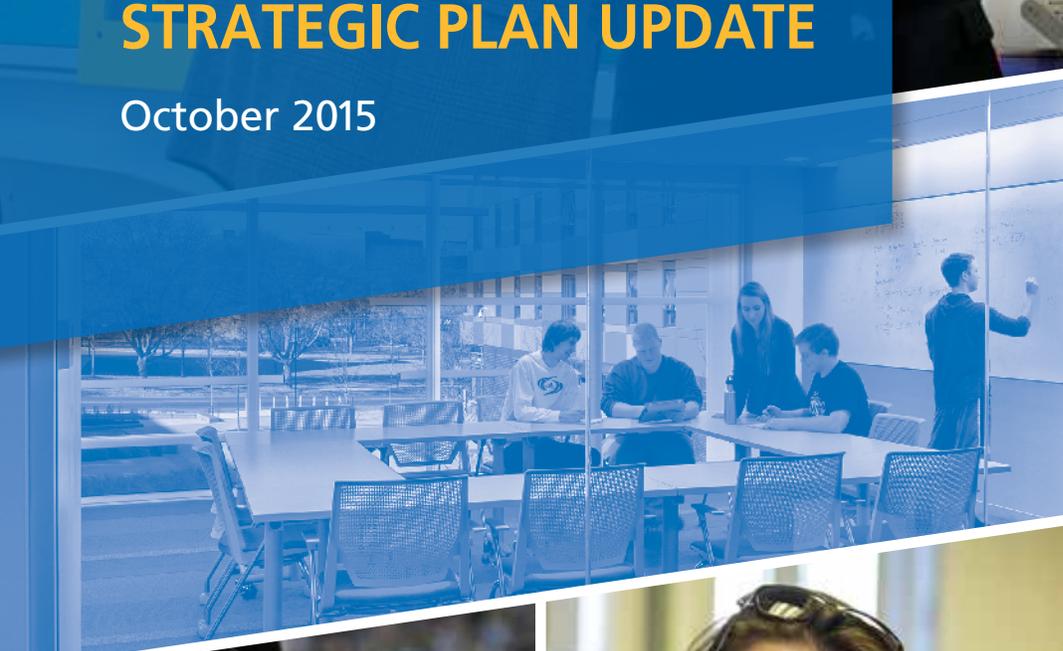




UMASS LOWELL 2020 STRATEGIC PLAN UPDATE

October 2015



MISSION AND PILLARS OF EXCELLENCE FOR UMASS LOWELL 2020

MISSION:

The University of Massachusetts Lowell is a nationally ranked public research university committed to excellence in teaching, research and community engagement. We strive to prepare students to succeed in college, and to become lifelong learners and informed citizens in a global environment. UMass Lowell offers affordable, experience-based undergraduate and graduate academic programs taught by internationally recognized faculty who conduct research to expand the horizons of knowledge. The programs span and interconnect the disciplines of business, education, engineering, fine arts, health and environment, humanities, sciences and social sciences. The university continues to build on its founding tradition of innovation, entrepreneurship and partnerships with industry and the community to address challenges facing the region and the world.

UMASS LOWELL 2020—PILLARS AND COMMITTEES:

Strategic Planning Commission:
Jacqueline Moloney, Chair

I. TRANSFORMATIONAL EDUCATION

Experiential and trans-disciplinary learning prepare UMass Lowell students for fulfillment and making a difference in the world.

Academic Technology Committee:
Michael Cipriano, George Hart,
Co-chairs

Committee on Transformational Education: Charlotte Mandell,
Anita Greenwood, Co-chairs

Subcommittee on Advising

Subcommittee on Pedagogy

Subcommittee on Assessment

Committee on NCAA Division I Institutional Performance: Don Pierson,
Chair

II. GLOBAL ENGAGEMENT & INCLUSIVE CULTURE

Dynamic, global collaborations around the world support student and faculty exchanges, research and other entrepreneurial enterprises. These initiatives will contribute to the development of an inclusive campus culture.

Committee on Global Engagement and Inclusive Community: Luis Falcon,
Lauren Turner, Co-chairs

Committee on Title IX: Ann Ciaraldi,
Clara Orlando, Co-chairs

III. INNOVATIVE RESEARCH & ENTREPRENEURSHIP

UMass Lowell fosters innovative and creative research and scholarship that seeks sustainable solutions to the major challenges in today's world.

Committee on Innovative Research:
Julie Chen, Andrew Harris, Co-chairs

Subcommittee on University Research and Engagement Centers and Institutes

Subcommittee on Faculty Honors and Awards

Subcommittee on Dissemination and External Visibility

Subcommittee on Intellectual Property and Technology Transfer

Subcommittee on Research Infrastructure and Faculty Support

River Hawk New Venture Fund Advisory Board: Jack Wilson,
Don Latorre, Co-chairs

IV. LEVERAGE OUR LEGACY AND OUR PLACE

UMass Lowell is a public enterprise committed to building on our legacy by creating partnerships, locally, regionally, nationally and internationally that enrich and sustain the human experience.

Committee on Economic Development, Entrepreneurship and Corporate Relations: James Sherwood,
Steve Tello, Jack Wilson, Co-chairs

Marketing Committee: Joseph Hartman, Patricia McCafferty,
Co-chairs

Web Advisory Committee: Mark Hines,
Gerry Nelson, Co-chairs

Deans' Alumni Advisory Councils

V. ENTREPRENEURIAL STEWARDSHIP

An entrepreneurial approach to stewardship of human, physical and financial resources will be the hallmark of UMass Lowell's approach to building a healthy and sustainable future.

Committee on Financial Planning:
Michael Carter, Steve O'Riordan,
Co-chairs

Facilities Renewal and Master Planning Committee: Thomas Dreyer, John Ting,
Co-chairs

Climate Action Plan Committee:
Mark Hines, Rich Lemoine, Co-chairs

Sustainability Committee:
Mark Hines and Rich Lemoine,
Co-chairs



OVERVIEW

The University of Massachusetts Lowell embarked on a strategic planning process five years ago to craft a bold vision for its future and map out a blueprint to achieve its ambitious goals by 2020. Stakeholders from across the university community came together and clearly defined our values as an institution, laid out our direction for the future and set the strategies to bring our plan to life.

In the intervening years, the coordinated efforts of so many have brought about great progress in every area. Enrollment has climbed, research flourished, opportunities for experiential and international learning increased, the endowment has grown and collaborations with industry and other partners are thriving. In a sign of the national and international recognition of this progress, the university has steadily climbed in numerous college rankings.

From state-of-the-art facilities, to new academic programs, to success in athletics, to a growing reputation for excellence, the university is building on its legacy and taking its place among the best public institutions of higher education in the country.

These achievements, however, are not an end point. They are, instead, the building blocks for further growth and improvements.

From the outset, we committed to a strategic planning process that is open, transparent, inclusive and iterative. To that end, over 250 faculty and staff have engaged in thoughtful meetings, consultations and retreats to update and revise the direction and benchmarks that define UMass Lowell 2020. This update maps our course for the next five years. As a university we have identified the strategic imperatives—our five Pillars of Excellence—that must be pursued to continue our forward momentum. These imperatives will guide us as we plan for the future.

To benchmark our progress on the indicators that are critical to meeting our 2020 goals, the university created an annual Report Card. The 2015 Report Card, included as a second section of this report, provides a snapshot of the great progress we have made toward our original 2020 goals, including the many areas where we have exceeded our original targets.

— Jacqueline Moloney, Chancellor



PILLAR I:

TRANSFORMATIONAL EDUCATION

UMass Lowell will continue to distinguish itself for the quality of student learning and the excellence of its academic programs. This vision will be realized through ongoing curricular reform and innovative teaching. The faculty and administration will continue to identify academic areas that limit student success and will develop and implement programs and curriculum to address those needs. We will build on our commitment to creating an academic experience that provides students with the knowledge, skills and confidence to develop innovative solutions to make a difference in their communities, their country and the world.

The university will also strategically expand its master's and doctoral degree programs and continue to enhance the graduate student experience, providing robust research, experiential and international learning opportunities.

STRATEGIC PRIORITIES

ACADEMIC EXCELLENCE IN UNDERGRADUATE EDUCATION:

1 Continue to create innovative curriculum and programs that foster academic excellence.

- Provide high-quality coursework, woven through and across all undergraduate programs, that advances the understanding of the diverse perspectives and essential learning outcomes that are needed to succeed in a globally connected and rapidly changing world.
- Promote interdisciplinary learning and encourage interdepartmental collaboration.
- Expand and enhance the UMass Lowell Honors College into a nationally recognized program.

2 Continue to build opportunities for students to participate in experiential learning and community engagement.

- Build on the university's commitment to provide a multitude of opportunities for students to apply their classroom learning through service learning, cooperative education, internships and the DifferenceMaker program.
- Ensure that all students graduate with an understanding of global issues and challenges facing society so they can solve problems, innovate and become leaders in a changing world.

3 Pursue innovations in teaching and learning to foster student success.

- Cultivate innovations in pedagogy to create a dynamic learning environment that optimizes the experience for students and faculty.
- Improve student performance by strengthening support services through best practices such as expanded advising and tutoring and through the innovative use of technology such as the one-stop Solution Center.
- Further the transformation of the university library as an important resource for student success.



BEYOND THE CLASSROOM: ENHANCING THE STUDENT EXPERIENCE:

4 Respond to economic and workforce development needs by expanding access to the university's high-quality programs on campus, at satellite sites such as Haverhill and Kuwait, or online.

- Create a comprehensive three-semester university and the infrastructure to support it that provides students with world-class amenities and learning opportunities.
- Continue to build the scale and improve the quality of the nationally recognized Division of Online and Continuing Education programs and expand the use of web-enhanced instruction to improve teaching and learning.

1 Provide a world-class student experience that promotes healthy, responsible and civically engaged students who are prepared to lead in the 21st century.

- Broaden experiential learning opportunities to advance professional preparedness, cultural competencies, life skills and social responsibility.
- Expand opportunities for leadership development and campus engagement through involvement in athletics, clubs, organizations and other student life activities.
- Enhance student understanding and appreciation for the importance of health and wellness in preparation for a productive, balanced and rewarding life.

2 Cultivate a vibrant campus and community experience.

- Fully realize the benefits of NCAA Division I status in America East and Hockey East through expanded opportunities for athletes and all students, alumni and supporters.
- Continue to enrich the residential experience through Living Learning Communities that enhance academic success and sense of belonging.
- Engage students in meaningful dialogue that critically examines issues that affect self and society.
- Provide dynamic social, cultural and recreational offerings that create memorable experiences and traditions.





ACADEMIC EXCELLENCE IN GRADUATE EDUCATION:

1 Continue to build highly competitive disciplinary and interdisciplinary master's programs that position graduates to advance their careers and become leaders in existing and emerging industries.

- Create programs that respond to unmet demand and support economic growth.
- Target market-related clusters of master's programs at industry partners and prospective students.

2 Expand the university's internationally recognized Ph.D. experiences by providing excellent classroom, lab, research and teaching opportunities to produce outstanding scholarship and thought-leadership.

- Implement the recently approved clinical doctoral program in pharmacy, the only such public program in the Commonwealth.

3 Enhance experiential and international learning opportunities to enrich the graduate student experience.

- Expand professional development and networking opportunities.
- Pursue best practices in online, blended and on-campus course delivery models.
- Increase the number of dual degrees offered with international partners.

ASSESSMENT AND CONTINUOUS IMPROVEMENT:

1 Create a system for the assessment and continuous improvement of all programs.

- Expand the use of accreditation and the Academic Quality Assessment and Development (AQAD) review process to provide meaningful feedback to academic programs.
- Actively monitor student achievement and develop comprehensive assessment plans to support continuous improvement of all undergraduate and graduate programs.
- Expand systematic assessment of student satisfaction and career placement to guide curriculum and policy development.

PILLAR II:

GLOBAL ENGAGEMENT & INCLUSIVE CULTURE

By 2020, the university will be a model campus community where all students, faculty and staff feel appreciated, respected, connected, valued and engaged with the larger life of the campus and beyond.

To prepare students as productive 21st century citizens and to bring more students from around the globe to campus, the university will continue to develop international partnerships that offer students meaningful international learning experiences. The university will enhance its efforts to improve cultural understanding between countries through our partnerships with universities around the world.

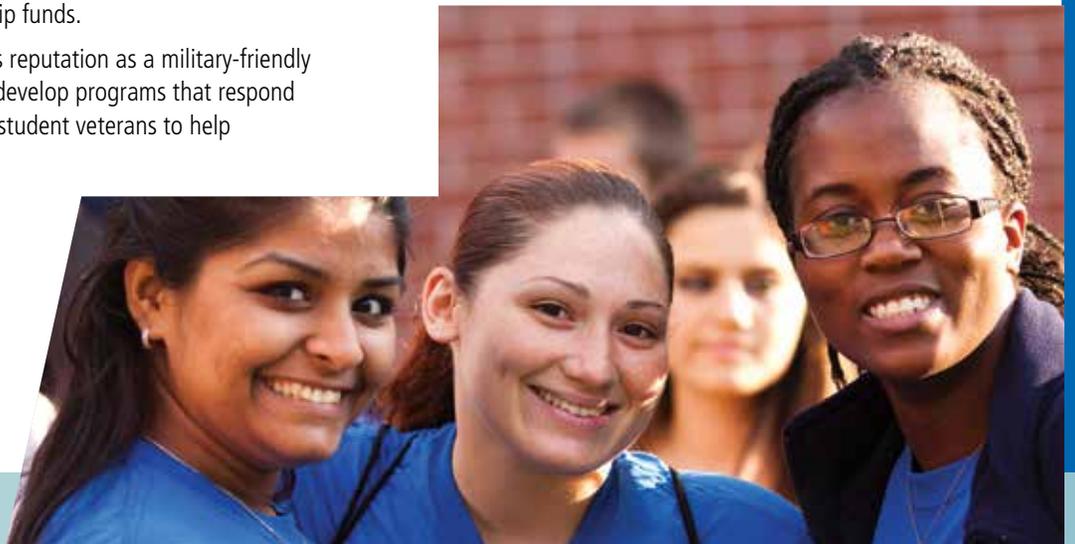
STRATEGIC PRIORITIES

1 Become a university of choice for students from diverse backgrounds by strengthening recruitment and retention programs for such students.

- Create an inclusive culture on campus that supports students from diverse backgrounds regardless of ability, race, ethnicity, class, gender, sexual orientation and religion by developing programs and services tailored to meet their needs.
- Improve the academic performance of students from diverse backgrounds by closing the performance gap with majority students through supplemental instruction and learning support.
- Improve affordability by reducing the cost of attending college through improved transfer agreements and degree opportunities with the community colleges and by expanding scholarship funds.
- Build on the university's reputation as a military-friendly campus, continuing to develop programs that respond to the unique needs of student veterans to help them succeed.

2 Build on successful recruiting and retention strategies to support increased diversity and excellence in faculty and staff.

- Continue to develop broad campus engagement, through workshops, orientation, focus groups and faculty and staff hiring roundtables to provide opportunities for sharing best practices in hiring and in increasing visibility of the university as a great place to work, especially across diverse communities.
- Continue to monitor and report on faculty and staff hiring to inform and engage the entire campus community in adopting best practices.





3 Support students, faculty and staff in developing more effective inclusive practices and behaviors.

- Increase opportunities for faculty and staff to engage in dialogue about diversity and inclusion and further develop skills and effectiveness in working and teaching across differences. Promote and support employee resource groups and affinity groups.
- Sponsor workshops and mentoring for faculty and staff on diversity and inclusion topics, including inclusive management and leadership development.
- Support ongoing and comprehensive review of policies and practices to ensure that they advance our mission to be a globally engaged and inclusive community. This effort will include a comprehensive review of Title IX compliance.

4 Continue to strengthen international partnerships that enhance faculty, staff and student experiences and collaboration.

- Prioritize and further develop key international partnerships.
- Identify and build innovative academic programs that enhance opportunities for domestic and international student learning including team-taught courses with international partners, international learning communities, intensive courses, online and blended learning and dual-degree programs.
- Implement the dual-degree programs agreed upon with the Gulf University for Science and Technology in Kuwait.
- Support academic success of students whose first language is not English.

PILLAR III:

INNOVATIVE RESEARCH & ENTREPRENEURSHIP

UMass Lowell fosters innovative and creative research and scholarship that seeks sustainable solutions to the major challenges in today's world. As a leading public research institution, UMass Lowell must attract and produce outstanding scholars across numerous disciplines. We will continue to strengthen our graduate programs and develop new ones. As a result of these efforts, we will gain national and international recognition for the quality of our graduate programs by 2020.

The university will cultivate outstanding scholarship and an entrepreneurial culture, increasing external funding and support from all sources. We will strengthen collaboration with other campuses, industry, national labs and research and development centers, non-profits and other institutions. We will enhance students' experience through their participation in research projects. We will foster innovation by developing an eco-system that connects the vital resources needed for entrepreneurship to thrive.



INNOVATIVE RESEARCH:

1 Increase research expenditures to \$90 million per year by developing significant partnerships and multi-disciplinary centers and by increasing proposal success rates.

- Create and grow research communities that serve as a catalyst for interdisciplinary collaborations, information sharing, external visibility and recruiting, via approximately 25 faculty-led university research and engagement centers and institutes.
- Ensure that all faculty members have the opportunity and resources to successfully pursue scholarship by strengthening infrastructure and support, including research facilities and administrative and technical support.
- Develop collaborative partnerships with other universities, industry, government and other institutions.
- Ensure high-quality mentoring programs for faculty.

2 Raise national and international awareness of research quality (as measured by the U.S. News & World Report metrics) by increasing visibility of research accomplishments and supporting faculty for external honors and awards.

- Enhance acknowledgment of excellence and achievement in scholarship.
- Increase national and international conferences at UMass Lowell.
- Build visibility to funding agencies and institutions.

3 Enhance the participation in and quality of experience for students engaged in research.

- Recruit high-quality graduate students, including those from underrepresented groups.
- Promote professional development for students by having them participate in activities such as national professional meetings and student research symposia.
- Encourage undergraduate participation in research and discovery and increase undergraduate student research opportunities through expansion of the Co-op Scholar Program to include juniors and seniors.
- Build a diverse, high-quality cadre of doctoral students.

4 Grow the entrepreneurial spirit of our students and faculty and the translation of research discoveries to public benefit, encouraging the creation of new programs, services and products that change the world.

- Increase student and faculty awareness of and participation in entrepreneurial initiatives on campus and in the region.
- Build upon successful National Science Foundation I-Corps teams, technology development funds, River Hawk Venture Funds and similar programs to increase student and faculty participation in the formation and launch of startup companies.
- Strengthen the connections between researchers and companies to accelerate licensing and development of university research discoveries, as well as successful development of inventions by industry partners and by Massachusetts Medical Device Development Center (M2D2) and Innovation Hub companies.
- Engage alumni in the development and commercialization of entrepreneurship initiatives.
- Increase student and faculty participation in the formation and launch of startup companies.



PILLAR IV:

LEVERAGE OUR LEGACY AND OUR PLACE

UMass Lowell is committed to building on our unique legacy by creating partnerships, locally, regionally, nationally and internationally that enrich and sustain the human experience. The university will continue to leverage this legacy by expanding its economic development initiatives, community engagement and the expansion of its world renowned public/private partnerships. As we do so, it is critical that the university share its story, successes and plans with the public. As the university's reputation continues to grow, we must institute strategies for elevating the brand on a national and international level.

*Though the university has tripled its endowment in the last five years, it is vital that we continue to grow it. One essential means of building on our legacy is the launch of our first-ever comprehensive fundraising campaign. **Our Legacy, Our Place: The Campaign for UMass Lowell** will be a seven-year effort with a goal of raising \$125 million to support strategic priorities.*

*Success in this campaign will require significant leadership from alumni, donors, friends, faculty and staff. **Our Legacy, Our Place** is an opportunity to honor our shared history and shape the future of UMass Lowell.*

STRATEGIC PRIORITIES

ECONOMIC DEVELOPMENT AND COMMUNITY ENGAGEMENT:

1 Create a comprehensive approach to engage the university and the community in economic development for the region, the Commonwealth, the nation and the world.

- Launch a partnership with the City of Lowell that helps encourage mutually beneficial economic development and creates opportunities for co-branding and joint marketing in such areas as entrepreneurship, education and workforce development, cultural partnerships, transportation and infrastructure.
- Create a continuum of opportunities to engage colleagues from industry, education and health care to partner in creating economic development initiatives including co-ops, sponsored research, corporate education, faculty fellows in DifferenceMaker and other programs.
- Identify opportunities and apply for funding from foundations, companies and government to sponsor economic development initiatives.





2 Expand the university's leadership role in establishing innovative programs that support the creation of new industries and jobs in the region.

- Improve access by industry and external audiences to university resources, knowledge and facilities in support of economic development and engagement.
- Continue to develop and deliver high-quality education programs that are tailored to meet the workforce needs regionally, nationally and globally at the undergraduate, graduate and corporate levels.
- Grow the university's business incubator and accelerator programs by expanding the successful models of M2D2 and others.
- Engage alumni and friends to support the expansion of the university's entrepreneurial ecosystem.

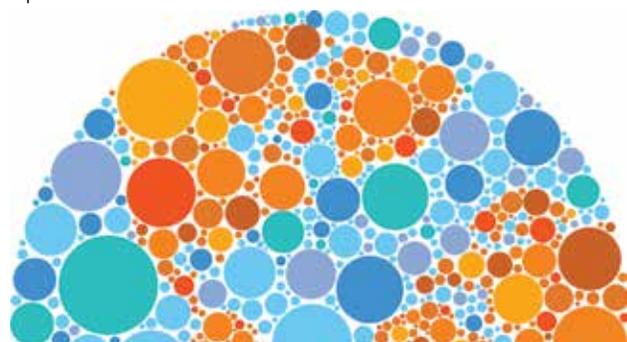
3 Expand national recognition for the university's role as a public institution promoting innovation and entrepreneurship.

- Develop and promote broad-based partnerships with regional, state and national organizations and agencies that support business innovation, economic development and entrepreneurship.
- Expand participation in professional and national speaking and award programs that recognize the university's achievements in promoting entrepreneurship among students, faculty and regional partners.
- Increase regional and national participation in the Deshpande Symposium in Innovation and Entrepreneurship in Higher Education, particularly among aspirant peer institutions.



4 Expand national recognition for the university's role as a public institution promoting community engagement at the local, state, national and global levels.

- Create and sustain partnerships and collaborations at all levels that provide mutual benefits to students, faculty, staff, alumni and the community.
- Expand participation of students, faculty and staff in substantive engagement initiatives across the range of disciplines represented on campus.
- Improve data collection to track engagement activity.





REPUTATION AND RANKINGS:

1 Strengthen and expand awareness of UMass Lowell on regional, national and international levels.

- Continuously cultivate a unified and data-driven branding system based on UMass Lowell's signature strengths and distinctive characteristics.
- Share the university's accomplishments and successes with appropriate audiences through the award-winning Alumni Magazine and other publications, the web, social media, video, advertising and earned media coverage.
- Develop and host events that bring thought leaders and high-profile individuals to campus to contribute to public dialogue, understanding of critical issues and campus engagement.

2 Enhance the university's reputation with influential third parties, including producers of widely regarded rankings such as U.S. News & World Report.

- Continue the implementation of a long-term, multi-platform marketing strategy to elevate the university's reputation among peers and external partners whose opinions influence rankings.
- Strengthen relationships with external stakeholders, including non-profits, government officials and elected leaders.

3 Leverage the university's website so that it effectively promotes the campus and facilitates communication.

- Design the website to enhance the user experience, specifically on mobile platforms.
- Increase interactivity of the site through social media, video, downloadable applications and other available technologies.

ALUMNI AND PHILANTHROPY:

1 Build the endowment to reach levels commensurate with our peers in the \$115 million range.

- Grow the number of funds and the total endowment by building relationships with alumni, corporate sponsors and friends.
- Increase major gifts and leadership gift support to ensure that private support is sustained.
- Expand opportunities for constituents to make gifts to the university.

2 Build an engaged community of alumni, community, friends and corporate partners who work to advance the university's reputation.

- Increase opportunities for engagement, especially among affinity groups, to expand outreach, communication and events.
- Broaden our volunteer network to promote the university in all parts of the world.



PILLAR V:

ENTREPRENEURIAL STEWARDSHIP IN HIGHER EDUCATION

An entrepreneurial approach to stewardship of human, physical and financial resources will be the hallmark of UMass Lowell's approach to building a healthy and sustainable future.

The university will secure and deploy resources that support investment in academic programs and facilities, consistent with the overall campus strategic plan. Central to this effort is the university's commitment to managing the campus in an entrepreneurial manner, generating new revenues through enrollment growth, enhanced research funding, philanthropy and auxiliary enterprises while controlling costs through increased efficiency. The campus will be secure, energy efficient and environmentally friendly. The university will expand and promote opportunities for students, faculty and staff to learn about and engage in sustainability initiatives.

The development on campus will be integrated and holistic and foster engagement with our urban setting. The development process will be participatory, technically supported and balance the pragmatic with the visionary.

The university will become a leader in the use of information and instructional technology to sustain top-quality teaching, transformative learning and groundbreaking research. We will optimize our technology infrastructure to ensure efficient operations, effective communications and active learning.

STRATEGIC PRIORITIES

ADMINISTRATION AND FINANCE:

1 **Maintain a goal-oriented, multi-year financial plan to support strategic priorities put forth in UMass Lowell 2020 and contingencies for future uncertainties.**

- Develop a rolling five-year financial plan to support strategic and capital renewal plans.
- Benchmark financial health of the campus against peers and track progress of the financial plan using industry-standard financial indicators and ratios.
- Implement an all-funds approach to budgeting, which takes into consideration all aspects of university operations, not just those funded from state appropriations and student fees.
- Ensure development of business plans for all university initiatives.



2 Continue developing a transparent budget process.

- Improve communication about resource allocation and strategic decisions.
- Improve executive-level and management reports and reporting tools to disseminate key budget information.

3 Promote an enterprise-wide risk management mind-set to ensure risks that could impact the goals outlined in the strategic plan are identified and assessed.

- Proactively manage operational, compliance, finance and reputation risks that could threaten the success of the university. Develop, test, monitor and update mitigation strategies and programs aimed at reducing risk in all aspects of campus academic, research and administrative operations.

4 Set clear goals and high standards of excellence in performance across the university.

- Continue development of strong and appropriate organizational infrastructure to support the university's goals and ensure effective planning for the future, including staff development and succession planning.

MASTER PLANNING, PHYSICAL ENVIRONMENT AND INFRASTRUCTURE:

1 Build mechanisms and approaches that recognize and support UMass Lowell as a one campus/one academic community, in all its interactions and mix of participants.

- Create sound and sustainable rolling master and facilities renewal plans that drive organizational development and activities to foster a single academic community.
- Foster ease of movement around campus and within the city. Expand the way-finding system, including signage, technology and gateways while enhancing campus accessibility and compliance with the spirit of the Americans with Disabilities Act.





2 Leverage the attributes of our legacy and place by building on Lowell's collaborative tradition and practice in developing the urban fabric of one campus/one city.

- Strengthen collaboration with city and community planning counterparts to identify mutually beneficial strategies to promote one campus/one city.
- Improve the quality of the campus environment including green spaces, interior and exterior places, and fuller integration of the iconic Merrimack River.
- Incorporate programs of exhibited art and shared archives that complement our legacy in key locations.

3 Using entrepreneurial strategies, renew, modernize and right-size campus facilities while addressing growth.

- Renew and reconfigure spaces that support academic success and career readiness, student collaboration, entrepreneurship and research, including learning commons and academic conferencing.
- Improve student life for the growing body of residential and commuter students, through enhancements and expansion of auxiliary and student services, in particular, dining, athletic and recreational resources.
- Progressively reduce the deferred maintenance backlog by broadening investments in preventative and corrective measures while concurrently supporting the development of facilities needed for new programmatic requirements and growth.

4 Confirm a sense of a safe, modern and welcoming campus community through enhanced security and technology across the campus.

- Continue to invest in security technologies, including building access systems and emergency communications systems and enhance community-based policing.
- Expand collaboration with the Lowell Police Department and other law enforcement agencies.
- Continuously improve the university's business continuity posture, disaster recovery capabilities and emergency preparedness including medical response and training. Seek grant funding where possible.
- Support the full range of campus activities and programs with information technology systems that are current, secure and have sufficient capacity to meet projected demand.





SUSTAINABILITY:

1 Responsibly renew and enhance energy systems and infrastructure for sustainability and cost avoidance and meet the Climate Action Plan milestones.

- Modernize existing buildings to improve energy conservation. Strive for LEED certification in new building and renovation projects.
- Implement the university's Accelerated Energy Program (AEP) to provide significant energy efficiency and conservation enhancements.
- Implement sustainable practices, including transportation and landscaping initiatives and water conservation.
- Evaluate and implement renewable energy opportunities.

2 Integrate sustainability and climate change literacy in learning, research and operations.

- Support the creation of sustainability-related curricula and programming that emphasize and expand sustainability learning outcomes.
- Enhance student, faculty and staff engagement in sustainability initiatives that promote the university as a living laboratory, locally and globally.
- Encourage cross-disciplinary, collaborative teaching and research about climate change and sustainability by providing incentives for faculty to team teach such courses.
- Ensure that all students have the opportunity to graduate with an understanding of environmental stewardship, sustainability and climate change.



INFORMATION TECHNOLOGY:

1 **Build and sustain a robust information technology infrastructure via wired and wireless networks, all protected by leading-edge cybersecurity.**

- Optimize the use of cloud services and virtualization to reduce operating costs and increase access to IT services.
- Develop and deliver a robust cybersecurity and education program.
- Ensure that classrooms, labs and learning spaces are built to support rich media and active learning approaches.
- Promote access to the university's resources, applications and services through mobile applications and technologies.

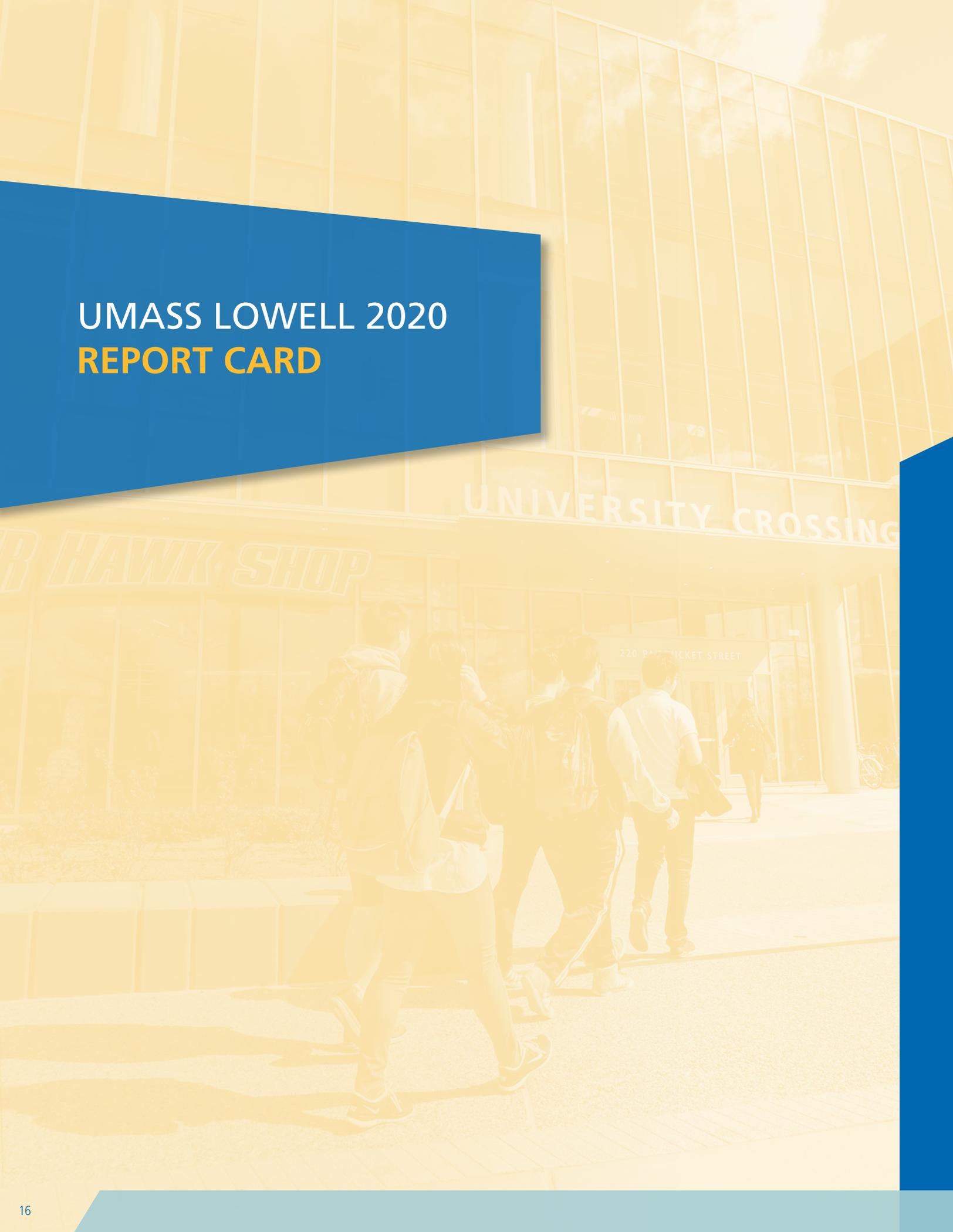
2 **Provide leadership for innovative and scalable enterprise applications to enhance administrative, library and academic computing.**

- Integrate academic technologies into the curriculum supported by faculty workshops and academic technology staff.
- Partner with academic leadership to deploy strategic applications that enhance student success (demonstrated by improved retention and graduation rates, academic support and student advising).
- Improve student engagement and service delivery by deploying a customer relationship management (CRM) strategy.

3 **Foster engagement in support of teaching, learning and scholarship through the use of partnerships, collaboration tools and online technologies.**

- Leverage strategic campus committees (i.e. Academic Technology) to promote engagement in best practices, instructional technology standards and emerging technologies.
- Provide and support robust tools for document sharing, data analytics and collaboration.
- Partner with UMass campuses and professional associations to drive economies of scale for improved technology pricing.

UMASS LOWELL 2020 REPORT CARD



Note: Yellow highlights indicate earlier 2015 goals met or exceeded.

EXTERNAL NATIONAL RANKINGS AND CLASSIFICATIONS

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2020 GOAL
U.S. News & World Report, "National Universities"						
Publics	#101	#97	#94	#85	#84	#60
Overall	#183	#177	#170	#158	#156	#120
Tier/National Universities Ranked	Tier 1/260	Tier 1/268	Tier 1/270	Tier 1/270	Tier 1/268	Tier 1
Payscale.com "30-yr Return on Investment Rank"						
Publics				#10	#16*	
Overall				#50	#52*	
Carnegie Foundation for the Advancement of Teaching						
Basic Classification	Research University – High Research (RU/H) since 2010					
Community Engagement Classification	Curricular Engagement & Outreach and Partnerships**				Yes [†]	Yes
President's Higher Education Community Service Honor Roll^{††}						
	Distinction	n/a ^{††}	Distinction	Yes	Yes ^{***}	Yes
APLU "Innovation & Economic Prosperity Universities"						
					Yes	
Times Higher Education						
World Reputation Ranking (UMass system)					#61-70	
World University Ranking (UMass system)					#91	

*20-year Return on Investment, spring 2014.

**Since 2008.

[†]Until 2025.

^{††}UMass Lowell has been on every Honor Roll since 2009.

^{***}In Community Service; Education; Economic Opportunity.

I. TRANSFORMATIONAL EDUCATION

A. Overall Admissions & Enrollment

SAT Scores of First-time Freshmen

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
75 th Percentile	1160	1160	1190	1210	1230	1290*
Average	1083	1083	1113	1134	1150	1180*
25 th Percentile	1000	1000	1020	1040	1060	1080*

*2020 goal based on average of schools ranked 80-120 in USNWR.

Student Enrollment—Headcount

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
Undergraduate	6,659	8,031	9,026	9,804	10,161	12,900
Master's	1,307	1,505	1,883	2,365	2,421	3,400
Doctoral	487	569	684	834	809	900
Total Day inc. certificates, non-degree	9,404	11,085	12,728	14,002	14,359	18,200
Online & Continuing Ed	2,231	2,517	2,711	2,930	2,832	3,000*
GRAND TOTAL	11,635	13,602	15,439	16,932	17,191	21,000

*OCE undergraduate only.

Online Course Registrations

	AY 2007	AY 2009	AY 2011	AY 2013	AY 2014	AY 2020 GOAL
Number of Registrations	10,476	14,427	18,567	22,522	23,372	29,500
Year-on-Year Increase	21%	17%	13%	12%	3.8%	4.0%

Web-Enhanced Pedagogy

	AY 2009	AY 2010	AY 2011	AY 2012	AY 2013	AY 2014	AY 2020 GOAL
Number of courses using <i>Echo360</i> lecture-capture*	100	180	271	348	416	455	800
Number of faculty using <i>Blackboard</i>			458	530	586	645	1,000

* Includes both semester-long recordings and one-time events.

B. Undergraduate Education

Bachelor's Degrees Awarded

	AY 2007	AY 2009	AY 2011	AY 2013	AY 2014	AY 2020 GOAL
Bachelor's Awarded	1,381	1,337	1,653	2,031	2,228	3,000*
Peers (Median)	2,855	3,105	3,186	3,429	n/a	

*Includes estimate for UMass-Kuwait.

Full-Time Freshman One-Year Retention Rate

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
UMass Lowell	75%	81%	79%	84%	84%	90%
Peers (Median)	82%	83%	84%	84%	84%	87%

Full-Time Freshman Six-Year Graduation Rate

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
UMass Lowell	44%	53%	50%	54%	54%	60%
Peers (Median)	57%	59%	59%	60%	60%	70%

Four-Year Graduation Rate of Upper-Level Transfer Students

	Fall 2009	Fall 2011	Fall 2012	Fall 2013	Fall 2014*	Fall 2020 GOAL
4-Year Graduation Rate	65%	65%	70%	67%	69%	77%
Number in Cohort	33	88	152	215	206	

* Transfer students entering Fall 2010.

Undergraduate Day Class Size

	AY 2009	AY 2011	AY 2012	AY 2013	AY 2014	AY 2020 GOAL
Percent below 20	37%	55%	51%	50%	50%	50%
Peers (Median)		36%	37%	36%	n/a	

Experiential Learning Opportunities

	AY 2010	AY 2011	AY 2012	AY 2013	AY 2014	AY 2020 GOAL
Professional Co-ops	26	43	116	199	251	500
Research & Community Co-ops		25	111	102	161	500

Number of Faculty

	Fall 2009	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2020 GOAL
FT Faculty	425	484	535*	541	549	687†
PT FTE Equivalent*	156	180	153	155	165	200
Total Faculty FTE**	581	664	688	696	714	887
% Instruction Capacity by Adjuncts	27%	27%	22%	22%	23%	23%

*Includes Research Faculty.

**Calculated according to IPEDS methodology: FT + [(1/3)PT].

† Assuming 4% annual increase.

National Survey of Student Engagement Results: Overall Student Satisfaction

	2008	2011	2012	2013	2014	2020 GOAL
UMass Lowell Freshmen	80%	86%	82%	81%	85%	86%
New England Publics Freshmen	82%	85%	84%	84%	86%	
UMass Lowell Seniors	79%	85%	84%	81%	83%	86%
New England Publics Seniors	86%	83%	84%	84%	86%	

*Percent of students evaluating their entire educational experience as "good" or "excellent."

National Survey of Student Engagement Results: High-Impact Practices*

		2013	2014	2020 GOAL
* For Freshmen, these high-impact practices include learning community, service learning and research with faculty;	UMass Lowell Freshmen	65%	63%	70%
	New England Publics Freshmen	56%	54%	
	Carnegie Class Peers	57%	57%	
for Seniors, these include internship, study abroad and culminating senior experience in addition to those for Freshmen.	UMass Lowell Seniors	83%	87%	88%
	New England Publics Seniors	86%	88%	
	Carnegie Class Peers	85%	86%	

C. Graduate Education

Master's/Doctoral Degrees Awarded

	AY 2007	AY 2009	AY 2011	AY 2013	AY 2014	AY 2020 GOAL
Master's*	465	602	654	745	879	1,100
Peers (Median)	999	1,108	1,116	n/a	n/a	
Doctoral**	69	80	83	102	100	125†
Peers (Median)	91	106	121	n/a	n/a	

* Master's includes Education CAGS/Ed.S. degrees.

** Doctoral includes research and professional practice degrees.

† Strategy is to increase selectivity of research doctorates.

II. GLOBAL ENGAGEMENT AND FOSTERING INCLUSION

International Undergraduate/Graduate Students

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
Undergraduate Day + CE Number	82	57	129	181	303	525**
Percent	0.9%	0.7%	1.1%	1.4%	3.8%	4%
Pathways Students*	n/a	n/a	63	218	189	
TOTAL UG + Pathways			192	399	492	
Graduate Number	422	403	405	678	747	1,000**
Percent	15.3%	13.2%	11.0%	16.2%	17.8%	17.9%

*Includes Navitas students.

**Includes UMass Lowell-Kuwait.

Underrepresented Populations—Faculty and Staff

	Spring 2007	Spring 2009	Spring 2011	Spring 2013	Spring 2014	2020 GOAL
Faculty [†] Number	82	89	93	115	128	172
Percent	19.4%	21.3%	22.3%	21.5%	23.3%	25%
Staff Number	86	91	111	122	146	168
Percent	11.2%	12.0%	13.6%	13.4%	15.0%	16%

*Includes instructional and research faculty.

Underrepresented Populations—Students

	Fall 2007	Fall 2009	Fall 2011	Fall 2013	Fall 2014	Fall 2020 GOAL
Undergraduate Number	1,266	1,741	2,442	2,601	2,720	3,900
<i>Percent</i>	21%	23%	29%	29%	29%	30%
Graduate Number	327	404	664	692	705	1,300
<i>Percent</i>	17%	18%	21%	21%	22%	24%

III. INNOVATIVE RESEARCH

Research Expenditures

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
Total Research and Development Expenditures	\$36M	\$57M	\$60M	\$63M	\$65M	\$90M
Per TT Faculty Member	\$89,000	\$133,000	\$143,000	\$151,000	\$151,000	\$175,000

License Income (Thousands)

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
UMass Lowell	n/a	\$340	\$1,130	\$430	\$103	\$500

IV. LEVERAGE OUR LEGACY AND OUR PLACE

Alumni Giving

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
Alumni Giving	5,894	4,683	6,898	8,106	8,383	11,000
<i>% Giving</i>	9.8%	7.4%	10.4%	11.5%	11.8%	13%
Peers Average % Giving		5%	5%*	7%	n/a	

*Without U. New Hampshire, U. Rhode Island.

Private Funds Raised Annually (Millions)

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
UMass Lowell	n/a	\$9.4	\$15.2	\$19.3	\$20.6	\$27.2

Total Endowment and Annual Growth in Endowment (Millions)

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
UMass Lowell Total	\$33.7	\$34.1	\$48.2	\$66.1	\$78.4	\$115
Annual Growth	16%	0.6%	19%	17%	19%	7%

Endowment Per Student

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
Per FTE	\$3,726	\$3,604	\$4,291	\$5,295	\$6,007	\$6,500
Peers (Median)	\$6,962	\$4,692	\$7,346	n/a	n/a	

V. ENTREPRENEURIAL STEWARDSHIP

Financial Health (Millions)

	FY 2007	FY 2009	FY 2011	FY 2013	FY 2014	FY 2020 GOAL
Total Operating Revenues	\$120.6	\$149.3	\$189.3	\$220.8	\$244.4	\$380
Annual Growth		15%	11%	8%	11%	7.6%
Operating Margin		2.9%	5.9%	2.1%	1.3%	2.0%
Debt Service Ratio		4.1%	4.2%	5.8%	6.0%	7.5%

Sustainability

	FY 2007	FY 2010	FY 2011	FY 2013**	FY 2020 GOAL
Net GHG* Scope 1+2 emissions, MT/1000 Gross SF	10.68	9.15	9.34	8.65	8.0
Net GHG emissions Scope 3, MT per FTE	1.92	1.80	1.71	1.51	1.9

*Green House Gas emissions in Metric Tonnes (MT).

Scope 1 Emissions from fossil fuels in on-campus utilities systems & fleet vehicles.

Scope 2 Emissions from off-campus utility providers (electricity).

Scope 3 Emissions from commuter vehicles & business travel.

** Total reduction in GHG (all Scopes) between FY11 and FY13 is 920 MT.

Sources of data: Offices of Institutional Research; Advancement; Budget and Financial Planning; Division of Online and Continuing Education; Vice-Provost for Research.

Current Peers: Georgia State U., U. Maine, U. Maryland–Baltimore County, San Diego State U., Virginia Commonwealth U., U. Wisconsin–Milwaukee

Aspirant Peers: U. New Hampshire, U. Rhode Island





Learning with Purpose

