The Chancellor’s Strategic Planning Task Force (CSPTF) Charge:

“To receive input from throughout our internal and external constituencies and develop a comprehensive report recommending strategic directions for the University of Massachusetts Boston over a three year period beginning in 2008.”

Recommended Strategic Goals

1. Increase Student Access, Engagement, and Success
2. Attract, Develop, and Sustain Highly Effective Faculty
3. Create a Physical Environment that Supports Teaching, Learning, and Research
4. Enhance Campus-Community Engagement through Improved Organizational Structures

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B. CSPTF Recommendations

Our mission is to develop in Boston a great public urban university, which will preserve and extend in the best tradition of the Western world the domain of knowledge and nurture intellectual freedom and integrity, and with the kind of program, service and leadership given rural communities over the past century by the land-grant universities…The urban university must stand with the city, must serve and lead where the battle is. This is what the University of Massachusetts at Boston must do.

The University of Massachusetts Boston Founding Statement of Purpose, 1965

From its beginnings, the University of Massachusetts Boston has followed the vision of its founders to ‘serve and lead where the battle is.’ We have developed our urban mission through a continuous emphasis on excellent faculty and instruction, affordable costs, and responsiveness to community needs. We are geographically and financially accessible to students of all means, ages, and backgrounds. We have become the most ethnically diverse public university in New England. More than half of our graduates are the first persons in their families to receive a college degree and most remain in the area to contribute to the economic, social, and cultural vitality of the region. We have not marched in place, but have changed with the times. We have added professional programs to the original liberal arts focus of the campus. Doctoral programs, workforce and continuing education programs, and on-line programs have expanded UMass Boston’s reach and impact.

To remain vital and relevant, we seek to build on our accomplishments and marshal our resources in ways that strengthen our standing as Boston’s great public university. The recommendations of this Task Force chart a proposed course for the next three years that continues the vision of UMass Boston’s founders. The Task Force subcommittees made many important recommendations. This report presents sixteen recommendations that the Task Force considered most carefully and supported most fully. Other subcommittee recommendations are also well worth considering. They appear in the subcommittee reports, which are included as appendices to this document. The subcommittee reports also provide significant documentation, extended discussion, and analysis in support of the recommendations. It is the Task Force’s hope that the subcommittee reports will be used extensively in developing the actual strategic plan.

The Task Force recommendations are grouped under four strategic goals:

1. Increase Student Access, Engagement, and Success
2. Attract, Develop, and Sustain Highly Effective Faculty
3. Create a Physical Environment that Supports Teaching, Learning, and Research
4. Enhance Campus-Community Engagement through Improved Organizational Structures
STRATEGIC GOAL #1:
INCREASE STUDENT ACCESS, ENGAGEMENT, AND SUCCESS

UMass Boston must grow in size if it is to fulfill its mission to provide access to a quality education for academically prepared students of all backgrounds and financial means. Increasing enrollment to 15,000 students by 2010 is also necessary for our development as a research university and for the financial stability necessary to fulfill our mission. The original vision for UMass Boston was for a campus of more than 15,000 students. In recent years, enrollment has begun to increase. We currently expect slightly more than 13,000 students to enroll in fall 2007. We have begun to move toward the enrollment that was originally intended for the campus.

Our enrollment goal can be achieved through incremental overall growth, by targeting specific populations of students, by increasing our focus on master’s degree programs, by ongoing consideration of lifelong learners, by facilitating the transfer of students from community colleges, and by exploring external opportunities for partnerships. We are committed to maintaining the current student profile, with its healthy mix of older and younger students, full-time and part-time students, and students of all economic means. To do this, it is essential to provide adequate financial aid, including scholarships and graduate assistantships. Financial aid should be increased to meet a greater percentage of student need. In addition, the campus must assist students to reduce the number of hours that they work off-campus by offering more scholarship opportunities; on-campus work options; and local, well-paid co-ops and internships.

Our students deserve first-class academic buildings equal to the best facilities that other universities have to offer. Too many of our classrooms are windowless, small, cramped, and unattractive. The classrooms do not provide the necessary flexibility to support the advanced pedagogical methods and technology-enhanced instruction preferred by instructors. The condition of our classroom facilities is a major deterrent to recruiting and retaining both students and faculty. In addition to better instructional space, we need more instructional space. A careful review done by our architectural consultants, Chan Krieger Sieniewicz, shows that our current facilities do not provide us with sufficient academic space based on higher education facilities standards. To grow to 15,000 students, we will need to add 500,000 square feet of academic space to what we currently have. Therefore, we should begin planning for construction of several new academic buildings with construction of the first to begin as soon as possible.

UMass Boston is also concerned about being responsive to the housing needs of our students. We need to provide a wide range of housing options including, but not limited to, on-campus residence halls. Creating a limited number of residential spaces on campus would be in keeping with what has taken place at almost all other urban, public universities across the country. In a survey of UMass Boston students conducted by an independent research firm, seventy-nine percent (79%) of respondents believed that the University of Massachusetts Boston should offer students on-campus residence halls. Eighty-three (83%) believed that the presence of residence
halls would improve the quality of campus life. The university should pursue a path that includes on-campus residence halls as well as enhanced coordination with the Harbor Point Apartment Community, where many students reside.

We believe that a limited number of on-campus residents would invigorate the campus, increase student identification with the university, improve student retention, and create student services that would serve all students at the university. At the moment, there are limited dining, academic support, advising, recreational, and other services for the many students who attend UMass Boston in the evening. On-campus housing would necessitate the development of critical services outside of the standard daytime hours. It would make the campus a living community, serving the needs of all UMass Boston students, the vast majority of whom will continue to commute to campus. On-campus housing will be a critical component in the growth, competitiveness, and quality of the University of Massachusetts Boston educational experience. We currently believe that on-campus housing for approximately 2,000 students would meet student needs; however, this number is subject to review and refinement. Construction of on-campus housing must, of course, involve extensive consultation with our neighbors.

Another thing we must do to maximize student success is to address concerns about the availability, quality, and consistency of undergraduate student advising, including the appropriate mix of professional and faculty advising. Our centralized advising services serve a vital function for new students, especially transfer students who need course equivalency, general education, and graduation requirement consultations. At the same time, services based in some of our colleges are proving to be fundamental to student success by increasing connections between students and faculty, and by increasing students’ academic identification with their majors and colleges. We need to have both central advising services and college-based services. In numerous surveys, both formal and informal, our students tell us that the most important factor in their success at UMass Boston is their connection to a faculty member. We must develop mechanisms to foster those connections.

We also must promote best teaching practices for our diverse student population to increase student academic engagement across the curriculum at all levels, from first-year undergraduate through graduate education. These practices include active and collaborative learning, reflective thinking for deep learning, heightened student-faculty interaction, and community-based learning. We also recommend that UMass Boston make better use of its instructional resources by a judicious increase in large classes and expanded use of educational technology, consistent with best teaching practices. To ensure that our efforts are effective, we must institute student outcomes assessment programs and use the results to improve our teaching practices. Finally, programs and services within the Division of Student Affairs should move from a service paradigm to one of student learning and development.

The central recommendations for increasing student access, engagement, and success are listed below with references to relevant sub-committee reports.

**Recommendations**
1. Increase enrollment to 15,000 students by 2010 while maintaining the diversity of the current student profile. (Enrollment and Financial Aid Sub-committee final report and Appendices 1-4; Academic Sub-committee final report and Appendix 8)

2. Increase financial aid to meet a greater percentage of student need. (Enrollment and Financial Aid Sub-committee final report.)

3. Construct new academic buildings with state-of-the-art teaching and learning spaces. (Academic Sub-committee final report; Enrollment and Financial Aid Sub-committee final report; Master Plan Sub-committee final report)

4. Provide a variety of housing options including, but not limited to, on-campus residence halls. (Student Life Sub-committee final report; Enrollment and Financial Aid Sub-committee)

5. Develop a comprehensive advising system integrating centralized advising with college-based professional staff and faculty advising. (Academic Sub-committee final report; Enrollment and Financial Aid Sub-committee final report)

6. Promote and assess best teaching practices including active and collaborative learning and community-based learning. (Academic Sub-committee final report.)

7. Promote and assess co-curricular activities that foster student engagement and active learning. (Student Life Sub-committee final report)

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**STRATEGIC GOAL #2**

**ATTRACT, DEVELOP, AND SUSTAIN HIGHLY EFFECTIVE FACULTY**

UMass Boston’s success is inextricably tied to the success of its faculty. From its earliest days, the campus has enjoyed an exceptionally talented faculty. Because of the faculty’s commitment to the institution and its students, UMass Boston has survived, and in some instances thrived, even during very difficult financial times. The university has continued to ask more and more of its faculty without making available a concomitant increase in resources. It would be unwise to assume that the faculty can continue to produce fine scholarship, engage in meaningful service, and nurture students unless efforts are made to nurture the faculty as well.

Faculty can and should be nurtured at all points in their careers, beginning with recruitment. Faculty retirements and growth in academic programs require that new faculty be hired each year. In some respects, it is easy to interest prospective faculty in our campus. UMass Boston has wonderful students, is located in an interesting and historic city, has a gorgeous waterfront location, and is in close proximity to world-class educational and research institutions. These advantages are not always sufficient to overcome the disadvantages of Boston’s high cost of living, the university’s lack of first-class teaching and research facilities, and high teaching loads.
By addressing some of these disadvantages, UMass Boston will position itself to be more attractive to the most desirable faculty candidates.

Once new faculty members have been hired, they will benefit from a coherent faculty development and mentoring plan. Over the years, various modest efforts to help new faculty members to establish their academic careers have been offered. None has been sustained, nor has any been comprehensively evaluated. Furthermore, no systematic plan has been designed to support faculty as they leave their novice years and continue to develop as teachers and researchers. Although most faculty received mentoring in the researcher role as graduate students, few received mentoring in the teaching role. A career-spanning faculty development program, focusing on all aspects of faculty responsibility, would support faculty as well as help the university to refine its expectations of the faculty role.

Faculty success is related not only to the personal expertise and skill of individual faculty members, but also to the size, diversity, composition and workload of the faculty as a whole. In the area of teaching, tenured and tenure track faculty are responsible for developing and evaluating curricula, providing instruction, and advising students. Non-tenure track faculty, on the other hand, have a more limited set of teaching responsibilities, most often confined to direct instructional activities. Similarly, tenured and tenure track faculty are explicitly responsible for engaging in significant research, whereas non-tenure track faculty are not. In addition, emerging research suggests that student learning outcomes and graduation rates may be compromised by an increase in non-tenure track faculty, and that this may be particularly the case with regard to disadvantaged students. Therefore, the ability of the university to carry out its responsibilities fully and well rests in part on having a sufficient number of tenured and tenure track faculty to teach at all levels of the curriculum. In the past ten years, the percentage of tenured and tenure track faculty has decreased from 75% of total full-time equivalent faculty members to 66%, thus jeopardizing the university’s teaching and research missions. Modifying this trend will enhance our ability to attract and retain the best possible faculty, and therefore to support student success.

The expectations that the university has for its tenured and tenure track faculty have changed over time. As the campus gained stature as a research university, faculty members were called on to produce a greater amount of sophisticated scholarly work. Because our faculty answered that call, we can now look back over a decade or more and take pride in the effort that has led to our designation as a Carnegie research-intensive university. It is time to recalibrate the way in which we use faculty time in the three primary areas of academic life: teaching, research, and service. In order for faculty to continue to grow as researchers, while maintaining the excellent quality of teaching for which UMass Boston is deservedly known, the campus must create teaching assignments that more closely mirror those of our aspirational peer institutions. This should be done by developing a consistent course-release policy that will eventually result in a typical teaching assignment of two courses per semester.

Our aspirational peers produce strong basic research in single disciplines as well as interdisciplinary and applied research. UMass Boston should support its existing programs, investing strategically in high-quality undergraduate and graduate programs with strong research components and/or capacity for growth. Programs selected for strategic investment should represent the full range of campus scholarship: the sciences, the humanities, the arts, and
professional programs. The campus should also develop several interdisciplinary research clusters.

The following possible clusters were identified in the consulting report prepared for UMass Boston by the Batelle Memorial Institutes’ Technology Partnership Practice: urban health and public policy; transnational, cultural, and community studies; developmental sciences; science and mathematics; computational sciences, analysis and modeling; integrated environmental monitoring; biological systems and technology; and sustainability and social venturing. The original purpose of the Batelle report was to inform planning for the UMass Boston Venture Development Center and therefore was not intended to reflect the full range of research expertise, capacity, and opportunity on the campus. To better support and capitalize on the broad range of scholarly activity at UMass Boston, the following clusters (some of which have been re-conceptualized from the Batelle clusters) should also be considered: urban studies, health, and public policy; human development and learning; creative economy and cultural capital. Regardless of which clusters are developed, targeted faculty hiring will be required to ensure the necessary range of faculty expertise. Other necessary resources include core research facilities that can be shared by researchers in many disciplines, state-of-the-art library and information technology services, and substantially increased research administration and support services.

The central recommendations for attracting, developing and sustaining highly effective faculty are listed below with references to relevant sub-committee reports.

**Recommendations**

8. **Institute a career-span, institution-wide faculty development and mentoring program.** (Academic Subcommittee final report and Appendix 1; Research and Graduate Studies Subcommittee final report)

9. **Increase the percentage of tenured and tenure track faculty in the faculty as a whole from 66% to at least 70%.** (Academic Subcommittee final report; Research and Graduate Studies Subcommittee final report)

10. **Develop a consistent course-release policy that will eventually result in a typical teaching assignment of two courses per semester.** (Academic Subcommittee final report; Research and Graduate Studies Subcommittee final report)

11. **Identify and invest in high-quality undergraduate and graduate academic programs with strong research components and/or capacity for growth.** (Research and Graduate Studies Subcommittee final report; Enrollment & Financial Aid subcommittee final report.)

12. **Identify and invest in one or more interdisciplinary research clusters.** (Academic Subcommittee final report; Research and Graduate Studies Subcommittee final report)
STRATEGIC GOAL # 3
Create a physical environment that supports teaching, learning, and research

UMass Boston sits on one of the most spectacular sites in the city of Boston. Surrounded by water on three sides, with unimpeded views to the sea, the downtown skyline, and the Blue Hills, the campus shares with its neighbors a site to uplift the spirit and engender optimism. The potential of this site has been unrealized, however. The original physical plan created an inward-looking, defensive campus marred by faulty construction. Years of inadequate funding for necessary maintenance have led to a woefully deteriorated campus. The opening of the Campus Center in 2004 finally gave the campus community a building that our students deserve and that reflects and increases the vibrancy of the campus. We have a vision of what is possible and we must commit ourselves to creating a campus that properly supports our teaching, learning, and research missions. Our studies show that this will entail new as well as renovated buildings developed within an overall master plan for the campus.

A comprehensive physical master plan is necessary to ensure thoughtful growth of the campus over the next 20-25 years. The university is working with the Commonwealth’s Division of Capital Asset Management (DCAM) and the architecture and urban design firm Chan Krieger Sieniewicz (Chan Krieger) to analyze the current state of the campus and its facilities. DCAM and Chan Krieger have collected and reviewed information on all campus facilities. They have prepared a preliminary facilities assessment that compares the costs of repairing and upgrading buildings to the estimated replacement costs. Preliminary findings indicate that repair costs for many of our buildings come close to or exceed the cost of constructing new buildings. Based on this cost analysis, we recommend constructing two academic buildings in the early stages of the 25 year master plan rather than investing in the repair of existing buildings that have outlived their usefulness and that would be prohibitively costly to repair.

The master plan will include a building and land use plan. Particular attention is being paid to site locations, open spaces, and integration with the surrounding community. The content of the master plan is driven by the recommendations of this Task Force. Therefore, a reconfigured master planning committee will continue to work and present a plan to the University Board of Trustees this coming academic year.

In regard to the recommendation to provide on-campus housing for students, we recommend developing preliminary plans for residence halls for 1000 students. We recommend the immediate creation of a task force to provide guidance to the Master Plan Sub-committee on all aspects of residence hall construction and operation, including size, location, facilities, programming, and auxiliary services necessary for success. The task force should consult extensively with all appropriate community members and organizations.
The central recommendations for creating a physical environment that supports teaching, learning and research are listed below with references to relevant sub-committee reports.

Recommendations

13. Create a facilities master plan with a 25 year time frame to support our campus mission. (Master Plan Sub-committee final report.)

14. Begin detailed planning for the first phase of campus capital improvements. (Student Life Sub-committee final report; Enrollment and Financial Aid Sub-Committee final report; Master Plan Sub-committee final report)

STRATEGIC GOAL #4

ENHANCE CAMPUS - COMMUNITY ENGAGEMENT THROUGH IMPROVED ORGANIZATIONAL STRUCTURES

UMass Boston was deliberately and explicitly placed into relationship with external communities in its founding documents, which emphasized the university’s urban mission and its responsibilities to the Commonwealth of Massachusetts. Since its birth, our campus has eagerly sought opportunities to interact with neighbors, cities and towns, organizations, and business concerns. No longer limited by the boundaries of the Commonwealth, UMass Boston has worked with communities elsewhere in the country and indeed, the world.

Our campus collaborates with partners – especially in urban communities – to create opportunities, solve problems and build on community strengths. UMass Boston has always understood that campus-community engagement benefits the university as much as it benefits the communities with which it interacts. The university shares its intellectual and physical resources with those communities and in turn is enriched by the diverse students who come from the communities, by the deep knowledge that community members share with us, and by opportunities to work together with communities on projects that could not be done well by the university acting alone.

As we plan for the future, we will seek ways of strengthening campus-community engagement. We must find ways to more effectively develop partnerships with external groups and institutions that advance the university’s urban mission. We must also become more purposeful in selecting high-quality, high-impact projects, rather than diffusing our energy and attention among many projects, some of which will never give rise to substantial outcomes.

The central recommendations for enhancing campus-community engagement are listed below with references to relevant sub-committee reports.

Recommendations
15. Create a government and community relations unit with an office of community partnerships. (External Relations Sub-committee final report)

16. Identify and promote signature campus - community engagement initiatives. (External Relations Sub-committee final report)

SUMMARY OF RECOMMENDATIONS OF THE CHANCELLOR’S STRATEGIC PLANNING TASK FORCE

**Strategic Goal One: Increase Student Access, Engagement, and Success**

1. Increase enrollment to 15,000 students by 2010 while maintaining the diversity of the current student profile.
2. Increase financial aid to meet a greater percentage of student need.
4. Provide a variety of housing options including, but not limited to, on-campus residence halls.
5. Develop a comprehensive advising system integrating centralized advising with college-based professional staff and faculty advising.
6. Promote and assess best teaching practices including active and collaborative learning and community-based learning.
7. Promote and assess co-curricular activities that foster student engagement and active learning.

**Strategic Goal Two: Attract, Develop, and Sustain Highly Effective Faculty**

8. Institute a career-span, institution-wide faculty development and mentoring program.
9. Increase the percentage of tenured and tenure track faculty in the faculty as a whole from 66% to at least 70%.
10. Develop a consistent course-release policy that will eventually result in a typical teaching assignment of two courses per semester.
11. Identify and invest in high-quality undergraduate and graduate academic programs with strong research components and/or capacity for growth.
12. Identify and invest in one or more interdisciplinary research clusters.

**Strategic Goal Three: Create a Physical Environment that Supports Teaching, Learning, and Research**

13. Create a facilities master plan with a 25 year time frame to support our campus mission.
14. Begin detailed planning for the first phase of campus capital improvements.

**Strategic Goal Four: Enhance Campus-Community Engagement through Improved Organizational Structures**

15. Create a government and community relations unit with an office of community partnerships.
16. Identify and promote signature campus-community engagement initiatives.
**Matrix of Sub-committee Recommendations**

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<tr>
<td><strong>Enrollment and Financial Aid</strong></td>
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<tr>
<td>Grow campus to 15,000 students by 2010.</td>
<td>X</td>
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<tr>
<td>Strengthen existing academic programs and services.</td>
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<td>Enhance stature, visibility and impact of campus.</td>
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<td>Focus on specific segments of existing population.</td>
<td>X</td>
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<td>Strengthen reputation of existing programs.</td>
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<td>Stronger retention efforts.</td>
<td>X</td>
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<td>Consider new academic units and offerings.</td>
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<td>Improve student support in advising, remediation, tutoring, writing and language services, international services.</td>
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<td>University housing - 20% matriculated undergrads; 10% matriculated grad students.</td>
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<tr>
<td>Expand off-campus housing services.</td>
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<td>New academic buildings with state of the art teaching and research facilities and academic resource center for students.</td>
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<td>New freshmen undergraduates from 39% to 50%.</td>
<td>X</td>
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<td>International students from 5% to 10% of total.</td>
<td>X</td>
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<td>Out of state students from 3% to 5% of total.</td>
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<td>Double size of undergraduate Honors Program from 230 to 500.</td>
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<td>30% of total enrollment is graduate.</td>
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<td>Continuously collaborate with CCDE.</td>
<td>X</td>
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<td>Retention rate - first year 70% to 75%; 6 year graduation rate 35% to 40% by 2012.</td>
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<td>Maintain or increase diversity of student population.</td>
<td>X</td>
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<td>Percent of need met from 87% to 90% for financial aid eligible undergrads.</td>
<td>X</td>
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<td>Full orientation required of all new undergrads.</td>
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<td>Comprehensive advising program.</td>
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<td>Establish a program development and review committee.</td>
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<td>Increase Student Access, Engagement and Success</td>
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<td>Academics</td>
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<td>Student academic engagement across the curriculum at all levels.</td>
<td>X</td>
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<td>Active and engaged learning derived from the National Survey of Student Engagement.</td>
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<td>Judicious increase in large classes, and the use of technology.</td>
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<td>Institute student outcomes assessment programs.</td>
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<td>Faculty development activities and mentoring.</td>
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<td>Recruit and retain faculty with strong commitments to both research and teaching.</td>
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<td>Faculty teaching and research activities.</td>
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<td>Full-time tenure-stream faculty from 66% to a minimum of 70%.</td>
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<td>2+2 in class instructional load to all probationary faculty and to all research-productive senior faculty.</td>
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<td>Transition to a permanent 2+2 structure.</td>
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<td>Attract and retain the most talented faculty.</td>
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<td>Address concerns about availability, quality and consistency of advising.</td>
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<td>Commit to the urban mission, global and local cultural literacy, and diversity in students/faculty that makes UMass Boston a distinctive educational leader.</td>
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<td>Support graduate education by increasing stipend amounts and offering additional stipends.</td>
<td>X X</td>
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<td>Coordinate research and program growth.</td>
<td>X X</td>
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<td>Align growth in student numbers with growth in human and physical resources.</td>
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<tr>
<td>Investigate collaborations with other UMass campuses that would enable us to offer cooperative degree programs.</td>
<td>X X</td>
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<td>Academic oversight of all our offerings.</td>
<td>X X</td>
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<td>Research and Graduate Studies</td>
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<tr>
<td>Faculty hiring to achieve strategic research priorities.</td>
<td>X</td>
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<td>Invest strategically in programs with strong research components.</td>
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<tr>
<td>Increase support for grad students.</td>
<td>X X</td>
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<td>Mentoring program for new untenured faculty.</td>
<td>X</td>
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<tr>
<td>Promote innovative research and development ventures.</td>
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<tr>
<td>Research admin to support, facilitate and generate talent to grow research enterprise.</td>
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<td>Expand the university’s research and graduate studies vision.</td>
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<td>Establish and maintain state-of-the-art library services.</td>
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<td>Expand IT resources to support research activities.</td>
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<td>Increase specialized core research facilities.</td>
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<td>Increase stakeholders’ awareness of research capabilities and products through centralized</td>
<td>X</td>
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<td>marketing campaign.</td>
<td>X</td>
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<tr>
<td>Sub-committee Recommendations</td>
<td>Strategic Goals</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Increase Student Access, Engagement and Success</td>
</tr>
<tr>
<td>Provide diverse and multifaceted program of University housing.</td>
<td>X</td>
</tr>
<tr>
<td>Implement program of co-curricular learning and development.</td>
<td>X</td>
</tr>
<tr>
<td>Use principle learning areas of Leadership, Civic Engagement, Multicultural Literacy, Global Citizenship, and Wellness.</td>
<td>X</td>
</tr>
<tr>
<td>Create offices of commuter student services and multicultural affairs.</td>
<td>X</td>
</tr>
<tr>
<td>Move offices of Career Services, Disability Services, Recreational Sports, Dining Services and the Campus Center to become part of the Division of Student Affairs; create a Child Services area; Transfer Early Learning Center out of Division of Student Affairs.</td>
<td>X</td>
</tr>
<tr>
<td>Re-configure Student Life space in Campus Center.</td>
<td>X</td>
</tr>
<tr>
<td>Increase staffing within Division of Student Affairs in targeted areas.</td>
<td>X</td>
</tr>
<tr>
<td>Consider opportunities for shared space for Student Life departments and other units as part of master planning process.</td>
<td>X</td>
</tr>
<tr>
<td>Sub-committee Recommendations</td>
<td>Increase Student Access, Engagement and Success</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Master Plan</td>
<td></td>
</tr>
<tr>
<td>Preliminary facilities improvement cost analysis.</td>
<td></td>
</tr>
<tr>
<td>New academic building.</td>
<td>X</td>
</tr>
<tr>
<td>A second new building.</td>
<td>X</td>
</tr>
<tr>
<td>New student housing.</td>
<td>X</td>
</tr>
<tr>
<td>Establish guiding principles regarding Master Plan.</td>
<td></td>
</tr>
<tr>
<td>Pursuit of urban mission.</td>
<td>X</td>
</tr>
<tr>
<td>Re-conceptualizing space to meet needs of commuting and resident students.</td>
<td>X</td>
</tr>
<tr>
<td>Green/sustainable facilities.</td>
<td></td>
</tr>
<tr>
<td>Durability and flexibility of space.</td>
<td></td>
</tr>
<tr>
<td>Integration of space functions.</td>
<td></td>
</tr>
<tr>
<td>Use of ground level space.</td>
<td></td>
</tr>
<tr>
<td>Incorporation with the natural surroundings.</td>
<td>X</td>
</tr>
<tr>
<td>Integration with the surrounding community.</td>
<td></td>
</tr>
<tr>
<td>Viability of shared spaces.</td>
<td>X</td>
</tr>
<tr>
<td>Safety planning.</td>
<td></td>
</tr>
<tr>
<td>Sub-committee Recommendations</td>
<td>Strategic Goals</td>
</tr>
<tr>
<td>------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td>Increase Student Access, Engagement and Success</td>
</tr>
<tr>
<td><strong>External Relations</strong></td>
<td></td>
</tr>
<tr>
<td>Create a Government and Community Relations unit.</td>
<td></td>
</tr>
<tr>
<td>Designate and aggressively market &quot;signature initiatives.&quot;</td>
<td>X</td>
</tr>
<tr>
<td>Align signature initiatives with research clusters.</td>
<td>X</td>
</tr>
<tr>
<td>One communications office for the university.</td>
<td></td>
</tr>
<tr>
<td>Overhaul the website.</td>
<td></td>
</tr>
<tr>
<td>Create outreach/community connections page on website.</td>
<td></td>
</tr>
<tr>
<td>Develop and use consistent set of vehicles in terms of look, marketing and branding.</td>
<td></td>
</tr>
</tbody>
</table>
C. Appendices

1. **Sub-committee Final Reports**

Reports are available at:

http://www.umb.edu/strategic_plan/subcommitteefinalreports.html

2. **UMass Boston’s Mission, Vision and Value Proposition**

**Mission Statements***

University of Massachusetts Mission: The University's mission is to provide an affordable and accessible education of high quality and to conduct programs of research and public service that advance knowledge and improve the lives of the people of the Commonwealth, the nation, and the world.

University of Massachusetts Positioning: The path to the social and economic development of Massachusetts and its diverse regions goes through the University of Massachusetts.

The Boston campus mission statement states: The University of Massachusetts Boston, one of five campuses of the University of Massachusetts, is nationally recognized as a model of excellence for urban universities. A comprehensive, doctoral-granting campus, we provide challenging teaching, distinguished research, and extensive service which particularly respond to the academic and economic needs of the state’s urban areas and their diverse populations.

* Derived from the Board of Trustees document, BOT, T19-107.

**Vision Statement**

The University of Massachusetts Boston, a doctoral-granting, research university, will be a leading urban public university in the nation. Through the depth and breadth of its commitment to the following areas of endeavor, the University will serve as a model to other such institutions. The University of Massachusetts Boston will:

- sustain a superior faculty dedicated to excellence in undergraduate and graduate teaching;
- provide innovative and often interdisciplinary programs that can respond in a timely manner to societal issues and problems;
- meet the needs of both traditional and nontraditional students; continue to promote diversity among students, faculty, and staff; and conduct educational, scholarly, and service activities that contribute to meeting the needs of a diverse society;
– nurture both pure and applied research to advance knowledge and to create a
better society for all;
– devote a high proportion of research and public service activities to the cultural,
social, and economic development of the Commonwealth and the global
community; and dedicate itself especially to understanding and improving the
environment and the well being of citizens of this region.

** Joint product of the UMass Boston’s Faculty Council and the Office
of the Chancellor, February 1993

VALUE PROPOSITION

The University of Massachusetts Boston:

- Provides students with the intellectual resources of a research university in a diverse and learner-centered culture.
- Promotes the intellectual, professional, civic and personal growth of students from all backgrounds including those traditionally underserved by higher education.
- Strives to increase access to university education for students of modest financial means.
- Uses its strength as a research university to create new knowledge, address the problems of society, inform public policy, and support the economic and social welfare of the Commonwealth.
- Collaborates with partners – especially in urban communities – to create opportunities, solve problems and build on community strengths.
- Is characterized by the intellectual engagement of students, faculty and staff with each other, and with institutions and communities in the U.S. and abroad.

“I believe everyone in the university community must be focused on growth in our enrollment. The value proposition of our university is superb: Our high-quality education is provided at a more reasonable cost than elsewhere in our market place.”
Michael F. Collins, MD, Chancellor, University of Massachusetts Boston, Convocation Address, September 14, 2006.

* Created by the Chancellor’s Strategic Planning Task Force, March, 2007
3. Planning, Organization and Schedule

Planning Process, Organization and Schedule

- **Sept. 28th**: Kick off Retreat
- **Sept. 28th**: CSTF and Sub-Committee Monthly Meetings
- **Sept. 28th**: Sub-Committee Interim Reports
- **Classroom Capacity Analysis – Chan Kreiger**
- **Feb 8th**: Mid-Term Retreat
- **2007**: Final Master Plan based on Strategic Planning Recommendations and Input from Academic and Student Housing Work Groups
- **November**: Academic and Student Housing Work Groups
- **CSPTF Report to the Chancellor**
- **Complete Strategic Plan: Develop Schedule and Resource Requirements to Achieve Agreed Upon Strategic Goals**
- **February 8th**: Strategy and Master Plans to UMASS Board
4. **ANALYSES SUPPORTING STRATEGIC PLANNING PROCESS**

Reports are available at:
www.umb.edu/strategic_plan/ReportofChancellorsStrategicPlanningTaskForce.html

B. Instructional Space Preliminary Analysis, 2/7/07 - Rickes Associates
C. Carnegie Peer Discussion – UMass Boston OIRP
D. Research Report – Battelle (forthcoming)
E. Summary of CSPTF Groups Discussion on “Preferred Student Profile”
F. Performance Measurement System (UPMS), Formula Budgets and Specialty Peers
G. Race, Ethnicity, Age Profile

5. **SUMMARY OF PROCEEDINGS OF STRATEGIC PLANNING RETREAT**

**FEBRUARY 2007 MID-TERM RETREAT: Achieving Consensus on Key Strategic Issues**

Summary of Group Discussions on Four Key Issues:

<table>
<thead>
<tr>
<th>#1</th>
<th>Increase enrollment</th>
</tr>
</thead>
</table>
| **Risks/ Benefits** | - if we grow too quickly, it may decrease retention  
- change of culture  
- trade off of time blocks  
- financial aid within UMass System must keep up  
- loss of personal attention  
+ more opportunity for more people  
+ united alumni  
+ increased revenue/resources |
| **Critical Success Factors** | deliberate and planned enrollment  
defined programs  
increased international presence  
planned target housing  
need for endowed faculty  
improvement of art and music programs  
complementary growth of faculty and support services  
expansion of market, financial aid and smart classrooms  
need for student housing/dorms  
need for growth |
| **Specific Initiatives for Success** | students need to be involved with the community  
pre-collegiate programs must be provided  
continuation of diverse programs  
marketing campaign must be established  
engage alumni, friends, etc  
need to “fully” fund students |
| **Group Support for Goal (Yes/No)** | Group 1-yes  
Group 2-yes  
Group 3-yes  
Group 4-yes  
Group 5-yes (it is a good goal but what is the mix of freshman/transfer & undergraduate/grad ?) |
## Build Student Housing

### Risks/Benefits
- dichotomy of on/off campus
- economic impact study
- community concerns/reaction
- criticality of urban mission – will it pull us away?
- revenue source
- external funding for faculty and students
- housing/SS academic building first
- 2000: 15,000 relationship, the need to have to get there
- where do students live now?

### Critical Success Factors
- must continue to serve commuter students
- must tie dorms to academic programs
- get out the facts about students
- must have comprehensive plan
- 24/7 services need to be available

### Specific Initiatives for Success
- faculty housing
- students will need housing year round
- marketing campaign: FACTS
- investment in neighborhood, not walls
- innovative models (i.e. summer programs)

### Group Support for Goal (Yes/No)
- Group 1-yes (inevitable)
- Group 2-(3-yes, b-no, living/learning=3)
- Group 3-yes(cautiously)
- Group 4-yes (without doubt)
- Group 5-yes
- Group 6-yes (of course)

## Build New Academic Building

### What does it look like/rationale/purposes served
- beautiful and built well with parking
- seminar/mid size, large lecture rooms
- lounge space by discipline
- green buildings, model “showoff”
- greenhouses
- new state of the art labs
- radio station, health club programs
- climbing wall
- theatre
- pool
- tennis courts
- extracurricular spaces for students
- attract and invigorate
- positive asset to community
- dedicated to science/nursing
- dedicated for more than one use
- new innovative disciplines
- model of entire academic excellence
- tied to the JFK library
- blended classrooms
- interdisciplinary
- consistent plan/coordinated
- front door should be welcoming to all
- constructed sooner rather than later
- why not 2 buildings?
- connected to others in New England
- concerned with losing college “identity”

### Group Support for Goal (Yes/No)
- Yes
<table>
<thead>
<tr>
<th>#4</th>
<th>Increase Tenure-stream Faculty</th>
<th>2-2 Teaching Load</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risks/ Benefits</strong></td>
<td>+ increase commitment + increase costs + increase scholarship + increase grants + increase marketing + increase revenue</td>
<td>+ increase research + practically now 2-2, can’t go to a 3-3 + increase student interaction + increase quality, research, service + increase qualified faculty + we are a research inst., should have 2-2 if factors are considered + faculty development - costs - students/class - degree completion</td>
</tr>
<tr>
<td><strong>Critical Success Factors</strong></td>
<td>recruitment must be done well increase space support infrastructure needs must be considered plan for increased costs</td>
<td>student productivity, scholarship degree completion communication plan support services to attract faculty need flexibility to include 3-3 option</td>
</tr>
<tr>
<td><strong>Specific Initiatives for Success</strong></td>
<td>example: Amherst 250 plan model discover how to complement full and part time faculty transition with buyouts mixture of tenure stream and non tenure stream</td>
<td>need more info increase teaching assistants flexible, 3-3 reviews need fair policy of course release needs to be bargained - can we afford it? accountability for engagement need robust learning outcomes</td>
</tr>
<tr>
<td><strong>Group Support for Goal (Yes/No)</strong></td>
<td>Group 1-yes Group 2-yes Group 3-yes Group 4-yes Group 5-yes Group 6-yes</td>
<td>Group 1-yes Group 2-yes (one abstain) Group 3-yes Group 4-yes (but) Group 5-yes (if...) Group 6-(1 yes, 4 maybe)</td>
</tr>
</tbody>
</table>