



2028

UMASS LOWELL

THE 2028 STRATEGIC PLAN



# University of Massachusetts Lowell

## The 2028 Strategic Plan

### Introduction

Every advancement of knowledge builds on the foundations of yesterday's discoveries.

In 2010, the UMass Lowell community set audacious goals. Together we leapt, with the determination that we would find solutions to the challenges before us.

Today, our goals are just as bold, and as we advance toward new thresholds of achievement, we are armed with the wisdom gained in our first strategic planning effort. The campus community, under the leadership of Chancellor Julie Chen, is ready to accept the responsibilities of a new, more nimble strategic planning cycle based on a five-year horizon.

We are confident that when we land in 2028, we will see a UMass Lowell that has continued to evolve and ascend.

Our extraordinary students will still be at the center of everything we do. But they won't just graduate: They will graduate having been transformed by the educational and experiential offerings at UMass Lowell. As a campus, we will have rallied together to support their success, and they will leave our fold prepared not only to go out into the world, but to change it.

And they will do so equipped with the richness provided by a university that operates at the highest levels of research, teaching and scholarship.

A university that values differences, where first-generation students, residents of Gateway Cities and people from all over the world feel like they belong from day one, no matter what their backgrounds.

A university located in a vibrant city that gives prospective students a reason to apply to UMass Lowell. Where there is a clear and deep connection between the success of our campus and that of our city.

A university that gives every student an opportunity to get work experience that matters before they walk across the stage at Commencement.

To get there, we must lead with an unyielding confidence and a commitment to constant improvement. That begins with sustaining and advancing the momentum sparked by the 2020 Strategic Plan:

- Our six-year graduation rate grew from 51% in 2010 to **71%** in 2022.
- Our total number of degrees awarded annually grew from 2,149 to **4,254**.
- Our percentage of undergraduate students of color grew from 26% to **42%**.
- Our percentage of graduate students of color grew from 19% to **31%**.
- Our research and development expenditures grew from \$59M to **\$92M**.
- Our endowment grew from \$37.4M to **\$102.6M**.
- Our footprint grew from 3.1M square feet to **4.9M square feet**, including 19 new or substantially renovated buildings.

These are powerful measures of growth and transformation. And they are not the only ones. But there is more to be done.

## **This is collaborative work.**

The 2028 strategic planning process was built upon the campus-wide initiatives developed over the past few years, integrating key themes identified through collaboration with dozens of internal and external stakeholders, specifically:

The 2020-2022 development of the **DEIB Action Plan** to improve our diversity, equity, inclusion and belonging efforts.

The 2022 **Research Plan**, which lays out the actions and resources needed to advance the university to R1 status.

The 2023 **institutional self-study** for our 10-year New England Commission of Higher Education (NECHE) accreditation evaluation.

The 2022-2027 Facilities Management **Strategic Development Plan**, which documents the planned development of the physical campus.

These themes were further defined and validated during the fall 2020 planning process, which included:

Over **2,600 survey responses**, representing over half the faculty and staff and hundreds of students, alumni and community members.

Evaluation and aggregation of the survey results by **common themes, concerns and questions**, which were then presented to the campus community.

**Listening sessions** led by an external facilitator, organized by the key themes identified in the survey results.

This process confirmed the importance of continuing the efforts that have been in place since 2010, including but not limited to:

- Our teaching excellence
- The elevation of the Honors College
- Sustainability leadership among New England universities
- International partnerships
- The transition to Division I athletics
- Improved student life and campus culture
- External partnerships, including with alumni, donors and industry.

We fully intend to continue the progress in all of these areas. In addition, four new priorities have emerged.

**The priorities of the 2028 Strategic Plan are important unto themselves, but not mutually exclusive; each is vital to the success of the others. They are:**

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## **ENROLLMENT AND STUDENT SUCCESS**

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### **A DIVERSE, WELCOMING AND INCLUSIVE CAMPUS**

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### **RESEARCH EXCELLENCE**

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### **PARTNERING WITH OUR COMMUNITY FOR MUTUAL BENEFIT**

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## **Onward to 2028.**

The primary goal of this 2028 strategic plan is to help us articulate **who we are** and **what makes UMass Lowell distinctive**, to define **what success looks like**, and to identify **what we need to do to get there**. It will **guide our decision-making** and the **allocation of our resources** at all levels of the university. Strategic planning is a continuous process. Measurement is key to our momentum and to the transparency of our efforts. Simple metrics will help us track and fine-tune our actions.

Upon publication of the 2028 Strategic Plan, individual departments, colleges and divisions are expected to develop localized strategic plans that align with, contribute to and amplify this plan. In addition, we plan to revisit our mission and values to align with the consensus vision at the heart of this plan.

**Here, then, is not just the university's vision for the next five years, but how we intend to achieve it.**

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# ENROLLMENT AND STUDENT SUCCESS

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**S**tudent success has been and will always be central to who we are and what makes UMass Lowell distinctive. We believe that the promise of a public education is to provide an accessible, affordable and transformational educational experience, well-anchored by support, connections and opportunities. None of this happens without excellent teaching.

Although the 2020 Strategic Plan made great strides in student outcomes, there is still room to ensure that all students, across all demographic categories, are succeeding at the same rates. We are committed to constantly building a more supportive and enriching experience for undergraduates and graduate students, on-campus and online, inside and outside the classroom, from day one to the completion of their degree and beyond.

Our more diverse student body provides unique opportunities to create a correspondingly diverse portfolio of support and access. For example, our ability to teach varied populations across a wide range of class modalities—in-class, online, hybrid, hyflex and experiential—is a distinct advantage of UMass Lowell.

## **Challenges are opportunities.**

We acknowledge that students are taking on more debt and facing challenges created by the pandemic. Our population is smaller, and many will suffer from pandemic learning and wellness challenges for the foreseeable future. Our students require support academically, socially and emotionally, and the impending decline in the number of high school graduates in New England will put significant pressure on future enrollments. In addition, while most statistics have trended positively over the past decade, gaps still exist in measures of success along gender, race, ethnicity, disability, socioeconomic status and residency lines.

Our **online education programs** remain highly regarded and viable. However, the intense competition for a shrinking pool of applicants means we need to offer them more support than before. The pandemic provided an opportunity to grow **graduate programs**, as evidenced by our rapid MBA enrollment growth. Significant opportunities exist in fields that have not historically competed online—including science, engineering and health sciences—to create more access across more fields to more specialized populations. Supporting lifelong learning and development beyond just degree-seeking students is also fertile ground for new and expanded programs.

Despite the challenges, UMass Lowell remains uniquely positioned to help our students succeed. The expected return of international students is good news for growing in-person graduate and doctoral programs that will be even more valuable in the face of a strong economy and low unemployment. Our strong relationships with industry and government, nonprofits and educational partners provide significant opportunities to develop programming unequalled by our peers, especially at a public-school price.

## **Our Road to Success:**

### **Attract, recruit, enroll and graduate a diversified student body.**

We will continue to recruit, retain and support a diverse student body to offset demographic declines in the number of students and the increased competition across the commonwealth and the country. *Measured by enrollment headcount according to career and demographic data.*

### **Provide a supportive, enriching, transformative and personalized experience, in and out of the classroom, to prepare every student to be a critical thinker, creative problem-solver and global citizen.**

While students attend a university for an education recognized by a certificate or degree, research shows that the value of the experience is defined by opportunities both in and out of the classroom. *Measured by the rate of completion of Student Mosaic, a framework that captures student engagement and success across four areas: academic opportunities, university supports, engagement and involvement, and career-connected and experiential opportunities.*

### **Close the achievement gaps across all groups.**

We will continue to support the success and well-being of our diverse student body fluidly defined by categories that include, but are not limited to: transfer status, gender, gender identity, race, ethnicity, disability, socioeconomic status, age, experience, national origin and other marginalized social identities. *Measured by graduation rates by career and both traditional and non-traditional demographic data (i.e., veterans, LGBTQIA+, disability).*

### **Support each student to achieve their post-graduation goals.**

We understand that achieving a desired career, service path or other aspirational goal is the outcome that ultimately defines the success of a UMass Lowell education. *Measured by placement rates into careers as defined by jobs, military or volunteer service and continuing education.*

### **Provide a compelling, accessibly priced, on-campus living-learning experience.**

We commit to improving access to a residential program that combines academics, student life, housing and dining because we know that students who live in on-campus residence halls, and especially Living Learning Communities, consistently outperform their peers academically. *Measured by graduation and satisfaction rates for residential students.*

### **Provide services, programming and resources that promote holistic student wellness.**

We will continue to support the health, safety, well-being and mental health of our students through innovative and effective strategies to foster empowerment, engagement, learning and connection. *Measured by self-reported and documented student health assessment data.*

A diverse and welcoming community fosters a sense of belonging and respects the unique identity of every individual. It brings positive educational outcomes and improves workplace engagement and commitment. It also exposes us all to the discomfort that can result when we engage with values, beliefs, ideas and opinions that differ from our own. We believe these conversations are important opportunities to share perspectives, wrestle with difficult topics, forge common ground and facilitate appreciation for the rich experiences we each bring to campus every day.

Inclusion embraces all talents, identities and experiences, so we can each be the best versions ourselves as students, faculty and staff. Belonging creates a sense of commitment and investment; it is vital to student learning and quality of work life and is core to our values as a university.

We acknowledge the legacy of colonialism and oppression that has created layers of inequity and privilege. We are committed to Diversity, Equity, Inclusion and Belonging (DEIB) to empower historically marginalized communities and confront and dismantle systemic oppression to build a more equitable university campus and, ultimately, a better world.

### **Embedding DEIB in all we do.**

As we continue to strengthen commitment to DEIB on campus, we acknowledge that societal inequities permeate and show up all around us. Transformative change requires environments that empower the histories and experiences of the marginalized, challenge inequitable social assumptions and accompany our vision for inclusive excellence with strategies for creating a more just and equitable world.

Incorporating a culturally relevant education and experiences is critical. Social justice pedagogy must be infused across all facets of UMass Lowell. The academic potential of any university is dependent on the free and open exchange and exploration of ideas in the pursuit of knowledge. An environment that fosters healthy and constructive interaction and discourse among faculty, students and staff from diverse backgrounds maximizes the potential for learning, discovery and critical thinking.

To this end, we aim to advance a culture of “equity-mindedness,” a way of thinking that calls attention to patterns of inequity in student outcomes. Equity-mindedness demands a critical assessment of institutional and personal practices and a willingness to take institutional and personal responsibility for student success. It requires each of us to be race-conscious and aware of the social and historical context of exclusionary practices in higher education. Race is but one of many identities, and our work at UMass Lowell includes the full breath of student diversity today, encompassing but not limited to gender and gender expression, socioeconomic background, sexual orientation, ability, veteran status, age, national origin and religion.

Our DEIB values statement calls on each of us “to advance a climate whereby equity, transparency, fairness, safety and inclusion are valued so that all of its members—faculty, staff and students—can fully engage and thrive.” Maintaining a healthy campus climate improves learning and developmental outcomes for students as well as personal and professional development for faculty and staff. A more inclusive and accessible campus allows us to better understand and address the economic, social, environmental and scientific challenges facing our communities through our teaching, research, scholarship and service.



**Our Road to Success:**

**Intensify systemic efforts that advance diversity, equity, inclusion and belonging.**

*Measured by completion rate of division and departmental DEIB strategic plans that outline goals and improvements.*

**Advance diversity, equity and inclusion of students, faculty and staff from underrepresented communities by focusing on access, retention and success.**

*Measured by comparative graduation rates of students and by demographics of faculty and staff workforce participation across ranks, positions and tenure.*

**Incorporate inclusive excellence in all academic pursuits including research, scholarship, teaching and public service.**

*Measured by number of faculty with research and scholarship programs on DEIB-related topics, by percentage of courses by discipline that address DEIB-J topics and that incorporate inclusive pedagogy, and by the number of community-engaged initiatives that seek to address social justice issues.*

**Accelerate a culturally responsive campus climate and culture.**

*Measured by changes in community sentiment reported on periodic campus climate surveys.*



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ENROLLMENT AND STUDENT SUCCESS

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## RESEARCH EXCELLENCE

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Our goal is to be a premier comprehensive research university that is recognized nationally and internationally for high-impact research and scholarship. Momentum is on our side. UMass Lowell's research and scholarship have grown considerably in recent years, fueled by the hiring of outstanding faculty, expanded and renovated research facilities, new degree programs and increased student financial support. Our students deserve to have access to, and participate in, world-class and world-transforming research.

Our key values of excellence, integrity, equity, diversity and inclusion must continue to underpin our entire research enterprise. Continued growth and sustained excellence require additional investments across a broad range of touchpoints to ensure comprehensive, accessible and coordinated support for faculty and staff and formative opportunities for students to engage in cutting-edge research and scholarship. We must grow our investments in research infrastructure and increase our collaborations internally and with other universities, the government, industry and the community.

Our goals fall under five key areas of focus. Our focus on **facilities and hard infrastructure** includes the physical space, capital equipment, core research facilities and facilities services to support cutting-edge research needs. **Faculty recruitment, retention and success** covers recruiting and mentoring exceptional junior and midcareer faculty with a special focus on traditionally underrepresented groups. **Student research success** includes increasing the number, quality and diversity of student applicants to enhance our research culture. **Research support services** covers administrative, professional development, technical and library support. **Communications** focuses on creating a strategy to promote the significant discoveries, technologies and scholarship that we are regularly pioneering.





## **Our Road to Success:**

### **Identify multidisciplinary research focus areas and use these to promote resource and facilities sharing and to inform cluster hiring.**

Evaluate resource sharing through an equity lens to promote efficiencies in use. Support multidisciplinary research areas and cluster hiring to enhance faculty recruitment, satisfaction and success by connecting new faculty with colleagues in related and synergistic fields. *Measured by overall Carnegie classification and its metrics (including external and total research expenditures), number of interdisciplinary proposals submitted, number of scholarly publications, number of researchers included and success rate of submitted proposals in identified focus areas.*

### **Increase resources and support for faculty who are mentoring student researchers and formalize the recognition of these efforts.**

Provide resources and professional development for faculty who are mentoring students in research and scholarship. Increase recognition of the importance of and effort required for student mentorship, and work toward a more balanced and reasonable faculty investment in teaching, research and service. *Measured by average number of undergraduate and graduate students mentored in research and scholarship activities by faculty by college and rank, as well as by administrative service reductions and increase in resources provided and the resulting faculty satisfaction with balance of workload demands.*

### **Increase graduate student support and help students identify research opportunities.**

Expand recruitment and experience of graduate students across campus. Ensure that current programs are being adequately marketed; create pathways for student research and scholarship to increase experiential learning, advance of research and scholarship; and provide co-curricular opportunities that enhance the student experience. *Measured by overall Carnegie classification and its metrics (including number of doctoral degrees conferred), number of undergraduate and graduate students participating in research activities (paid and unpaid) and average graduate stipends by college over time.*

### **Increase library resources and research administrative support services.**

Ensure equitable access to collections and services needed to support the diverse research and scholarly activities of the campus. Promote equitable research administration and development support for faculty pursuing and managing extramural funding. Decrease faculty administrative burden while maintaining compliant and consistent research administration. *Measured by number of FTEs in research administration and development directly supporting faculty, number of FTEs in library supporting research activities, the amount of funds supporting research-related library collections, and faculty opinion of research and library support services.*

### **Expand promotion and branding of UMass Lowell research and scholarship activities and improve communications related to research support and research-related activities.**

Build a culture of public dissemination of research and scholarly activities to enhance UMass Lowell's research reputation and attract potential students, faculty, research collaborators and sponsors. Provide timely and easily accessible information on policies, procedures, personnel, resources, tools and funding opportunities (internal and external) available to support faculty in their pursuit and management of funding for research and scholarly activities. *Measured by internal and external media recognition, communication and publicity promoting research activity.*

### **Increase research- and scholarship-related funding from alumni, donors and corporate sponsors.**

Supplement government funding and fill gaps where government funding is not available. This will also lead to new partnerships that may expand into other university initiatives. *Measured by total dollars donated to research-related activities, endowed chairs and space per year.*

### **Increase transparency, efficiency and equity in research space distribution and prioritize research space improvements that support the growth of the research portfolio.**

Find creative solutions for shared lab opportunities to overcome limited space for growth. Guided by an interdisciplinary research space coordination committee, research facility resources can be targeted to reinforce productivity and collaboration. *Measured by the rate of external research funding per square foot of space allocated to research use on campus, recognizing the diversity of requirements among disciplines.*

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**U**Mass Lowell has been an anchor institution of Lowell for nearly 130 years. This is where the river that powered industry now inspires ingenuity. Our community partnerships and contributions to the city's economic, social and cultural vitality are points of pride. We believe it is to our mutual well-being to strengthen the bonds we enjoy and create new points of connection.

We're not just Lowell's only comprehensive public research university, but we also actively collaborate with Middlesex Community College and the Lowell K-12 schools. We collaborate with, learn from and benefit from the local businesses and robust corporations, vital community-based organizations and government agencies working for the common good.

Our students, faculty, resources and spirit connect us with prospective students, nearly half of whom are the first in their families to attend a university. Many grew up in local communities and come from culturally diverse backgrounds that make us a more powerful and exciting university community.

Our students and graduates are attractive to companies seeking a skilled workforce. By enhancing our local economy, we strive to strengthen Lowell as a sought-after location for more employers from outside the region. Our goal is to bolster Lowell as a fertile destination for business—a place for companies eager to join an affordable, growing community of industry, education, research and culture.

But challenges remain. We are still solidifying our reputation as a premier comprehensive research university in the minds of many residents. There is still a gap between outdated perceptions of our host city and the reality of this right-sized urban environment, a vibrant college town with restaurants, arts and entertainment. Our goals embrace the challenges and celebrate the opportunities to strengthen our bond with this vigorous Gateway City to help us both, town and gown, be all we can be in this world.

## **Our Road to Success:**

### **Social and economic development.**

Promote the role of students, faculty, staff and alumni as significant drivers of a thriving regional economy across Lowell and the Merrimack Valley. Support the role of employers to attract students and enhance the value of their experience on campus. *Measured by industry partnerships and student placements in paid career-connected experiences in Greater Lowell, including in nonprofits and government agencies.*

### **Arts and culture.**

Increase our active partnership as creators and patrons of on-and off-campus arts and cultural offerings that help differentiate this campus from peer institutions in more isolated settings. *Measured by attendance at concerts, shows, exhibitions and cultural events on campus and participation by UMass Lowell community members in local arts and cultural organizations and events.*

### **Teaching and learning.**

Capitalize on the geographic integration of the university in the heart of the city and promote active engagement between the two to expand learning beyond the boundaries of the physical campus. *Measured by numbers of students completing courses that incorporate engagement with Lowell.*

### **Faculty and staff community engagement.**

Support the role of UMass Lowell employees as active members of the local community, both as residents and volunteers in municipal and community-based organizations and as research and scholarship partners. *Measured by employee volunteer hours; number of employees serving on municipal and community boards and commissions; and faculty, staff and student involvement in externally funded projects with community partners.*

### **Promoting Lowell's strengths.**

Celebrate the collective assets of the campus and the city to help encourage both students and employees from across the country and around the globe to choose the UMass Lowell community as a place to live and learn. A Gateway City location encourages a diverse student body to enroll and thrive. *Measured by impressions of Lowell among current and prospective students as documented in periodic surveys.*

### **Environmental sustainability.**

Promote the recognition of UMass Lowell and the city of Lowell together as an urban-focused center of excellence for climate change, energy and sustainability that merges expertise in teaching, research and operations in an urban environmental justice community. *Measured by the university's sustainability rating issued by the Association for the Advancement of Sustainability in Higher Education.*



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