Grounding our planning in the Mission and Values of UMass Boston

As we contemplate our goals for 2019-20, it is worthwhile to remind ourselves of the purposes we try to serve and the values we embrace. Each of us has a particular take on the mission of UMass Boston. Here is one way to express our “true north”:

UMass Boston was born to serve an urban population, especially students from low income, first-generation college families and embraces people from all walks of life. Beacons seek an excellent and affordable education, enriched by critical thinking and intellectual vitality. Students look to us to facilitate the acquisition of knowledge that will enable them to realize their dreams, enable upward mobility, and lead to a rewarding life, however they define it.

To that end, we provide them with an outstanding, accomplished faculty dedicated to original research and path-breaking knowledge as well as student success. We collectively rely on a hard-working, diverse staff who embrace the campus mission. Because our students and staff come from all over the world and every region of the Commonwealth, we celebrate the plethora of cultures, languages, religions, and identities that they bring with them.

UMass Boston’s urban mission extends in profound ways to the communities around us, serving as a vehicle for economic development consistent with the desires and ambitions of our neighbors. In pursuit of these goals, we are dedicated to incorporating the campus into the economic orbit of greater Boston and to ensure that our students, their families, and our neighbors share in the prosperity that has been its good fortune. Finally, we seek to ensure that our people participate in the debates and decisions that have such a profound impact on their lives, their community, their country and nations around the globe.

UMass Boston Chancellor Goals for FY20

The following goals and initiatives have been identified as priority goals for UMass Boston for FY20. The UMass President’s Office defined six goals for the campus which have been integrated, as noted in red, into the goals below.

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 re-organizations 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).

**Chancellor’s note:** Let me acknowledge how hard it has been on this campus community to bring ourselves into financial balance in each of the past three years. RIFs, VSIPs and general belt tightening have impacted the lives of many of our colleagues. Although these cuts have been necessary, I know they have not been easy. I want to thank the entire community for weathering the storm, for making hard decisions, and for remaining committed to the mission of this incredible University.

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 apprenticeships, career-oriented course offerings, and internship and job pipelines through industry clusters.
Advance graduate student success: Expand student orientation, increase writing and statistical modeling support, enhance community building, improve tracking of time to degree, and include a focus on development of marketable skills. Create and monitor metrics charting increased responsiveness to student needs.

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

4. Enrollment: Increase enrollment and net tuition revenue, with a focus on predictive and accurate models and proven best practices.
   o Increase new undergraduate enrollment: Optimize financial aid and merit scholarship strategies to strengthen yield and net revenue. Execute multi-channel marketing and communication strategy targeting applicants and committed students. Improve campus visit experience. Embed an enrollment counselor at Bunker Hill to support transfer student pathways. Expand veteran student interest and services.
   o Maximize continuing undergraduate enrollment: Execute visible and sustained registration campaigns to remove holds and reduce barriers to student progression.
   o Focus on improving net tuition revenue: Engage with industry experts to analyze financial aid and discounting practices, in order to develop strategies to increase overall and per student net tuition revenue.
   o Increase new graduate enrollment: Achieve growth in revenue-producing graduate programs through streamlined application processing, targeted digital marketing, and deep collaboration with program faculty.
   o Sustain out-of-state enrollment and diversify international enrollment: Strengthen and deepen partnerships with international recruitment partners. Boost international visibility of UMB (especially in Latin America, Africa, and areas of Asia other than China, where we already have a footprint) in
collaboration with Navitas. Launch innovative new partnerships with Shorelight (especially in Computer Science and in undergraduate programs for students remaining in home countries and attending over the Shorelight Live platform). Improve and sustain out-of-state recruitment and marketing and host admitted student receptions.

5. **Online: Provide significantly increased access to, and impact from, online education. Increase revenues and continue to collaborate and cooperate with UMass Online.**
   - **Improve organizational focus:** Streamline management of online courses, appointing Dr. Mya Mangawang, a senior leader reporting directly to Provost – with a dotted line to the Chancellor - to lead the effort.
   - **Build quality of online instruction:** Build faculty strength and supports for teaching online, including comprehensive wraparound services for new online instructors and for new course design and delivery. Institute measures to assure quality of online instruction.
   - **Increase enrollment and revenue by 5%:** Execute a series of initiatives to increase enrollment, including (a) launch new online programs, in addition to focusing on existing programs and individual online courses, (b) build marketing, lead generation, and nurture capacities for online programs, (c) assess and strengthen online faculty and student supports, and (d) assess and strengthen online instructional design and delivery capabilities.
   - **Re-introduce revenue sharing:** Re-introduce revenue sharing for growth of new and existing online programs, providing a clear incentive to departments for online program growth.
   - **Continue to collaborate and cooperate with UMass Online on the plans to support growth.**

6. **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 strengths going forward. Ensure that academic excellence is served by the resulting arrangements.
   - **Advance the academic master plan:** Execute upon the program planning and approval processes that were developed in FY19. Continue with governance fast tracking, implementing the revised AQUAD process, and develop a full academic master plan by January 2020.

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.

- **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.

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.

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<tr>
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<th>Actual</th>
<th>Goal</th>
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<tr>
<td><strong>Fundraising</strong></td>
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<td>Total new commitments</td>
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<td>$13.5 Million</td>
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<td>Total new commitments from alumni</td>
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<td><strong>Endowment</strong></td>
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<td>Total new commitments designated for core endowment</td>
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<td><strong>Chancellor activity</strong></td>
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<td>Number of prospect meetings attended by the chancellor</td>
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<td>Number of substantive off-campus alumni events hosted by the chancellor</td>
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<td>Number of prospect meals hosted by the chancellor</td>
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<td><strong>Total Major Gift Officer activity</strong></td>
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<td>Number of new + re-rated major prospects</td>
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9. **Connecting to Boston: Improve ties to major industries, and maximize opportunities for students to realize their occupational ambitions in the private, public, and non-profit sectors.**
   - Inaugurate on-campus apprenticeship program primarily for 1st and 2nd year students.
   - Complete 20 Industry clusters and assure follow up.
   - Enhance philanthropic relations with participating firms.
   - Further develop student and faculty opportunities to engage with city, state and federal government offices, as well as community, civic, neighborhood and non-profit organizations (e.g. the D4 Lab, etc.).
   - File proposal to host Minority Small Business Development Center.

10. **Campus rehabilitation and planning process: improve the physical appearance and functionality of the campus.**
    - **SDQD:** Complete the decanting of the Science Center, the construction of the new catwalk, and begin the demolition of the Science Center that will be completed in the summer of 2020. Design and plan for the construction of the campus quadrangle, including engaging staff around the programmatic use of the space.
    - **Master plan:** Begin the preliminary update of the campus master plan.
      - Replace retiring Associate Vice Chancellor for Facilities to support the development and implementation of a comprehensive and affordable strategic plan for facilities management and enhancement.
      - Begin development of the long-range plan for departments displaced by the demolition of the Science Center.
    - **Bayside:** In partnership with the President’s Office and the UMass Building Authority (UMBA), launch campus and community consultations to ensure participation of all constituencies in discussions with Accordia Partners. Engage in preliminary consultations concerning the disposition of the 200,000 square feet reserved for UMB at Bayside.
    - **Initiate planning for Calf Pasture Pumphouse renovation:** Following Board of Trustees approval, plan to issue a Request for Information to explore development plans for the Pumphouse and adjacent related parcels, in keeping with historic preservation guidelines.

11. **Visibility and reputation: Increase the visibility and reputation of UMB to student, family, alumni, donor, community, and policy maker audiences.**
    - Continue the constant, concerted, and strategic effort to pitch and place stories in Boston and higher education industry media that tell the University’s positive story
    - Recruit Chief Marketing Officer and develop an effective outreach plan that highlights the research and educational excellence of UMB.
i. Reorganize marketing into a structure that is responsive to campus divisions and programs and achieves a measurable return on investment.

ii. Strengthen UMB’s brand through consistent brand management and messaging,

iii. Make more proactive use of social media, digital content, web-based communication.

- Develop regular opportunities for showcasing UMB’s contributions to legislators and enable the automatic tallying of faculty community engagement (in research, teaching, service) by legislative district.
- Convene the Boston Advanced Academic Consortium across local universities to promote collaboration and cross registration, particularly in UMB accelerated masters programs.

12. Financial planning: Collaborate with, and follow the recommendations of, the UMPO Financial Planning Advisory Working Group, a collaborative system-wide project that was announced in August.

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

- Aim for a minimum of 20 legislative visits and at least one campus gathering for legislators.