Town Hall Meeting

October 23, 2019

Presented by: Katherine Newman, Interim Chancellor
Kathleen Kirleis, Vice Chancellor for Administration and Finance
Emily McDermott, Interim Provost and Vice Chancellor of Academic Affairs
Garrett Smith, Deputy Chancellor
Two quick announcements

1. **Athletics update**

2. **Bayside Sessions with Accordia Partners**

### Information Session on Campus

- **Wednesday, November 20**
  - 3:30pm-5:00pm
- Snowden Auditorium, Wheatley Hall

*Hosted by UMass Boston*

### Community Visioning Sessions

- **Saturday, October 26**
  - 10:00am-12:30pm
- Carson Place (BTU), 180 Mt. Vernon St.

*Hosted by Citizens Connect to Bayside*
Agenda

- Introduction
- FY19 Operating Results
- FY20 Operating Budget
- FY20 Capital Budget
- AY19-20 Chancellor’s Goals
- Questions and Comments
FY19 Operating Results
FY 2019 Preliminary Results

• **University was able to finish the year with a balanced budget**

  • Departmental expenses were within budget – thank you!!
  
  • Depreciation and interest expenses were within budget
  
  • Net tuition and fees were down due to changes in course-taking behavior
  
  • Legislature appropriated extra funding for collective bargaining increases for state-funded employees
  
  • $3.4M one-time accounting adjustment
## FY19 Actual Results

<table>
<thead>
<tr>
<th></th>
<th>FY19 Adopted Budget ($thousands)</th>
<th>FY19 Forecast Third Quarter ($thousands)</th>
<th>FY19 Unaudited Actuals* ($thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition &amp; Fees</td>
<td>190,999</td>
<td>180,734</td>
<td>180,898</td>
</tr>
<tr>
<td>State Appropriation</td>
<td>136,471</td>
<td>139,472</td>
<td>140,659</td>
</tr>
<tr>
<td>Other</td>
<td>109,030</td>
<td>109,665</td>
<td>113,306</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>436,500</td>
<td>429,871</td>
<td>434,863</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and Fringe Benefits</td>
<td>269,623</td>
<td>269,860</td>
<td>269,723</td>
</tr>
<tr>
<td>Non-personnel operating expenses*</td>
<td>101,446</td>
<td>97,068</td>
<td>98,429</td>
</tr>
<tr>
<td>Scholarships and fellowships</td>
<td>17,186</td>
<td>17,180</td>
<td>17,983</td>
</tr>
<tr>
<td>Depreciation Expense</td>
<td>29,474</td>
<td>28,443</td>
<td>28,010</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>17,186</td>
<td>17,321</td>
<td>16,823</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>436,500</td>
<td>429,871</td>
<td>430,968</td>
</tr>
<tr>
<td><strong>Surplus/(Deficit)</strong></td>
<td>-</td>
<td>-</td>
<td>3,895</td>
</tr>
</tbody>
</table>

*FY19 Actual includes one-time accounting adjustment (system-wide) that reduced campus non-personnel operating expenses by $3.4M
FY19 Actual Results – Tuition & Fee Revenue

- Precipitous decline in FY19 net Tuition & Fee Revenue from Budgeted
  - $10M difference between budgeted and Unaudited Actual

<table>
<thead>
<tr>
<th>Area of Change</th>
<th>Amount ($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-state vs Out-of-state enrollment mix</td>
<td>(1.0)</td>
</tr>
<tr>
<td>CAPS course taking &amp; over 12 credit impact</td>
<td>(4.0)</td>
</tr>
<tr>
<td>Navitas, Professional Development</td>
<td>(2.7)</td>
</tr>
<tr>
<td>Other Fees</td>
<td>(1.5)</td>
</tr>
<tr>
<td>Tuition Discounting</td>
<td>(0.9)</td>
</tr>
<tr>
<td>Total</td>
<td>(10.1)</td>
</tr>
</tbody>
</table>

- Tuition discounting is increasing more rapidly than gross revenue
  - Gross Tuition & Fee revenue increased $13.4M or an average of 1.9% annually FY16-19
  - Discounting (institutional aid excluding waivers) increased $9.4M or an average of 6.0% annually FY16-19
  - 70% of increased Tuition & Fee revenue going to Discounting (Campus Living and Merit Scholarships)
Reserves (Unrestricted)

Use of Unrestricted Reserves:

- Recurring operating expenses must be covered by recurring revenues. The use of reserves to pay for operating expenses is a non-recurring revenue source and not sustainable.
- Reserves may not be used to balance the operating budget per the Board of Trustees’ Reserve Policy.
- Reserves increased in FY19 due to one-time accounting adjustment and capital activity that is planned for future years.

<table>
<thead>
<tr>
<th></th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19 (unaudited)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted net assets</td>
<td>88,321</td>
<td>72,024</td>
<td>40,352</td>
<td>40,265</td>
<td>38,620</td>
<td>47,020</td>
</tr>
<tr>
<td>Total expense</td>
<td>347,427</td>
<td>377,435</td>
<td>411,912</td>
<td>424,462</td>
<td>424,202</td>
<td>430,967</td>
</tr>
<tr>
<td>Financial cushion</td>
<td>25.4%</td>
<td>19.1%</td>
<td>9.8%</td>
<td>9.5%</td>
<td>9.1%</td>
<td>10.9%</td>
</tr>
</tbody>
</table>
FY20 Operating Budget
### Operating Margin Trend

<table>
<thead>
<tr>
<th></th>
<th>FY14 Actual</th>
<th>FY15 Actual</th>
<th>FY16 Actual</th>
<th>FY17 Actual</th>
<th>FY18 Actual</th>
<th>FY19 Actual</th>
<th>FY20 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enrollment (Fall FTE)</strong></td>
<td>12,333</td>
<td>12,833</td>
<td>13,137</td>
<td>13,013</td>
<td>13,036</td>
<td>13,213</td>
<td>13,134</td>
</tr>
<tr>
<td><strong>Revenue (annual, $ thousands)</strong></td>
<td>354,137</td>
<td>376,122</td>
<td>406,403</td>
<td>421,461</td>
<td>426,590</td>
<td>434,863</td>
<td>442,523</td>
</tr>
<tr>
<td><strong>Expenses (annual, $ thousands)</strong></td>
<td>347,427</td>
<td>377,435</td>
<td>411,912</td>
<td>424,463</td>
<td>424,202</td>
<td>430,967</td>
<td>442,523</td>
</tr>
<tr>
<td><strong>Operating Margin $ (annual, $ thousands)</strong></td>
<td>6,710</td>
<td>-1,313</td>
<td>-5,509</td>
<td>-3,002</td>
<td>2,388</td>
<td>3,895</td>
<td>-</td>
</tr>
<tr>
<td><strong>Operating Margin %</strong></td>
<td>1.9%</td>
<td>-0.8%</td>
<td>-1.4%</td>
<td>-0.7%</td>
<td>0.6%</td>
<td>0.9%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>
# FY20 Board of Trustees Adopted Budget

<table>
<thead>
<tr>
<th></th>
<th>FY19 Unaudited Actual ($millions)</th>
<th>FY20 Adopted Budget ($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition &amp; Fee</td>
<td>180,898</td>
<td>182,056</td>
</tr>
<tr>
<td>State Appropriation</td>
<td>140,659</td>
<td>144,708</td>
</tr>
<tr>
<td>Other</td>
<td>113,306</td>
<td>115,759</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and Fringe Benefits</td>
<td>269,723</td>
<td>268,359</td>
</tr>
<tr>
<td>Non-personnel operating expenses</td>
<td>98,429</td>
<td>101,938</td>
</tr>
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<tr>
<td>Depreciation Expense</td>
<td>28,010</td>
<td>33,578</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>16,823</td>
<td>21,468</td>
</tr>
<tr>
<td><strong>Subtotal Expense</strong></td>
<td>430,968</td>
<td>442,523</td>
</tr>
<tr>
<td><strong>Surplus/(Deficit)</strong></td>
<td>3,895</td>
<td>-</td>
</tr>
</tbody>
</table>
## FY20 High-level Balanced Budget Assumptions

<table>
<thead>
<tr>
<th>Increased Pressure (decreased revenue/increased expense)</th>
<th>($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest &amp; Depreciation</td>
<td>(10.2)</td>
</tr>
<tr>
<td>Merit Scholarship</td>
<td>(2.5)</td>
</tr>
<tr>
<td>Unfunded Collective Bargaining Increase</td>
<td>(.7)</td>
</tr>
<tr>
<td>Fringe Rate</td>
<td>(2.5)</td>
</tr>
<tr>
<td>Enrollment</td>
<td>(1.9)</td>
</tr>
<tr>
<td>No one-time accounting adjustments</td>
<td>(3.4)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Solutions (increased revenue/decreased expense)</th>
<th>($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition &amp; Fee increase</td>
<td>5.3</td>
</tr>
<tr>
<td>Ground lease from residence halls</td>
<td>0.5</td>
</tr>
<tr>
<td>Personnel: VSIP, elimination of vacancies, etc.</td>
<td>11.8</td>
</tr>
<tr>
<td>Non-personnel: 3% departmental reductions/other efficiencies</td>
<td>2.4</td>
</tr>
<tr>
<td>RTF</td>
<td>0.7</td>
</tr>
</tbody>
</table>

*Note: No Bayside proceeds are included in the FY20 budget.*
Throughout FY20, progress will be monitored in a number of ways:

- **Investing and monitoring revenue**
  - New student enrollment, retention, online growth and international students

- **Variance reporting process to identify key material differences from budget**
  - Monitoring general operating spend vs budget and prior year on a quarterly basis
  - Requires explanation from budget owners for significant variances

- **Important data points**
  - Tuition and Fee revenue analysis
    - Fall, half year, spring
  - Monthly expense projections based on current year vs prior year trending (augmented by variance reporting process)

- **Carry-forward process**
  - Revenue-based chartfield review at half year to determine if there is room to release carry-forward balances
  - RTF changes in FY20 include allowing carry-forward for capital purchases and start up projects

**New and current process implementation will ensure that the FY20 BOT target is achieved**
FY20 Centers & Institutes

- Taskforce submitted final report to the Provost on April 4, 2019

- Many of the Taskforce recommendations were incorporated into the FY20 Glide-Path Assessment and were included in the report to the Commonwealth that was submitted on October 7, 2019
  
  - A budget development methodology was applied to centers and institutes (C&Is) that is consistent with other university units, as well as includes
    
    - A baseline institutional investment
    
    - A return on investment (ROI) credit
    
    - Costs associated with teaching loads and shared services are planned are being shifting from C&I’s to reduce expenses

- FY20 budgets distributed on October 9th, 2019 reflecting assessment results.
FY20 Capital Budget
FY20 Adopted Capital Budget

FY20-24 Local Capital Plan approved by Cabinet

Capital projects funded in three ways: Local (Depreciation or Reserves), Debt (UMBA) or by State Appropriation/Debt (DCAMM)

1. **Local Projects:**
   - $7.7M of new local funding preliminarily approved for FY20 start, including
     - $1.2M for Academic departments
     - IT, Student Affairs, Facilities, Athletics and Campus Services
   - $10.9M of committed prior-year funding in FY20

2. **UMBA Projects:**
   - SDQD and REAB,

3. **DCAMM Projects:**
   - SDQD (provided $78M funding)
   - Critical Repair Program (split-funded)
Chancellor’s Goals
Thirteen Chancellor’s goals have been established for FY20
(goals mandated by the President’s Office are noted in red)

1. **Operating margin**: Achieve an operating margin of more than 0% as measured by audited financial results.

2. **Student success**: Improve student success including increased retention, graduation, and career attainment rates.

3. **Faculty and staff excellence**: Invest in excellence and diversity of faculty and staff, with a focus on supporting faculty research.

4. **Enrollment**: Increase enrollment numbers, with a focus on predictive and accurate models and proven best practices.

5. **Online**: Provide significantly increased access to, and impact from, online education. Increase revenues and continue to collaborate and cooperate with UMass Online.

6. **Enhance the academic organization**: Continue the process of aligning campus academic structure with resources.

7. **Administrative enhancements**: Enhance administrative quality, while promoting greater administrative efficiency.

8. **Fundraising**: Increase fundraising donations and pipeline programs for future giving with an emphasis on growing the endowment.

9. **Connecting to Boston**: Improve ties to major industries, and maximize opportunities for students to realize their occupational ambitions in the private, public, and non-profit sectors.

10. **Campus rehabilitation and planning process**: Improve the physical appearance and functionality of the campus.

11. **UMB visibility**: Increase the visibility and reputation of UMB to student, family, alumni, donor, community, and policy maker audiences.

12. **Financial planning**: Collaborate with, and follow the recommendations of, the UMPO Financial Planning Advisory Working Group.

13. **Outreach**: Insure Boston delegation and other legislators are kept apprised of campus concerns, milestones, and needs for support. Coordinate with President’s Office on advocacy efforts for system-wide legislative issues.
Eliminate the structural deficit:

➢ Grow revenue:
  ▪ strategic revenue initiatives – new student enrollment, retention initiatives, online program growth, international programming, optimization of per student net revenue, and other initiatives.

➢ Reduce expenditures *(in process)*:
  ▪ Voluntary Separation Incentive Program
  ▪ 3% cut to all division budgets
  ▪ strategic re-organizations across administrative units,
  ▪ careful alignment of NTT faculty resources with high-need instructional areas,
  ▪ other strategic cost savings measures.

Plan for a 2% margin: Establish plans to move beyond a 0% margin towards the Trustees’ requirement of 2% margin by FY23.
GOAL 2 - Student Success:
Improve student success – increase retention, graduation, and career attainment rates

- **Promote supportive and engaging student experience:**
  - Deepen programs in student life, focus attention on the residence hall community and the commuter population.
  - Continue to grow 24/7 student experience: safety, successful operation of residence halls, leadership and community engagement, learning communities, student employment, athletics, and other activities.

- **Improve undergraduate advising:** Continue advising enhancement initiative. Focus on equitable distribution of advising resources, deepen the use of common tools, metrics, and practices.

- **Execute retention campaigns using early warning predictors, supported by analysis and technology tools:**
  - Extend and deepen use of predictive analytics, early alert campaign and use of CRM technology.
  - Use data to identify and target barriers to student success, including common reasons for transfer or withdrawal.

- **Remove barriers to student progression:** Continue to remove course bottlenecks and improve DFW rates in gateway courses (particularly in math), streamline the registration process, provide emergency and targeted financial support to deserving students.

- **Expand career development opportunities:** further engage and prepare students to succeed post-graduation: on-campus apprenticeships, career-oriented course offerings, and internship and job pipelines through industry clusters.

- **Advance graduate student success:** Expand student orientation, increase writing and statistical modeling support, enhance community building, improve tracking of time to degree, and include a focus on development of marketable skills. Create and monitor metrics charting increased responsiveness to student needs.
This fall, we have our largest-ever cohort of returning second-year students due to the size of last fall’s freshman class.

First-time, full-time freshmen returning for subsequent fall semester

<table>
<thead>
<tr>
<th>Year</th>
<th>Original Cohort</th>
<th>Retention Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2009</td>
<td>973</td>
<td>77.3%</td>
</tr>
<tr>
<td>Fall 2010</td>
<td>936</td>
<td>74.9%</td>
</tr>
<tr>
<td>Fall 2011</td>
<td>1,069</td>
<td>75.0%</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>1,249</td>
<td>78.9%</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>1,172</td>
<td>77.5%</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>1,314</td>
<td>79.6%</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>1,440</td>
<td>77.8%</td>
</tr>
<tr>
<td>Fall 2016</td>
<td>1,539</td>
<td>79.4%</td>
</tr>
<tr>
<td>Fall 2017</td>
<td>1,545</td>
<td>77.8%</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>1,799</td>
<td>76.8%</td>
</tr>
<tr>
<td>Fall 2019</td>
<td>2,279</td>
<td>75.2%</td>
</tr>
</tbody>
</table>

Note: Includes first-time, full-time freshmen in fall cohorts of respective academic years; retention rate is share of original cohort that returned to UMB in fall of following year. Source: OIRAP; 2018 figures preliminary as of Oct 1, 2019.
Freshmen of different racial/ethnic identities (by federal reporting category) were retained at differing rates

One-year retention rates among first-time, full-time freshmen by race/ethnicity, Fall 2016, 2017, 2018 cohorts

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Fall 2016</th>
<th>Fall 2017</th>
<th>Fall 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>84%</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Black</td>
<td>80%</td>
<td>80%</td>
<td>79%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>75%</td>
<td>71%</td>
<td>80%</td>
</tr>
<tr>
<td>White</td>
<td>73%</td>
<td>76%</td>
<td>75%</td>
</tr>
<tr>
<td>Non-Resident Alien</td>
<td>84%</td>
<td>84%</td>
<td>79%</td>
</tr>
<tr>
<td>Not Specified</td>
<td>73%</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Multiracial</td>
<td>62%</td>
<td>70%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Note: Includes first-time full-time freshmen in fall cohorts of respective years; excludes students identifying as Native American due to small n size (n<10 students per year)

Source: OIRAP; retention figures preliminary as of Oct 1, 2019
Each of the colleges has experienced moderate variation in freshman retention rates over the past three years.

One-year retention rates among first-time, full-time freshmen by college at entry, Fall 2016, 2017, 2018 cohorts

<table>
<thead>
<tr>
<th>College</th>
<th>Fall 2016</th>
<th>Fall 2017</th>
<th>Fall 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSM</td>
<td>569</td>
<td>596</td>
<td>692</td>
</tr>
<tr>
<td>CLA</td>
<td>746</td>
<td>76%</td>
<td>72%</td>
</tr>
<tr>
<td>CM</td>
<td>74%</td>
<td>72%</td>
<td>74%</td>
</tr>
<tr>
<td>CNHS</td>
<td>187</td>
<td>83%</td>
<td>81%</td>
</tr>
<tr>
<td>SFE</td>
<td>150</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>CEHD</td>
<td>30</td>
<td>76%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Note: Includes first-time full-time freshmen in fall cohorts of respective years; excludes n=2 students in CAPS.
Source: OIRAP; retention figures preliminary as of Oct 1, 2019.
Our freshman graduation rates have risen steadily over the past several years.
GOAL 3 - Faculty and staff excellence:
Invest in excellence and diversity of faculty and staff, with a focus on supporting faculty research.

- **Invest in faculty excellence and diversity:**
  - Insofar as possible—in light of margin requirements—replenish tenure-track (TT) faculty vacancies.
  - Invest at least 20% of hiring resources into faculty diversification efforts.
  - Through redistribution of TT lines, invest in faculty growth in areas of high student demand and new fields of research.
  - Seek philanthropic support for endowed chairs and research.

- **Invest in staff excellence and diversity:** Redouble efforts to analyze and improve campus climate. Continue to roll out bias training across the campus to improve customer service.

- **Advance and support faculty research:**
  - Analyze and improve grant and proposal development and post award support.
  - Measure and increase the number of faculty proposals submitted.
GOAL 4 - Enrollment:
Increase enrollment and net tuition revenue, with a focus on predictive and accurate models and proven best practices.

- **Increase new undergraduate enrollment:**
  - Execute multi-channel marketing and communication strategy targeting applicants and committed students.
  - Optimize financial aid and merit scholarship strategies to strengthen yield and net revenue.
  - Improve campus visit experience.
  - Expand veteran student interest and services.

- **Maximize continuing undergraduate enrollment:** Execute visible and sustained registration campaigns to remove holds and reduce barriers to student progression.

- **Increase new graduate enrollment:** Achieve growth in revenue-producing graduate programs through streamlined application processing, targeted digital marketing, and deep collaboration with program faculty.

- **Sustain out-of-state enrollment and diversify international enrollment:**
  - Strengthen and deepen partnerships with international recruitment partners.
  - Boost international visibility in collaboration with Navitas.
  - Launch innovative new partnerships with Shorelight.
  - Improve and sustain out-of-state recruitment and marketing and host admitted student receptions.
**GOAL 5 - Online:**
Provide significantly increased access to, and impact from, online education. Increase revenues and continue to collaborate and cooperate with UMass Online.

- **Improve organizational focus:** Streamline management of online courses, appointing Dr. Mya Mangawang, a senior leader reporting directly to Provost – with a dotted line to the Chancellor - to lead the effort.

- **Build quality of online instruction:** Build faculty strength and supports for teaching online, including comprehensivewraparound services for new online instructors and for new course design and delivery. Institute measures to assure quality of online instruction.

- **Increase enrollment and revenue by 5%:** Execute a series of initiatives to increase enrollment.
  - launch new online programs, in addition to focusing on existing programs and individual online courses,
  - build marketing, lead generation, and nurture capacities for online programs,
  - assess and strengthen online faculty and student supports, and
  - assess and strengthen online instructional design and delivery capabilities.

- **Re-introduce revenue sharing:** for growth of new and existing online programs, providing a clear incentive to departments for online program growth.
GOAL 6 - Enhance the academic organization

- Advance the academic master plan.
  - Execute upon the program planning & approval processes that were developed in FY19.
  - Continue with governance fast tracking, implementing the revised AQUAD process.
  - Develop a full academic master program plan by January 2020.

- Continue to engage faculty in studying the academic structure on campus.
GOAL 7 - Administrative enhancements:
Enhance administrative quality, while achieving greater administrative efficiency.

- **Continue to conduct organizational reviews:**
  - IT, Athletics, Government Relations, Office of Grants and Contracts, Financial Aid, Undergraduate and Graduate Admissions designed to promote efficiency and effectiveness of administrative processes.

- **Reinforce commitment to customer service:** Renew our focus on service to students and to campus colleagues, with an emphasis on timely and useful customer feedback on performance for use in department level improvement.

- **Execute shared services initiative:** Integrate a shared services model both in the areas defined by the system office and in conjunction with our own needs on campus.

- **Support IT infrastructure enhancements:** Launch 60+ initiatives under the leadership of the new CIO to support student success & development, enrich & expand academic programs, and contribute to the teaching, learning, & working environment.
GOAL 8 - Fundraising:
Increase fundraising donations and pipeline programs for future giving with an emphasis on growing the endowment.

- Reach a target of $13.5 million in new gifts and pledges, as well as a set of advancement milestones in prospect qualification.
  - Chancellor/donor meetings
  - Major gift officer visits
  - Corporate/foundation proposals

- Build team fundraising strength
  - Build capacity in corporate and foundation relations
  - Complete hiring of front line fundraisers

- Cultivate prospects
  - Secure 500 face-to-face visits with prospects (a 230% increase over FY19)
  - Discover 100 new prospects
  - Host six “consultation dinners” in key geographies
GOAL 9 - Connecting to Boston:
Improve ties to major industries, and maximize opportunities for students to realize their occupational ambitions in the private, public, and non-profit sectors.

- Inaugurate on-campus apprenticeship program primarily for 1st and 2nd year students.
- Complete 20 Industry clusters and assure follow up.
- Enhance philanthropic relations with participating firms.
- Further develop student and faculty opportunities to engage with city, state and federal government offices, as well as community, civic, neighborhood and non-profit organizations.
- File proposal to host Minority Small Business Development Center.
GOAL 10 - Campus rehabilitation and planning process:
Improve the physical appearance and functionality of the campus.

- **Substructure Demolition and Quadrangle Development ("SDQD")**
  - Complete the decanting of the Science Center
  - Construct the new catwalk
  - Begin the demolition of the Science Center (completed summer 2020)
  - Design/plan the campus quadrangle, including engaging faculty, staff around the programmatic use of the space.

- **Master plan:**
  - Begin the preliminary update of the campus master plan.
  - Support the development and implementation of a strategic plan for facilities management and enhancement.
  - Begin development of the long-range plan for dept’s displaced by the demolition of the Science Center.

- **Bayside:**
  - In partnership with the President’s Office and the UMass Building Authority (UMBA), launch campus and community consultations to ensure participation of all constituencies in discussions with Accordia Partners.
  - Engage in preliminary consultations concerning the disposition of the 200,000 square feet reserved for UMB at Bayside.

- **Calf Pasture Pumphouse:**
  - Following Board of Trustees approval, issue a Request for Information to explore development plans for renovation of the Pumphouse and adjacent related parcels.
GOAL 11 - Visibility and Reputation:
Increase the visibility and enhance the reputation of UMB to internal and external stakeholders.

- Continue strategic effort to place stories in Boston and higher education industry media that tell the University’s positive story

- Hire a Chief Marketing Officer and develop an effective outreach plan that highlights the research and instructional excellence of UMB.
  - Reorganize marketing into a structure that is responsive to campus divisions and programs and achieves a measurable return on investment.
  - Strengthen UMB’s brand through consistent brand management and messaging,
  - Make more proactive use of social media, digital content, web-based communication.

- Convene the Boston Advanced Academic Consortium across local universities to promote collaboration and cross registration, particularly in UMB accelerated masters programs.
**GOAL 12 - Financial planning:**
Collaborate with, and follow the recommendations of, the UMPO Financial Planning Advisory Working Group, a collaborative system-wide project announced in August.

**GOAL 13 – Outreach:**
Ensure Boston delegation and other legislators are kept apprised of campus concerns, milestones, and needs for support.
QUESTION

and

ANSWER

SESSION