AY 2019–2020 Goals
Year-End Report

Katherine S. Newman, Interim Chancellor
July 31, 2020

Martin T. Meehan
President
University of Massachusetts
One Beacon Street
Boston, MA 02108

Dear President Meehan:

I am pleased to submit this final AY2019–20 report covering the goals that we mutually agreed upon, including operating margin, enrollment, fundraising, online growth, collaboration with the Financial Planning Advisory Working Group, and improvement in government relations.

Additionally, I am providing a report on a separate set of goals that my colleagues and I established for the year that include student success, faculty and staff excellence, enhancement to the academic organization, administrative efficiencies, connections to Boston, campus rehabilitation and planning, and improving campus visibility and reputation.

As you well know, this has been a challenging year, especially with the arrival of COVID-19 shortly after the start of the spring term. Our campus had the first confirmed case of the virus in January; hence, we have been dealing with the consequences for more than six months now. It is truly a tribute to UMass Boston that I can report such remarkable success in meeting our goals.

Nonetheless, our achievements did not come without pain for many of our colleagues who are on the receiving end of furloughs, layoffs, notices of potential non-reappointment, and unemployment. We truly wish these steps were not necessary to balance the budget and acknowledge that they have been very hard on very valued members of the UMass Boston community.

Following a one-page summary of progress toward meeting the goals, this report provides an overview of progress toward each goal. The appendix provides full details by each executive area. I should mention as well that we required every executive area to report weekly on the work of its leadership and direct reports throughout the period when we have all been “remote.” That record will continue to be maintained in order to provide a portrait of their diligence over time.
<table>
<thead>
<tr>
<th>GOAL</th>
<th>PROGRESS ACHIEVED</th>
</tr>
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<tbody>
<tr>
<td>1. Operating Margin</td>
<td>• Exceeded the goal of a 0% operating margin</td>
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<tr>
<td>(achieve 0% margin)</td>
<td></td>
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<tr>
<td>2. Enrollment</td>
<td>• In-state and out-of-state undergraduate first-year enrollment is up by 10+%. However, new transfer deposits, master’s deposits, and international enrollment (new and continuing) are all down. Head count will likely be on par with last year, but the mix (esp. the absence of international students) will cause revenue to decline.</td>
</tr>
<tr>
<td>(increase)</td>
<td></td>
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<tr>
<td>3. Fundraising</td>
<td>• $24.1 million in “total philanthropic achievement”</td>
</tr>
<tr>
<td>(exceed $13.5M)</td>
<td>• 79% above our campus-wide goal</td>
</tr>
<tr>
<td>4. Online</td>
<td>• FY20 online revenue will be at least $21.6 million, an 11% increase from the prior year.</td>
</tr>
<tr>
<td>(grow revenues)</td>
<td></td>
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<tr>
<td>6. Improve Government Relations</td>
<td>• Communicated frequently and proactively with Boston delegation and 29 elected officials in the statehouse</td>
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<tr>
<td>7. Student Success</td>
<td>• 6-year grad rate up from 48% to 49%                                                                                                         • 4-year grad rate up 26% to 27%                                                                 • 1-year first-year retention rate declined from 76% to 75%</td>
</tr>
<tr>
<td>8. Faculty and Staff Excellence</td>
<td>• 20 new faculty hires; 9 contribute to racial/ethnic diversity                                                                                      • Research awards increased by 11% to $56 million                                                                                       • 440 staff, faculty, and students participated in “Inclusive Excellence” diversity training</td>
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<tr>
<td>9. Enhance the Academic Organization</td>
<td>• Reorganization of CAPS, IT, Enrollment Management, Online</td>
</tr>
<tr>
<td>10. Administrative Efficiency</td>
<td>• External reviews completed for Athletics, IT, Enrollment Management, and Marketing                                                                • Customer service initiatives boost student experience</td>
</tr>
<tr>
<td>11. Connecting to Boston</td>
<td>• Expanded the industry cluster initiative, increasing engagement with local employers                                                                                           • Professional apprenticeship program on campus launched with $2.3 million gift</td>
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<tr>
<td>12. Campus Rehabilitation and Planning Process</td>
<td>• Substructure Demolition and Quadrangle Development (SDQD) has moved from design to construction</td>
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<tr>
<td></td>
<td>• New vice chancellor for marketing and engagement launched positive brand campaign in summer 2020</td>
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Overview of progress for each goal:

SYSTEM OFFICE GOALS:

**Goal: Operating Margin**

*(Achieve an operating margin of more than 0% as measured by the audited financial results for the fiscal year)*

The reported Q3 results reflect that the campus expects to meet the margin requirements for this fiscal year. We are now in the process of closing the books for FY20, and although there are still several entries to be recorded that could impact the final margin, we now expect to end the year with a surplus. Recognition of the CARES Act funds, along with better summer and gift revenue than expected and lower non-personnel spending due to remote campus operations are driving the surplus. Final year-end results will be available by mid-September.

The team worked tirelessly to stay on budget and to navigate a variety of financial challenges that arose during the year. Additional plans were developed to address the budget impacts of COVID-19. Overall, we are pleased by the support we received from our colleagues and campus stakeholders to stay within budget and to weather another year of tight finances in order to ensure that we met this most important target.

The leadership continued its commitment to budget transparency via town hall meetings on October 23, February 26, and a final “virtual” town hall forum May 14, which focused on budget results for the academic year, COVID-19, and planning for fall 2020. These meetings were complemented by documents distributed to faculty and staff throughout the year.

Quarterly budget-to-actual variance reports were used and a new Summit Department Manager dashboard was developed to provide more timely financial information for departments and for review with the Office of Budget and Financial Planning. Also, a quarterly process with the Controller’s Office was established to improve forecast accuracy throughout the fiscal year.
Goal: Enrollment

*Increase enrollment numbers with focus on predictive and accurate models and proven best practices*

Overall, we are seeing increases in new in-state and out-of-state first-year students, while new transfers, master’s degree students, and international students are all seeing a decline. Overall, fall enrollment is likely to come in flat, but tuition revenue will decrease as a result of fewer international students paying full out-of-state tuition.

- **Increase new undergraduate enrollment**: While final numbers will not settle until the fall term begins, and considerable uncertainty exists as a result of COVID, *new student numbers overall look positive*. As of July 20, first-year student deposits are up by 11% year over year with specific strength among in-state (up 14%) and out-of-state students (up 16%). International enrollments are expected to be down significantly, although we cannot yet judge the magnitude. The community college sector experienced significant enrollment downturns even before COVID-19, and hence, it comes as little surprise that transfer deposits are down year over year by 14%, or 150 deposits, despite a great deal of effort to focus on this category.

We were thrilled to appoint John Drew as the new vice chancellor of enrollment management in summer 2019 and this year we have benefited from his leadership in numerous areas, including recruiting and admissions, marketing, re-enrollment, retention, financial aid, and student services.

- **Enhance campus visits**: We are attracting a greater number of prospective visitors at each stage in the admissions pipeline. Their visit experience has been greatly enhanced because we have thoroughly revised tour and information sessions, created new campus visit marketing materials, and required additional training of admissions staff and campus tour guides.

- **Financial aid review**: Ruffalo Noel Levitz (RNL), an organization with a long history of providing analysis and best practices in the financial aid space, has been helping us gain greater understanding of the interplay between merit and need-based aid budgets and provided industry and campus trends resulting in several new initiatives that have increased new-student yield and maximized net tuition revenue.

- **Out-of-state recruitment**: Awareness of UMass Boston in out-of-state markets is growing. Our efforts saw success in a 5% increase in completed New England first-year applications and a 50% increase in deposits from New England students. Out-of-state applications from beyond New England grew by 19% in both completed applications and admitted students. Targeted email campaigns drew attention to the regional tuition credit, reaching nearly 4,500 first-year inquiries and the parents of upwards of 450 New England applicants. Deposits among this group have only increased slightly, no doubt impacted by COVID-related factors, but we are on the right path.
Multi-channel marketing: Multi-channel, audience-specific marketing and communication strategies on Facebook, Instagram, and Snapchat increased the frequency and quality of communication to prospects, applicants, and admitted students. We complemented these marketing efforts with a new strategy involving embedding an enrollment counselor at Bunker Hill to support transfer student pathways from our largest transfer feeder partner.

Shift to virtual: COVID-19 forced our admissions operation to go completely virtual in mid-March. We pivoted all in-person offerings to a virtual experience while maintaining a quality experience. Our surveys show high levels of satisfaction despite a completely new modality of event. Attendance at our April Welcome Day for accepted students increased by 38% from the prior year, with students logging into our online platform from 31 states and 23 countries.

Maximize continuing undergraduate enrollment: Registration and re-enrollment campaigns are mounted each term to support student retention. Improvements in our Salesforce CRM enable advisors and student support offices to target, communicate with, and support students in removing holds and registering for the next semester. In state (+0.8%) and out of state (+22%) registration are strong, while international registration (-25%) is not. We are still working on improving continuing student registration, which is down slightly (0.5%) on a year over year basis. (Interestingly, the CUNY system is experiencing exactly the same pattern: robust first-year enrollment, lagging continuing enrollment).

Our undergraduate triage committee, which focuses on student needs and registration activities, has redoubled attention to readmit/reenrollment efforts to encourage students who “stopped out” to come back to UMass Boston. Readmitting student applications are up significantly (over 100%) for both the summer and fall terms, and actual registrations for the fall are currently up 8%.

COVID-19 has placed major pressure on international student continuing enrollment, including travel problems and visa processing. In response, we are packaging high-demand courses for “live” delivery at times that are convenient for students living in India, Vietnam, and China.
• **Increase new graduate enrollment**: We have strengthened our master’s-level marketing and recruitment efforts over the past 2+ years to include digital marketing in support of lead generation for priority programs, improved yield communication through CRM-enabled “journeys,” and digitizing application and admission processes which cuts response time. Strategic program growth (e.g., MS in Business Analytics) coupled with streamlining and MBA requirements have enabled us to stabilize master’s-level enrollment after the declines experienced from 2015–2018. New accelerated master’s programs enable our students to combine BA and MA degrees in roughly five years.

  ◆ This fall we launched a new initiative, the Boston Advanced Academic Consortium, in which we are partnering with six local universities to attract undergraduate students into these accelerated master’s programs, boosting their enrollment.

  These efforts propelled application increases for fall 2020 at the doctoral (+25%), master’s (+12%), and certificate (+29%) levels. However, COVID uncertainty has dampened deposit and enrollment numbers – while doctoral deposits remain strong, **master’s deposits are currently down 18% compared to the prior year**. Since deadlines for some key master’s programs are still open and efforts to assuage some of the uncertainties are still underway, there is time to improve.

  Lastly, the campus has adopted gradCAS (the graduate common application) for the fall 2021 recruitment cycle, and that will generate national exposure for our programs and further broaden the applicant pool.

• **Sustain out-of-state enrollment and diversify international enrollment**: Increases in undergraduate applications and deposits from beyond New England are gratifying. However, international enrollment will crater as a consequence of COVID-19. Although the fall 2020 cycle saw a 7% increase in applications and admit rates were up 14%, deposits and enrollment are down by 35% and 19%, respectively. Our partners, Shorelight and Navitas, are predicting substantial reductions (60–80%) in new international students in the fall, and as noted above, our international continuing student registrations are down by 25%.

  ◆ **American Collegiate Live**, an innovation launched in collaboration with Shorelight, will help stabilize international enrollments. We broadcast undergraduate courses online, live and synchronously, to nondegree international students in their home countries. We piloted the process in Qatar this spring to 38 students. We reached an additional 150 international students this summer and expect hundreds more in the fall term, as students are unable to travel to the United States but are still eager to begin their college journeys.
Goal: Fundraising
(Increase fundraising donations and pipeline programs for future giving with an emphasis on growing the endowment)

Adam Wise, vice chancellor for University Advancement, continues his work to build strength in this area and has been very successful, breaking every major record for a second year in a row, despite the impediments caused by COVID-19.

• **UMPO set a goal of $13.5 million**, which is a 28.5% increase over FY19’s goal. *Remarkably, we have received $24.1 million, which is 79% above our campus-wide goal in “total philanthropic achievement”* (re: new pledges and cash gifts received minus pledge payments to avoid double counting). This marks the second year in a row that UMass Boston has raised over $20 million; our previous high was $17 million.

UMass Boston received over $19.1 million in gifts, a 61% increase over FY19’s total of $11.8 million – well beyond our 10-year annual average of $7.2 million. A total of $19.8 million in new pledges was raised, 10.3% ahead of last year’s record-breaking $17.6 million and shattering our historical annual average by a factor of four.

Colleagues from across campus and at all giving levels participated: our principal and leadership gifts team helped secure 28 new pledges in the $25,000–$500,000 range. We garnered five commitments at the seven-figure-plus level, all from generous alumni and friends of UMass Boston rather than pledges from corporations or foundations.

UMass Boston’s largest gift was $5 million to create the Stone Living Laboratory on Rainsford Island, named for philanthropists Jim and Cathy Stone to support the research of Professor Paul Kirshen and his team in the School for the Environment (SFE). Other significant gifts included $2.5 million from Ralph and Janice James to support the PACE on-campus apprenticeship program, a $1.5 million gift to establish the Robert Seeley Assistant Visiting Professorship in Mathematics (with Professor Eric Grinberg), a $1 million gift for the Paul English Scholarship in Computer Science (with Professor Marc Pomplun), and a $1 million gift to create the Russell Barnaby Scholarship.

A total of $5.3 million in gifts and pledges were earmarked for UMass Boston endowments, another high-water mark. Six newly endowed scholarships were created after the pandemic led us to “go remote,” including one at $1 million and another at $500,000, while a third donor stepped forward as the equity markets were in free fall and wired in their first $1 million gift! Additionally, a local foundation committed $600,000 to support student retention grants and other student success initiatives.

Finally, I was honored to learn that a new endowment was established in my name this June, just in time for the UMass Foundation to invest those funds for next year: alumni and colleagues created the Katherine S. Newman Beacon Student Fund. It will be used to provide the first endowment ever for the campus’s emergency support fund which has, until now, had to rely on current-use funding only. Having been one of those undergraduates in financial distress myself, I understand all too well what it means to UMass Boston students to be able to depend on the university.
• **Build team fundraising strength:** Our newly formed Corporate and Foundation Relations team, under the leadership of Kim Gentry, met with 15 multibillion-dollar foundations and 9 multimillion-dollar ones, and raised $1.2 million. I am hopeful that these efforts have laid an effective groundwork for introducing Chancellor Marcelo Suárez-Orozco to these powerful institutions. We also supported faculty as they develop applications to RFPs, and we partnered with faculty to strategically focus on ways to discuss their work with funders.

• **Cultivate prospects:** Our new Prospect Management and Research team (PM&R) has increased our pool of active prospects from 1,394 to 1,997; over 65% of this pool has a rating today as compared to less than 31% in January 2019. They have tripled the number of prospects at the $500,000+ potential giving level. Their illuminating research profiles also helped guide me, Adam Wise, and the leadership gifts team to our record-setting results – in fact, including two highly-rated prospect discoveries who had previously been completely disengaged. Each gave $1 million either as first-time donors or alumni who had long been off the radar.

• Our Alumni Engagement team has done a terrific job in this remote modality of attracting our alumni community to virtual events, with over 900 attendees participating in a dozen gatherings hosted in just the last few months. Further, on July 27th, we were informed that our alumni magazine garnered a 2020 “American Inhouse Design Award” by Graphic Design USA.

<table>
<thead>
<tr>
<th>Year-End Numbers</th>
<th>Actual</th>
<th>Goal</th>
<th>Notes</th>
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<tbody>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
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<tr>
<td>Total new commitments</td>
<td>$24.1 M</td>
<td>$13.5 M</td>
<td>+79%, a new record high, topping last year’s record. Netted five commitments at the $1M+ level from individuals; and 28 pledges $25K - $600K, both record highs as well</td>
</tr>
<tr>
<td>Total new commitments from alumni</td>
<td>$7.52M</td>
<td>15%</td>
<td>+31.2%, a new record¹</td>
</tr>
<tr>
<td><strong>Endowment</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total new commitments designated for core endowment</td>
<td>$5.3M</td>
<td>15%</td>
<td>+21.9%, virtually all for endowed scholarships or professorships</td>
</tr>
<tr>
<td><strong>Chancellor activity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of days dedicated to advancement</td>
<td>22</td>
<td>30</td>
<td>Pandemic impact: scheduled trips in March and April alone would have pushed the number over 30 days</td>
</tr>
<tr>
<td>Number of prospect meetings attended by the chancellor</td>
<td>64</td>
<td>90</td>
<td>Pandemic impact: would have easily topped this goal</td>
</tr>
<tr>
<td>Number of substantive off-campus alumni events hosted by the chancellor</td>
<td>9</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Number of prospect meals hosted by the chancellor</td>
<td>14</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td><strong>Total Major Gift Officer Activity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average number of annual visits</td>
<td>63</td>
<td>110</td>
<td>Pandemic impact: also two of our new MGO’s started at UMass Boston mid-year</td>
</tr>
<tr>
<td>Number of new prospects qualified</td>
<td>16</td>
<td>20</td>
<td>16 per contact officer</td>
</tr>
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</table>

¹Alumni total includes $2.25m from Janice James, an Amherst alumna and her husband Ralph; if we exclude this UMass graduate’s pledge, then we raised $5.21M from UMass Boston alumni which equals +21.6%.
**Goal: Online**

*(Exceed budgeted forecast of $19,152,000. Continue to collaborate and cooperate with UMass Online CEO Don Kilburn on the plans to support the growth of UMass Online.)*

- **Revenues are up!** Preliminary figures show that FY20 online revenue will exceed FY19 by 11%. These are the numbers for the end of June:

<table>
<thead>
<tr>
<th></th>
<th>FY19</th>
<th>FY20</th>
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</thead>
<tbody>
<tr>
<td>Summer 2</td>
<td>$864,804</td>
<td>$1,106,775</td>
</tr>
<tr>
<td>Fall</td>
<td>$6,377,630</td>
<td>$7,087,923</td>
</tr>
<tr>
<td>Winter</td>
<td>$909,815</td>
<td>$1,016,400</td>
</tr>
<tr>
<td>Spring</td>
<td>$7,129,960</td>
<td>$7,358,288</td>
</tr>
<tr>
<td>Summer 1*</td>
<td>$4,068,997</td>
<td>$5,075,358</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>$19,351,206</strong></td>
<td><strong>$21,644,743</strong></td>
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*Summer 1 is always part of the current fiscal year, while Summer 2 is revenue for the succeeding year.*

- **Improve organizational focus:** The good news above reflects major organization changes made during the academic year. In summer 2019, we appointed Dr. Mya Mangawang to lead our online (“OL”) expansion efforts, which have now been separated out into an independent unit reporting to the provost and chancellor. Identifying a singular leader is critical to focusing attention on growth and to preparing to work collaboratively with UMOL/UMass Global. Under her supervision,
  
  - Online courses and programs were moved entirely out of CAPS and into their respective academic colleges, putting the deans more squarely in charge of them. They have begun fully managing scheduling and hiring for OL, and beginning this fall the academic calendar for OL will be fully aligned with the “day program.”
  
  - Course development stipends that incentivize quality and strategic course builds became centrally managed. Our eLearning and Instructional Support (eLIS) team scrutinizes each course and injects a critical element of continuity in design. Through this new process, faculty and deans have submitted requests for the development of 22 new courses for FY20 and 25 courses for FY21.
  
  - Under Mya’s leadership we have created:
    
    i. Minimum design and accessibility requirements for new online courses,
    
    ii. a new training program for new online faculty,
    
    iii. support for the improvement of existing courses that do not meet the identified standards,
    
    iv. A Digital Mentor Program involving faculty champions to share best practices and help support their faculty colleagues,
    
    v. a new certificate for graduate students for online teaching is increasing on-ground teaching capacity—to date, 61 graduate students are participating in this program.
• **Marketing and recruiting efforts:** We continue to invest in digital marketing, lead generation, and yield-management efforts for all online programs. This year we

- Launched a new website (https://online.umb.edu) to serve as a marketing platform for OL programs and courses that now generates more than 600 leads per month
- Established a digital marketing spending strategy (and tools to monitor effectiveness) that generated over 5,000 leads for summer and fall 2020 (and an increase of 23% in summer enrollment)
- Implemented chat and FAQ functionality to resolve common student questions and issues, freeing up staff time for more personal and targeted responses
- Created programmatic “nurture journeys,” that provide for ongoing communication with applicants and prospective students; they are now live for 26 programs
- On-boarded a new enrollment coach in June, who is now actively building out a system for personalized phone communications with prospective students.

• **Online programs in FY20:** Dr. Mangawang has worked with departments, deans, the provost, and the chancellor to identify priority courses and programs for online conversion and growth, including the accelerated bachelor’s degree in nursing, a nursing certificate, the ABA program, the undergraduate management program (to support degree completion), the OT/PT Doctoral Program, and an online cybersecurity certificate.

• **Reintroduce revenue sharing:** In an effort to incentivize UMass Boston deans and faculty to develop OL programs, the university reintroduced a program in which those programs that are “substantially” online would receive a portion of the net revenue generated. The following table displays the actual gross revenue generated and the split between department, dean, provost, and university:

<table>
<thead>
<tr>
<th>Gross Revenue</th>
<th>$547,289</th>
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<tbody>
<tr>
<td>Fixed Instructional Cost</td>
<td>$191,551</td>
</tr>
<tr>
<td>Net Revenue</td>
<td>$355,738</td>
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<tr>
<td>Dept RS (30%)</td>
<td>$106,721</td>
</tr>
<tr>
<td>Dean RS (10%)</td>
<td>$35,574</td>
</tr>
<tr>
<td>Provost RS (15%)</td>
<td>$53,361</td>
</tr>
<tr>
<td>University OH (45%)</td>
<td>$160,082</td>
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</table>

• **Continue to collaborate and cooperate with UMass Online (UMOL) on the plans to support growth:** We have continued to work with UMOL CEO, Don Kilburn to clarify marketing roles and responsibilities prior to the proposed launch of the new UMOL collaboration with Brandman. UMass Boston looks forward to developing a marketing segmentation plan that will draw attention to campus-based programs, something I will be working on myself from the vantage point of UMPO.
**Goal: Collaborate with Financial Planning Advisory Working Group**

*(Continue to work with Senior Vice President Lisa Calise to follow the recommendations of the Financial Planning Working Group, a collaborative, system-wide project that was announced in August 2019)*

Vice Chancellor for Administration and Finance Kathleen Kirleis serves as the campus representative on the Financial Advisory Planning Work Group. She was closely engaged and participated in the development of the legislative report that was submitted by your office on January 15. Due to COVID-19, the committee has put much of its work on hold. As you know, I will be joining this group in my new capacity and look forward to contributing to its work.

**Goal: Improve Government Relations**

*(Continue to work with Vice President David McDermott to coordinate advocacy efforts for system-wide legislative initiatives. Meet with campus delegations on an ongoing basis to ensure university concerns are communicated and understood)*

This year, I continued our successful approach to government relations working closely with Assistant Chancellor Matt Fenlon. We built off the shift from reactive meetings in response to issues or events to a series of one-on-one meetings and group briefings with the goal of developing open lines of communication to improve relationships with our federal and state elected officials.
Over the course of the year, I visited, hosted, and regularly communicated with the following elected officials and/or their designees: Representative Dan Hunt, Representative David Biele, Speaker Bob DeLeo, Senate President Karen Spilka, Majority Leader Ron Mariano, Assistant Majority Leader Mike Moran, Assistant Majority Leader Paul Donato, Higher Education Chair Jeff Roy, Higher Education Chair Anne Gobi, Ways & Means Chair Aaron Michlewitz, Ways & Means Chair Mike Rodrigues, Senator Pat Jehlen, Representative Michele Ciccolo, Representative Dan Cullinane, Representative Liz Miranda, Senator Pat Jehlen, Representative Michele Ciccolo, Representative Dan Cullinane, Representative Liz Miranda, Senator Pat Jehlen, Representative Michele Ciccolo, Representative Dan Cullinane, Representative Liz Miranda, Senator Pat Jehlen, Representative Michele Ciccolo, Representative Dan Cullinane, Representative Liz Miranda, Senator Pat Jehlen, Representative Michele Ciccolo, Representative Dan 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In conjunction with the Office of General Counsel, Matt Fenlon (assistant chancellor for Government Relations), housing officials in the Town of Nantucket, and the legislative delegation, I reached an agreement for the sale of the UMass Boston condominiums in central Nantucket. The Board of Trustees approved the prospective sale during their meeting in July. Necessary special legislation has now been filed and its passage is assured in the fall. We are grateful that the proceeds will be committed to the UMass Boston endowment; this will provide a special opportunity for Chancellor Suarez-Orozco to seek out matching funds in collaboration with University Advancement.

In consultation with Academic Affairs, UMass Boston developed a legislative outreach strategy to combat misinformation about our centers and institutes.

We hosted a successful visit from the Joint Committee on Higher Education for a campus briefing as part of the committee’s tour of all Massachusetts public higher education campuses. We provided an update to the members on enrollment, infrastructure improvements including the plaza demolition, endowment match, the new PACE apprenticeship program, the Boston Advanced Academic Consortium, and the need for a new nursing building. We gave the committee a walking tour of the campus to show them what the plaza demolition will entail and a tour of University Hall so they can see how the campus was a prudent financial steward of its most recent building. At the committee’s request, the meeting concluded with a meeting with faculty and another with students.

Our proactive communications approach with our elected officials proved especially valuable once the campus shifted to remote operations in March. I provided weekly updates, and in some cases multiple weekly updates, which were shared with state and federal officials and were extremely well received for our consistency and transparency.
ADDITIOAL CAMPUS GOALS:

Goal: Student Success

(Improve student success including increased retention, graduation, and career attainment rates)

This fall, we achieved the following improvements in the domain of student success:

- **6-year graduation rate** for first-time full-time freshmen (FTFTF) rose from 48% (2012 cohort) to 49% (2013 cohort).
- **4-year graduation rate** for FTFTF rose from 26% (2014 cohort) to 27% (2015 cohort).
- **1-year first-year retention rate** declined from 76% (2017 cohort) to 75% (2018 cohort).
- Our 1-year transfer retention rate was roughly the same from the prior year, declining from 72.7% (2017 fall cohort) to 72.4% (2018 fall cohort). However, we are making progress, which is observable in these metrics:
  - Our fall-spring first-time, full-time freshmen (FTFTF) retention rate held steady at 91% between the fall 2018 and fall 2019 cohorts, a promising sign that we are on track to begin reversing the decline in our FTFTF one-year retention rate.
  - Our **1-year transfer retention rate** increased from 85% (fall 2018 cohort) to 87% (fall 2019 cohort), another promising result.

While our graduation rates continue to rise slowly each year, our one-year freshmen retention rates have flatlined for several years and have fallen slightly over the past couple years. Some of this decline can be attributed to the rapidly increasing size of the freshmen cohorts, but we regard these results as unacceptable; hence, we will redouble our efforts to support students in their first year.

When the coronavirus pandemic upended campus operations and our community’s daily lives in mid-March, our student success work took on a renewed urgency. We worked to develop new initiatives and engagement strategies to better support students remotely and to address the personal and economic turmoil that impact their academic success. While we anticipate that the pandemic may negatively impact our retention and potentially graduation rates this year, we are working aggressively to counteract its effects.

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1It should be noted that the 2018 cohort was significantly larger than the prior year (2,315 vs. 1,881, a 23% increase), so the returning sophomore class in fall 2019 (2018 cohort) was the university’s largest ever by roughly 300 students. This may help to explain the decline.
The following were key areas of focus and progress in FY20:

**Promote supportive and engaging student experience:** Under the leadership of our vice chancellor of student affairs, Gail DiSabatino, we continue to deepen our programs in student life, focusing attention both on the residence hall community and the commuter population so that integration and belonging characterize both.

The residence halls were 98.4% occupied in fall 2019. Survey data indicate that 83% of residents are satisfied or very satisfied (12% more said “neutral”) with their overall housing experience, a marked increase from the prior year. In addition, 83% of residents indicated that they would recommend living in the residence halls. Police dispatched calls and counseling center emergencies both decreased substantially this year compared to the prior year.

We developed a “living learning community” focused on first-generation students in the residence halls; more targeted engagement strategies for out-of-state residential students; and increased connection to academic support and major/career exploration, particularly for undecided students.

New nighttime and weekend programming was added with measurable increases in participation the Student Arts and Events Council’s activities, Beacons at Night, and OSLCE (Office of Student Life & Community Engagement) volunteering hours. An innovative “Beacon Rewards Program” was introduced, where students can “tap in” to events in order to accumulate points and win prizes. The purpose is to generate enthusiasm for student activities and to be able to gather data on participation. More than 4,000 students tapped into one or more events. Once the campus moved to remote operations, we worked diligently to create virtual engagement opportunities to keep students connected to the UMass Boston community.

In fall 2020, the campus launched Here4U, a support app that connects students with staff best positioned to resolve issues or answer questions. Since its launch in September 2019, Here4U has serviced more than 600 student questions and has achieved a nearly 90% satisfaction rate.

**Improve undergraduate advising:** Advising at UMass Boston has suffered from imbalances between the colleges, leaving some with the most pronounced need understaffed. By redistributing personnel, we were able to improve student-advisor ratios in the College of Science and Mathematics. A somewhat disparate set of advising traditions has been replaced by common tools, metrics, and practices. CRM system tools have been refined to include key academic data, providing advisors with informative snapshots of their caseloads, and hence the capacity to drive targeted campaigns and accommodate faculty and staff referrals for student interventions.

**Execute retention campaigns using early warning predictors:** We successfully transitioned the Student Referral Program to a case management system in Salesforce so that advisors across campus can manage referrals coming from faculty and subsequent interventions.

Our Early Alert program invites faculty to submit midterm grades to provide students an advanced sense of how they are doing and to help them get back on track if necessary. In the 2019–20 academic year, almost 18,000 such midterm grades were given, a ~20% increase from the prior year. Advisors and other offices (Athletics, Residential Life, Ross Center, Success Boston) used the CRM to conduct outreach and follow up for students on their caseload receiving alerts.
When all courses shifted to remote delivery in the middle of the spring semester, a cross-functional team launched the RESPOND Peer Coaching initiative, designed to identify at-risk students and pair them with a peer trained to coach them through successful completion of the semester. We used predictive analytics to identify students with decreased engagement in their courses after the shift to remote. Thanks to a grant from the Trefler Foundation, we hired a cadre of peer coaches and paired them with the more than 400 students who were referred by faculty or staff – or referred themselves – to receive coaching. The RESPOND initiative will continue through the fall – with additional support from the Lumina Foundation – and is currently being evaluated by our Center for Social Policy to understand the program’s impact and areas for improvement.

- **Remove barriers to student progression:** We are keen to understand why (and where) students transfer out of UMass Boston. Factors associated with increased retention (e.g., on-campus engagement, participation in learning communities), and with decreased retention (e.g., being an out-of-state student or failing to pass a course in the first semester) are grist for our mill.

  Financial stress clearly contributes to dropping/stoping out. We secured a grant from a local foundation to support a retention grant program for continuing undergraduate students within two years (60 credits) of completion. During summer 2020, more than 75 qualified students will receive a $1,000–$4,000 grant, with the goal of increased retention and completion by removing the financial barriers to progression. The program is being run as a randomized control trial (RCT) to better understand its effects.

- **Expand career development opportunities:** The Professional Apprenticeship and Career Experience Program (“PACE”) provides students with highly structured, paid, career-relevant, on-campus work opportunities under the supervision and mentorship of staff and faculty. It was launched this year with a $2.3 million donor commitment and was piloted with a dozen apprenticeships across three divisions during the spring semester. The pilot launch coincided with the campus’s move to remote operations; the apprenticeships pivoted to “work from home,” truly providing students with a real-world experience and creating a strong connection to the university among participating students. The pilot continued into the summer, adding five new roles and will continue to expand in the fall. After students complete their apprenticeships, they will be able to take advantage of work opportunities with our 20 industry clusters, deepening relationships with local employers in order to provide internships and full-time career opportunities. This will create career pathways for students who can move from an on-campus apprenticeship, to an off-campus internship, to full-time employment post-graduation.

- **Advance graduate student success:** Numerous initiatives are underway to support graduate student success. New students now attend an orientation, an online video orientation, and can access an updated resource website. The Office of Graduate Studies has increased email communication to students, highlighting academic resources and professional opportunities. Training for students in dissertation proposal development and cheat sheets to help navigate admissions and student policy issues have been central this year.
Goal: Faculty and Staff Excellence

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

• **New faculty hires:** AY2019–20 started with 23 new tenure-stream hires. This was the second year that we employed a novel strategy to emphasize diverse hiring, reserving a minimum of 20% of the hiring pool for colleagues that add to faculty diversity. The record is, we think, extraordinary by any measure (and has been described by *Inside Higher Ed* as such).

  ◆ **Building on last year’s success,** 26 TT faculty searches – all replacement lines, no new lines – were authorized in three phases throughout the year. Of these, 4 were specifically targeted to enhancing faculty diversity.

    ◇ Of the 26 searches, 2 failed and 5 were chilled after the COVID crisis began, for budgetary reasons; one spousal hire was added, bringing the final tally of new hires to 20. Of these 20:

      - 7 (35%) are female, 2 do not declare gender (10%), 11 (55%) are male
      - 9 (45%) contribute to racial/ethnic diversity
      - 2 (10%) Black
      - 2 (10%) Hispanic
      - 5 (25%) Asian or Asian-American
      - 11 (55%) are White, non-Hispanic

• **Faculty promotions:** During AY2019–2020, 15 faculty members were granted tenure and promoted to the rank of associate professor. Of this group:

  ◆ 10 (67%) are female, 5 (33%) are male
  ◆ 6 (40%) contribute to racial/ethnic diversity
    ◇ 2 (13%) are Black
    ◇ 4 (27%) are Asian or Asian-American
  ◆ 9 (60%) are White, non-Hispanic

12 faculty were promoted to the rank of professor. Of this group:

  ◆ 8 (67%) are female, 4 (33%) are male
  ◆ 3 (25%) are Asian or Asian-American and contribute to racial/ethnic diversity
  ◆ 9 (75%) are White, non-Hispanic

We are excited by the strength and diversity of our new faculty hires and our promoted faculty. Indeed, we believe our profile compares favorably to other campuses in the country. We intend to continue our practice of reserving 20% of our hiring budget annually in service of increased faculty diversity.
• **Research activity:** Research awards to UMass Boston faculty for use in FY20 were up by 11% compared to the prior year, resulting in $56.0 million in awards, as compared to $50.3 million in FY19. This was the first increase in awards to the university since FY16.

• **Inclusive excellence training:** Offered by our assistant chancellor for diversity and inclusion, this training series helps establish a baseline vocabulary around the pressing identity-based issues that inform our interactions with each other and our community. The training is 4 hours and covers non-binary pronoun guidelines, micro-aggression basics, motivators/de-motivators, and implicit bias. To date, there have been 22 Inclusive Excellence workshops serving 318 staff/faculty and 10 abbreviated student workshops serving 122 students for a total of 32 workshops serving 440 staff, faculty, and students in small groups. Evaluations have been overwhelmingly positive. Requests for training have increased, with 11 additional virtual workshops scheduled as of now during summer 2020 and plans to continue training departments in fall 2020.

• **Promoting diversity:** A great deal of energy surrounded this year’s efforts to enhance diversity: the Office of Diversity Equity and Inclusion (ODEI), led by Assistant Chancellor Georgianna Melendez, created a student diversity council and supported more than 20 campus-wide events during Diversity Month in October 2019. ODEI staff facilitate conversations on racial equity for members of the Advising Collaborative during summer 2020; participated in and led dialogues with individuals, departmental leaders, and community stakeholders regarding identity-related concerns (particularly racial justice).

Amidst the resurgence Black Lives Matter campaign, the campus has been engaged in thinking deeply about the need to build a more robust anti-racist and tolerant community. The Academic Continuity Task Force, a faculty/administration committee whose initial purview was focused on planning for fall 2020, has formulated recommendations for educational and student affairs programming directed at diversity issues, including “Beacon 2020,” which will increase student engagement through a relevant “freshman read” and numerous anti-racist focused activities.
Goal: Enhance the Academic Organization

(Continue the process of aligning campus academic structure with resources – and the Trustee requirement of a 2% operating margin by 2023 – so that we can build on the strengths going forward. Ensure the academic excellence is served by the resulting arrangements)

Under the leadership of Emily McDermott, vice chancellor for academic affairs, we continue to work on academic reorganization, designed to maintain/enhance academic program quality while achieving administrative/fiscal efficiencies.

• Further college-level academic reorganizations: Thus far, we have reduced the number of colleges from 11 to 8, but we have more to do on this score. Given the transition in leadership that absorbed so much energy this year, it was not possible to execute beyond governance-based study/discussion of further academic reorganizations. With the support of the incoming chancellor, a more determined effort will be needed which will be accomplished via a faculty-administration task force will be officially launched in September 2020, with a short-term goal of making a recommendation to the incoming chancellor concerning possible reorganization of the School for the Environment and the McCormack Graduate School, among others.

• Reorganized the Office of Global Programs (OGP): OGP has moved into Academic Support Services and Undergraduate Studies, effectively centralizing all student and scholar immigration processing, which had been dispersed across three departments. International student and scholar advisor positions were created to better meet international student, exchange student, and visiting scholar immigration needs, while ensuring compliance.

• Reorganized ESL programs and study abroad: The administration of study-away programs was moved from CAPS into OGP which is staffing up study abroad and away services. The non-credit ESL program was moved from CAPS into Academic Support Services, where they have been joined with our credit-bearing ESL programs. Nine ESL instructors were laid off during AY 2019-2020.
Goal: Administrative Efficiency

(Improve administrative quality, while achieving greater administrative efficiency, freeing up resources for student support and faculty growth.

- Conduct administrative and organizational reviews to improve efficiency:
  
  ◆ Athletics and Recreation: In anticipation of the retirement of Vice Chancellor Charlie Titus, we turned to a specialized firm to conduct an external expert review of the division. Their recommendations will help guide Charlie’s successor, interim Athletic Director Darlene Gordon, who will be charged with strengthening the operation.

  ◆ Enrollment Management and IT: With the appointment of two new vice chancellors, the divisions of Enrollment Management and IT undertook some general administrative reorganization to free up resources that have been reinvested in a more productive fashion. Ruffalo Noel Levitz, a nationally recognized consulting firm in the admissions and financial aid field, has helped us sharpen our merit- and need-based student aid.

  ◆ Marketing: An external, expert review of the marketing area took place last fiscal year. Based on their recommendations, we hired a Vice Chancellor for Marketing and Engagement, Megan Delage Sullivan, who came to us from Hill Holiday. Reorganization efforts are underway and include the evaluation of the current structure and the development of recommendations for a division restructure that will result in centralizing this function, emphasizing return on marketing investment, and the development/execution of a brand strategy that will enhance our competitive position.

  ◆ Controller’s Office and Procurement Department: Both areas under the VCAF underwent changes due to several factors. The largest was the stand-up of the Unified Procurement Services Team (“UPST”) in November 2019. The entire Accounts Payable and Procurement staffs moved to the UPST as founding members of the team. The Property Department was moved from the Procurement Department to the Controller’s Office to align it with a new Fixed Asset accounting position. The Controller’s Office, under new leadership for a full year in FY20, had multiple staffing changes and is now organized appropriately if still understaffed slightly.

  ◆ Compliance reviews: The State Auditor’s Office began an audit following the KPMG report, which was still underway at the end of the fiscal year. University Internal Audit began an audit of parking operations that will be concluded in FY21.

  ◆ Additional reviews: Because of the pandemic, a review of the Office of Research and Sponsored Programs was deferred to AY 2020–21.
Improving service and responsiveness: Efforts are underway to improve service to students and campus colleagues, emphasizing timely and useful customer feedback. Examples include the following:

- Recognizing that remote learning constitutes a hardship for some of our students, we instituted a laptop and Chromebook loaner program. To date, 86 Dell laptops and 112 Chromebooks were provided to students, faculty, and staff in need.

- An online system for managing course and program changes and approvals, Curriculog, is under development for the fall.

- A new student billing system was implemented to provide students with an additional functionality and an improved tuition and fees invoice.

- Working with Finance, the Bursar, and IT, Advancement implemented an automated business process whereby all donations are recorded on our Constituent Relations System (CRM) and automatically fed to the appropriate gift fund in UMass Boston’s general ledger, making the funds available to the recipient much more quickly than before. This replaces a 50-year-old practice of hand-entering gifts into ledgers.

Improve IT infrastructure: Classroom technology upgrades, digital signage, and expanded cybersecurity awareness have been executed by our IT division. Our new Vice Chancellor and CIO Ray Lefebvre has developed a strategic plan for the Massachusetts Green High-Performance Computer Center and undertaken 21 projects to improve IT infrastructure (e.g., Data Center relocation, document imaging, developing an online student orientation system, improve service and security in the parking garages and open lots across campus, and upgrade from Xythos to MS OneDrive).

Shared services: Transitioned the campus to the system-wide shared services model for procurement and accounts payable. We continue to work closely and collaborate with the UPST team to work out some of the transition opportunities/challenges. UPST has enabled the campus to begin to generate cost savings by “cost optimization through proactive commodity sourcing and contracting with innovative suppliers and partners that support UPST in delivering on our “better, cheaper, faster” mission and through improved transactional efficiencies.
Goal: Connecting to Boston

(Improve ties to major industries, and maximize opportunities for students to realize their occupational ambitions in the private, public, and nonprofit sectors)

• On-campus apprenticeship: The Professional Apprenticeship and Career Experience Program (“PACE”) provides students with highly structured, paid, career-relevant, on-campus work opportunities. PACE is being supported by a $2.3 million commitment from a generous donor and was pilots with a dozen apprenticeships across three divisions during the spring semester. The pilot launch coincided with the campus’s move to remote operations; the apprenticeships pivoted to “work from home,” truly providing students with a real-world experience and creating a strong connection to the university among participating students. The pilot continued into the summer, adding five new roles, and will continue to expand in the fall. Our 20 industry clusters (see below) complement these apprenticeships, creating career pathways for students who can move from an on-campus apprenticeship, to an off-campus internship, to full-time employment post-graduation.

• Complete industry clusters: Last spring we initiated an “industry cluster” program in which leadership teams from local companies are convened on campus in order to build connectivity with UMass Boston, to provide input on relevant course curricula, and to engage with students on potential employment opportunities. In fall 2019, we hosted four cluster sessions in Banking, Computer/Data Science, Social Services and Criminal Justice, and Mass General Hospital. We also organized and disseminated a cluster newsletter, facilitated a virtual career assistance for the Office of Career Services with cluster company attendees and visited Google HG for presentations from students who were part of the UMass Boston winter internship program. Unfortunately, as a result of COVID-19, the sessions that were scheduled for the spring had to be postponed.

• Minority Small Business Development Center: We have submitted a thoughtful and detailed response to an RFP to create a Massachusetts Small Business Development Center and Minority Business Center at UMass Boston. We are currently waiting for an answer, but we have generated a great deal of local support in the small business community.

The Massachusetts SBDC Network is an extensive business development program in the state with an organization of regional and specialty offices across Massachusetts. SBDCs provide professional business advising, training, and information resources to help grow and strengthen Massachusetts’s small businesses. We are intent on creating a nonprofit organization that will facilitate small business development in Bayside, supporting the efforts of entrepreneurs and family firms from the surrounding communities of Dorchester and Mattapan to benefit from these opportunities.
• Mayor Martin J. Walsh honored us with his presence at UMass Boston as our keynote speaker at the fall 2019 Convocation ceremony.

• I have also been working closely with the Mayor's Higher Ed Advisory Group on the matter of COVID-19 and the university response to the pandemic.

• **City of Boston/College of Management – initiative to support Boston businesses:** UMass Boston worked with the City of Boston and the UMass Boston College of Management’s Marketing Department on an initiative to support Boston businesses in communities of color, with a special focus on those that are owned by persons of color, as they reopen and adjust their operations in response to the pandemic. Professor Raymond Liu, chair of the Marketing Department is interested in deploying graduate students, mentored by faculty experts, to provide management consulting services to these businesses.

• **Municipal Government Internship Program:** Annually we work with our Economics Department to place students with a state legislator and/or a Boston city councilor in a Government Internship Program which provides students an opportunity to participate in and contribute to the City of Boston’s Municipal Government and/or the Massachusetts State Legislature by interning for an elected official.

• **Point partners:** Along with Vice Chancellor for Administration and Finance Kathleen Kirleis, I have participated in a series of meetings with our campus neighbors, BC High, the Edward M. Kennedy Institute, and the JFK Library, to help coordinate some mutual areas of interest regarding development and infrastructure on the peninsula and surrounding community.

• Community Relations represents UMass Boston on the Moakley Park Redesign Committee. The successful redesign of Moakley Park is extremely important to the future of UMass Boston. The City of Boston is wrapping up the preliminary design phase and hopes to bring the revised plan to the community and stakeholders in late fall. In addition, the next phase of work will be finalizing the schematic plan for the entire park followed by construction documents for Phase 1. As part of this effort, they are applying for the State MVP and UMass Boston has submitted a letter of recommendation.
Goal: Campus Rehabilitation and Planning Process  
(Improve the physical appearance and functionality of the campus)

• **Facilities:** Our new associate vice chancellor for facilities, hired in December 2019, began prioritizing recommendations from the APPA review completed last year, which assessed the functionality of the Facilities Department from seven major perspectives:
  ◆ Leadership  
  ◆ Facilities Strategic and Operational Planning  
  ◆ Customer Focus  
  ◆ Assessment and Information Analysis  
  ◆ Development and Management of Human Resources  
  ◆ Process Management  
  ◆ Performance Results

• Per the APPA Report, the UMass Boston Facilities Department is underfunded and understaffed in many areas when compared to similar-sized peer institutions. Despite this fact, we have made improvements in the areas above through better utilization of existing resources and adjusting our focus to our customers and improving processes.

• There is much more work to do in all seven areas but as the Facilities team is rebuilt to appropriate levels and with the right hires, we will make improvements.

• The campus is rated by APPA as between a Level 3 “Managed Care” and 4 “Reactive Management.” Our goal is to move to Level 2 “Comprehensive Stewardship” and Level 3 “Managed Care” for most spaces and be at Level 1 “Showpiece” and Level 2 “Comprehensive Stewardship” for select spaces such as the Integrated Sciences Complex, University Hall and the Faculty Dining Club.

• We also must become more data driven. Being primarily reactive currently, we are not “looking down the road” enough to head off issues before they are issues and solving them in a more cost-effective manner.

• The Facilities Management Team is qualified and strong in these areas. A few more hires, when the time is right, will strengthen the team and our position to advance the practice of facilities management at UMass Boston.

• During the COVID-19 crisis, the Facilities Department had many essential employees. Many of us have been coming to campus every day to ensure the research is able to continue and to run the buildings at minimum occupancy. The goal is to keep the building healthy but reduce energy consumption to offset the revenue losses UMass Boston is experiencing. Energy savings will approach $1M through the end of the fiscal year.
• **Substructure Demolition and Quadrangle Development (SDQD):** SDQD has moved from design to construction; hence the construction manager is fully mobilized on campus to oversee:
  - Decades-old structural deficiencies in the foundations of Wheatley and McCormack are being remedied.
  - Science Center has been decanted in preparation for demolition.
  - The iHub project is complete.
  - The new home of the Machine Shop is in construction following the shutdown.
  - The redevelopment of the campus catwalk was put out to bid in fall 2019, but bids were rejected due to cost; the project was revisited to sequence the catwalk part of the project to the end of the SDQD phasing.
  - Athletics has moved out of the pool area with work for temporary athletic space to be done summer 2020.
  - The time frame for the remainder of the SDQD project is under review. Completion of SDQD fulfills another major portion of the Campus Master Plan.

• **Campus Master Plan:** The Campus Master Plan is from 2009 and has been updated only minimally since that time. A future goal is to fully update the Campus Master Plan to catch up on developments and evolution over last decade and set the road map for the next decade. Staffing the Campus Planning Department will be required to complete this task and to properly plan on a daily basis as well as reestablish the Space Committee.

• **Calf pasture pumphouse:** Following the approval of the Board of Trustees, the Calf Pasture Pumphouse renovation project RFI was issued and reviewed. Facilities reviewed the nine proposals and provided input to the President’s Office. We stand ready to be an active participant in this important initiative as it develops.
Goal: Visibility and Reputation

*Increase the visibility and reputation of UMass Boston to student, family, alumni, donor, community, and policymaker audiences*

- **Communications:** We have been successful in our efforts to reach Boston business leaders, opinion leaders, alumni, donors, foundations, and students and families. With the help of our communications consultant, Ray Howell, we have seen a steady stream of very positive stories in the *Boston Globe*, as well as covered in the *BBJ, CommonWealth Magazine*, and *Inside Higher Ed*. The chancellor has had many opportunities to speak to influential audiences in the city, and this has paid off in a far more positive public perception of UMass Boston.

- **Marketing and Engagement:** Our new Vice Chancellor for Marketing and Engagement Megan Sullivan is bringing more focused attention to university-wide marketing efforts. She is building new capabilities around brand management, promotion, and execution, both digitally and in print. Her work is most immediately visible in a much improved campus website and with rapid capacity to get important messages out in social media.

- **Brand campaign:** The true character of a brand is often defined by crisis response. With all the uncertainty surrounding the spring, summer, and now fall semesters, current students, prospective students, parents, and the community at large are watching to see how the UMass Boston administration and university lead through the pandemic. Focus groups with students and 1:1 interviews with core division leaders helped to hone our strategy and key messages. We then developed an integrated marketing campaign including video and photography that was distributed via digital, social media, email, and print. The branding language and iconography is being used by the undergraduate, graduate, summer, and alumni relations divisions.

- **Convene the Boston Advanced Academic Consortium:** We have finalized the governance of the Boston Advanced Academic Consortium, in which local universities will collaborate for cross-registration and accelerated master’s programs. In spring 2020, the first student from a BAAC partner institution enrolled in a UMass Boston graduate-level course as part of the accelerated master’s program in the College of Education and Human Development. More students are expected to apply for admission beginning this summer. Participating schools include the following: UMass Boston, Bentley University, Boston Architectural College, Boston Baptist College, Curry College, Lasell University, and Longy School of Music of Bard College. Other colleges and universities have indicated an interesting in joining the consortium in the future.
Alumni Engagement: The Advancement team produced two highly rated publications: our alumni magazine and the Just Imagine Campaign report. Our first-ever campaign report received stunning reviews from our alumni. Our Celebration of Philanthropy event (attracting nearly 200 donors, our largest number to date), the Venture Development Center Celebration at One Beacon Street, the launch of the Sport Leadership Program via the $5 million commitment from New Balance, and The Italian Cultural Center were all opportunities to showcase the vitality of UMass Boston. Regional Alumni Committees are now flourishing in key cities: Washington DC, Miami/Boca/Palm Beach, Los Angeles, and San Francisco, and NYC.

Shifting to virtual programming this spring, we kept our alumni engaged in the life of the university. Virtual events drew more than 900 participants. Our new Chat with a Dean series, highlighting alumni and beginning with the Deans of the College of Management and the College of Nursing and Health Sciences (other schools will follow this fall) is a part of our concentrated effort to reconstitute the college advisory boards and to strengthen alumni engagement and philanthropy.

Our Donor Relations team created personalized thank-you videos and print profiles for each donor. Among other creative and impactful donor relations activities, the Chromebook initiative allowed us to utilize the ThankView technology to acknowledge Chromebook and Beacon Student Aid donors, garnering an extraordinary 64% open rate.

As I hope you will appreciate, this report represents a summary of a year full of hard work, team building, restructuring, cost cutting, efficiency building, and change management. This work was made more challenging with the COVID-19 pandemic.

The success we have experienced is entirely owing to the remarkable leadership team I had the pleasure of working with, a dedicated faculty – especially its governance groups – and a staff that has given its all. It has been a privilege and an honor to serve this distinguished university these past two years. The institution that Chancellor Suarez-Orozco is inheriting is in far better condition than it was when I arrived, thanks to the hard work of hundreds.

And in the end, it is the students of UMass Boston that animate us all.

Please let me know if you have any questions.

Sincerely,

Katherine S. Newman
Interim Chancellor