partnerships with individuals, families, and communities. Together we advocate for personal choice, self-determination, and social and economic justice.*

The ICI moved the majority of its operations from Children’s Hospital of Boston (CHB) and Harvard University to UMass Boston in 2002 and continues as a joint program with CHB. Currently, ICI’s primary location is at 20 Park Plaza, Boston with offices for 116 staff members and 27 trainees. Eleven full and part time staff members share space in the Wheatley Building on the UMass Boston campus, 18 full and part time staff are housed in CHB offices at 125 Boylston St. and on the CHB Longwood Avenue campus. Twelve full- and part-time employees are located in five states (FL, MD, NY, OR, VA). Over the past five years, there has been an annual growth rate of 15% with 184 staff and Graduate Assistants (GA) now employed by the ICI. Additional hiring is anticipated to staff new projects and to increase GAs in the coming year.

Documents provided by ICI indicate significant grant and contract growth over the past 8 years. In the past 3 years, major national and policy grants were developed. In addition, there is a diversification of revenue sources from grants and contracts to fee for service and product development. ICI GAs increased for UMass Boston students in sociology, policy studies, and education. Outreach to faculty expanded in the College of Education and Human Development through programs in early childhood education, rehabilitation counseling, and for teachers of students with vision impairments. In addition, Dr. Kiernan and other ICI staff have increasingly assumed roles in University activities, such as strategic planning, staff and student recruitment, administration, governance, and student support.

**Strengths**

An impressive and clearly articulated unified mission and vision was expressed by all members of the ICI staff with a focus on making typical systems of education, health care, employment, and community life accessible to all persons with disabilities and those from all cultural backgrounds. The scholarly, teaching, and community engagement agenda of the ICI fully
support the mission of the UMass Boston by enhancing its research standing, instructional capacity, and Carnegie classification as an engaged institution. The ICI has strong ties to local, state, and national organizations promoting inclusion, and recently, initiated international outreach in Saudi Arabia and Turkey to help develop employment strategies for persons with disabilities. Another ICI project, the New England Technical Assistance and Continuing Education Center (TACE) is planning to move to online delivery of its core training modules in the areas of job development, job supports, marketing, and consumer participation through a newly developed relationship with Elsevier and the Institute on Community Integration at the University of Minnesota. This relationship holds promise for expanding the ICI mission of inclusion and workforce development to a global community. There are diverse activities directed to public as well as private sectors to support areas of interest and need. Consumer survey results provided evidence of the high quality of ICI services in training, consultation, and program evaluation (See Self-Study Appendices U, V, W, X).

ICI staff presented information and evidence for the various projects in the field of developmental disabilities supported by the Institute, all of which emphasized community inclusion and choice for persons with disabilities. Rigorous program evaluation methods, case studies, and outcome data supported the effectiveness of various ICI programs and consultancies (See Appendix B).

In the core area of EDUCATION, the Massachusetts Department of Elementary and Secondary Education (D-ESE) contracts with ICI to provide online graduate courses in transition planning for educators to impact post-secondary outcomes for students with disabilities (Mass FOCUS Academy). Think College focuses on research, training, and dissemination of information related to postsecondary education for students with intellectual/developmental disabilities. Several ICI initiatives address early childhood intervention and education by providing professional development and teacher education for the high need areas of special education and inclusive practices as identified by the Massachusetts Department of Elementary and Secondary Education (Boston Ready, Building Careers in Early Education and Care, Including All Children, Early Literacy Matters).

HEALTH CARE programs at ICI advance practitioner training and services for youth with disabilities and special health-care needs though early screening, child to adult medical care transitions, inclusive recreation, post-secondary education, advocacy, public policy, and rehabilitation (Opening Doors for Children and Youth with Disabilities and Special Health Care Needs). Twa Zanmi is a partnership between the ICI and Haitian American Public Health and Media organizations to assist new immigrants in the Haitian community understand the mental health issues of acculturation stress. The Leadership Education in Neurodevelopmental Disabilities (LEND) program sponsored by ICI and Children’s Hospital provides graduate-level
interdisciplinary training to health, health-related, and counseling professionals in twenty discipline areas to improve their knowledge of policy issues and team collaboration in intellectual and other developmental disabilities. The Down Syndrome Program at CHB offers comprehensive and specialized services for children with Down syndrome and their families.

**EMPLOYMENT** projects seek to create an environment that maximizes work opportunities for people with disabilities and to study employment outcomes at the state and national levels (*Access to Integrated Employment, Work Without Limits Disability Employment Initiative*). ICI provides technical assistance, training, and continuing education for professionals working in the field of developmental and other disabilities through the *Vocational Rehabilitation and Research and Training Center (VR-RRTC), Technical Assistance and Continuing Education Center for New England (TACE), State Employment Leadership Network (SELN), and Research and Technical Assistance Center (RTAC)*.

ICI promotes the inclusion of people with disabilities in their communities through training, research, consultation, and employment services. **COMMUNITY LIFE** projects at ICI involve local, state, and national agencies, schools, higher education institutions, national service programs, rehabilitation providers, and multicultural organizations. The *National Service Inclusion Project* (NSIP) builds connections between disability organizations and national service and volunteer organizations, such as AmeriCorps, Learn and Serve America. The *National Service to Employment Project* (NextSTEP) aids in the transition from service to employment. The *Northeast Regional Center for Vision Education* (NERCVE) is an ICI project housed at the UMass Boston College of Education and Human Development. It is New England’s only academic center for preparing teachers of students with visual impairments, orientation and mobility specialists, and vision rehabilitation therapists.

ICI is a leader in using technology for communication, marketing, and program administration. **UDS CONSULTING** works to incorporate universal design in job sites, classrooms, and communities to assist clients regardless of age, ability, or situation. ICI staff members also consult with Educational Technology services at UMass Boston to help faculty use assistive technologies and ensure their courses are accessible to all students.

In its various programs and related activities, ICI offers unique resources for UMass Boston. Its staff offer a high level of expertise and practical knowledge in disability services and inclusion strategies across a wide range of settings. Due to the importance of its mission and the scope of its operations, ICI should be seen as a vital part of the University’s efforts in research, teaching, and service.

**Opportunities**
Numerous scholarly, teaching, and community engagement opportunities exist at ICI. There is tremendous potential for ICI to expand its relationships with all colleges, centers, and institutes at UMass Boston as well as international agencies. The pursuit of these collaborations is a reciprocal process and the shared responsibility of the ICI and other UMass Boston research groups. ICI should take the lead in identifying and mapping the strengths of the ICI in relation to those of recognized University research clusters, such as developmental science, along with interests of the faculty in various colleges as well as other centers and institutes. ICI can and should play an important role in assisting UMass Boston obtain increased research recognition by creating collaborations with faculty and sharing project development and dissemination. A closer working relationship would occur if ICI were able to move its offices to campus, but in the short term, ICI can share its meeting spaces with other on-campus units, and its pre-service and in-service degree programs and professional development offerings on campus. Physical location at the downtown site should not be an impediment to increasing collaboration with the UMass Boston campus as ICI also collaborates with other institutions across the nation and is poised to increase its international involvement in countries that are establishing or expanding their disability services.

Through greater collaboration with other University units, ICI can help to infuse teaching and research at UMass Boston with insights from disability studies, it can increase its contributions to scholarship in diverse disciplines, and it can enhance its ability to secure major competitive investigator-initiated grants.

Question #1

Has the institute clearly aligned its activities and programs to the university mission and strategic research priorities and have these activities and programs helped the university to achieve its goals?

The formation of the University College reflects UMass Boston’s increasing emphasis on distance education to overcome time and geographic barriers by engaging students from their homes and workplaces. The ICI continues to be invested in serving a diverse community of learners through online pre-service and professional development initiatives. For example, the online program for teachers of students with visual impairments is a successful regional effort. Also, ICI sponsored professional preparation programs in early childhood intervention and education provide a vehicle for training in inclusive practices for young children with disabilities. The newly developed online self-paced College of Employment and Training will provide training to address the shortage employment and training professionals to assist people with disabilities seeking employment.
Aligned with the University’s global outreach, ICI helped to establish the Takamul Center in Dubai to increase intervention services for children and adults with disabilities, encourage inclusive practices, promote assistive technologies, and support workforce development. Formal agreements are in process for collaboration in employment development among ICI, UMass Boston, and disability service agencies in Saudi Arabia. Other ICI international initiatives focus on training mental health professionals in Turkey and vision specialists in Taiwan.

In response to requests, both nationally and internationally, for programs in disability research, policy, inclusion, and program development, the ICI is proposing an expansion of its employment and training, in-service training, and technical assistance as well as its vision studies degree program to increase capacities to support persons with disabilities and develop programs in global inclusion and social development.

Community engagement and service learning are fundamental in the work of the ICI and are integral to the University’s mission and vision. Historically, the ICI has been committed to building the capacity of local community organizations in supporting members with disabilities. More recently, through the National Service Inclusion Program (NSIP), the ICI provides technical assistance for the Corporation for National and Community Service in opening volunteer opportunities for persons with disabilities to engage in national service in 43 states. A new ICI/UMass Boston initiative is being planned to incorporate a service learning component in undergraduate introductory coursework to promote educational persistence and retain first generation college students at the University.

Through its various scholarly, teaching, and community engagement activities, the review team concluded that the ICI supports the mission and strategic plans of UMass Boston in concrete ways by enhancing its research priorities, instructional capacities, community engagement, and global impact. However, as ICI has shown with the substantial increase in attracting graduate assistants, it needs to develop a similar focus in collaborating with recognized researchers and centers to further ICI’s support of the University mission and strategic plan.

**Question #2**

Has the institute enabled faculty members and students to transcend the boundaries of traditional academic and disciplinary structures to enhance the exchange of ideas in ways that add value to interdisciplinary research?

The ICI supports students through its degree programs and graduate learning opportunities. Over the past year, the ICI funded 27 GA positions for students across the University. GAs are supported for research, policy development, and program evaluation. ICI projects cross traditional disciplinary lines thereby enriching the quality of inquiry and expanding the impact of the work. Several graduate students completed their dissertations at ICI. Service-learning
opportunities are available for UMass Boston students through the undergraduate Asian studies program offering support to Southeast Asian communities in greater Boston. Students also work in various community-based organizations (CBO), including the Somali Development Center, Haitian Public Health Initiative, Urban PRIDE, Boston Chinatown Neighborhood Center, Ethiopian Community Mutual Assistance Program, Congolese Women’s Alliance, Eritran Community Center, and International Institute of Lowell. Trainees develop projects with the staff at these CBOs while learning about disability issues in those communities. In April, 2010, ICI sponsored 12 fellows to attend a national disability policy conference. Appendix L is a complete list of ICI partnerships.

The review team concluded that ICI offers strong programs in interdisciplinary research, training, and community engagement. ICI’s grant activities are substantial and reflected in the number of activities carried out at ICI. Appendix N describes current ICI projects and activities. There is considerable evidence of their positive impact in research, teaching, technical assistance, policy development dissemination. The breadth of ICI activities as well as grant-related work makes outcome assessment mandatory. Appendix M contains a list of the ICI’s peer-reviewed publications, special reports, and related products for the past five years.

Further evidence of impact is the number of federal agencies that link to the ICI website as well as the number of visitors. A review by www.disability.gov shows strong use of ICI websites. The ICI flagship site, www.communityinclusion.org, handles over 85,000 visitors from 150 countries annually. ICI strives to make all its web products accessible to all people.

A limited number of UMass Boston faculty are engaged in ICI research, training, and service projects, however, there is room for improvement. There are increasing enrollments in the degree, certificate, and professional development programs in early education and vision studies that are collaborative efforts between ICI and College of Education and Human Development (CEHD) faculty. Interdisciplinary training is offered through the Leadership in Neurodevelopmental Disabilities (LEND) program in conjunction with CHB. There is also an opportunity to increase collaboration with UMass Boston’s developmental science research cluster with its recognized strength in this area. Appendix C of the self-study document lists the number of ICI interdisciplinary trainees over the past five years.

What remains to be achieved is to make ICI a vital part of the academic mission at UMass Boston. There is limited faculty awareness of ICI activities and academic departments are often unaware of opportunities for collaboration on ICI projects. The work of GAs at ICI is often disconnected from their academic programs and faculty. From public policy experts in the McCormack Graduate School to developmental psychologists and evaluation research sociologists in the College of Liberal Arts, the opportunities for greater engagement are extensive.
Question #3

Have the interdisciplinary research activities and programs of the institute had an impact on the search for solutions to complex societal problems?

Practitioners in the field of disabilities grapple with many social and economic injustices such as abuse, poverty, isolation, and unemployment affecting the lives of people with disabilities across all cultural backgrounds. Interdisciplinary knowledge and skills are needed to address these complex societal problems. ICI’s interdisciplinary approach as well as its policies and practices are conducted with the goal of fostering interdependence, productivity, and inclusion. Toward that end, the ICI is contributing to the knowledge base about disability issues as well as formulating and investigating best practices to enhance the quality of life for persons with disabilities. It is not only the volume, but the high quality and broad array of activity that sets ICI apart. Also, as one of the recognized leaders in the disability field, ICI has strategies to share their knowledge and increase capacity.

All ICI activities address the core values of inclusion and equality of opportunity for people with disabilities. For example, the Institute developed a consulting service (UDS Consulting) to respond to requests for technical assistance from employers in preparing for a more diverse workforce. ICI also consults with medical providers regarding health-care transitions for persons with disabilities from child to adulthood.

Staff members of ICI are actively engaged in national, state, regional, and local organizations advocating for the inclusion of people with disabilities in typical community settings. See Appendix K for a list of current ICI leadership affiliations. ICI Director, Dr. William Kiernan’s Congressional testimony has influenced legislation and policies that affect the lives and livelihoods of persons with disabilities.

The review team commended ICI for its commitment to finding solutions to vexing social and economic injustices and for its leadership in reaching goals of inclusion in all aspects of life for persons with disabilities. In addition, ICI should be commended for their full support to disseminate findings and best practices locally, nationally, and internationally. Its leading role in these respects also provides the foundation for even stronger contributions by ICI to the pressing problems associated with disabilities. UMass Boston faculty could help ICI staff to increase its publications in leading peer-reviewed journals and books that would extend its visibility and impact.

Question #4
Has the ICI leveraged institutional resources to attract external philanthropic and sponsored program supports, and have these resources been invested wisely to enhance the institute’s effectiveness and the impact of its activities and programs?

ICI represents about 25% of the external funds of the University and has steadily increased its efforts to align with the mission of UMass Boston in research, teaching, and service. In addition to its strong presence in the local community, ICI’s programs in early childhood education and vision support the Boston Public Schools and state agencies in developing policies and practices that promote inclusion and the engagement of persons with disabilities in all major life areas. Over the past five years, ICI has increased its investment in UMass Boston students by providing graduate assistantships and tuition waivers. ICI is working with faculty in CEHD to develop contracts and grants within the various departments.

ICI projects are shifting in size and complexity. Several ICI grants are above the million-dollar mark annually. The number of state contracts has increased as well as contracts with outside agencies, organizations, and businesses. Many grants have moved to more complex cooperative agreements where the expectation is not only to meet the funding agency’s goals and objectives but also to serve as a staff resource for the agency.

The ICI has many relationships with CBOs, consumer groups, institutions of higher education, public and not-for-profit organizations, and employers so that ICI is able to respond to requests for grant proposals and other research, training, or program evaluation initiatives. ICI is partnering with two national consultant organizations, Mathematica Policy Research and the Lewin Group, which will also increase ICI’s visibility as a preferred provider in bidding processes. ICI’s considerable investment in marketing and communication extends its reach to multiple audiences (See Appendix R).

The review team concurs that ICI’s use of resources to support the UMass Boston mission is diverse and substantial. The team also urges attention to the potential for significant expansion of ICI’s funding through competitive investigator –initiated grants obtained from federal agencies and other sources. Since such achievements would be of great benefit to the participating UMass Boston faculty and programs as well as to ICI, interested faculty and staff would be expected to make a major contribution to the efforts required to achieve this potential.

**ICI Priority Goals and Areas for Change**

The future for ICI is promising but the primary challenge will be adequate funding for its many programs to involve persons with disabilities in typical systems (jobs, community living, generic health care, schools, etc.) and to ensure that persons with disabilities have appropriate opportunities for individual choice and control in project development.
Financing the ICI needs to be increased given the potential for developing pre-service programs addressing global inclusion and social development both in terms of monies and faculty positions. This could be addressed, in part, by allowing ICI to retain a greater percentage of its indirect cost recovery to support a proposed expanded role. Space rental costs would be assumed by ICI in this arrangement. This arrangement could be time limited, remaining in place for a 5-year period, then reviewed and renegotiated.

As the revenue streams at ICI diversify, there is a need for a more streamlined review and budget process at the University. In particular, the University needs to develop a more efficient way of processing and managing smaller project-based and short-term contracts. A high level committee should be formed with a limited (90-day) timeframe to develop a system that not only will assist ICI but can serve as a model for other units.

It is clear that as the pre-service programs evolve, ICI will need to move these activities closer to the campus. Space for ICI will need to be considered in the master plan for the University building projects, including environmental accessibility to meet the needs of staff and clients with disabilities.

ICI must assess and increase its ability to foster collaboration across the Colleges as well as other Institutes and Centers to offer interdisciplinary training and research opportunities.

Recommendations

ICI currently performs all the functions of an academic unit. Its scholarly, teaching, community service, and global outreach efforts are compatible with the mission and strategic plan of the University. The review team focused on recommendations to increase the ICI’s visibility and integration in the academic life of UMass Boston. Initially, mapping the interests and initiatives of ICI with those of UMass Boston faculty and other institutes and centers will show points of intersection to begin collaborations. However, rather than a project by project approach, a comprehensive plan for integration is needed to ensure sustainability.

An integrating infrastructure needs to be established to encourage a closer relationship between ICI and UMass Boston and to maintain it over time. Such an infrastructure would support the development of pre-service and in-service degree and professional development programs addressing global inclusion and workforce development through joint faculty appointments, dual funded tenure-track faculty lines, shared grant proposals, and shared staff resources. Recruiting one or more faculty liaisons at the college or departmental level might be an effective way to build and maintain the relationship.

The ICI should eventually be moved onto the campus. Before this can be accomplished, the University needs to discuss the specific environmental needs of the ICI, integrate
them into its Master Plan, and ensure that the new campus buildings will be accessible
to and meet the needs of staff, students, and clients with disabilities. Until it is feasible
to move ICI to the UMass Boston campus, technological resources should be used to
increase opportunities to communicate (e.g., video conferencing).

• The ICI Director position should have full tenured faculty status in an appropriate
academic department in which he or she meets expectations for tenure. Other joint
appointments should be considered with other appropriately qualified professional ICI
staff and possibilities for joint recruitment should be identified. UMass Boston should
develop a plan for identifying such opportunities and for administering the resulting
lines.

• There needs to be better communication between ICI and UMass Boston Colleges,
Institutes, and Centers, about possible areas of mutual interest and collaboration, e.g.,
email blasts, colloquia. In addition to announcing specific projects, disseminating
information about ICI project themes might broaden the topics and points of common
interests to enlist faculty support.
  o Sharing ICI GAs with UMass Boston faculty would help to develop connections on
research or community projects. ICI should work with UMass Boston graduate
programs to develop ways in which the activities of ICI GAs can be connected to
their home departments and involve in some way their professors in those
departments.
  o ICI should invite UMass Boston faculty to contribute to a database that identifies
the interests of faculty who could contribute to ICI’s programming and grant
activities.
  o ICI should develop a targeted strategy for deepening its research and projects in
specific areas, in collaboration with faculty, in order to be able to secure major
investigator-initiated research grants and produce high impact publications in
major peer-reviewed journals.
  o ICI staff should partner with UMass Boston departments and faculty to develop
and teach or co-teach courses in disability-related areas and to offer seminars
and training workshops for students and faculty.

• ICI’s entrepreneurial efforts do not mesh well with the current grant procedures in the
UMass Boston Office of Sponsored Programs. A high level commission should be
formed to review and develop a prototype program for grants management that could
be piloted by ICI and then implemented across campus. This commission should include
key research and administrative personnel as well as external representation to bring
best practices to their deliberation. Several specific suggestions include:
  o Change E cert (effort reporting compliance) to annual instead of every 4 months.
o Change the grants management procedures so that flat fee for contracts (training, technical assistance, and evaluation services) as well as product services can be easily managed within the University system.

o Grants under 50K should require approval only within the unit, after an appropriate administrative plan is in place.

o Units/faculty should not lose 8% of Educational Sales and Services (ESS) funds.

In sum, the review team recognized considerable potential and mutual benefits for integrating ICI efforts more closely with the University. However, physical and academic structures need to be implemented at UMass Boston to support the integration. Moving ICI into the academic life of the University will require that academic status be granted to the Institute by investing in degree programs and tenure line faculty positions.

ICI has a vital role to play in UMass Boston’s strategic development into a more research-oriented campus with more graduate programs. The review team believes that ICI can help UMass Boston to become a model for research and scholarship that is interdisciplinary and translational, helping to solve key societal problems with the best research evidence developed and gleaned from multiple disciplines.
Appendix I: ICI Student Engagement and Support, 2008–2011

Over the past three years, the ICI has supported a large number of students (81) through engagement in a variety of projects mainly focused on research, program development and evaluation, capacity building, and systemic change. Students are recruited through outreach conducted by the UMB Office of Graduate Studies (and equivalent offices at other Boston-based universities and colleges), as well as through direct outreach to UMB departments, program directors, and individual faculty.

2008–2009 Academic Year

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Appendix J: Representative List of Graduate Core and Concentration Courses, Draft of 8-7-2011

Core and Track Courses

Required Core Courses

Theory

- **Current and Historical Perspectives on Global Inclusion and Social Development**
  Introduces students to the concepts of social inclusion / exclusion and social development in a global context. Examines definitions, current and historical perspectives on, and approaches to social inclusion / exclusion, social development, and globalization, and implications for policy and practice.

- **International Responses to Social Inclusion**
  Introduces students to the many international organizations that address both the development and the monitoring of populations around the world. Creates an understanding of the range of strategies to respond to immediate and long term crises; genocides, natural disasters, wars and neglect by these organizations and governmental entities. Develops an awareness of multi country monitoring, support and development efforts as they relate to cross cultural communities. Helps the student interpret the world of opinion, ethics, judgment, need and urgency as it is driven by what is known and what is transmitted. Creates a realization that communication, public awareness and understanding of ethical and moral concerns interrelate with social inclusion at all levels.

Research and Evaluation

- **Research and Evaluation in Diverse Settings: Methods and Implications**
  Introduces students to the concept of diversity and examines implications for design and methods choices in research and evaluation with a particular emphasis on stakeholder participation. Teaches students strategies for applying universal design and culturally sensitive practices to all phases of research and evaluation.

Policy and Practice (Choose one of the following two course offerings)

- **Ethics and Professionalism in Global Inclusion and Social Development**
  Introduces students to principles, values, and ethical behaviors that guide professional practice in global inclusion and social development in a local, regional, national, and global context. Teaches students techniques to identify and address ethical issues in practice, research, and evaluation, including Institutional Review Board criteria and processes.

- **Cultural Competency: Impacts on Innovations and Model Development**
  Introduces students to the concept of cultural competency and examines the impact of cultural, racial, ethnic, and socio-economic factors on access to programs, services, and resources.
Teaches students strategies for integrating cultural competency into policy and practice with a particular focus on innovations, model development, effectiveness, and evaluation.  

*Systems Change (Choose one of the following two course offerings)*

- **Strategies for Systemic Change**  
  Introduces students to theories and concepts of systemic change including principles and values. Examines approaches and strategies to systemic change through organizational case studies. Focuses on approaches and strategies used in a variety of sectors and fields including business, public administration, community organization, model demonstration, and program evaluation.

- **Managing Change: Supporting Communities and Embracing Cultures**  
  Examines key concepts of change management in community settings. Teaches strategies for identifying and addressing issues in the change-management process, and for managing change more effectively, giving consideration to the cultural, racial, ethnic, and socio-economic make up of the community.

*Leadership and Management (Choose one of the following two courses)*

- **Leadership in Global Inclusion and Social Development**  
  Examines the concept of leadership and the impact of personal values, beliefs, styles of communication, and experiences. Teaches students to assess their own leadership style through self-reflection as well as techniques to continually improve leadership skills and competencies with applicability to groups, organizations, communities, and cultures. Students learn about leadership styles, practices, and implications in the context of policy development and implementation, systemic change, innovations, and model development.

- **Population Needs and Global Practices:**  
  Changing global trends, practices and procedures have created a network of services and supports for populations that at times address needs and conditions and at other times complicate issues of social inclusion and community engagement. Reliance on public and private resources can stimulate the adoption of practices that have universal application and potential for addressing multiple country concerns. Understanding the interrelationship of cross cultural strategies, the development of such strategies and the evaluation of their impact in multiple settings is essential to demonstrating leadership in social inclusion and global development.

- **Practicum in Global Inclusion and Social Development (Elective not Core)**  
  Provides students with an opportunity to experience activities that build leadership skills and competencies through a one-semester practicum with a national or international organization, public agency, private corporation, or non-governmental organization. Students will be assigned a practicum adviser with whom they develop a reading list to complement their practicum experience; identify a task or set of tasks to be accomplished; and agree upon a product that will demonstrate proficiency in an area related to global inclusion or social development.
Track Course Brief Descriptions

**Concentration in Developmental Disabilities**

**Course Brief Descriptions**

- **Introduction to Developmental Disabilities and Current Issues**
  Provides an overview of the issues that affect the lives of individuals with developmental disabilities (DD) and their families, from birth to old age and in a variety of settings (health care, education, employment, community living, and other settings). This course will address both research and personal perspectives that include individuals with DD and their advocates, families, policymakers, service providers, practitioners, educators, and researchers, increasing student awareness and sensitivity about the needs of individuals with DD and how to address those needs.

- **Transnational and Transcultural Perspectives on Developmental Disabilities**
  Pre-requisite: Introduction to Developmental Disabilities
  Examines variation in meaning and understanding of DD across different nations (industrialized and developing nations) and cultures, addressing one or more particular issues (such as health care, education, employment, community living, and other issues). Introduces students to a range of comparative and other relevant approaches (such as cultural competency) and their application to inform policymaking and practice, as well as research and evaluation.

- **Developmental Disabilities: Legislation, Policy, and Change**
  Pre-requisite: Introduction of Developmental Disabilities
  Introduces students to past and present disability rights legislation and policy with a particular focus on DD. Examines concepts such as deinstitutionalization and independent living and the role of advocacy / the DD movement in bringing about legislative and policy change and the impact (or lack thereof) on access to services, supports, and resources for individuals with DD and their families. Addresses current issues and challenges in DD policy and practice and considers the approaches, strategies, and efforts to addressing those.

- **Developmental Disabilities: Self-advocacy, Self-determination, and Empowerment**
  Pre-requisite: Introduction of Developmental Disabilities
  Examines disability rights and advocacy in a historical context with a particular focus on DD. Traces the emergence of the DD movement, its role and impact on disability rights legislation, policy, systems and practice change. Examines avenues of advocacy for individuals with DD and their families in policy and practice, addressing issues of health care, education, employment, community living, and other issues.

- **Developmental Disabilities: Access to Employment and Community Living**
  Pre-requisite: Developmental Disabilities: Legislation, Policy, and Change
  Examines the parading shift in employment and non-work service delivery for individuals with DD, including concepts such as community integration and inclusion, self-determination and empowerment. Introduces students to the current service delivery and provider landscape,
including approaches to and best practices in service delivery (such as person-centered planning, supported and customized employment). Examines major trends, issues, and challenges in DD employment and non-work service delivery and how to address those issues and challenges.

**Concentration in Autism Spectrum Disorders (ASD)**

**Course Brief Descriptions**

- **Introduction to Autism Spectrum Disorders and Current Issues**
  Provides an overview of the issues that affect the lives of individuals with ASD and their families, from birth to old age and in a variety of settings (health care, education, employment, community living, and other settings). This course will address both research and personal perspectives that include individuals with ASD and their advocates, families, policymakers, service providers, practitioners, educators, and researchers, increasing student awareness and sensitivity about the needs of individuals with ASD and how to address those needs.

- **Comparative Review of Autism from a Practice to a Systemic Perspective**
  Provides an international overview of Autism from multiple countries. Differences in diagnostic and documentation procedures, development of policies and practices for individuals with ASD, community perspectives on ASD, family supports and services available and practices and services provided are examined, analyzed and critiqued. This course will consider the transcultural issues of ASD and how different countries are addressing ASD and other emerging conditions.

- **Autism Spectrum Disorders and Transition: Emerging Models and Best Practices**
  Pre-requisite: Introduction to ASD and Current Issues
  Examines current legislation, regulations, and policy that guide transition with a particular focus on ASD. Introduces students to (current research on) emerging models and best practices to assist individuals with ASD transition from school / college to work, including the role of service providers (such as disability services coordinators, vocational rehabilitation providers, institutions of higher education) and other stakeholders, and addresses implications for future policy, practice, research, and evaluation.

- **Autism Spectrum Disorders and Employment: Emerging Models and Best Practices**
  Pre-requisite: Introduction to ASD and Current Issues; ASD and School-To-Work Transition
  Examines current legislation, regulations, and policy that support competitive employment for individuals with ASD. Introduces students to (current research on) emerging models and best practices to assist individuals with ASD gain and maintain competitive employment, including the role of service providers (such as vocational rehabilitation providers, community rehabilitation programs, public employment and training systems) and other stakeholders, and addresses implications for future policy, practice, research, and evaluation.

**Concentration in Transition from School to Adult Life**

**Course Brief Descriptions**

- **Introduction to Transition Topics**
  Introduces course participants to legislation, regulations, and policy that guide transition, and examines related issues that impact transition, including social security benefits, transportation,
and accommodations. Coursework will consist of field assignments, including the use of the National Alliance for Secondary Education and Transition (NASET) standards to evaluate transition practices and make recommendations for improvement.

- **Youth Development and Self-Determination**
  Prepares course participants to recognize the phase of adolescence and emerging adulthood that students from a wide range of racial, ethnic, cultural, and socio-economic backgrounds experience differently. Introduces participants to best practices for promoting students’ self-determination at school, at home, and in the community (such as person-centered planning). As part of their coursework, participants are expected to develop and implement a person-centered plan with a student and write a transition plan and present that plan at a transition-team meeting.

- **Access to Postsecondary Education**
  Pre-requisite: Introduction to Transition Topics
  Examines current legislation, policy, and practices to highlight both the opportunities for college and the differences between high school and college expectations. Prepares course participants to recognize the unique challenges that students with disabilities face when pursuing college and how to address those challenges. Coursework will consist of field assignments focused on a student that may include visiting a college; meeting with a disability services coordinator and documenting the interview; organizing a student/family orientation to college; and other efforts.

- **Career Development and Competitive Employment**
  Pre-requisite: Introduction to Transition Topics
  Access to Postsecondary Education
  Examines current legislation, regulations, and policy that support competitive employment for individuals with disabilities. Prepares course participants to use a variety of approaches to career development and to align career development with academic pathways and work-based learning. Coursework will consist of field assignments that may include visiting local One-Stop career centers; directly supporting one or more students to seek, prepare for, and obtain competitive employment; using a work-based learning plan; and other efforts.

- **Transition Leadership and Systems Change**
  Focuses on training and sustainability activities required for transition education to be institutionalized in high-need schools and communities. Course participants will learn how to facilitate collaboration to secure a commitment from the entire school community that the transition-related needs of students with disabilities is a shared responsibility. Coursework will consist of field assignments that may include establishing/meeting with an interagency transition team; providing transition-related workshops to school personnel; and other efforts.

**Required Course Work for all Doctoral Students**

**Elective Research, Policy or Management (two course sequence)**
In consultation with their advisor, the student will identify two course offerings in related areas of study at UMB that will be taken to round out the students understanding of and utilization of research methods to support the translation of research to practice in a related area.
Transdisciplinary Research to Practice group participation
To further contribute the breadth of students’ research skills and experience, each PhD candidate will be required to take part in two different professors’ research groups for at least one year each. For most students, who will be full-time students supported by graduate fellowships, these will be the research groups that they join when supported by research assistantships. A total of 12 credits (three credits per semester for four semesters) will be granted for this work.
Appendix K: Definition of Health and Wellness

Health is a broad general concept that has many components, one being wellness. The term “wellness” is commonly used by health practitioners, health educators, and the general public; however, its meaning varies depending on the context and there is no universally agreed definition of what the term describes and how it can be attained (Bates & Eccles, 2008). According to Miller (2005), the wellness concept originated in the intellectual and religious movements of 19th century North America. Beginning in the 1950s in North America, wellness came to be associated with strategies to actively promote health, mostly through changes in one’s lifestyle. This contrasts with the European use of the term “wellness” where it is associated with alternative or non-medical treatments and their therapeutic benefits.

In an effort to move toward a universal definition, Corbin and Pangrazi (2001) define wellness as “a multidimensional state of being describing the existence of positive health in an individual as exemplified by quality of life and a sense of well-being” (p.1, emphasis added). Key dimensions of wellness are: physical, social, intellectual, emotional (mental), spiritual, vocational and environmental (though the last two dimensions are not personal in nature). Corbin and Pangrazi’s wellness definition emphasizes the positive aspects of health, building on the World Health Organization’s (1974) broad definition of health that moves beyond illness, disease, and debilitating conditions. The authors highlight the personal aspect or role that individuals play in terms of their wellness, while also acknowledging the potential impact of individuals’ working and physical environments on their wellness.

Bates and Eccles (2008) conducted a review of Canadian and international literature on definitions of wellness. They identified several common themes in addition to those already captured in Corbin and Pangrazi’s definition (i.e. wellness is multidimensional, a state of being, and results from intentional behaviors and life choices). One theme related to the active or dynamic nature of the processes and strategies used to attain wellness; another theme focused on wellness or attaining wellness as a strategy to promote personal growth and enhance overall quality of life and well-being. Since 1979, the US Department of Health and Human Services (USDHHS) has been investing in initiatives to improve the nation’s health by focusing on health promotion and disease prevention. In December 2010, the Department launched a new initiative, Healthy People 2020, that aims to “promote quality of life, healthy development, and healthy behaviors across all life stages” (USHHS, 2010, p.1), among other objectives. Quality of life and well-being, key descriptors of wellness, are key to this initiative, which intends to test and further improve measures of these descriptors (USDHHS, n.d.).

Health and wellness are linked to workforce and economic development. As mentioned before, one dimension of wellness is vocational (also referred to as occupational, workplace, or career wellness). According to the National Wellness Institute (NWI, n.d.), occupational wellness is about “personal satisfaction and enrichment in one’s life through work … [and is based on] the premise that occupational development is related to one’s attitude about one’s work.” Indeed, a body of literature has accumulated on how employers can promote wellness in the workplace to improve employee health and productivity, with the World Health Organization playing a key role in working with the business community in developing incentives, strategies, and practices around wellness (c.f. Leurent et al., 2008). The fact that wellness is also an
important factor in economic development is exemplified most recently by the passing of the American Recovery and Reinvestment Act by President Obama in 2009, which made an investment of one billion dollars into prevention and wellness initiatives (also referred to as Prevention and Wellness Fund).

References:


Appendix L: Outline and Development of the Degree Programs of the New School

The core of the instructional activities of the new School will be reflected in the development of the master’s (MA in Social Development and Global Inclusion) and doctoral program (PhD in Global Inclusion and Social Development). These programs will capitalize upon the interest, knowledge, and expertise of the faculty of a number of courses, concentrations, and programs at UMB (see Appendix B). These programs will distinguish themselves from those that are already on campus in that they will have as their guiding principle the integration of health, wellness, social and economic development in communities that are striving to be fully inclusive. The emphasis will be on the rapid translation of research and evidence-based practices into programs in local and regional communities.

The translational nature of these programs will set them apart from those programs on campus as well as those programs that are supported through other institutions of higher education in the greater Boston area and beyond. The applied nature of these programs will produce graduates who are well positioned to enter into the public and not-for-profit sectors addressing issues of equality of opportunity and enhanced quality of life for all. Knowledge in management, public policy, research, capacity development and systemic changes will set our graduates apart from those that may be emerging from programs that are more focused on public health, social policy, and epidemiology. Our graduates will be well prepared to apply effective and evidence-based practices in communities that are culturally diverse and seeking equality of opportunity for all. The requirements for the students as well as the projected enrollment patterns for both the doctoral and the master’s program(s) are presented below.

a. Projected enrollment, attrition, and completion rate for the doctoral program: The doctoral program will enroll a total of five students (three full-time and two part-time) in Year 1. Starting in Year 2, we will double enrollment, totaling 10 students per year (six full-time and four part-time). We expect full-time doctoral students to take a minimum of four years and an average of five years to complete the degree requirements. As for the part-time students, we expect them to take between six and eight years and an average of seven years to complete their work. Attrition is difficult to project given uncertainty in timing (i.e., when a student chooses to leave in the course of the program). However, for the purpose of projections, we assume that two students (one full-time and one part-time) of the first cohort will leave the program after the first year. We assume that a total of three students (two full-time and one part-time) of each subsequent cohort will exit the program after the first year. Table 1 on page 2 summarizes the information by program year and track. Based on these projections, we expect to award the first doctorates in Year 5 (2017–2018). The program will stabilize at around 37 students in Year 7 (2019–2020). This includes both students who are taking coursework and those who are conducting dissertation research.
Table 1:
Projected Program Enrollment, Attrition, and Completion Rates for Doctoral Program by Year and Track (Full-Time / FT, Part-Time / PT)

<table>
<thead>
<tr>
<th></th>
<th>Year 1 2013-14</th>
<th>Year 2 2014-15</th>
<th>Year 3 2015-16</th>
<th>Year 4 2016-17</th>
<th>Year 5 2017-18</th>
<th>Year 6 2018-19</th>
<th>Year 7 2019-20</th>
<th>Year 8 2020-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>New FT</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Continuing FT (Incl. Attrition)</td>
<td>-</td>
<td>3-1=2</td>
<td>8-2=6</td>
<td>12-2 =10</td>
<td>16-2 =14</td>
<td>18-2 =16</td>
<td>18-2 =16</td>
<td>18-2 =16</td>
</tr>
<tr>
<td>Graduates(^a)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>2 (Cohort 2011-12)</td>
<td>4 (Cohort 2012-13)</td>
<td>4 (Cohort 2013-14)</td>
<td>4 (Cohort 2014-15)</td>
</tr>
<tr>
<td>FT Total Enrolled</td>
<td>3</td>
<td>8</td>
<td>12</td>
<td>16</td>
<td>20-2 =18</td>
<td>22-4 =18</td>
<td>22-4 =18</td>
<td>22-4 =18</td>
</tr>
<tr>
<td>New PT</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Continuing PT (Incl. Attrition)</td>
<td>-</td>
<td>2-1=1</td>
<td>5-1=4</td>
<td>8-1=7</td>
<td>11-1 =10</td>
<td>14-1 =13</td>
<td>17-1 =16</td>
<td>19-1 =18</td>
</tr>
<tr>
<td>Graduates(^a)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1 (Cohort 2011-12)</td>
<td>3 (Cohort 2012-13)</td>
</tr>
<tr>
<td>PT Total Enrolled</td>
<td>2</td>
<td>5</td>
<td>8</td>
<td>11</td>
<td>14</td>
<td>17</td>
<td>20-1 =19</td>
<td>22-3 =19</td>
</tr>
<tr>
<td>FT &amp; PT TOTAL ENROLLED</td>
<td>5</td>
<td>13</td>
<td>20</td>
<td>27</td>
<td>32</td>
<td>35</td>
<td>37</td>
<td>37</td>
</tr>
</tbody>
</table>

\(^a\) The graduation rate is based on average time of program completion (5 years for full-time students and 7 years for part-time students).

We intend to provide assistantships for all full-time doctoral students for four years. (Note that we expect students to conduct their dissertation research in Year 4 and to defend their dissertation and graduate in Year 5). Given limited resources, we expect students who need more than one year to complete their dissertation research to be able to seek and find support for that work on their own. All assistantships include stipends and full tuition waivers. In Table 1, the total number of full-time students enrolled in the program each year equals the number of assistantships needed (three in Year 1, eight in Year 2, 12 in Year 3, 16 in Year 5, and 18 in each subsequent year). Types of assistantships will include: Teaching Assistant 1 (TA1), Teaching Assistant 2 (TA2), and Research Assistant (RA). TA1 refers to “a graduate employee who is primarily assigned to instructional support activities,” TA2 refers to “a graduate employee who has independent responsibility for the teaching and grading of a lecture section of a course,” and RA refers to “a graduate employee who performs work primarily related to academic research,
including gathering and analysis of data and conducting bibliographical searches.”¹ As of fall 2010, the minimum full-time (18 hours per week), nine-month stipend is estimated to be about $18,500 for TA1 and RA, and $19,500 for TA2. Eighty five percent of the costs of these assistantships will be covered by grant projects as well as indirect return by UMB to the School. Some of these costs will be offset by incomes realized through: a) graduate students with TA1 or TA2 assistantships who will assist in or teach their own sections of undergraduate or masters courses, b) research activities of grants or contracts awarded to the ICI or other institutes and centers in the School, or c) through an allocation from the Graduate Studies office.

b. Projected enrollment, attrition, and completion rates for the master’s program: The master’s program will enroll a total of 10 students (four full-time and six part-time) in Year 1 (2012–2013). Starting in Year 2, we will enroll a total of 32 students (eight full-time and 20 part-time). The master’s program will offer two tracks: a 12-month full-time intensive track with students graduating in the following year, and a 24-month part-time track with students graduating two years after program enrollment. As in the doctoral program, attrition in the masters program is difficult to project given uncertainty in timing (i.e., when a student chooses to leave in the course of the program). However, for the purpose of projections, we assume that three students (one full-time and two part-time) of the first cohort will leave the program within the 12-month study period. We assume that a total of seven students (two full-time and five part-time) will leave in Year 2, and we anticipate two full-time and five to six part-time students leaving each year for Year 3 to Year 5, for a total of seven to nine students leaving the program annually. Table 3 on page 37 summarizes the information by program year and track (full-time and part-time). Based on these projections, we expect to award the first master’s degrees in Year 2 (2013–2014). The program will reach 46 students in Year 7 and will stabilize at that number going forward. For the full-time master’s students, GA support will be made available. For those students who are part-time, assistance in securing funds from public or private sources will be provided, but GA support will most likely not be available.

### Table 2:
Projected Program Enrollment, Attrition, and Completion Rates for Master’s Program by Year and Track (Full-Time / FT, Part-Time / PT)

<table>
<thead>
<tr>
<th></th>
<th>Year 1 2012-13</th>
<th>Year 2 2013-14</th>
<th>Year 3 2014-15</th>
<th>Year 4 2015-16</th>
<th>Year 5 2016-17</th>
<th>Year 6 2017-18</th>
<th>Year 7 2018-19</th>
<th>Year 8 2019-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>New FT</td>
<td>4</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Attrition</td>
<td>-</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Graduates</td>
<td>-</td>
<td>3 (Cohort 2011-12)</td>
<td>6 (Cohort 2012-13)</td>
<td>6 (Cohort 2013-14)</td>
<td>6 (Cohort 2014-15)</td>
<td>6 (Cohort 2015-16)</td>
<td>6 (Cohort 2016-17)</td>
<td>6 (Cohort 2017-18)</td>
</tr>
<tr>
<td>FT Total Enrolled</td>
<td>4</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>New PT</td>
<td>6</td>
<td>20</td>
<td>25</td>
<td>25</td>
<td>30</td>
<td>30</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Continuing PT (Incl. Attrition)</td>
<td>-</td>
<td>6-2 =4</td>
<td>20-5 =15</td>
<td>25-6 =19</td>
<td>25-6 =19</td>
<td>30-6 =24</td>
<td>30-6 =24</td>
<td>35-8 =27</td>
</tr>
<tr>
<td>Graduates in Two-Year Period</td>
<td>-</td>
<td>-</td>
<td>4 (Cohort 2011-12)</td>
<td>15-3 =12 (Cohort 2012-13)</td>
<td>19-4 =15 (Cohort 2013-14)</td>
<td>19-4 =15 plus 3 prior yrs (Cohort 2014-15)</td>
<td>24-7 =17 plus 4 prior yr (Cohort 2015-16)</td>
<td>24-7 =17 plus 8 from prior yrs (Cohort 2015-16)</td>
</tr>
<tr>
<td>PT Total Enrolled</td>
<td>6</td>
<td>24</td>
<td>40-4 =36</td>
<td>44-12 =32</td>
<td>49-15 =34</td>
<td>54-18 =36</td>
<td>59-21 =38</td>
<td>63-25 =38</td>
</tr>
<tr>
<td>FT &amp; PT ENROLLED</td>
<td>10</td>
<td>32</td>
<td>44</td>
<td>40</td>
<td>42</td>
<td>44</td>
<td>46</td>
<td>46</td>
</tr>
</tbody>
</table>

c. Projections for all student enrollment: In the development of the master’s and doctoral programs, the projected enrollments are presented in Tables 1 and 2. These projections are for the development of only one master’s program. If we were to assume that the new School could offer areas of concentration, then it would be possible to build from this master’s program and offer a range of concentrations. Table 3 on page 6 presents the addition of two areas of concentration plus the generic master’s program. The areas of concentration that are proposed are areas where there is a documented need and where there is some capacity at UMB as well as within the ICI. The two initial concentrations would be autism and related developmental disabilities, and transition studies. The former is an area of need that is well supported in the literature and also has some current legislative language that would support such a program. The latter, transition studies, is a program that is not now offered nationally. In embracing the model
for a generic master’s with two options, one a full-time intensive option and one a two-year option, Table 3 reflects the development of two concentrations and forecasts the number of students who may be interested or enrolled in Year 3 through Year 8.

Other concentration areas could be considered in the coming years. There is a considerable amount of interest nationally and internationally in the area of workforce development, and in the preparation of personnel who are providing employment and training services to older workers, youth, individuals with disabilities, immigrant workers and workers in transition from one occupation to another or one job to another. Some of the additional areas that may offer options for establishing a concentration include but are not limited to (1) systemic change and community development, (2) transition from school to work, (3) information technology and the labor market, (4) intellectual disabilities and postsecondary education and (5) early-education certification. Several of these have federal and/or state resources that could support the development of the concentration and/or support the students who are involved in the concentration. In the first three years of the new School, the viability of these and other areas of concentration will be considered.

In addition to the deployment of the concentration in the master’s program, the three master’s programs in vision (Teachers of the Visually Impaired [TVI], Orientation and Mobility [O&M], and Rehabilitation Teaching) are all programs that have been in existence for the last two to ten years at UMB. These programs are currently located in the Department of Curriculum and Instruction in the College of Education and Human Development. The enrollment projections presented in Table 3 include the current enrollments in these programs, and reflect an additional increase of 20 students annually through a new federal grant that will create online training in TVI and O&M for staff in Guam, Micronesia, Palau, the Marshall Islands, and Taiwan in the coming five years. The master’s in rehabilitation counseling is also a program that has been extensively supported by the ICI and is designed to prepare professionals who will work in the public Vocational Rehabilitation (VR) agency, the private for-profit rehabilitation sector, or not-for-profit rehabilitation agencies. This program has considerable support at the national level as there is a federal requirement that all staff who are working in the public VR agencies have a master’s in rehabilitation counseling or a master’s in a related area and hold a Certification in Rehabilitation Counseling (CRC).

There is an opportunity for a considerable increase in online enrollment in the rehabilitation counseling program, leading to eligibility for CRC certification, as there is a new interpretation of the regulations that if a staff member in the public VR agency has a master’s in a related area by completing four to six identified courses, he/she will be eligible to sit for the CRC, a national credential. All of these courses are offered on line at UMB, thus allowing for this program to reach students in other parts of the country who are interested in becoming eligible for their CRC and already have a master’s degree. This expansion would account for a considerable increase in the number of students in this UMB training program from a current level of 22 students to an annual level of 65 students (one third seeking a master’s and the remainder having a master’s and seeking CRC eligibility).

Table 3 presents the data on student enrollment for the master’s with the establishment of two concentrations, the doctoral program, the three vision master’s programs, and the master’s in
rehabilitation counseling. Using the actual current enrollment patterns as well as the projections from Tables 1 and 2, we forecast that a total of 159 students will be enrolled in Year 1, with a 25% growth in Year 2 and Year 3 (N = 198 students in Year 2 and 245 in Year 3), an average growth of 15% in Year 4 and Year 5, and then an annual growth rate of 10% until Year 8 (N = 371 students in Year 8).

Table 3
Projected Program Enrollment Including Students from other Master’s Programs at UMB (Particularly the Teachers of the Visually Impaired [TVI], Orientation and Mobility [O&M], Vision Rehabilitation Teaching [VRT], and Rehabilitation Counseling [RC]), as well as Projections for PhD Program

<table>
<thead>
<tr>
<th></th>
<th>Year 1 2012-13</th>
<th>Year 2 2013-14</th>
<th>Year 3 2014-15</th>
<th>Year 4 2015-16</th>
<th>Year 5 2016-17</th>
<th>Year 6 2017-18</th>
<th>Year 7 2018-19</th>
<th>Year 8 2019-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master’s in GD and SI</td>
<td>10</td>
<td>32</td>
<td>44</td>
<td>40</td>
<td>46</td>
<td>51</td>
<td>48</td>
<td>45</td>
</tr>
<tr>
<td>Master’s in GD and SI (New Concentration)</td>
<td>-</td>
<td>-</td>
<td>10</td>
<td>32</td>
<td>44</td>
<td>40</td>
<td>46</td>
<td>51</td>
</tr>
<tr>
<td>Master’s in GD and SI (New Concentration)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>10</td>
<td>32</td>
<td>44</td>
<td>40</td>
</tr>
<tr>
<td>TVI Master’s or Certificate</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>55</td>
</tr>
<tr>
<td>O&amp;M Master’s or Certificate</td>
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<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td>VRT Master’s and Certificate</td>
<td>12</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Rehab Counseling Master’s or Certificate</td>
<td>22</td>
<td>28</td>
<td>45</td>
<td>55</td>
<td>65</td>
<td>65</td>
<td>65</td>
<td>65</td>
</tr>
<tr>
<td>Estimated Total Enrolled in Master’s Programs</td>
<td>159</td>
<td>193</td>
<td>232</td>
<td>260</td>
<td>298</td>
<td>321</td>
<td>326</td>
<td>334</td>
</tr>
<tr>
<td>PhD Program</td>
<td>-</td>
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<td>20</td>
<td>27</td>
<td>32</td>
<td>35</td>
<td>37</td>
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<tr>
<td>TOTAL ENROLLED</td>
<td>159</td>
<td>198</td>
<td>245</td>
<td>280</td>
<td>325</td>
<td>353</td>
<td>371</td>
<td>371</td>
</tr>
</tbody>
</table>

Table 3 does not include additional certificate, master’s, or doctoral programs that may be included under the umbrella of the School for Global Inclusion and Social Development in the coming years. Some of these opportunities are presented in the following section.
d. Outreach and marketing targeted at international students and scholars: There are many options available to the School regarding the development of an international student body. The new School will recruit at least 30 students with international backgrounds for the master’s and doctoral program in global inclusion and social development. Additionally, the School’s Visiting Senior Scholars program will support two scholars per year, including one international scholar. School staff will use a variety of strategies, sources, and venues for outreach and marketing in order to attract interested students and scholars from abroad to these programs. The UMB Office of International and Transnational Affairs (OITA) will support School staff in this effort, providing resources, connections, and networking, as well as guidance. In doing so, the OITA will ensure that the School’s outreach and marketing efforts are consistent with and contribute to UMB’s international (global) and transnational (borderless) reputation and the process of internationalizing the university and its community.

The School will use existing networks of the ICI and UMB/OITA for outreach and marketing while also capitalizing on the reputation of these organizations and networks in establishing credibility for the new School and its programs. The Center for Global Pediatrics at Children’s Hospital Boston (CHB), an ICI affiliate, maintains an extensive international network of physicians, scientists, researchers, and educators. School staff will utilize this network as a venue to conduct outreach and to market the graduate and visiting scholars programs.

The ICI is an active member of the Association of University Centers on Disability (AUCD) network. This is one of the largest federally-funded networks of university-based interdisciplinary programs, represented in all US states and territories as well as internationally, with affiliates in the UK, Spain, Israel, and Australia. Through the activities of the AUCD International Committee, the Association emphasizes national and international innovations in disability-related education, health care, and supports and services. The ICI has been a member of the AUCD International Committee for the past five years and has been involved with many of the committee activities through the Chair, Dr. David O’Hara. The School will use AUCD’s extensive network and the expertise of its members to publicize the newly established programs.

The ICI is also a member of the US International Council on Disabilities (USICD)—another venue for applicant outreach and program marketing. Through the ICI’s connection with the Executive Direction of the USICD, David Morrissey, there have been several opportunities to work on both the ratification of the UN Convention on the Rights of Persons with Disabilities (CRPD) as well as outreach to other countries addressing issues of disability rights. Beyond the membership on the USICD, the Special Assistant to the Secretary of State, Judith Heumann, has sought out assistance in outreach to countries in supporting and better understanding the needs and interests of persons with disabilities as well as increasing the ability of countries to support and serve persons with disabilities. The connection with Special Assistant Heumann in the US Department of State also will serve as a link to the engagement of future learners from other countries in the new School’s master’s and doctoral programs.

The School will also tap into UMB extensive networks and partnerships. The OITA maintains a list of faculty with international and transnational connections and a list of faculty who received Fulbright scholarship to teach and conduct research abroad. The Office also

2 Source: OITA website: [http://www.umb.edu/oita/entry_programs/publications/](http://www.umb.edu/oita/entry_programs/publications/)
manages UMB’s global partnerships involving more than 40 universities representing many parts of the world (Canada, West Indies, Ireland, England, France, Germany, Hungary, Italy, Kenya, China, South Korea, and Australia). In collaboration with the OITA, the School will reach out through these faculty and partner networks in an effort to publicize the new School, to recruit students and visiting scholar candidates, and to develop international internship sites and teaching and research networks focused on the School’s mission and content areas.

With respect to international internship sites, Dr. Eunsook Hyun, Director of the OITA and member of the Exploration Committee for the new School, commented: “Having various internships in global communities will strengthen the Schools’ field-based programs and its international capacity.” School staff will work closely with the OITA Manager of International Internship Development and Administration on the development and coordination of these international student internship sites.

ICI staff with expertise in establishing successful international exchange programs will also be a resource to School staff. Dr. Kerim Munir, for example, directs the prestigious Fogarty International Center on Mental Health (MH) and Developmental Disabilities program housed at the ICI / CHB. Funded by the National Institutes of Health (NIH), this international research-training program is aimed at MH professionals and faculty at institutions of higher education in Turkey. The program was established in 2001 and subsequently has trained more than 30 investigators in Turkey, some of whom have now gone on to become leaders in their fields.

The School will widely disseminate marketing materials for the graduate and visiting scholars programs. Staff will send these materials to the Ministries of Education (and equivalent offices) in selected countries with a request to distribute this information to the relevant audiences. School staff will share the materials with international organizations such as the German Academic Exchange Service—a publicly-funded independent organization of higher education institutions in Germany whose mission is to promote the international exchange of students, educators, scholars, researchers, and professionals. The OITA website lists international organizations—potential venues for applicant outreach and program marketing. Related to this, the European Commission’s 7th Framework Program (2007–2012), the “gateway to European research and development [efforts],” also provides opportunities to publicize the new School, its programs and related activities.

Beyond these efforts the ICI will also utilize the resources of the AUCD International Committee, the UCICD, and the partners of the school including the Center for Global Pediatrics at Children’s Hospital Boston as a resource in student recruitment and student engagement. Other outreach efforts through the European Union on Supported Employment, an organization dedicated to increasing the employment options for persons with disabilities in Europe will be accessed. The ICI has had a long standing relationship with this multi country Association. Other strategies and venues will include: outreach through relevant professional associations; advertisement of the visiting scholars opportunities on major academic US and international job websites; establishment of and eventual outreach and marketing through alumni groups—one for

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3 Personal e-mail communication (January 19, 2011).
4 Source: OITA website: [http://www.umb.edu/oita/entry_events/resources_events/#organizations](http://www.umb.edu/oita/entry_events/resources_events/#organizations)
the graduates of the master’s and doctoral programs in global inclusion and social development and another one for the visiting senior scholars.

*e. Supports for visiting international students and scholars*: The new School in conjunction with the OITA will support visiting international students and scholars. Specifically, OITA’s International Students and Visiting Scholars Services (ISSS) staff “help students find programs in English as a Second Language, offer advice on compliance with immigration and academic regulations, process work and travel requests, and work to protect students’ visa status.”6 International students enrolled in the master’s and doctoral program in global inclusion and social development will be required to participate in the OITA’s Mandatory Information Sessions for New International Students. This event provides an opportunity for students to meet ISSS staff and find out about the services and supports they provide; learn about housing, banking, insurance, immigration issues, and student life on campus; and meet other international students. Additionally, the School and the OITA will, to the extent possible, help students interested in applying for the master’s or doctoral program in global inclusion and social development identify and apply for financial resources to cover the academic and living costs during their stay in Boston. The OITA website lists possible funding sources7 as a resource. It should be noted that international students will have access to resources from their own countries as well as through international organizations. The School staff as well as OITA will assist students in both identifying and accessing those sources in their home countries as well as through international associations whenever possible.

Likewise, the OITA coordinates UMB’s International Visiting Scholars Academy (IVSA) program that is “designed for international scholars interested in coming to UMass Boston to participate in a series of transdisciplinary professional development workshops for their continuous improvement in teaching, research, and services related to their field.”8 The term “transdisciplinary” refers to the crossing of disciplinary and scientific / academic boundaries and the integration of disciplines and non-academic participants (Tress, Tress, & Fry, 2006). It is a semester-long program that engages scholars in a series of five workshops focused mainly on transdisciplinary approaches to teaching, research, and service and related topics. Staff of the new School and the OITA will discuss options for the School’s visiting senior scholars to perhaps participate in some of these workshops and related events. Compared to the international students, funding is not an issue for the School’s visiting senior scholars, as they will each receive a twelve-month scholarship to cover expenses.

Reference

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6 Source: OITA website: [http://www.umb.edu/oita/issss](http://www.umb.edu/oita/issss)
7 Source: OITA website: [http://www.umb.edu/oita/entry_events/resources_events/#funding](http://www.umb.edu/oita/entry_events/resources_events/#funding)
8 Source: OITA website: [http://www.umb.edu/oita/entry_programs/ivsa/](http://www.umb.edu/oita/entry_programs/ivsa/)
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http://library.wur.nl/frontis/landscape_research/02_tress.pdf
## Appendix M: ICI Projects and Activities from 2004 to 2010

### The Institute for Community Inclusion

#### Summary of Activities for FY05 thru FY10

The Institute for Community Inclusion (ICI), the University Center of Excellence on Disabilities (UCED) located at the University of Massachusetts Boston (UMB) and Children’s Hospital (CH), has and remains supportive in advocating for the continued growth in the role of persons with disabilities and their families through all aspects of the Institute’s activities. Over the past five years the ICI has had a number of grants and contracts addressing a variety of issues in research, training, technical assistance, dissemination and policy formulation for persons with disabilities in the Commonwealth, the New England region, nationally and internationally.

The following list provides a summary of the grants (state and federal) that are ongoing in the Institute for Community Inclusion at the University of Massachusetts Boston and the Children’s Hospital Boston as well as those grants that were received and completed during this five year project report (FY05 thru FY10).

### A. Current Projects at UMB

1. **Title:** Statewide Improvement Grant (SIG)  
   **Funding Agency:** MA Dept. of Education  
   **Project Period:** 7/1/02 through 6/30/10  
   **Annual Budget** $285,000  
   **Total Budget** $2,300,000

   **Abstract**
   
   The project will work with the state Department of Education on two major statewide personnel development needs that include improved secondary teacher quality and improved outcomes for youth with disabilities as they move into adult life. The ICI is working with the state to expand the early education and transition resources in the Commonwealth through the provision of pre-service and in-service training. Project personnel will work with local school districts to develop a collaborative interagency model for assisting all youth with disabilities to achieve competitive employment and/or postsecondary education options.

2. **Title:** National Service Inclusion Project  
   **Funding Agency:** Corporation for National and Community Service  
   **Project Period:** 7/1/05 through 12/30/12  
   **Annual Budget** $1,050,000

   **Abstract**
   
   Develop the capacity for the members of the CNCS system including Learn and Serve America, AmeriCorp and Senior Corp to support individuals with disabilities who
are interested in volunteering. This project will offer training and technical assistance to all of the five clusters nationally in the CNS system, training to states and TA to individual programs. It will work with other UCEDs in the development of the affiliation between the University Centers of Excellence to the National and Community Service programs at the state level. This project has also begun to work with the Senior Corp in addressing issues of supporting seniors who have a disability in working in volunteer settings.

3. Title: Universal Design for Learning  
   Funding Agency: US Department of Education  
   Project Period: 7/1/01 through 6/30/09  
   Annual Budget $175,000  
   Total Budget $875,000

Abstract
   This project will work with local school districts in redesigning the curriculum to reflect universal design strategies that will facilitate the full inclusion of students with disabilities into the typical classroom settings. The project will work with local school teachers and the administration of local schools to expand the involvement of students with disabilities in their natural school and classroom settings.

4. Title: Community Technical Assistance  
   Funding Agency: state and local agencies  
   Project Period: ongoing  
   Annual Budget $625,000 to 1,250,000  
   Total Budget ongoing

Abstract
   This activity reflects the various technical assistance contracts the Institute had and has with community vendors to provide technical assistance in expanding integrated employment opportunities for persons with severe disabilities, comprehensive medical supports for children with severe disabilities, early intervention staff building TA and local health and evaluation services for children with developmental disabilities. The contacts vary in scope and reflect the needs of the community program. Additionally, the Institute has a number of contractual relationships with several states (Maryland, Oregon, Washington, Delaware, Wisconsin, Connecticut, North Carolina, and Louisiana).

5. Title: Small project grants  
   Funding Agency: federal, state and local agencies  
   Project Period: ongoing  
   Annual Budget $155,000  
   Total Budget $155,000

Abstract
   The ICI has a number of small projects that include funding for doctoral students, short term training and technical assistance to federal or state agencies and small grants
from foundations. These projects vary from year to year and are often tied to specific training activities of the Institute.

6. Title: Ongoing National Data Collection on Day and Employment Services for Persons with Developmental Disabilities

Funding Agency: U. S. Dept. of Health and Human Services: Administration on Developmental Disabilities

Project Period: 10/1/07 through 9/30/12

Annual Budget $300,000

Total Budget $1,500,000

Abstract

This project collects and analyzes national data documenting day and employment service utilization and trends for individuals with mental retardation and other developmental disabilities. The project surveys state Vocational Rehabilitation (VR) agencies and state Mental Retardation/Developmental Disabilities (MR/DD) agencies, analyzes the RSA 911 data tapes, the national health follow up survey data and will complete a sample survey of facilities nationally. Other dissemination activities include a monograph series documenting day and employment service and policy trends, journal articles, newsletter submissions, conference presentations, data on request services for state agencies and the provision of technical assistance.

7. Title: DRRP on Vocational Rehabilitation Program Management

Funding Agency: NIDRR; U. S. Dept. of Education

Project Period: 10/1/09 through 9/30/14

Annual Budget $1,500,000

Total Budget $7,500,000

Abstract

This project will seek to develop with the state public Vocational Rehabilitation agencies a more formal and structured Strategic Planning, Quality Assurance and Human Resource Management. The project will provide training and technical assistance to selected public VR agencies in years one and two with the implementation of the management model in years two through four and the going to scale of the model in the fifth year. The project will further develop policy papers and documents reflecting expansion of VR services and administrative structures for consumers who are eligible for services through the public VR system nationally. This project links to a variety of national organizations in the expansion of employment for individuals with disabilities.

8. Title: TACE for Rehabilitation agencies and their partners in the New England region

Funding Agency: RSA

Project Period: 10/1/08 through 9/30/13

Annual Budget $727,000
Total Budget $3,635,000

Abstract
The TACE will provide training and technical assistance to the public VR agencies in the New England region as well as the community rehabilitation providers serving individuals with disabilities in employment and training programs. The focus will be on increasing the capacity of the staff in these programs as well as the programs themselves to increase the number of persons with disabilities who will enter integrated employment through this system. The TACE will offer seminars, workshops, certificate training and consultations utilizing distance education, face to face and on demand consultation strategies. The TACE is a collaborative project with Assumption College.

9. Title: National Center on Workforce Development and Disabilities
Funding Agency: U. S. Dept. of Labor
Project Period: 8/1/08 through 3/30/09
Annual Budget $450,000
Total Budget $450,000

Abstract
Provide training and technical assistance to One Stop Career Centers nationally and support to WIA mandated partners in the Workforce Development and Employment and Training system. Develop policy papers and documents reflecting expansion of workforce participation for individuals with disabilities. This project links to a variety of national organizations in the expansion of work opportunities for individuals with disabilities.

10. Title: RCEP for Community Rehabilitation Providers in the New England region
Funding Agency: RSA
Project Period: 10/1/05 through 9/30/10
Annual Budget $500,000
Total Budget $2,500,000

Abstract
The RCEP will provide training and technical assistance to the community rehabilitation providers serving individuals with disabilities in employment and training programs. The focus will be on increasing the capacity of the staff in these programs as well as the programs themselves to increase the number of persons with disabilities who will enter integrated employment through this system. The RCEP will offer seminars, workshops, certificate training and consultations utilizing distance education, face to face and on demand consultation strategies.

11. Title: Individual Placement Program
Funding Agency: MRC, DMR, local schools
Annual Budget $120,000
Project Period: ongoing

Abstract
This program is a direct placement program where persons with disabilities are placed into jobs and provided support through an employment training specialist to master the job duties, increase their productivity and become more integrated into the work force in the company. Referrals are received from the local offices of the Massachusetts Rehabilitation Commission and the Department of Mental Retardation. This program provides job development, job matching and job placement and ongoing supports to persons using a supported employment design. Emphasis is placed upon initial placement and onsite training.

<table>
<thead>
<tr>
<th>Title:</th>
<th>Massachusetts Comprehensive Assessment Alternate Assessment</th>
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<tbody>
<tr>
<td>Funding Agency:</td>
<td>Measured Progress</td>
</tr>
<tr>
<td>Project Period:</td>
<td>10/1/00 through 9/30/08</td>
</tr>
<tr>
<td>Annual Budget:</td>
<td>$75,000</td>
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<tr>
<td>Total Budget:</td>
<td>$440,000</td>
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</table>

Abstract
The Individuals with Disabilities Act (IDEA) requires that all students with disabilities be included in mandatory statewide assessment. As a result, states are also mandated to ensure that this statewide system will include students with significant disabilities. To this end, Massachusetts has developed a portfolio based system that is designed to ensure that all students, including students with the most severe and profound disabilities will have the opportunity to demonstrate their knowledge of the state curriculum frameworks and standards and receive a state approved diploma.

<table>
<thead>
<tr>
<th>Title:</th>
<th>RRTC on Vocational Rehabilitation</th>
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</thead>
<tbody>
<tr>
<td>Funding Agency:</td>
<td>U. S. Dept. of Education: National Institute on Disability Rehabilitation and Research</td>
</tr>
<tr>
<td>Project Period:</td>
<td>10/1/07 through 9/30/12</td>
</tr>
<tr>
<td>Annual Budget:</td>
<td>$650,000</td>
</tr>
<tr>
<td>Total Budget:</td>
<td>$3,250,000</td>
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</tbody>
</table>

Abstract
This research project will study critical elements in the public vocational rehabilitation system and document promising practices in employment training and job supports for this public system. Additionally, through the identification of key policy areas, the project will examine impacts of policy on employment outcomes nationally making recommendations for changes to the national public Vocational Rehabilitation system to address current challenges in this system. Consultation, training and technical assistance will be available through the project to individual state agencies.

<table>
<thead>
<tr>
<th>Title:</th>
<th>NextSTEP</th>
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</thead>
<tbody>
<tr>
<td>Funding Agency:</td>
<td>Corporation for National and Community Service</td>
</tr>
</tbody>
</table>
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Project Period: 10/1/09 through 9/30/12
Annual Budget $1,000,000
Total Budget $1,500,000

Abstract
This project will develop model demonstration on the use of national service as a gateway to employment for persons with disabilities. The project will fund two demonstration sites that will address the growth of employment opportunities for persons with disabilities through the use of a national service experience. Additionally the project will document the participation rates by persons with disabilities who are in national service and then enter employment.

15. Title: Equity and Excellence in Higher Education
   Funding Agent Office of Postsecondary Education
   Project Period 10/1/05 thru 9/30/09 (no cast extension to FY09)
   Annual Budget $300,000
   Total Budget $900,000

Abstract:
Equity and Excellence in Higher Education is working with over 100 college faculty across 5 colleges and universities in New England to educate faculty about Universal Course Design. The project is also building a Universal Course Design website where faculty will have access to the necessary tools to help them implement the principles of universal design into course syllabi, instruction and assessment.

16. Title: Post Secondary Options for Students with Intellectual Disabilities
   Funding Agent NIDRR
   Project Period 10/1/08 thru 9/30/11
   Annual Budget $500,000
   Total Budget $1,500,000

Abstract:
The ICI and TransCen will implement a national Center that will address these needs specifically by: (1) conducting secondary data analyses using existing national datasets (i.e., NSLTS2, RSA 911, ACF) to further explain the different types of postsecondary education (PSE) programs and related student outcomes; (2) conducting outreach using formal (e.g., AHEAD, AUCD) and informal networks to identify additional PSE programs; (3) conducting a national survey of these PSE programs to identify key characteristics and promising practices of such programs and services and determine the impact on the personal outcomes of students with ID; (4) compiling existing and developing new training and technical assistance (TTA) materials to address gaps in knowledge based on the Center’s research; and (5) collaborating with existing TTA providers to disseminate these materials.
17. Title: Post Secondary Options for Students with Intellectual Disabilities: College to Career Connections
   Funding Agent: Office of Postsecondary Education
   Project Period: 10/1/05 thru 9/30/09
   Annual Budget: $180,000
   Total Budget: $720,000

Abstract:
Research and demonstration in re: implementing individual support model to improve outcomes (pre & employment) for youth with intellectual disabilities. We work with teams of educators in high schools across MA; also develop and maintain website.

18. Title: Preservice Training for Teachers of the Visually Impaired
   Funding Agency: U.S. Department of Education.
   Project Period: 7/1/02 through 6/30/12
   Annual Budget: $200,000
   Total Budget: $2,000,000

Abstract
This project will develop training materials and offer a Masers training for preparing TVI educators in the New England region. The project is supported through federal resources as well as by each of the six New England states through their Statewide Improvement grants as well as the Hilton Perkins Foundation.

19. Title: Preservice Training for Orientation and Mobility Specialists
   Funding Agency: Hilton Perkins Foundation and Depts. of Education. in the New England Region
   Project Period: 10/1/03 through 9/30/13
   Annual Budget: $100,000
   Total Budget: $1,000,000

Abstract
This project will develop training materials and offer a Masers training for preparing O & M Specialists in the New England region. The project is supported through federal resources as well as by each of the six New England states through their Statewide Improvement grants as well as the Hilton Perkins Foundation.

20. Title: Long Term Training in Rehabilitation Counseling
   Funding Agency: U.S. Department of Education: Rehabilitation Services Administration:
   Project Period: 9/1/10 through 8/31/15
   Annual Budget: $150,000
   Total Budget: $750,000
Abstract
Through the College of Education and Human Development and in collaboration with the ICI this preservice training program will provide long-term training in rehabilitation counseling leading to a master's degree in Rehabilitation Counseling. The project expands the current rehabilitation counseling offerings to include an expansion to offer this master’s training in distance education format throughout the New England Region.

21. Title: SSDI Employment Demonstration Project  
Funding Agency: U. S. Department of Education: Rehabilitation Services Administration  
Project Period: 9/1/10 through 8/31/15  
Annual Budget $1,500,000  
Total Budget $16,700,000

Abstract
This project will identify effective practices that are utilized by the public Vocational Rehabilitation agencies at a state level to assist SSDI recipients to enter employment and earn at above SGA. The project will then develop replication strategies of effective practices in three states in year three through five with a dissemination effort in year five to all states.

22. Title: Strategic Planning and Technical Assistance  
Funding Agency: Department of Transitional Assistance  
Project Period: 7/1/07 through 6/30/10  
Annual Budget $1,200,000  
Total Budget $3,600,000

Abstract
Provide technical assistance and support in strategic planning as well as program development within the Department of Transitional Assistance addressing increasing employment options for persons on welfare that have a disability. The project will have employment trained staff in a selection of area welfare office on an annual basis.

23. Title: Statewide Employment Leadership Network  
Funding Agency: 17 individual state Mental Retardation agencies  
Project Period: 7/1/08 through 6/30/15  
Annual Budget $470,000

Abstract
This is a membership project in which the state Mental Retardation and Developmental Disability agencies pay a fee to join the roundtable. The states serve as the board of directors for the SELN framing the priorities and activities of the Network. The goal is to increase the cross fertilization of employment related activities across the 203 member states.
24. Title: Early Education Model Demonstration  
Funding Agency: US Department of Education  
Project Period: 7/1/06 through 6/30/09  
Annual Budget $1,200,000  
Total Budget $3,600,000

Abstract
This project will work with the Boston Public Schools in the rolling out of 90 early education classes over a three year period. The project will seek to evaluate the effectiveness of the reading, match and socialization curricula for BPS. Through the use of a randomized treatment and control design classrooms will be assigned to either a treatment or control status and then interventions including presentation on selected curricula and supports to teachers will be provided. Over a three year period the project team will assess impact and develop model programs for four year old BPS students.

25. Title: Early Education Pre-service Training  
Funding Agency: US Department of Education  
Project Period: 7/1/06 through 6/30/11  
Annual Budget $300,000  
Total Budget $1,500,000

Abstract
Through the College of Education and Human Development and in collaboration with the ICI this project will train early education teachers who are becoming more and more of a demand in the public as well as private school environment. This grant will develop a graduate training program that will prepare educators to meet the certification and licensure requirements of the Commonwealth of Massachusetts. This will be the only Mater’s training program in the eastern part of the state that is located in a public university system.

26. Title: Ticket Plus  
Funding Agency: Social Security Administration  
Project Period: 7/1/08 through 6/30/09  
Annual Budget $110,000  
Total Budget $110,000

Abstract
With the anticipated changes in the Social Security regulations regarding the rules for the Ticket to Work, the ICI is working with five state public Vocational Rehabilitation agencies in getting ready to implement the new VR Ticket option. This TA project will increase the use of the SSA Ticket nationally

27. Title: Comprehensive Employment Supports  
Funding Agency: Department of Mental Retardation  
Project Period: 7/1/08 through 6/30/10
<table>
<thead>
<tr>
<th>Title</th>
<th>Consortium for Postsecondary Education for Youth with Intellectual Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Agency</td>
<td>Administration on Developmental Disabilities</td>
</tr>
<tr>
<td>Project Period</td>
<td>7/1/10 through 6/30/15</td>
</tr>
<tr>
<td>Annual Budget</td>
<td>$500,000</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$2,500,000</td>
</tr>
</tbody>
</table>

Abstract

Working with the Department of Mental Retardation and the four regions in the Commonwealth the ICI is working with providers, state agency staff and consumers in increasing the number of persons with mental retardation who enter integrated employment. The project will develop comprehensive case studies and identify policies and practices that enhance employment placement for consumers.

<table>
<thead>
<tr>
<th>Title</th>
<th>Early Reading First</th>
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<tbody>
<tr>
<td>Funding Agency</td>
<td>US Department of Education</td>
</tr>
<tr>
<td>Project Period</td>
<td>7/1/09 through 6/30/12</td>
</tr>
<tr>
<td>Annual Budget</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$3,000,000</td>
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</tbody>
</table>

Abstract

This project will develop additional options for Institutions of Higher Education to accommodate students with intellectual disabilities as they transition from school to adult life and postsecondary education to employment. The project will work in collaboration with the Association of University Centers on Disabilities, the National Down Syndrome Congress, AHEAD, and several University Centers on Disabilities in developing protocols and models for postsecondary education for these students throughout the country.

<table>
<thead>
<tr>
<th>Title</th>
<th>Ticket to Work and One Stops</th>
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<tbody>
<tr>
<td>Funding Agency</td>
<td>Department of Labor: Employment and Training Administration and SSA</td>
</tr>
<tr>
<td>Project Period</td>
<td>9/30/10 through 9/29/11</td>
</tr>
<tr>
<td>Annual Budget</td>
<td>$847,000</td>
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</tbody>
</table>
Total Budget $847,000

Abstract
Working with the One Stops in a selected group of state this project will develop with these programs a methodology to support the accessing and utilization of the Ticket to Work resources for those individuals who find employment though the One Stop and are on Social Security.

B. Current Projects at Children's Hospital

31. Title: LEND Interdisciplinary Training in Mental Retardation
Funding Agency: U. S. Dept. Health and Human Services: Maternal and Child Health
Project Period: 7/1/01 through 6/30/16
Annual Budget $550,000 to 755,326
Total Budget $5,500,000

Abstract
This project provides interdisciplinary training supports for the core Maternal and Child Health (MCH) disciplines of the University Centers on Developmental Disabilities (UCEDD) located at Children's Hospital. The UCEDD mandate is to provide interdisciplinary training, exemplary service, research and dissemination in the field of mental retardation. The emphasis of the LEND training program is on the development of professionals from many fields such that they understand interdisciplinary training and that they will be prepared to assume a leadership role in the field of mental retardation. In addition to the staff support limited trainee support is available through this core grant.

32. Title: UCEDD Administrative and CORE Support
Funding Agency: U. S. Dept. Health and Human Services: Administration on Developmental Disabilities
Project Period: 7/1/03 through 6/30/13
Annual Budget $520,000
Total Budget $5,200,000

Abstract
This grant provides core support for the UCEDD. This core support includes administrative staff support, management support and some clinical staff support. The ADD project is used in concert with the MCH grant (noted above) to develop a more stable funding base for the UCEDD, expands the training to undergraduate and community college trainees, and creates a stronger emphasis upon community outreach for the UCEDD. The CORE grant allows the UCEDD to expand its outreach efforts,
develop a more targeted adult service component and expand on the relationship with local schools.

33. Title: RRTC on Children with Disabilities and Special Health Care Needs
   Funding Agency: NIDRR
   Project Period: 3/1/06 through 2/28/11
   Annual Budget $800,000
   Total Budget $4,000,000

Abstract
The RRTC includes three research studies that are specifically addressing the needs of the target population and meet the gold standard of improved outcomes for CYDS. Research activities include two intervention projects that use randomized controlled designs to improve the educational and recreational activities of CYDS and a demonstration project to improve the early identification of CYDS from traditionally underserved communities. Research Study 1 will investigate the use of a regional interagency team that will integrate innovative practices in education, social services, and medical support for transition aged students. Research Study 2 will build off of innovative practices in recreation and volunteer training to examine a model that integrates CYDS into community recreation activities. Research Study 3 will model the integration of a reliable screening mechanism into the flow of activity at a busy, urban neighborhood health center. The research activities address the NIDRR’s priorities of transition, community-based practices, and access.

34. Title: Massachusetts Technology Assistance Resource Team (MASSTART)
   Funding Agency: Department of Public Health: Bureau of Family and Community Health Division of Special Needs
   Project Period: 7/1/03 thru 6/30/11
   Annual Budget $125,000
   Total Budget $675,000

Abstract:
MASSTART is a free program providing services for children with special health care needs and who are assisted by medical technology in the school setting. Nurses from Children’s Hospital provide consultation in developing HCHP’s, assist in developing emergency plans of care, provide technical assistance and training to schools, families, and health care providers, conduct educational seminars, and provide information referral and resources concerning services for children with special health care needs.

35. Title: Work Experience Program
   Funding Agency: MRC, DMR, local schools
   Project Period: ongoing
   Annual Budget $75,000
Total Budget $75,000

Abstract
This program provides onsite job experiences for persons referred from the local public schools, offices of the Massachusetts Rehabilitation Commission and the area offices of the Department of Mental Retardation. The program provides evaluation, counseling (individual and group) and onsite training to persons with disabilities. The program utilizes a wide variety of work environments throughout the hospital including clinical labs, environmental services, message center, Fegan clinics, patient accounting, medical records, and other hospital departments. The purpose of the program is to provide support to people with disabilities while they gain real work experiences. It is not a specific skill building program but a counseling and support program which uses the real work setting as an opportunity for the trainees to develop appropriate work and social skills. The trainees generally work a six hour day five days per week and remain in the training program for an average of six months. They will have experiences in two to five work areas during this training program.

C. Past Projects at the ICI that have been Completed

1. Title: Family Support Net
   Funding Agency: Administration on Developmental Disabilities
   Project Period: 7/1/03 through 12/31/07
   Annual Budget $100,000
   Total Budget $400,000

Abstract
This project will work with a series of Community Based Minority Organizations in increasing the capacity of individuals who are part of these communities to access information on the Web addressing their or their children’s needs when there is a disability. The project will develop the capacity of the local CBMOs to expand their services and utilize technology more effectively to support their families and individuals with disabilities.

2. Title: Universal Design for Learning
   Funding Agency: US Department of Education
   Project Period: 7/1/01 through 6/30/07
   Annual Budget $175,000
   Total Budget $875,000

Abstract
This project will work with local school districts in redesigning the curriculum to reflect universal design strategies that will facilitate the full inclusion of students with disabilities into the typical classroom settings. The project will work with local school teachers and the administration of local schools to expand the involvement of students with disabilities in their natural school and classroom settings.
3. Title: National Center on Workforce Development and Disabilities  
Funding Agency: U. S. Dept. of Labor  
Project Period: 10/1/02 through 9/30/07  
Annual Budget $1,200,000  
Total Budget $6,000,000  

Abstract  
Provide training and technical assistance to One Stop Career Centers nationally and support to WIA mandated partners in the Workforce Development and Employment and Training system. Develop policy papers and documents reflecting expansion of workforce participation for individuals with disabilities. This project links to a variety of national organizations in the expansion of work opportunities for individuals with disabilities.

4. Title: Emerging Disabilities  
Funding Agency: U. S. Dept. of Education: National Institute on Disability Rehabilitation and Research  
Project Period: 7/1/02 through 6/30/06  
Annual Budget $400,000  
Total Budget $1,200,000  

Abstract  
This study will examine the elements of the emerging disabilities and develop a methodology for understanding the issues related to emerging disabilities in service, program development and policy formulation. The issues of emerging disabilities will be examined to offer NIDRR a realistic understanding of the concepts of new of emerging disabilities nationally.

5. Title: TAP: Technical Assistance to Community Rehabilitation Providers  
Funding Agency: Virginia Commonwealth University  
U.S. Department of Labor  
Project Period: 7/1/02 through 6/30/07  
Annual Budget $350,000 ($100,000 FY07)  
Total Budget $1,500,000  

Abstract  
This project will provide TA and technical assistance to selected community rehabilitation programs in the area of program conversion and the increased use of integrated employment for individuals served in 14 programs. This project will develop training modules and offer direct technical supports to providers interested in moving away from sheltered employment to integrated employment.
6. Title: Massachusetts Innovative State Alignment Grants for Improving Transition Outcomes for Youth with Disabilities Through the Use of Intermediaries

Funding Agency: U.S. Department of Labor and MA Department of Workforce Development

Project Period: 10/1/03 through 9/30/08
Annual Budget $250,000
Total Budget $1,250,000

Abstract
This project will assist the MA Department of Workforce Development in developing a comprehensive youth infrastructure to support improved employment and postsecondary education outcomes for youth with disabilities as they exit secondary school. To this end, project personnel will assist the Commonwealth in establishing a state Transition Coordinating Committee (TCC) to conduct resource mapping on the state level to identify transition related resources, duplication of resources, and gaps in services for all youth. Next, project staff will work with the SWIB to develop and implement an RFP process designed to identify and provide technical assistance to model demonstration projects designed to pilot innovative strategies (e.g., braided/blended funding) in eight communities across the Commonwealth. The project also includes a comprehensive evaluation for each of the eight demonstrations with a feedback loop to the TCC to inform policy development and statewide implementation of promising practices.

7. Title: Ticket Plus

Funding Agency: Social Security Administration

Project Period: 7/1/06 through 6/30/07
Annual Budget $150,000
Total Budget $150,000

Abstract
With the anticipated changes in the Social Security regulations regarding the rules for the Ticket to Work, the ICI is working with five state public Vocational Rehabilitation agencies in getting ready to implement the new VR Ticket option. This TA project will increase the use of the SSA Ticket nationally.

8. Title: Pediatric Medical Unit

Funding Agency: Social Security Administration/AUCD

Project Period: 12/1/06 through 11/30/07
Annual Budget $435,000
Total Budget $435,000

Abstract
The ICI will provide a review process for the Social Security Admonition on the disability determination process for children. The ICI team will review documents to facilitate the eligibility and disability determination process for children with disabilities.
This project will reduce the length of time that children will be waiting for health case and Social Security payments.

9. Title: Making Connections: Personal Networking as a Job Search Strategy in Culturally Diverse Communities
   Funding Agency: Administration on Developmental Disabilities
   Project Period: 7/1/01 through 6/30/04

Abstract
This project will study strategies to improve the employment outcomes of job seekers with disabilities from culturally diverse communities by introducing the use of a personal networking curriculum in four community-based organizations in diverse communities, and developing culturally sensitive approaches to career development.

10. Title: Community Employment Demonstration with Public Housing consumers
    Funding Agency: Department of Education: Rehabilitation Services Administration
    Project Period: 10/1/01 through 9/30/06

Abstract
This project will work with a series of local public housing authorities facilitating the movement of individuals with disabilities who are served through the public housing system into competitive employment. The project will work with the public rehabilitation system in increasing the involvement of public housing residents who have a disability to enter and remain in employment. The project will offer contracts with the local housing authorities and community groups to expand integrated employment for this audience.

11. Title: MA Customized Employment Demonstration
    Funding Agency: Metro North Workforce Investment Board
    Project Period: 7/1/01 through 6/30/06

Abstract
This project will work with the local workforce investment board in developing more innovative ways of serving individual job seekers who have significant disabilities. The project will link the resources of the LWIB with those of community based agencies in increasing the involvement of individuals with disabilities into the core, intensive and training services. This project will also work with the local offices of the Departments of mental Health and Mental Retardation. The ICI will offer ongoing training and TA to the LWIB in the development of the project.

12. Title: Project Impact
    Funding Agency: MA Rehabilitation Commission
    Project Period: 7/1/01 through 6/30/06

Abstract
This project will work with various diverse communities in the development of the capacity of these cultural communities to support individuals with disabilities in making decisions about return to work and to utilize some of the community training in benefits counseling for individuals with disabilities.
13. **Title:** Promising Practices Case Studies  
   **Funding Agency:** Academy of Educational Development  
   **Project Period:** 10/1/02 through 9/30/07

**Abstract**

This project will review and develop case studies addressing the development of a comprehensive employment service utilizing the One Stop Career center design. The case studies will be used to develop promising practices in enhancing the employment of individuals with disabilities.

14. **Title:** Linking Hands  
   **Funding Agency** Rochester Area Community Foundation  
   **Project Period** 7/1/02 thru 6/30/04

**Abstract:**

This project was developed to teach residents what family life is like for families of children with chronic illnesses and disabilities. Residents from the Primary care Program and the Coordinated Care Service Program spend time with families in their homes. Residents complete pre and post assessments and receive valuable resources to support families. Families receive a stipend.

15. **Title:** Educating Providers About Down Syndrome Via an Integrated Marketing Module  
   **Funding Agency** CDC-AUCD  
   **Project Period** 10/1/03 thru 9/30/05

**Abstract:**

This project submitted by the USC UCEDD and funded via AUCD in collaboration with the Centers for Disease Control (CDC) will bring together the ICI and the UCEDDs from Iowa and Univ. of Southern CA to develop materials for pediatricians, OB/GYN, and family practitioners about Down syndrome.
Appendix N: Staff Biographies
Institute for Community Inclusion
University of Massachusetts Boston

Heike Boeltzig
Senior Research Associate
PhD, Public Policy, University of Massachusetts Boston
MA, Applied Social Research, University of Stirling, Scotland, UK

Heike Boeltzig is adjunct faculty in the John W. McCormack Graduate School of Policy and Global Studies at UMass Boston. Her key research interests are disability, employment, and information and communication technology.

At the ICI, Dr. Boeltzig has been directing research activities under the Vocational Rehabilitation Research and Training Center, jointly funded by the National Institute on Disability and Rehabilitation Research (NIDRR) and the Rehabilitation Services Administration (RSA). She is implementing a national survey of community rehabilitation providers funded by the Administration on Developmental Disabilities and NIDRR/RSA. She is also a lead researcher on the NIDRR-funded Rehabilitation and Technical Assistance Center on Vocational Rehabilitation Program Management.

Dr. Boeltzig has collaborated on projects with City University London in the UK, and Griffith University and Bond University in Australia. At the University of Stirling in the UK, she served as the lead researcher on German disability and employment policy in a 13-country comparative research study funded by the EU.

In 2008–2009, Dr. Boeltzig and her colleagues won a grant from the IBM Center for the Business of Government to conduct a systematic review of research on ways that public employment service systems in the US and the UK can better serve consumers with disabilities. She has also conducted research into strategies in the US and the UK to encourage traditionally underserved groups of people to access online services such as e-government. Dr. Boeltzig’s doctoral dissertation focused on technology adoption and use by rehabilitation counselors providing public vocational rehabilitation services to people with disabilities.

Kathy Boisvert
Adjunct Faculty, Teacher of Students with Visual Impairments
EdD, Health and Behavior Studies, Columbia University
EdM, Instructional Practice in Special Education, Columbia University
MEd, Low Incidence Disabilities, Boston College
BA, Framingham State College

In addition to her teaching at UMass Boston, Kathy Boisvert supports an integrated pre-school program at Blackstone Millville Public Schools. She is responsible for instruction and modification of the preschool curriculum for children with and without disabilities. Dr. Boisvert
serves as liaison between parents and school personnel, provides evaluations and educational placements, is responsible for reporting and changing Individualized Education Program mandates to reflect students’ needs, and works directly with children in an inclusive educational setting.

**Laura Bozeman**  
**Associate Professor/Director: Vision Studies**  
PhD, Visual Impairment & Multiple Disabilities, University of Texas at Austin  
MEd, Visual Impairment & Multiple Disabilities, University of Texas at Austin  
BS, Stephen F. Austin State University

Laura Bozeman entered the vision profession in 1974 as an Orientation & Mobility Specialist in Texas. She has served as a faculty at the University of Texas at Austin; North Carolina Central University; Massey University in Auckland, New Zealand; and UMass Boston. Dr. Bozeman has worked with all ages, and has been fortunate to teach in Taiwan, China, Australia, New Zealand, and the US.

Dr. Bozeman holds certification in Orientation and Mobility, Low Vision, and was licensed as a Teacher of Students with Visual Impairments. Her research centers around sustaining low-incidence personnel-preparation programs (locally and internationally), promoting leadership in personnel preparation, and Orientation and Mobility. She is co-editing and contributing to *O&M for Life: Orientation and Mobility for Older Individuals with Visual Impairments*. This book will be published by AFB Press in 2012. Dr. Bozeman will also contribute the chapter on preparing vision professionals in the *Handbook of Special Education Research*, also planned for 2012.

**John Butterworth**  
**Director of Employment Systems Change and Evaluation**  
**Senior Research Fellow**  
PhD, Special Education, University of Connecticut  
MS, Special Education, George Peabody College for Teachers (now Vanderbilt University)  
BA, Bowdoin College

John Butterworth is the project director for the State Employment Leadership Network, and principal investigator of Access to Integrated Employment, a 20-year national data-collection project on day and employment services for people with developmental disabilities funded by the Administration on Developmental Disabilities. He also directs research and technical assistance initiatives focused on employment and transition from school to employment.

Dr. Butterworth has over 30 years of experience as a manager of community-based day and employment services, trainer, consultant, and researcher. His interests include organizational and systems change, employment outcomes, employment policy, natural supports, person-centered planning, and program management.
Julisa Cully  
Program Manager  
MEd, Mental Health Counseling, University of Massachusetts Boston  
BA, Whittier College

Julisa Cully is a member of the ICI research team, where she contributes to projects including the Vocational Specialist Initiative, the Vocational Rehabilitation Research and Training Center, and the Research and Technical Assistance Center. Ms. Cully joined the ICI after working as a clinical research coordinator in psychiatric research at a medical school in Boston, and as a clinical manager for community corrections programs in Massachusetts.

Sheila Fesko  
Senior Program Manager  
PhD, Rehabilitation Administration and Special Education, Boston College  
MS, Rehabilitation Counseling, Boston University  
BS, Rehabilitation Services, Boston University

Sheila Fesko has 25 years of experience working on the inclusion of individuals with disabilities in the workplace. As the director of the National Service to Employment Program (NextSTEP), she is working with the Corporation for National Community Service on increasing employment opportunities for youth with disabilities through community service and volunteerism.

Areas of Dr. Fesko’s research include: effective job-development strategies, inclusion of people with disabilities in the generic workforce-development system, and universal strategies to support inclusion of all employees in the workplace. She has an extensive history of national and international training of employers, community providers, and workforce-development personnel, and was an invited speaker at the Korean Employment Promotion Agency for Disability 2007 International Conference in Seoul, South Korea. Dr. Fesko has also worked at the Massachusetts Rehabilitation Commission and as a program manager for a community-based employment program, and is a certified rehabilitation counselor.

Allison Fleming  
Research Assistant  
ABD Rehabilitation Counselor Education, Michigan State University  
MS, Rehabilitation Counseling and Disability Studies, Springfield College  
BS, Springfield College

Allison Fleming is an ABD doctoral candidate in the Rehabilitation Counselor Education program at Michigan State University. She currently works for the Vocational Rehabilitation Research and Training Center and the Research and Technical Assistance Center at the ICI. At Michigan State, Ms. Fleming is a research assistant with Project Excellence, a program-evaluation partnership between Michigan State University and the Michigan vocational rehabilitation (VR) agency.
Ms. Fleming has previous experience as a VR counselor for the state of Massachusetts, providing employment services to individuals with disabilities. She also worked as a staff trainer at the ICI for the New England Regional Continuing Education Center. In that role, she provided online and in-person trainings in several topics relevant to employment services for individuals with disabilities.

At Michigan State, Ms. Fleming has taught a three-credit elective undergraduate course, both online and in person, for the last eight semesters. She has presented on several topics including research findings at national conferences, including the National Council for Rehabilitation Educators and the Program Evaluation Summit. Ms. Fleming continues to pursue research interests in several areas, including program evaluation, professional issues in rehabilitation counseling, quality of life and employment, and postsecondary and employment outcomes for transition-age youth with disabilities.

Karen Flippo  
**Senior Technical Assistance Specialist**  
MRA, Rehabilitation Administration, University of San Francisco  
BA, American University

Karen Flippo’s experience spans over 30 years in the disability field. She began her career providing job-placement services to individuals with developmental and other disabilities. She has experience with program evaluation, policy development, research, and education and training (through the University of San Francisco Rehabilitation Administration and the Research and Training Center on Supported Employment at Virginia Commonwealth University).

Ms. Flippo has served as the vice president of the Brain Injury Association of America and the Chief Executive Officer of the National Association of Councils on Developmental Disabilities. She is the immediate past president of the Council on Quality and Leadership. In addition to her current role at the ICI, Ms. Flippo is the state team liaison for the Alliance for Full Participation.

Susan Foley  
**Senior Research Fellow**  
PhD, Social Welfare Policy, Brandeis University  
BA, Bates College

Susan Foley directs the research activities of the ICI. She is the principal investigator (PI) or co-PI of several large national centers: the Vocational Rehabilitation Research and Training Center, the Opening Doors Project, and the Rehabilitation Technical Assistance Center on Vocational Rehabilitation Program Management, funded by the National Institute on Disability and Rehabilitation Research.

Dr. Foley is also the PI of the National Center for Ease of Use of Community-Based Services, funded by the Maternal and Child Health Bureau, and the PI of the Twa Zanmi Project, funded
by the Robert Wood Johnson Foundation and the Benton Foundation. She is the co-PI of the newly funded Model Demonstration on Improving Employment Outcomes of Individuals receiving Social Security Disability Insurance, funded by the US Department of Education.

Dr. Foley has successfully overseen numerous large federally funded grants involving multiple subcontractors performing policy research, including surveys, case studies, qualitative research, document reviews, and research synthesis. She has also conducted qualitative and quantitative research and collected data from a wide range of research participants, including youth with disabilities, adults across disability, policy makers, practitioners, and families. Her responsibilities include development and grant writing, managing subcontractors, mentorship of research staff, and management team responsibilities. She has taught at Tufts University and Umass Boston.

**Stelios Gragoudas**  
Research Associate  
EdD, Special Education, University of Kansas  
MS, Rehabilitation Counseling, Boston University  
BS, Boston University

Stelios Gragoudas has over 20 years of experience working in the disability field. His primary focus is the special-education arena, specifically on improving postsecondary outcomes for students with cognitive disabilities. Dr. Gragoudas’s research examines how teaching self-determination and leadership skills in secondary educational settings can improve transition outcomes for students with disabilities.

In his current position, Dr. Gragoudas develops and instructs professional-development courses. These courses address transition issues, such as self-determination and youth development, career development, and postsecondary education for youth with intellectual disabilities. In addition, he provides technical assistance in the area of transition to agencies and schools.

Dr. Gragoudas is on the executive board of the Division of Career Development and Transition, a division of the Council for Exceptional Children (CEC). He is also on various state-agency advisory boards concerning youth with disabilities.

**Meg Grigal**  
Senior Research Fellow  
PhD, Special Education, University of Maryland  
MEd, Transition/Supported Employment, University of North Carolina, Charlotte  
BA, Rutgers

Meg Grigal is the co-principal investigator for the Center on Postsecondary Education for Individuals with Intellectual Disabilities (funded by the National Institute on Disability and Rehabilitation Research), and the National Coordinating Center (funded by the Office of Postsecondary Education). Dr. Grigal previously directed On-Campus Outreach (OCO) at the
University of Maryland, funded by the Office of Special Education Programs. Through OCO, she provided technical assistance and training and conducted research on the provision of transition services to students with significant disabilities in postsecondary settings across the country. She has published numerous journal articles on the topic.

Dr. Grigal has extensive experience in adult vocational and independent-living programs, as well as secondary special education for students with disabilities and community-based transition programs for students with significant disabilities. She has conducted and published research in the areas of transition planning, postsecondary access, self-determination, inclusion, and the use of person-centered planning techniques. Dr. Grigal was appointed by the governor of Maryland to serve on the Maryland Interagency Transition Council, and has served on this council for five years.

**Allison Cohen Hall**  
**Research Associate**  
PhD, Disability Policy, Brandeis University  
BS, Boston University

Allison Cohen Hall’s work at the ICI crosses over several domains within disability and employment. She has been involved in multiple national case-study research projects spanning several areas, including: promising practices for serving people with disabilities through the One-Stop Career Center system; systems-level strategies for increasing employment for individuals with intellectual disabilities; business strategies for supporting workers with disabilities; and most recently, how participation in national-service programs can lead to employment.

Dr. Hall has also conducted qualitative research on employment and social networks. She is currently the research coordinator for the Access to Integrated Employment project, which provides a description of day and employment services for individuals with intellectual disabilities and develops a comprehensive understanding of the factors that influence employment outcomes at an individual, employment-support, service-provider, and public-policy level. Before joining the ICI in 2000, Dr. Hall worked as a policy analyst for the Massachusetts Governor’s Commission on Mental Retardation.

**John Halliday**  
**Senior Program and Policy Specialist**  
MEd, Counseling, Suffolk University  
BA, Suffolk University

John Halliday has provided technical assistance to a number of organizations and states in support of their systems-change efforts. All these endeavors aim to improve employment outcomes for people with disabilities, particularly outcomes related to interagency coordination, joint funding, and systems change.
Mr. Halliday has demonstrated extensive leadership in the development and management of employment and community-based programs for individuals with disabilities. His current activities include a significant role in the national Rehabilitation Research and Training Center on Vocational Rehabilitation and the VR Rehabilitation Research and Technical Assistance Center. He is director of the statewide vocational counseling program with the Massachusetts Temporary Assistance for Needy Families program.

As director of the Connecticut Bureau of Rehabilitation Services (BRS) from 1991 to 2003, Mr. Halliday led the bureau’s vocational rehabilitation and disability-determination units to national recognition. The innovative service delivery, purchasing, and administrative structures designed and implemented by BRS led to significant systems change within Connecticut, and served as models for other systems.

Mr. Halliday has a proven track record of leadership in program innovation and replication, with particular emphasis on organizational development, program financing SSI/SSDI, and interagency partnerships. He is highly regarded for his ability to structure human and financial resources using creative methods leading to major organizational and program changes.

Ellen Hanson
Developmental Psychologist, Behavioral Specialist, and Researcher, Children’s Hospital Boston
PhD, Psychology, University of California, San Diego, and California School of Professional Psychology

Ellen Hanson is a licensed psychologist and an instructor in psychology at Harvard Medical School. Dr. Hanson is an expert in differential diagnosis and treatment of children who have significant developmental disabilities. Within this area, she also has a specific interest in children with autism spectrum disorder (ASD), with whom she was worked for over 20 years. Dr. Hanson travels nationally and internationally to train professionals in the use of phenotyping measures, developmental-assessment tools, and behavioral interventions for clinical and research use with children.

Dr. Hanson has developed and run numerous programs at Children’s Hospital Boston (CHB), including social-skills enhancement programs for children with ASD and educational programs for parents. Additionally, she has developed an undergraduate training program at CHB for students who are interested in pursuing careers as specialists in developmental disability. Dr. Hanson is involved in numerous research projects that include the differential diagnosis of autism, the genetic and environmental influences on ASD, adjustment of siblings of individuals with ASD, and the convergence of sleep and memory in children with autism.

Debra Hart
Director of Education and Transition
PhD (ABD), Policy, Brandeis University
MS, Education, Simmons College
Debra Hart is the principal investigator for three national postsecondary education (PSE) initiatives, including: 1) the Consortium for Postsecondary Education for Individuals with Developmental Disabilities (funded by the Administration on Developmental Disabilities), through which substantial national training and technical assistance is provided; 2) the Center on Postsecondary Education for Students with Intellectual Disabilities (funded by the National Institute on Disability and Rehabilitation Research), which conducted a national survey of PSE programs for students with intellectual disabilities and secondary data analysis of two national databases (NLTS2 and RSA 911); and 3) the National Coordinating Center (funded by the Office of Postsecondary Education), which is working with 27 postsecondary education transition programs for students with intellectual disabilities.

Ms. Hart has over 30 years of experience working with youth and adults with disabilities, their families, faculty members, and professionals who support students in K–12 and postsecondary education and competitive employment.

David Helm
Director, Leadership Education in Neurodevelopmental Disabilities program, Children’s Hospital Boston
PhD, Medical Sociology, Boston University
MA, Boston University
BA, College of William & Mary

David Helm has been working in the disability field for over 35 years. He has worked with families on home training programs, directed programs for teenagers and young adults learning about work in their communities, and taught graduate and post-graduate students entering the field of developmental disabilities.

Dr. Helm’s major research interests include professional education, relationship-building between health-care providers and families, and qualitative research. He has presented his work at professional conferences throughout the US, as well as in Canada, Mexico, and overseas. Dr. Helm also teaches and coordinates courses that are accredited at six universities. He has served on numerous community and professional boards, including the Association of University Centers on Disabilities, where he is chair of the National Training Directors Council. He co-edited a book released in 2010, *End of Life Care for Children and Adults with Intellectual and Developmental Disabilities*, published by the American Association on Intellectual and Developmental Disabilities.

Kathleen Heydt
Adjunct Faculty, Vision Studies
PhD in Physical Therapy, Simmons College
MEd, Special Education, Boston College
BS, Russell Sage College
Kathleen Heydt has 18 years of experience teaching as adjunct faculty at UMass Boston. She supported the initial curriculum development of the graduate Certificate in Orientation and Mobility. Dr. Heydt completed her doctorate in physical therapy at Simmons College and teaches the Medical Aspects of Disabilities course.

In addition to her long-term adjunct appointment at UMass Boston, Dr. Heydt has been adjunct faculty at Boston College and has 35 years of experience in physical-therapy positions. She is currently assistant director of the Lower School at Perkins School for the Blind.

David Hoff  
**Senior Technical Assistance Specialist**  
MSW, Concentration in Policy, Planning, and Administration, Rutgers University  
BS, Cornell University

David Hoff has an extensive background in working with public systems and community agencies to enhance employment outcomes for people with disabilities. He has done work in over 25 states, providing technical assistance and training on effective practices in human services and workforce development.

Mr. Hoff regularly presents on a range of employment-related topics to policy makers, practitioners, people with disabilities, and their family members at various national, regional, and local forums. A primary focus of his work is on organizational and systems change to improve employment outcomes, with a particular emphasis on public policies and their impact on the lives of people with disabilities. Along with his work with public disability agencies, much of Mr. Hoff’s work is focused on enhancing the ability of the general workforce-development system to serve people with disabilities.

Mr. Hoff has written extensively on topics related to the employment of people with disabilities, including serving as lead author and editor of *Access for All*, a manual for One-Stop Career Centers published by the ICI. He is also co-author of the book *Demystifying Job Development*. In addition to his 13+ years at the ICI, Mr. Hoff has been an administrator for a Local Workforce Investment Board and spent several years in a direct-service role, assisting individuals with disabilities to find and maintain employment.

Prior to entering the human-service field, Mr. Hoff held management roles in the private sector for ten years. He is currently the vice president of APSE, a national organization focused on integrated employment of people with disabilities. He also is a board member of New England Business Associates and Imagine Enterprises, community-based agencies meeting the employment needs of people with disabilities.

William E. Kiernan  
**Executive Director and Research Professor**  
PhD, Rehabilitation and Special Education, Boston College
William Kiernan is the director of the ICI and a research professor in the Graduate College of Education and the McCormack School of Policy Studies at UMass Boston. For the past 38 years, Dr. Kiernan has served in a variety of capacities in the ICI and as a senior staff member of Children’s Hospital Boston. He has been a faculty member at UMass Boston for more than 20 years.

Dr. Kiernan has served as an international consultant in seven countries on the development of adult-service systems for people with disabilities, and has provided training and technical assistance in almost every state in the US. He is the author of more than 125 articles and reports in the field of disabilities, with a specific emphasis on transition, employment, public-policy development, workforce development, and systemic change.

Dr. Kiernan has been a member of several national boards, has served as the president of the American Association on Intellectual and Developmental Disabilities (formerly the American Association on Mental Retardation), and has served as the president of the Association of University Centers on Disabilities.

Ngai Kwan
Graduate Assistant
MA, Applied Gerontology, Ball State University
BA, Hong Kong Baptist University

Ngai Kwan is a doctoral candidate in the Department of Gerontology at the McCormack Graduate School of Policy Studies at UMass Boston. His dissertation topic is “Effects of Physical Activity Participation on Mortality and Other Health Outcomes among the Oldest Old in China.” Mr. Kwan’s research interests include: health behaviors in aging, quality of later life, and demography and policy analysis related to older adults.

From fall 2009 to spring 2010, Mr. Kwan was a research assistant for Dr. Nina Silverstein and Dr. Alison Gottlieb at UMass Boston on a project entitled “Fitness to Drive: Early Stage Dementia.” For this project, he managed survey data from University of Michigan’s Drive Ability Program, analyzed data, compiled summary tables, and wrote narratives of the findings.

In 2008, Mr. Kwan was co-investigator with Dr. Jeffrey A. Burr, Ms. Kerstin Gerst, and Dr. Jan Mutchler at UMass Boston on a project entitled “Economic Well-Being of Older Immigrants,” for which he managed data from ACS 04-06 and analyzed data on various economic well-being measures.

Amanda Hall Lueck
Visiting Senior Faculty, Vision Studies
Amanda Hall Lueck is a professor in and coordinator of the Program in Visual Impairments at San Francisco State University. A teacher of visually impaired students, Dr. Lueck was a Fulbright Professor in Katmandu, Nepal, and also taught and consulted in India, Nairobi, Cyprus, Sri Lanka, and Hong Kong. She has also coordinated low-vision services at the University of California, Berkeley School of Optometry, and had an adjunct clinic addressing the needs of children with cerebral visual impairment at the University of California, San Francisco Medical Center.

Dr. Lueck has published widely in the area of low vision. She is currently consulting with the Northeast Regional Center for Vision Education (run by the ICI) in its development of a low-vision therapy graduate certificate curriculum, and exploring a post-retirement contract with the UMass Boston to coordinate a pending proposal with the Taiwan Lions Club. Other plans include the exploration of a post-graduate curriculum in cortical visual impairments as a specialized area of advanced study.

Joe Marrone
Senior Program Manager
MEd, Northeastern University
BA, Lemoyne College

Joe Marrone is coordinator of training and technical assistance at the ICI’s Vocational Rehabilitation Research and Training Center, and the Rehabilitation and Technical Assistance Center on Vocational Rehabilitation Program Management, both funded by the National Institute on Disability and Rehabilitation Research. He is on the editorial boards of the Psychiatric Rehabilitation Journal and the American Journal of Psychiatric Rehabilitation.

Mr. Marrone has consulted, trained, and lectured in all 50 states, Canada, Puerto Rico, Asia, and Europe. He was a member of two nationally appointed primary-study groups (15 people appointed annually) by the US Department of Education’s Rehabilitation Services Administration Commissioner, once in 1990 and again in 2004. Mr. Marrone is currently involved in projects related to national technical assistance. He has delivered keynote presentations on topics including policy and programmatic design issues related to vocational rehabilitation systems and customers with disabilities, employment and recovery within mental health systems of care, and workforce development.

Mr. Marrone has over 30 years of direct-service/administrative experience in delivering rehabilitation services and in community mental health. He has been on the staff of the New England Psychiatric Rehabilitation Training Program, UMass Boston, the Michigan State University Long-Term Training Grant in Psychiatric Rehabilitation, and the University of Pittsburgh/Western Psychiatric Institute’s National Psychiatric Rehabilitation Training Grant. He
has also been an adjunct faculty member of the New England School of Professional Psychology and the Boston University School of Medicine.

Robert McCulley  
**Director, Northeast Regional Center for Vision Education**  
MEd, Special Education, Boston College  
BS, University of Massachusetts Amherst

Robert McCulley is the founding director of the Northeast Regional Center for Vision Education (NERCVE) at the ICI, affiliated with the UMass Boston College of Education and Human Development. NERCVE is nationally recognized for addressing the critical need for low-incidence pre-service personnel in vision education and rehabilitation through community engagement and high-quality distance education.

With 30 years of professional service experience and 18 years in higher education, Mr. McCulley supported the development of three nationally recognized and professionally accredited graduate degree programs in Vision Studies: Orientation and Mobility, Vision Rehabilitation Therapy, and state-licensed Teacher of Students with Visual Impairments. Through his administrative efforts, NERCVE has been awarded over 8 million dollars in grants and contracts.

Today, NERCVE provides expanded faculty and staff resources and scholarship support to over 120 actively matriculated graduate students across New England. The success of the center has recently resulted in a 1.2-million-dollar federal award partnering the University of Guam with the UMass Boston to meet the critical need for vision-education specialists across the Western Pacific Territories.

Neil McNeil  
**Program Manager**  
MA, Rehabilitation Counseling, Assumption College  
BA, Providence College

Neil McNeil provides technical assistance to state vocational rehabilitation (VR) agencies as a member of the New England TACE Center. Prior to joining the ICI, Mr. McNeil worked for the Massachusetts Rehabilitation Commission (MRC). He has led MRC area offices in Quincy, Plymouth, and Worcester, Massachusetts.

Mr. McNeil has led and participated in a large number of task forces and initiatives focusing on policy development, service system improvements, and staff training. In addition to his many years as a practicing vocational rehabilitation counselor, his professional activities have included serving as a career consultant for the Norcap Center for Addictions in Norfolk, Massachusetts and as an employee assistance specialist for Family Services of Central Massachusetts. Mr. McNeil has been a guest lecturer for the Rehabilitation Continuing Education Program at Assumption College and at the Rehabilitation Counseling Program at UMass Boston.
As a member of the 33rd Institute on Rehabilitation Issues Prime Study Group, Mr. McNeil co-authored a chapter on organizational culture for the monograph entitled *Recruitment and Retention of Vocational Rehabilitation Counselors* (George Washington University, 2007). In addition to his bachelor’s and master’s degrees, he is a graduate of the Summer School of Alcohol Studies at Rutgers University. Mr. McNeil is a licensed rehabilitation counselor in the Commonwealth of Massachusetts.

**Alberto Migliore**  
**Research Associate**  
PhD, Special Education, Indiana University  
MA, Disability Management, University College Dublin, Ireland  
BA, Università degli Studi di Torino, Italy

Alberto Migliore joined the ICI in 2006 as a postdoctoral research fellow. His expertise is in quantitative research, including correlation and intervention research and secondary data analyses (e.g., RSA-911, ACS, and NLTS-2 datasets). Dr. Migliore’s professional interest is on research about employment policies and practices that assist job seekers with intellectual disabilities.

At the ICI, Dr. Migliore works on research protocol development, survey development, data collection, data analysis, and dissemination. In Italy, where he grew up, he helped found a social cooperative where he worked for about ten years involving individuals with intellectual disabilities in community work activities.

**Kerim Munir**  
**Director, International Mental Health/Developmental Disabilities Program, Children’s Hospital Boston**  
PhD, Maternal and Child Health and Psychiatric Epidemiology, Harvard University  
MD, University College London, UK

Kerim Munir is director of the International Mental Health/Developmental Disabilities Program (funded by the Fogarty International Center/NIH) and the Mental Health/Developmental Disabilities National Research Education Program (funded by the NIMH). These programs promote interdisciplinary research and training about public health and developmental disabilities among medical students, graduate students, and early-career national and international clinical fellows. Dr. Munir also serves as director of psychiatry in the LEND program at the ICI and Children’s Hospital Boston. He teaches in the Department of Psychiatry, Harvard Medical School.

Dr. Munir began international liaison activities between the US and Turkey as special consultant to UNICEF in 1999, following a major earthquake in Turkey. He is the principal author of the National Mental Health Policy for Turkey, and is the recipient of the Distinguished Physician of the Year Award in 2010 from the Turkish Ministry of Health. Dr. Munir has received the Klaus
Peter Award in International Medical Education from Harvard Medical School, as well as awards from the Turkish child-psychiatry and public-health professional societies.

Maria Paiewonsky  
**Transition Specialist**  
EdD, University of Massachusetts Boston  
MEd, Boston College  
BS, Emerson College

Maria Paiewonsky is the participatory action research coordinator for the Think College program at the ICI. She oversees numerous postsecondary and transition-related projects with teachers, interdisciplinary team members, students with disabilities, and families to develop positive transition outcomes from school to adult life.

Ms. Paiewonsky has an interest in participatory action research and uses a number of research methods with various participants to promote their perceptions and assessment of transition-related activities. Her work also includes online course development and teaching, as well as face-to-face training and technical assistance on transition and postsecondary topics. These topics include youth development and self-determination, career development, and access to postsecondary education.

Judith Palfrey  
**Co-Chair, Children’s Hospital Global Health Initiatives, Children’s Hospital Boston**  
**T. Berry Brazelton Professor of Pediatrics at Harvard Medical School, and Professor of Society and Human Development at Harvard School of Public Health, MD, Columbia University**  
AB, Radcliffe College

Judith Palfrey is the T. Berry Brazelton Professor of Pediatrics at Harvard Medical School, and Professor of Society and Human Development at Harvard School of Public Health, as well as Professor of Global Health and Social Medicine at Harvard Medical School. Dr. Palfrey came to Children’s Hospital Boston (CHB) in 1974 as a fellow in Community Child Health following her internship and residency in pediatrics at Albert Einstein College of Medicine in New York City. She has a primary interest in the concerns of children with disabilities and special health-care needs. For over thirty years, Dr. Palfrey has developed now universally accepted approaches for helping families and children achieve greater functional capacity. She is now turning her energies to sharing these approaches with underserved immigrant populations in the United States and more broadly on an international basis.

In Boston, Dr. Palfrey directs Opening Doors, a project to provide comprehensive services to children with special health-care needs and disabilities who come from underserved communities. Opening Doors has collaborated with the Boston Chinatown Neighborhood Center, the Eritrean Community Center, the Ethiopian Community Mutual Assistance Association, the Haitian American Public Health Initiative, the Massachusetts Alliance of Portuguese Speakers,
the Massachusetts Asian and Pacific Islanders for Health, and the Somali Development Center to improve access of these communities to early identification and early intervention services, to community-based recreation, and to opportunities for college.

Dr. Palfrey is currently serving as an advisor to the Ministry of Education in Chile on a project designed to study the possibility of replicating Head Start in a country where there is a wide gap in opportunities between rich and poor children. In Indonesia, Dr. Palfrey has served as a consultant to the International Office of Migrations, assisting with the redesign of the primary health-care system in the wake of the 2004 tsunami.

As the immediate past president of the American Academy of Pediatrics (AAP), Dr. Palfrey has been working with the AAP to assist the Haitian Pediatric Society in the wake of the 2010 earthquake. She also provided consultation to several universities in Chile in the wake of the 2010 earthquake and tsunami using the materials of the AAP Disaster Course. She is a delegate to the International Pediatric Association.

In 1995, Dr. Palfrey was one of the five American finalists for the position of executive director of UNICEF, the United Nations Children’s Fund. She is the author of *Community Child Health: An Action Plan for Today* (Praeger Press, 1994) and *Child Health in America: Making a Difference through Advocacy* (Johns Hopkins Press, 2006).

**Myra Rosen-Reynoso**  
**Senior Research Associate**  
PhD, Developmental Psychology, Boston College  
MEd, Harvard University  
BA, Georgetown University

Myra Rosen-Reynoso has been directing the OPT4College project at the ICI for the past three years. OPT4College is a randomized-control study aimed at improving transition to college for urban minority students with disabilities or special health-care needs. In addition, Dr. Rosen-Reynoso is implementing a statewide survey of Massachusetts high schools on transition practices as part of the Medicaid Infrastructure and Comprehensive Employment Opportunities (MI-CEO) grant.

Dr. Rosen-Reynoso has studied adolescent risk and prevention, and women with disabilities and their employment outcomes. She completed an adolescent sexuality research study at the Wellesley Centers for Research on Women at Wellesley College, where she received extensive training on qualitative methodologies. Her doctoral dissertation was on the employment experiences and outcomes of Latinas with psychiatric disabilities living in Boston.

Dr. Rosen-Reynoso completed a one-year post-doctoral fellowship at the Center for Multicultural Mental Health Research at Cambridge Health Alliance/Harvard Medical School, where she worked with diverse communities including: Haitian and Afro-Caribbean, Brazilian, Latino, Asian, and African-American. In this fellowship, she was trained in a variety of research methodologies via the University of Michigan’s Institute for Social Research.
Jennifer Sulewski  
**Senior Research Associate**  
PhD, Social Policy, Brandeis University  
SM, Environmental Engineering, Massachusetts Institute of Technology  
SM, Technology and Policy, Massachusetts Institute of Technology  
BA, Boston College

Jennifer Sulewski has over 14 years of research experience, including nine years at the ICI. She is currently coordinating an evaluation of activities geared toward increased integrated employment at the Massachusetts Department of Developmental Services. Dr. Sulewski also serves as evaluator for the Greater Boston Employment Collaborative (a collaborative of service providers, state agencies, employers and people with disabilities). She provides research and evaluation support to the Work Without Limits Initiative, funded by the Massachusetts Medicaid Infrastructure and Comprehensive Employment Opportunities grant.

Dr. Sulewski is a member of the evaluation team for the ICI-based Think College Coordinating Center for Transition and Postsecondary Programs for Students with Intellectual Disabilities. She has conducted or managed program evaluations of a diverse array of projects, including an integrated mental-health/physical-health/employment-support system in two Washington counties; a support center for families of people with developmental disabilities in a Massachusetts city; and multiple training series provided across Massachusetts by the ICI for audiences ranging from job developers to family members to youth with intellectual and/or developmental disabilities.

Ludwik Szymanski  
**Director of Psychiatry Emeritus**  
MD, Hebrew University Medical School, Jerusalem, Israel

Ludwik Szymanski joined the Developmental Evaluation Center (which later became the ICI) in 1967. Over the years, he developed and directed the clinical and training program in psychiatry of developmental disabilities at Children’s Hospital. Dr. Szymanski is an associate professor of psychiatry at Harvard Medical School. He was one of the psychiatrists who first developed the field of psychiatry of intellectual/developmental disabilities (IDD). His interests include diagnosis and treatment of mental disorders in people with IDD; facilitating their inclusion in normalized community environments; training psychiatrists in the field of developmental disabilities; and sexual, legal, and forensic issues of persons with IDD.

For many years Dr. Szymanski served as a consultant to the US Department of Justice and to state governments on mental-health care of people living in residential institutions. In 1990, he established and directed at ICI a Center for Autism and Related Disorders. Dr. Szymanski has served as a chair of committees on intellectual disability for the American Academy of Child and Adolescent Psychiatry and for the American Psychiatric Association. He has taught and
presented his work in professional conferences locally, nationally, and internationally (including the Netherlands, Israel, Poland, Turkey, Finland, Italy, and the UK).

Dr. Szymanski is the co-editor of a book on mental disorders of people with intellectual disability. He also has written and co-authored numerous chapters in major textbooks of psychiatry, child psychiatry, and developmental pediatrics, and has published scientific papers on mental health and developmental disabilities. Dr. Szymanski is a recipient of many awards from professional organizations. Since his retirement, he has devoted his time to teaching trainees at the Leadership Education in Neurodevelopmental Disabilities (LEND) program at Children’s Hospital Boston, and to mentoring students engaged in international projects related to mental health and developmental disabilities.

**Cindy Thomas**  
**Director of Employment Services, Training and Technical Assistance**  
MS, Rehabilitation Counseling, Boston University  
BA, Boston College

Cindy Thomas has over 25 years of experience providing employment services for individuals with significant disabilities and directing state- and federally-funded projects. At the ICI, she has been responsible for overseeing the provision of employment services and supports for over 400 individuals with significant disabilities. As principal investigator for a number of state and federal grants and contracts, Ms. Thomas oversees a variety of employment-related training, technical assistance, and systems-change initiatives. She has extensive experience working with the vocational rehabilitation system, community rehabilitation providers, and the workforce development system on strategies to improve employment outcomes for people with disabilities.

Ms. Thomas has presented locally and nationally on employment issues. Prior to joining the ICI, she worked in several direct-service roles. In her local community she has served on the board of directors for a number of non-profit organizations serving individuals with disabilities and the community at large, and she is an elected member of the school committee. Ms. Thomas is a certified rehabilitation counselor.

**Jean Winsor**  
**Research Associate**  
PhD, Public Policy, University of Massachusetts Boston  
MS, Educational Psychology and Methodology, University at Albany-SUNY  
BA, Binghamton University-SUNY

Jean Winsor’s work focuses on state systems and integrated employment, as well as program evaluation. She has investigated the policies and practices of states with high rates of integrated employment for people with intellectual and developmental disabilities (IDD). Dr. Winsor has also engaged in research to better understand the methods states use to collect data on employment outcomes, the strategies they use to fund employment services, and the factors that impact the choices individuals with IDD make about employment.
Dr. Winsor has conducted program evaluations for Washington’s Division of Developmental Disabilities and for Clark County, Washington. Currently she is the coordinator of the National Survey of Day and Employment Programs and is engaged in the development of strategies to support individuals with IDD to conduct qualitative research. Prior to joining the ICI in 2002, Dr. Winsor provided school- and community-based supports to adolescents and adults with IDD for ten years.

Yueh-Hsia Yu
Adjunct Faculty, Vision Studies
PhD, Educational Research, Measurement & Evaluation, Boston College
MEd, Special Education/Visually Handicapped, Boston College
BS, National Taiwan Normal University, Taipei, Taiwan

Yueh-Hsia Yu is director of the Blind & Visually Impaired Center of Monterey County, CA and is adjunct faculty at UMass Boston, teaching literary Braille and Music Braille. Dr. Yu has also helped expand collaboration between the teacher-training programs at UMass Boston and Taiwan Normal University.

Through Dr. Yu’s efforts, the University of Massachusetts Vision Studies Program has an online bilingual curriculum in the North American Literary and Nemeth code, as well as Braille Music. Dr. Yu has been a strong advocate for an expanded collaboration between UMass Boston and the Taiwan Lions Club. The ICI’s Northeast Regional Center for Vision Education has a pending $160,000 proposal to establish a bilingual Low Vision Therapy graduate certificate to expand the vision-therapy curriculum of the optometric students trained in Taiwan.
Appendix O: Letters of Intent to Affiliate

This section includes letters of intent to affiliate or participate in some way with the School of Global Inclusion and Social Development. These institutions of higher education have expressed an interest in becoming more involved with the activities of the School in the coming years. Additional affiliation opportunities will be developed in the first three years of the School’s existence and beyond.

These letters include:

Miguel Angel Verdugo Alonso, PhD
Director
Institute for Community Integration
University of Salamanca

Errol Cocks, MPsysc PhD
Director
Centre for Research into Disability and Society
Curtin Health Innovation Research Institute
Curtin University of Technology

David O’Hara PhD
Chair, International Committee
Association of University Centers on Disabilities (AUCD)

Felicia Wilczenski, EdD
Professor and Interim Dean
College of Education and Human Development
University of Massachusetts Boston
Salamanca, 2\textsuperscript{nd} March 2011

William E. Kiernan, Ph.D.
Director and Research Professor
Institute for Community Inclusion
University of Massachusetts Boston
100 Morrissey Blvd.
Boston, MA 02115-3393
USA

I am very pleased about hearing about the setting up of a new School of Global Inclusion and Social Developmental, which the University of Massachusetts in collaboration with the Institute for Community Inclusion will be developing.

After reading the description of the school, I would like to tell you that it is always a pleasure to hear about this kind of initiative; I think it is an interesting project, with a large number of noteworthy issues and with an international scope, focus to help people with disabilities and other special needs.

So, I would like to show my support to the new School and I must admit that it will be a privilege to be a part of this initiative and be able to collaborate with the idea.

Sincerely,

Miguel Angel Verdugo Alonso, Ph.D.
Director of Institute for Community Integration
University of Salamanca, Spain
March 23, 2011

Dear Bill

Your plans to establish a new School of Global Inclusion and Social Development are very exciting and I can see such a School continuing the excellent work of your Institute. I have valued our contact since the mid-1990s when I was in the UK and then from the Middle East. We are very interested to explore affiliation with the new School, particularly to pursue collaboration in research and academic enterprises that reflect our mutual interests in promoting social inclusion.

Curtin University is the largest of five universities in Western Australia with a student cohort of over 30,000, including a substantial proportion of overseas students. My School of Occupational Therapy and Social Work is located in the Faculty of Health Sciences and currently has a student cohort of about 950. The School provides four-year BSc degrees in occupational therapy and in social work, and graduate entry master programs that enable graduates to qualify in two-year MSc programs. We also offer higher degree research programs (MPhil and PhD) and have about 35 HDR students and about 30 Honours students in the undergraduate programs.

My Centre (CRDS) manages the School’s research and graduate studies programs. Much of our research is focused on disability and other groups that experience vulnerability. Currently we have about 15 externally funded research projects. As you know, the CRDS is affiliated with the AUCD and we value that connection.

The School established an international experiential program for OT students about 8 years ago (OT Abroad) which enabled students to spend semesters in countries in the southeast Asian region and in some eastern European countries. The program was very successful – so much so that the Faculty took it over.

Please keep me informed of your progress in establishing the new School and I would be pleased to provide any further information.

Regards,

Errol

Professor Errol Cocks MPsysc PhD
School of Occupational Therapy and Social Work | Faculty of Health Sciences
Director, Research and Graduate Studies

Director
Centre for Research into Disability and Society
Curtin Health Innovation Research Institute
Curtin University of Technology | GPO Box U1987 | Perth | Western Australia 6845
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e.cocks@curtin.edu.au
March 20, 2011

William E. Kiernan, Ph.D.
Director and Research Professor
Institute for Community Inclusion
University of Massachusetts Boston
100 Morrissey Blvd.
Boston, MA 02115-3393

Dear Bill:

Please let me applaud you, the Institute, and The University of Massachusetts for pursuing this initiative. It could provide a very timely focus for the range of international activity pursued by the many member universities of the Association of University Centers on Disabilities (AUCD). The specific international mandate placed on the member university programs of AUCD by the last reauthorization of the Developmental Disabilities Act is reflected in the range of individual initiatives currently being pursued. What is proposed by the Institute for Community Inclusion and the University of Massachusetts could provide a critical new focus for this multiplicity of activity. In particular, the planned emphasis on the international issues of inclusion as well as social and economic development offers what I believe is the right umbrella to bring together future AUCD member university activities.

I also believe that the key focus you propose for this new School – “the preparation of leaders in global inclusion and social development who are knowledgeable in the area of creating inclusive communities” - is the right one. As you describe in your summary description, you can build on the extensive range of existing of programs and initiatives of the University of Massachusetts and the Institute. This provides an explicit definition of the broad agenda you plan to pursue while at the same time demonstrating how you plan to maximize the impact of the proposed new School. Your proposed structure for the development and support of collaborative activity provides many avenues for success.

As you know, I have been Chair of the International Committee of the AUCD for over twenty years as well as a committee member of the International Association for the Scientific Study of Intellectual Disabilities (IASSID). During that time there has been a constant back and forth dialogue between these two organizations on how international collaboration can promote the goals you define for the new School around the world and especially in developing countries. I think that what is being proposed represents the kind of university commitment that will be critical to moving this agenda forward. It will be a critical focus of the next quadrennial meeting of IASSID in Halifax, Nova Scotia in July, 2012. Both AUCD and IASSID at that meeting will, I believe, want to explore how they can together pursue the goals you define for the new School.

So the timing of the plans for the new School is excellent. And your own leadership contributions to both AUCD and the American Association on Intellectual Disabilities give you a very informed perspective on how to maximize both the School’s and other international US university contributions worldwide.
I look forward to hearing more on the progress toward the creation of the new School. We should make your proposal a focus of the AUCD International Committee agenda at our annual Association meeting in the fall.

May I wish you every success.

Sincerely,

David M. O’Hara
Chair, International Committee
August 5, 2011

Winston Langley, Provost and Senior Vice Chancellor for Academic Affairs
University of Massachusetts Boston

Dear Provost Langley,

I am pleased to support your effort in establishing a School for Global Inclusion and Social Development. This initiative fits well with the University’s vision to enhance UMass Boston’s standing as a research university with a public service mission and an inclusive global perspective. The Institute for Community Inclusion (ICI) is ideally suited to fulfill the vision and mission of the new School.

The core of ICI’s current work is engaging communities at the local, national, and international levels to address issues of capacity development through pre-service and in-service training, policy research, and the development of inclusive practices. It is easy to imagine how this longstanding work can also serve as the core of the new School in studying and supporting global inclusion and social development in the U.S. and in other countries. Through the new School, ICI would acquire an academic presence within the University allowing for deeper partnerships and greater opportunities for collaboration with faculty and students among the existing UMass Boston colleges, centers, and institutes. The academic status of the School would allow for an exchange of scholars to facilitate ICI in extending its collaborations geographically to confront more complex social challenges in a global environment. As part of an academic unit, ICI would further contribute to the University through the expansion of selected pre-service and in-service training and degree programs.

ICI would form the basis of a diverse and inclusive School that would provide scholarly environments for faculty and students across the University to nurture a respect for differences, stimulate curiosity, and enact civility. The new School would expand ICI’s concern with social inclusion beyond local communities to worldwide cultures and communities that share a desire to seek equality and improve the quality of life for all. ICI is influential in the framing of state and national disability policies and practices and is one of the premiere University Centers of Excellence in Disabilities (UCED) hosting 12 national and 6 regional and state centers or major projects. Given the already high regard for its exemplary work, ICI would immediately impart to the new School an excellent reputation and advanced standing in the eyes of funding agencies, policy-makers, scholars, and students.

There are several ICI-supported programs within the College of Education and Human Development (CEHD). The program for teachers of students with visual impairments began as a New England regional program but now has outreach training in Taiwan, Guam, and India. Another ICI grant allowed the establishment of an early childhood program to address the
critical need for teachers of young children, especially those at risk due to disabilities or psychosocial circumstances. A new grant awarded to Dr. Molly Tschopp and co-directed by Dr. William Kiernan will expand the offerings in rehabilitation counseling over the next five years, engaging students in both research and practice options in their training. Beyond this the ICI is developing a national pre-service training program in Rehabilitation Teaching that will address the need for professionals who are able to assist adults who are blind or visually impaired to be more independent in their homes. This is coupled with the ICI’s nationally approved program in Orientation and Mobility training again addressing issues of advanced training and national certification focusing on the needs of visually impaired or blind adults. All of these programs bring financial resources to the CEHD as well as research, teaching, and professional development opportunities for faculty and students. The example of CEHD demonstrates the benefits of ICI collaborations that could be extended University-wide. To realize its full potential, ICI’s multidisciplinary work needs a broader platform at UMass Boston than is available within CEHD.

As co-chair of the ICI AQUAD review conducted in June of 2010, I gained insight into the high quality programs that ICI provides through an interdisciplinary model for research and training. The recommendations of the AQUAD to increase ICI’s visibility and integration in the University as a whole could be realized through the formation of a new School of Global Inclusion and Social Development with ICI as its core. ICI’s work in disability policies and practices intersects with all the Colleges at UMass Boston and the new School would be well-positioned to lead fruitful collaborations among faculty and students across campus. ICI currently performs all the functions of an academic unit. Its scholarly, teaching, community service, and global outreach efforts are compatible with the mission and strategic plan of the University. ICI has a vital role to play in UMass Boston’s strategic development into a more research-oriented campus with more graduate programs.

Incorporating ICI into the academic life of the University will require that academic status be granted to the Institute by investing in degree programs and tenure line faculty positions. Through the new School for Global Inclusion and Social Development, ICI will make UMass Boston a model for research and scholarship that is interdisciplinary and translational, helping to solve key societal problems with the best research evidence developed and gleaned from multiple disciplines.

Thank you.

Sincerely,

Felicia L. Wlczenski, Ed.D.
Professor and Interim Dean