AY2019-2020 GOALS
MID-YEAR REPORT
EXECUTIVE AREA: ATHLETICS AND RECREATION, SPECIAL PROJECTS AND PROGRAMS

Goal 1: Operating Margin: Achieve an operating margin of more than zero (0%) as measured by audited financial results for the fiscal year.

- Eliminate the structural deficit: Reduce expenditures via the execution of a Voluntary Separation Incentive Program, a 3% cut to all division budgets, strategic reorganizations across administrative units, careful alignment of NTT faculty resources with high-need instructional areas, and other strategic cost savings measures.

- Grow revenue to support fiscal stability: Grow revenue through strategic initiatives such as international programming, online program growth, optimization of per student net revenue, and other initiatives.

- Plan for a 2% margin: Establish plans to move beyond a 0% margin towards the system goal of 2% margin by FY22. This includes deploying instructional resources to achieve a 17:1 student: faculty IPEDS ratio. It also necessitates achieving additional administrative efficiencies, including savings from the shared services initiative and aligning the campus academic structure (see goal #6).

Progress due: 1/20/20 and 6/15/20

<table>
<thead>
<tr>
<th>Chancellor Goals</th>
<th>Division Goals</th>
<th>Mid-Year Update on Progress</th>
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<tbody>
<tr>
<td>Develop ways to assure efficient budget management</td>
<td>• Conduct annual inventory review</td>
<td>• Completed a full inventory of the Division’s assets and are currently waiting on the reconciled spreadsheet of the Division’s assets from the auditor. Working with department heads to develop an analysis of these assets (some of which are more than 20 years old) to create a 5-year replacement plan that will incorporate the Division’s GOF and University’s Capital Project Fund. First draft of the plan will be in January.</td>
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<td>• Develop replacement plan for outdated equipment.</td>
<td>Maintaining a 0% operating margin</td>
<td>• In the process of forming a committee to review Capital Project request prior to submission to F&amp;A. The committee will include two representatives from University Facilities, two from our Division, and one floater from the areas that is requesting the project to ensure have all of the required information before moving the project forward. Currently waiting on facilities to forward their representatives. First meeting will take place near the end of January.</td>
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<td>Collaborate with the Office of Administration and Financial Planning (capital request).</td>
<td>• Create a process for capital request that affect University Facilities.</td>
<td>• Working with Budget, the Controller’s Office, and University Advancement to update our accounts so funds are put into the appropriate account and no co-mingling occurs (i.e., charity and non-charitable funds).</td>
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<td>• Build a committee with the right stakeholders.</td>
<td>• Increase Safety of athletic and recreation facilities through Capital Funding:</td>
<td>Facilities</td>
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<td>• Develop a process with buy-in from all stakeholders</td>
<td>• Replacing the flooring in Beacon Fitness</td>
<td>• Both Capital Projects were submitted in November are currently being reviewed by University Facilities. Currently waiting on Facilities for approval to move forward. The goal is to start the project at the end of 2nd semester with completion by the start of FY 21 school year.</td>
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<tr>
<td>• Maintain the same $58,000 income level from 2018-2019, through guest fees, staff memberships, and merchandise sales.</td>
<td>• Upgrade locker rooms to be equipped with the one car system.</td>
<td>Recreation</td>
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<tr>
<td>• Decrease Facility rental expenses:</td>
<td>• Maintain the same $58,000 income level from 2018-2019, through guest fees, staff memberships, and merchandise sales.</td>
<td>• Generated $36,000 to date through guest fees, staff memberships, and merchandise revenue streams.</td>
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<tr>
<td>• Due to the increase of rental fees at BC High, we are exploring the use of Moakley Park as well as other options for non-traditional seasons where possible.</td>
<td></td>
<td>Decrease Facility rental expenses:</td>
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<td></td>
<td></td>
<td>• Staff has begun a review of Moakley Park availability and</td>
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</table>
**Goal 2: Student success: Improve student success including increased retention, graduation, and career attainment rates.**

- **Promote supportive and engaging student experience:** 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. Continue to grow an experience reflecting 24/7 student needs including safety, successful operation of residence halls, leadership and community engagement, learning communities, student employment, athletics, and other activities.

- **Improve undergraduate advising:** Continue our advising enhancement initiative. This includes a focus on equitable distribution of advising resources as well as deepening 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 to support advising case management. 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, and provide emergency and targeted financial support to deserving students.

- **Expand career development opportunities:** Expand career development opportunities to further engage and prepare students to succeed post-graduation: on-campus

**Divisional Website management – Athletics and recreation**

- Select point person to lead this effort
- Develop a business plan that link have a strong focus on social media
- Collaborate with Recreation and University Web Master to ensure a consistent message.

*Progress due: 1/20/20 and 6/15/20*

**Recreation**

As we enter the second year as a residential campus, the need to engage more students continues to grow.

- Our intention is to implement even more innovative programming such as:
  - E-sports tournaments,
  - Freshman only start-up program
  - Fitness on demand-style classes.
  - Seek alternate recreational swim opportunities at some local swimming pools.
  - Continue collaborations with Student Affairs and the 24/7 programming
- Continue to improve business operations
  - Employ a new recreation software system that will meet our abilities to handle all facets of Recreation’s operations: sales, check-in, court reservation and reporting.

**Academic Success**

- Develop online evaluation surveys for student-athletes
  - True Beacons – participants will submit survey feedback to quantify the value of the program. Explore program associated challenges with such a move. Students would be required to increase time to their sports and therefore time off campus/away from their academics. Current staffing from athletic trainers does not allow for one to be on-site with teams which increases risk and liability. In addition, the Park is only available during non-peak hours (i.e. early mornings).

**Website and Social Media**

- Recreation continues to use the established University website for Intramurals and Recreation. We have no plans this year to stem from that. It currently meets our needs, despite its lackluster appearance. Recreation heavily employs Instagram, Twitter and Facebook for marketing. The website serves as a detailed informational tool. Andrew Castagna is the point person.

- Reached the 7,500 mark in terms of number of students who are registered participants of Recreation. The first three bullets listed under innovative programming have not been implemented yet. They are still in the idea stage. Recreation did seek other swim opportunities; however, they were cost prohibitive. Lastly, we continued to offer monthly special events. We partnered with the Chancellor’s Barbecue as well as Rec the Halls (a holiday carnival). In addition, on our own, we offered a dodgeball night, breast cancer walk, and several intramural tournaments.

- We have spent the last two months working with the new project group from IT. We pursued three possible vendors and vetted them out to ensure each would meet all of our requirements and fulfill all university IT compliance matters. After the new year, we will be working with Procurement on negotiation and pricing and hope to select a vendor before the start of the second semester.

**Academic Success**

- Online evaluation survey for True Beacons was implemented in Fall 2019.
- Assistant AD for Compliance and Student-Athlete Welfare is working on drafting a program expansion for True Beacons.
### AY2019-2020 GOALS
#### MID-YEAR REPORT

**EXECUTIVE AREA: ATHLETICS AND RECREATION, SPECIAL PROJECTS AND PROGRAMS**

<table>
<thead>
<tr>
<th><strong>Student-athlete retention</strong></th>
<th><strong>Expansion for juniors and seniors.</strong></th>
<th><strong>Expanded program would include sophomores, juniors and seniors. Athletic staff, coaches and industry experts would be a part of the expanded program.</strong></th>
</tr>
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<tbody>
<tr>
<td>Apprenticeships, career-oriented course offerings, and internship and job pipelines through industry clusters.</td>
<td>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.</td>
<td>Sr. Associate AD is transitioning end of season surveys to online. This is a work in progress.</td>
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<tr>
<td><strong>•</strong> 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.</td>
<td><strong>•</strong> Intercolligate teams will complete surveys upon the end of their seasons. Survey results will be shared with administrative staff and coaches. Action plans will be created to address feedback and shared with student-athletes.</td>
<td><strong>•</strong> Life Skills Program Update: The newly developed initiative between UMB student athletes and Dr. Melanie Cadet’s Life Skills Coaching program achieved our goal: two student athletes receive short term self-care intervention in fall 2019.</td>
</tr>
<tr>
<td><strong>•</strong> Enhance Academic Support</td>
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<td><strong>As we move forward, we plan to build on the policy and procedural framework developed this semester and shift the priority to focus on student athlete self-care. In addition, this program help enhance the relationship with the Graduate College of Education. Dr. Cadet has been an excellent referral resource for students who have undiagnosed learning and attention issues.</strong></td>
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<tr>
<td><strong>o</strong> Collaborate with the College of Education &amp; Human Development to assist with securing tutors and academic support services assistants</td>
<td><strong>o</strong> Define at-risk</td>
<td>Definition of “at-risk” is a student-athlete with a cumulative GPA below a 2.5. Athletics finds value and support in watching not only those deemed “at—risk” but student-athletes who fluctuate semester to semester with high varying GPAs.</td>
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<tr>
<td><strong>o</strong> Work with the Triage Retention Program under-enrollment.</td>
<td><strong>o</strong> Ensure completion of Academic Contracts and provide timely reports to coach and administrators</td>
<td>A representative of athletics currently attends the triage retention committee meetings.</td>
</tr>
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<td><strong>o</strong> Ensure completion of Academic Contracts and provide timely reports to coach and administrators</td>
<td><strong>Student-athlete retention</strong></td>
<td>Monthly reports are submitted to the Sr Associate AD and Assistant AD for Compliance by the Assistant AD for Student Support Services for those student-athletes under academic contracts. Coaches of these athletes also meet monthly with Assistant AD for Student Support Services to discuss.</td>
</tr>
<tr>
<td><strong>Collaborate with the Office of Institutional Research on streamlining the process for retention calculation to mirror that of the University.</strong></td>
<td><strong>Evaluate retention numbers and graduation rates. True Beacon – increase # of surveys returned from FY19 to FY20</strong></td>
<td><strong>Student-athlete retention</strong></td>
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<td><strong>Evaluate retention numbers and graduation rates. True Beacon – increase # of surveys returned from FY19 to FY20</strong></td>
<td><strong>Athletics has reached out to Bruce Haimowitz to meet and discuss in greater detail retention and graduation rates for athletics.</strong></td>
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<td><strong>Increased completed True Beacons surveys by 19% from FY19 to FY20.</strong></td>
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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 support. Review the Office of Research and Sponsored Programs with a view to improving services, including post-grant support. Measure and increase faculty proposal throughput.

Focus on the health, well-being and professional development of athletic administrators and coaches.

- **Redefine Development accounts VCAR, Golf and Hall of Fame**
- **Work Life / Balance programming**
  - Athletic Training staff will develop strategies for balance.
  - Strategies will be input into Operations Manual
- **Internal and external professional development opportunities**
  - When possible use University training options (i.e. time management, stress management)
  - Senior Team Group reading projects
  - Redefine use of two development accounts to create grant opportunities for external professional development opportunities.
- **Highlight UMB alum athletic staff through editorial pieces developed through sports information**
- **Orientation for new employees in Athletics**

The Vice Chancellor looked at the current list of gift and development accounts under the Division’s umbrella. It was decided that the Athletic Gift account will be used to house funding for professional development opportunities staff can request. A request process was put in place and athletic administrators and coaches applied. The 1st funded professional development grant will happen in early January 2020.

Other professional development opportunities have been with select reading initially introduced during the Leadership team Advancement meeting over the summer. This has continued during monthly meeting during the school year.

Highlight UMB alum athletic staff through editorial pieces developed through sports information – Athletics is working on videos to highlight UMB alums (Geoff Ebbs, Alexa Cappione, Genesia Eddins, Charles, Lai). These videos could be used as a recruiting piece and a promotional piece to the student body to encourage athletic participation.

Orientation for new employees in Athletics. In FY20 new head coaches were scheduled for multiple budget and NCAA compliance meetings with the appropriate staff. Moving forward that will expand to include a more formal peer-to-peer component.

Prior to the start of the FY 21 school year we would like to have an orientation for all assistant coaches. This would include:
  - University policies on purchasing
  - Explanation of background checks
  - Representative from HR to attend

Goal 7: Administrative efficiency: Improve administrative quality, while achieving greater administrative efficiency, freeing up resources for student support and faculty growth.

- **Conduct administrative reviews:** Complete reviews of IT, Athletics, Government Relations, Office of Grants and Contracts, Financial Aid, Undergraduate and Graduate Admissions. Streamline units and promote more efficient service to our students and faculty.

- **Credit Card System/ New Pro Card**
  - Schedule trainings for staff to ensure appropriate use of resources

  Progress due: 1/20/20 and 6/30/20

- **Review Athletic policies**
  - Revise Operations Manual

Held training for all Head Coaches regarding travel card use and expense reporting. This was done early November prior to the move to Central.

Updated manual is online on the Athletics website.
## AY2019-2020 Goals

### Mid-Year Report

### Executive Area: Athletics and Recreation, Special Projects and Programs

**• Improve 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.

**• Improve IT infrastructure:** Launch 60+ initiatives under the leadership of the new CIO to support student success & development, enrich & expand academic programs, and improve the teaching, learning, and working environment.

**• IT Project**
  - Review and clean data used for fundraising
  - Develop universal electronic filing system for the Division
  - Look for ways to collaborate with other University Division around digital storage
  - Develop an archiving procedure in collaboration with University Archiving.

**• Enhance Athletic Concessions**
  - Review health standards of the operation.
  - Determine replacement of key equipment

**• Addressing Softball Title IX Issues:**
  - Add another bleacher system beyond the left field fence that would increase seating an additional 160 seats.
  - Add drainage to left field grass, which would increase player safety.
  - Though capital funding replace scoreboard and add outfield padding

  - Increase Ice Maintenance efficiency through new equipment:
    - Replacing the Zamboni Batteries
    - Replacing Edger

**• Athletics Master Plan**
  - Draft a primary outline for athletics
  - Collaborate with University facilities and Chancellor’s Office

**• IT Project**
  - Electronic system has been built will review in the January Leadership Team meeting prior to implementation.
  - Currently collaborating with Creative Services and Government Relation in the use of the Intelligence Bank digital storage. Sport Information will use the storage for current year photos and videos. All physical photos and VHS tapes have been given to University Archives for historical purposes.

We have implemented a cleaning policy with custodial services. Might want to investigate renovating though capital projects.

Keeping existing Bleachers but adding a patio/tailgating area to enhance fan experience. Added drainage to left field in August. Will allow for games to be played quicker after rain. Outfield padding has been ordered and will be installed before the 2020 season. Scoreboard will be installed in Summer of 2020 with the help of UMB Facilities.

Zamboni batteries will be replacing at the end of hockey season through GOF. The Edger was replacing this summer. It has greatly enhanced ice rink operations efficiency.

The Master Plan process has not started. Waiting for the Asst. Vice Chancellor of Facilities position to be filled.
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 endowment and cash gifts**, as well as a set of advancement milestones in prospect qualification, chancellor/donor meals and dinners, major gift officer visits, and corporate/foundation proposals.

- **Build team fundraising strength**: Hire new Associate Vice Chancellor for corporate and foundation relations. Focus attention on, among other things, Center and Institute fundraising. Complete hiring for front line fundraisers.

- **Cultivate prospects**: Secure 500 face-to-face visits with prospects/suspects (a 230% increase), discover 100 new prospects, and host six “consultation dinners” in key geographies.

- **Increase Golf Classic net revenue from $31K in FY19 to $50K in FY20**
  - Begin outreach in November 2019, e.g., with local unions, university vendors, and corporate sponsors
  - Explore a partnership with Sports Leadership supporters to broaden participation and increase yield
  - Work with Allyce Najimy to increase silent auction yield from $2500 in FY19 to $4K in FY20

- **Review and revise (i.e., scrub) data used for fundraising purposes as part of IT project**
  - Use that clean data for a general print/electronic appeal by 1/20/20 that highlights the recent significant success of UMB Athletics

- **Begin the effort to secure major funding for the significant improvement of the softball facility**
  - Meet with 2-3 potential corporate and individual donors by 12/31/19

- **Aggressively rejuvenate the effort to secure major funding for the significant improvement of the skating facility**
  - Meet with key early supporters of the rink revitalization effort by 10/31/19
  - Determine BC High’s level of interest in a fundraising partnership by 10/1/19
  - Regardless of BC High’s involvement, identify and meet with 2-3 potential corporate and individual donors by 12/31/19

- **Begin planning for the biennial Athletics Hall of Fame event scheduled for the Fall of 2020**
  - Meet with VC Titus, Dave Walberg, et. al. by 10/15/19 to begin planning process

Progress due: 1/20/20 and 6/30/20

**Golf Classic:**
Targeted outreach has begun to various unions and prior sponsors. Will accelerate in January/February prior to mailing of Golf brochure in March 2020.

Will work with the re-aligned University Purchasing department in January to establish the appropriate procedure for outreach to vendors.

**Data:**
Will work with Dave M and Advancement to use the updated contact data for all Athletics donors as the basis for outreach in 2020

**Softball Facility:**
A very positive campus visit in October by the leader of a local foundation focused on sports and recreation will pave the way for a specific request in 2020 aimed at installing lights and a new turf field.

Other campus visits by potential conduits to corporate funding will be scheduled for early 2020.

**Skating facility:**
In an October mtg. with BC High leadership it was made clear that although a joint rink improvement effort was a worthy goal, other priorities required their concerted attention at this point. Given that reality, I will continue to pursue other funding possibilities.

**2020 Hall of Fame event:**
A mtg. with VC Titus, Dave Wolberg, et. al. will take place in January to begin the formal planning and implementation process for the Fall, 2020 HOF event.

**Other significant progress:**
Initiated a potentially substantive partnership with the local professional Lacrosse franchise, the Boston Cannons, which has moved forward with the involvement of VC Titus, Senior Athletics Staff, Coach Low, and Dr. Cooper of Sports Leadership.

Initiated what promises to be a fruitful collaboration with the incipient...
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<tr>
<th>Greater Boston Sports Partnership, Inc. following outreach to TD Garden leadership re: our tennis athletes' participation in the upcoming September 2020 Laver Cup event.</th>
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<tr>
<td>Continued my collaboration with other University sectors, e.g., career services, advancement and special events, student affairs, etc., and have enhanced the Division and University visibility in external circles by active participation in The Breakfast Group, the New England Council, the Tradition, etc.</td>
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