

# 2023 Report on Annual Indicators

## University Performance Measurement System

### August 2023



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law

**2023 REPORT ON ANNUAL INDICATORS**  
**University Performance Measurement System**

# CONTENTS

ABOUT THE ANNUAL INDICATORS REPORT.....	1
LIST OF 2023 INDICATORS.....	3

## UMASS SYSTEM

HEADLINES .....	5
AT-A-GLANCE.....	6
INFOGRAPHICS AND CHARTS	
ACCESS AND AFFORDABILITY.....	7
SERVICE TO THE COMMONWEALTH.....	10
FINANCIAL HEALTH.....	14
DEFINITIONS AND SOURCES.....	17

## UMASS AMHERST

HEADLINES .....	21
AT-A-GLANCE.....	25
INFOGRAPHICS AND CHARTS	
ACADEMIC QUALITY.....	27
ACCESS AND AFFORDABILITY .....	30
STUDENT SUCCESS AND SATISFACTION.....	37
SERVICE TO THE COMMONWEALTH .....	38
FINANCIAL HEALTH .....	44
DEFINITIONS AND SOURCES.....	45

## UMASS BOSTON

HEADLINES .....	51
AT-A-GLANCE.....	56
INFOGRAPHICS AND CHARTS	
ACADEMIC QUALITY.....	58
ACCESS AND AFFORDABILITY.....	61
STUDENT SUCCESS AND SATISFACTION.....	66
SERVICE TO THE COMMONWEALTH.....	69
FINANCIAL HEALTH .....	74
DEFINITIONS AND SOURCES.....	76

## UMASS DARTMOUTH

HEADLINES .....	82
AT-A-GLANCE.....	85
INFOGRAPHICS AND CHARTS	
ACADEMIC QUALITY.....	87
ACCESS AND AFFORDABILITY .....	90
STUDENT SUCCESS AND SATISFACTION.....	95
SERVICE TO THE COMMONWEALTH.....	98
FINANCIAL HEALTH.....	103
DEFINITIONS AND SOURCES.....	105

## UMASS LOWELL

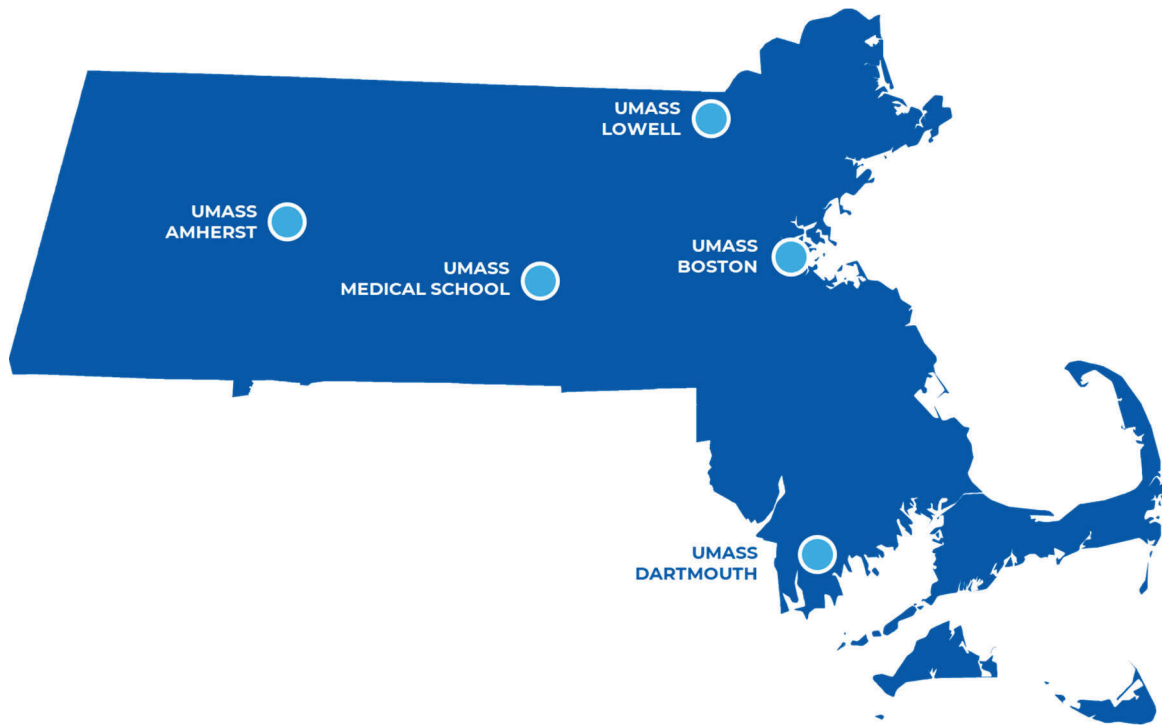
HEADLINES .....	111
AT-A-GLANCE.....	113
INFOGRAPHICS AND CHARTS	
ACADEMIC QUALITY.....	115
ACCESS AND AFFORDABILITY.....	119
STUDENT SUCCESS AND SATISFACTION.....	123
SERVICE TO THE COMMONWEALTH .....	126
FINANCIAL HEALTH .....	130
DEFINITIONS AND SOURCES .....	133

## UMASS CHAN MEDICAL SCHOOL

HEADLINES .....	139
AT-A-GLANCE.....	142
INFOGRAPHICS AND CHARTS	
ACADEMIC QUALITY .....	144
ACCESS AND AFFORDABILITY.....	148
STUDENT SUCCESS AND SATISFACTION.....	149
SERVICE TO THE COMMONWEALTH .....	150
FINANCIAL HEALTH .....	153
DEFINITIONS AND SOURCES .....	155

## APPENDICES

CLERY ACT CRIME STATISTICS	
UMASS AMHERST.....	160
UMASS BOSTON.....	161
UMASS DARTMOUTH.....	162
UMASS LOWELL.....	163
UMASS CHAN MEDICAL SCHOOL.....	164



## **THE 2023 REPORT ON ANNUAL INDICATORS**

The University of Massachusetts Annual Indicators Report measures progress toward achieving the strategic priorities approved by the Trustees and embedded in its mission - '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.' The 2023 Report on Annual Indicators is the 24<sup>th</sup> annual report of the University of Massachusetts Performance Measurement System.

This report provides trustees, legislators, and state-level policymakers with information by which they can assess the University as compared with similar institutions and its performance in the past. Through this report and other aspects of performance measurement and assessment, the University seeks to be open and accountable to the constituencies it serves.

The Report on Annual Indicators includes measures that relate to five primary areas:

- *Academic Quality*
- *Student Success and Satisfaction*
- *Access and Affordability*
- *Service to the Commonwealth*
- *Financial Health*

Encompassed within these five areas are nine strategic priorities of the University. The strategic priorities are:

- *Improve student learning experience*
- *Strengthen research and development*
- *Renew faculty*
- *Continue a focus on diversity and positive climate*
- *Maintain and improve access and affordability*
- *Develop a leadership role in public service*
- *Increase endowment*
- *Improve administrative and IT services*
- *Develop the first-rate infrastructure*

To ensure that the University's self-evaluation process is current and in alignment with emerging issues of salience, the Report on Annual Indicators undergoes a system-wide review process every five years. The 2023 Report on Annual Indicators reflects an updated list of the metrics that we collect.

This report provides relevant longitudinal and comparative data to help the reader assess the information being provided. Each campus has an established peer group that contains comparable as well as "aspirant" institutions. For the UMass Medical School, the peer group consists of 20 selected medical schools in the United States, while their 'endowment' peer group consists of all public medical schools. For all the other UMass campuses, small groups of institutions comparable in mission, size, student characteristics, and programmatic mix are used.

The report presents some indicators in aggregate for the entire system, in particular, those that relate to *Access and Affordability*, *Service to the Commonwealth*, and *Financial Health*. Indicators in these areas reflect decisions that rest with the system administration and the Board (such as tuition and fee levels) or describe the collective role of the campuses in serving the students and citizens of the Commonwealth (such as degree production or enrollment of Massachusetts residents). Depending on the indicator, data for the UMass system are compared with Massachusetts private universities, Massachusetts demographic data, New England public universities, or for the financial indicators the relevant financial group peers (a small group of public university systems in other states or Bond-rating peer group).

The System report is followed by individual reports for each campus. Each report has the following format:

- Headlines from the 2023 Annual Indicators
- 2023 Annual Indicators at a Glance
- Infographics and Charts
- Definitions and Sources
- List of Institutional Peers

Legislative Priorities	UMass Strategic Priorities	<b>2023 ANNUAL INDICATORS</b>
<b>ACADEMIC QUALITY</b>	<b>Improve student learning experience</b>	Average High-School GPA of Freshmen
		SAT Scores of Freshmen
		<i>25<sup>th</sup> – 75<sup>th</sup> Percentile</i>
		<i>Average</i>
		Average GPA of Entering Transfer Students
		Mean MCAT Scores of Entering Students (UMMS Only)
		Student Satisfaction with Educational Experience
		Student-Faculty Ratio
		Technology-Enhanced Classrooms
	<b>Strengthen research and development</b>	Total R&D Expenditures
		Total R&D Expenditures Rankings
		Total R&D Expenditures Rankings among Carnegie Peers, US Publics, Non-Medical
		Federal R&D Expenditures (Optional)
		Total R&D Expenditures per Tenured/Tenure-track Faculty
		Total R&D Expenditures per FT Faculty
		Federal R&D Expenditures per FT Faculty
		Sponsored Instruction/Outreach per Faculty
		NIH Funding Among Medical Schools (UMMS Only)
		US News Ranking in Primary Care Medicine (UMMS Only)
		Patent Applications
		License Income
		Utilization of Shared High-Performance Computing Research Resources*
	<b>Renew faculty</b>	Percent Tenured/Tenure-Track Faculty FTE
		New Tenured/Tenure-Track Faculty Hired
		New Tenured/Tenure-Track Faculty Hired as Percent of All Tenured/Tenure-Track Faculty
		Tenured/Tenure-Track Faculty
		Faculty FTE
Faculty-of-Color		
Women Faculty		
National Academy Members*		
<b>ACCESS AND AFFORDABILITY</b>	<b>Access and Affordability/ Diversity &amp; Positive Climate</b>	Percent UGs from Massachusetts
		Percent UGs who are Students of Color
		Percent UGs who are International
		Percent First-Time UGs who are First Generation in College
		Percent First-Time UGs who have English as Second Language
		Percent of Students of Transfer Origin**
		Dual Enrollment Students**

Legislative Priorities	UMass Strategic Priorities	<b>2023 ANNUAL INDICATORS</b>			
ACCESS AND AFFORDABILITY	Access and Affordability	Percent (In-State) Pell Grant Recipients	Percent of Need Met for In-State Students Awarded Need-Based Aid		
		Average Debt of Students for Graduating Class	Percent Graduating Class with Debt		
		Total Students who participated in the Study Abroad program	Total Online Course Registrations		
		Annual Growth in Online Course Enrollments*	Percent of Online Enrollment that is Full-Time**		
		STUDENT SUCCESS AND SATISFACTION	Diversity and positive climate	Freshmen One-Year Retention Rate	Freshmen Four-Year Graduation Rate
				Freshmen Six-Year Graduation Rate	Transfer One-Year Retention Rate
				Transfer Four-Year Graduation Rate	Student Achievement Measure
				Student Satisfaction with Educational Experience	Alumni Participation Rate
Match Rate/Choice of Residency (UMMS Only)					
SERVICE TO THE COMMONWEALTH	Develop a leadership role in public service			Degree Completions	Percent Mass Residents Attending UMass
				In-State UG Enrollment by Region*	Total Degrees Awarded
				UMass as Percent of all Massachusetts Degrees	Total R&D Expenditures, Rankings, and Expenditures per Faculty Member
				Number of Patent Applications	License Income
		Percent Alumni who live in MA	Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs (Graduate/Undergraduate) *		
		Degrees and Certificates Awarded in STEM fields	Degrees and Certificates Awarded in Healthcare fields		
		Test Takers in MTEL Science and Math subject tests*			
		FINANCIAL HEALTH	Endowment	Endowment Assets and Annual Growth in Endowment	Total Endowment per Annualized Student FTE
				Private Funds Raised Annually	
				Administration and IT Services/ Infrastructure	Operating Margin (%)
			Debt Service to Operations		Bond Ratings (Moody's, S&P, Fitch)
			Campus Safety		

\*Indicators in Red are no longer reported. \*\*Indicators in Blue have been added

## HEADLINES

### ACCESS AND AFFORDABILITY

**UMass enrolls 8 times more First-year resident undergraduates than peers.** UMass attracts new aspiring residential students at 8 times the rate of competing peer universities. Among all 4 UMass campuses 8,120 new first-year undergrads were admitted, with the next highest peer being Northeastern University at 1,073.

**Dual-enrollment student numbers continue to rise.** In FY 2022, the system showed a head count of 361 dual-enrolled students. This number has been on an upward trajectory since Fall 2020 and has persisted upwards through the pandemic.

**UMass continues to be the most affordable institution despite economic shifts.** In the year 2022 UMass schools continue to be the most affordable to families when looking at median family income. The percentage of family income has only gone up 3% despite median family income in 2022 dropping almost 20,000 dollars from 2021 due to the economic fallout of the pandemic.

**Study abroad programs revived.** In Fall 2020 to Summer 2021 due to the pandemic the amount of study abroad students dipped to only 156 throughout the system. This number has increased to 1,025 for Fall 2021 to Summer 2022 and is expected to continue upwards to its pre-pandemic numbers.

### SERVICE TO THE COMMONWEALTH

**UMass' contributes to creating an educated citizenry and workforce.** UMass awarded over 18,000 degrees in AY 20121-22. These include a total of 18,627 degrees (bachelor's and above). This represents a 7% increase in total degrees awarded since AY 2017, with a constant upward trend of degrees awarded since then.

In 2021-2022, three in ten (33%) or 5,889 of the University's total degrees were awarded in STEM fields. The University's impact in the Healthcare field has also grown over the past five years, reflecting a

5% increase over this period. Additionally, in 2021-2022 UMass awarded the most health certifications it has in 5 years (209).

**Patent applications nearly double.** In FY2022 UMass applied for 250 patent applications, a percentage change of 82% from the previous year of 137 applications.

**Alumni reside and work in Massachusetts.** Nearly six of ten (59%) graduates overall of the University remain in the Commonwealth after graduation.

### FINANCIAL HEALTH

**Total Endowment stands at \$920 million.** The market value of the University's endowment improved by 36% between FY 2017 and FY 2022.

**Private Funds raised a total of \$430 million.** The private giving to UMass increased by a staggering 269% in FY 2022 versus last year. Additionally, this is also a 239% increase compared to five years ago in FY 2017.

**Bond ratings remain high.** The University's high agency bond ratings for FY 2022 (Aa2 rating by *Moody's*; AA- rating by *S&P*; AA rating by *Fitch*) reflects continuing confidence in the institution's overall financial health. These scores have been unchanged since FY 2012.



## AT-A-GLANCE

### ACCESS AND AFFORDABILITY

• Percent of First-year Undergraduates from Massachusetts	<b>79%</b>	• Dual Enrollment Headcount	<b>361</b>
• Percent of Undergraduates from Massachusetts	<b>81%</b>	• Tuition and Fees as a Percentage of Median HH Family Income	<b>18%</b>
• Percent Undergraduates who are Students of Color	<b>42%</b>	• Total Students who Participated in a Study Abroad Program	<b>1,025</b>
• Number of First-degree Bachelor-seeking Students Aged 25+	<b>4,931</b>	• Online Course Registrations	<b>111,045</b>

### SERVICE TO THE COMMONWEALTH

• Degree Completions	<b>18,627</b>	• License Income	<b>\$33M</b>
<i>Bachelor's</i>	<b>13,153</b>	• Percent Alumni who Remain in MA	<b>59%</b>
<i>Master's</i>	<b>4,423</b>	• Degrees Awarded in STEM Fields	<b>5,889 (32%)</b>
<i>Doctorates</i>	<b>1051</b>	<i>Undergraduate</i>	<b>4,355 (33%)</b>
• UMass Degrees as Percent of Massachusetts Degrees	<b>16%</b>	<i>Graduate</i>	<b>1,482 (32%)</b>
• Total R&D Expenditures	<b>\$813M</b>	• Certificates Awarded in STEM Fields	<b>219 (14%)</b>
• Patent Applications	<b>250</b>	• Degrees Awarded in Healthcare Fields	<b>2,156</b>

### FINANCIAL HEALTH

• Total Endowment	<b>\$1118M</b>	• Debt Service to Operations	<b>5.8%</b>
• Annual Growth in Endowment	<b>-9.2%</b>	• Operating Margin (%)	<b>3.8%</b>
• Private Funds Raised Annually	<b>\$430M</b>	• Total Cash & Investments to Expenses	<b>0.82</b>
• Agency Bond Ratings			
<i>Moody's</i>	<b>Aa2</b>		
<i>S&amp;P</i>	<b>AA-</b>		
<i>Fitch</i>	<b>AA</b>		

# ACCESS AND AFFORDABILITY

## ENROLLMENT OF MASSACHUSETTS RESIDENTS

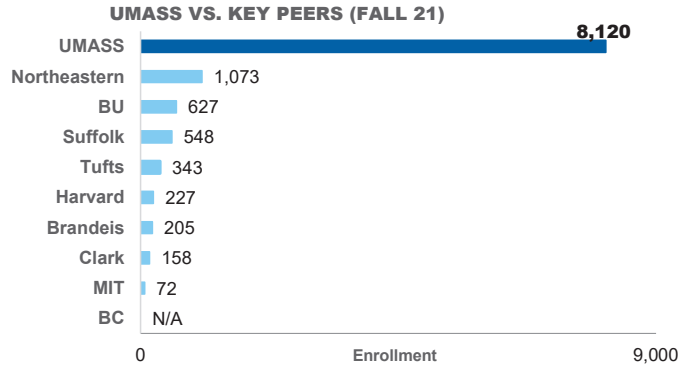
**71%**

Of all MA FY\* UGs enrolled at UMass or key private peers are enrolled at UMass (Fall 2018)

**42%**

Of all MA FY\* UGs enrolled at a MA 4 year college/university are enrolled at UMass (Fall 2018)

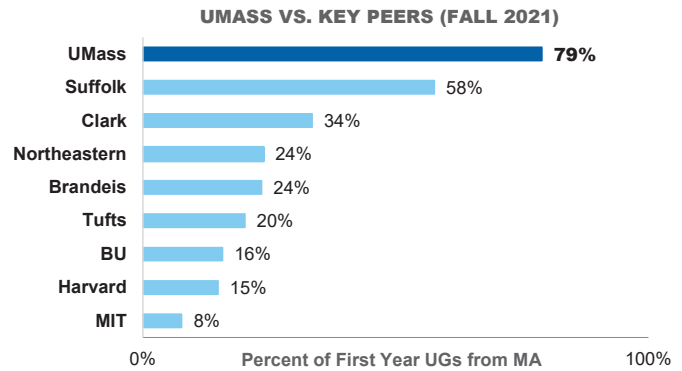
\*Undergraduate first-year (FY) students  
\*Data for BC unavailable. Not yet submitted.



## PERCENT OF FIRST YEAR UNDERGRADUATE STUDENTS

**79%**

UMass first-year UGs from MA in Fall 2021



## UMASS UNDERGRADUATES: ALL STUDENTS

**44.1k**

UMass UGs from MA in Fall 2022

▼ **3%**

One-year % change (vs. Fall 2021)

▼ **6%**

Five-year % change (vs. Fall 2017)

**81%**

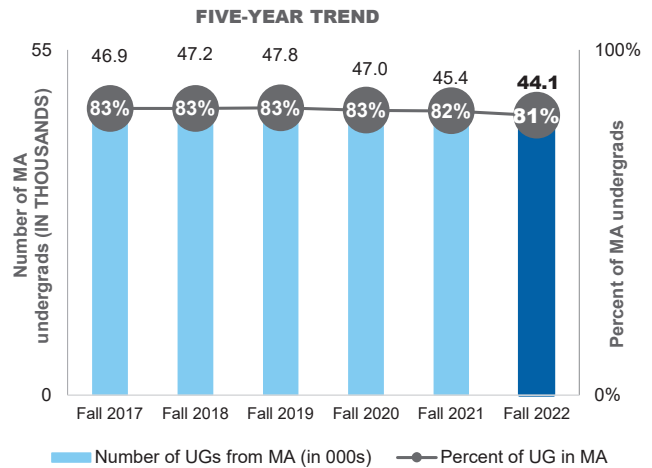
UMass % UGs from MA in Fall 2022

▼ **1**

One-year % point change (vs. Fall 2021)

• **0**

Five-year % point change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATE STUDENTS OF COLOR

**42%**

UMass UG Student of Color in Fall 2022

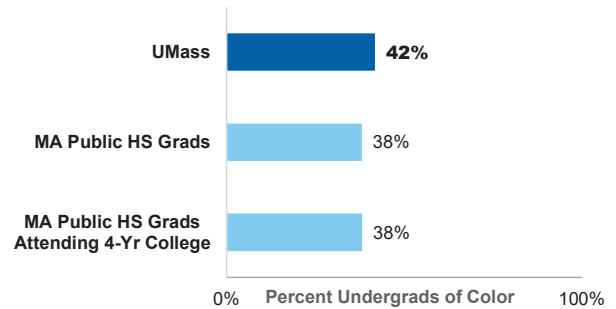
**▲ 4**

Pct point comparison vs. MA Public HS Graduates Class of 2019

**▲ 4**

Pct point comparison vs. MA Public HS Graduates Attending 4-Yr College Class of 2019

UMASS Fall 2021 VS. MA PUBLIC HS CLASS OF 2019



SOURCE: Massachusetts Department of Elementary and Secondary Education (DESE)

## NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

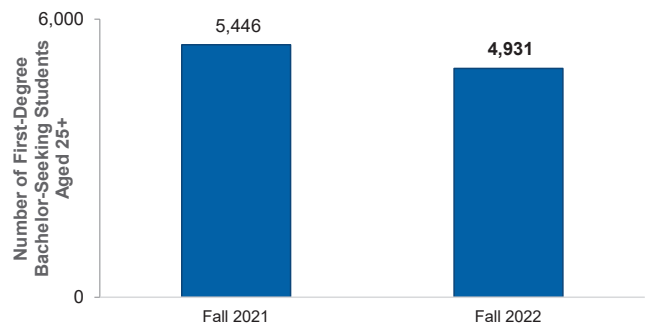
**4,931**

Number of First-Degree Bachelor-Seeking Studnets Aged 25+

**▼ 9**

One-year % point change at UMass (vs.Fall 2021)

ONE-YEAR TREND



## DUAL ENROLLMENT STUDENTS (HEADCOUNT)

**361**

Dual Enrolled Students in Fall 2022

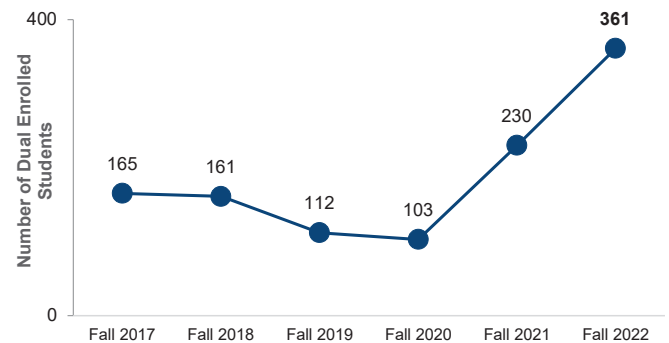
**▲ 57%**

One-year % change (vs.Fall 2021)

**▲ 119%**

Five-year % change (vs.Fall 2017)

FIVE-YEAR TREND



# ACCESS AND AFFORDABILITY

## TUITION AND FEES AS A PERCENTAGE OF FAMILY INCOME\*

**18%**

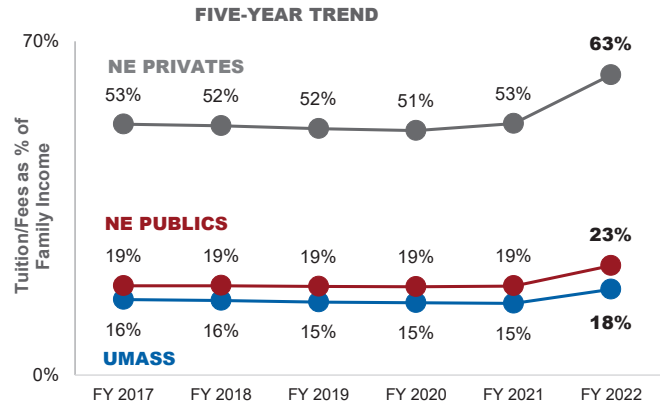
Tuition & Fees as % of family income at UMass in FY 2022

**▲ 3**

One-year % point change at UMass (vs. FY 2021)

**▲ 2**

Five-year % point change at UMass (vs. FY 2017)



\*Percentage of MA statewide median family income

## TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

**1,025**

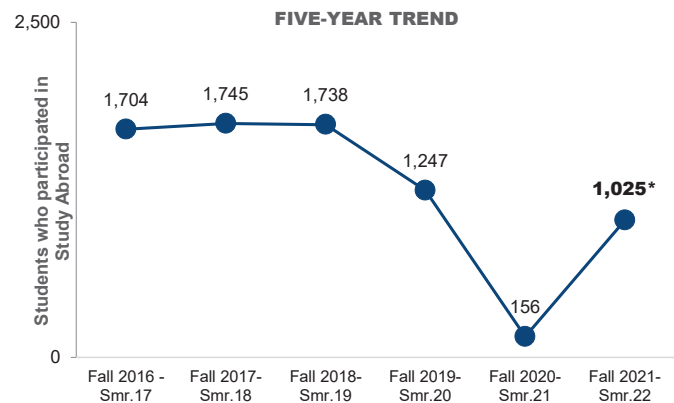
UMass UG participation in study abroad in Fall 2021-Smr.22

**▲ 557%**

One-year % change vs. Fall 2020-Smr.21

**▼ 40%**

Five-year % change vs. Fall 2016 -Smr.17



\*Decrease due to COVID

## ONLINE COURSE REGISTRATIONS

**111,045**

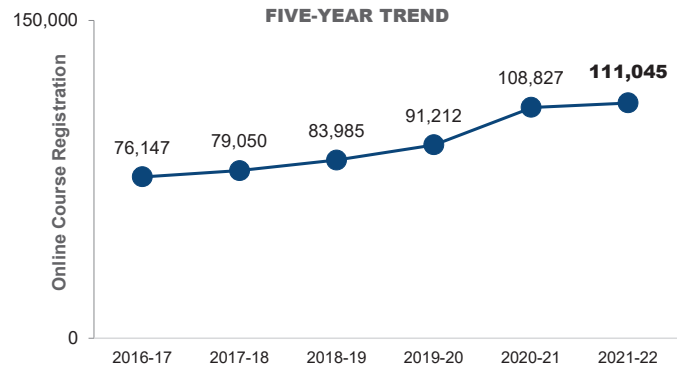
UMass total Online course registrations in 2021-22

**▲ 2%**

One-year % change (vs. 2020-21)

**▲ 46%**

Five-year % change (vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS

**19k**

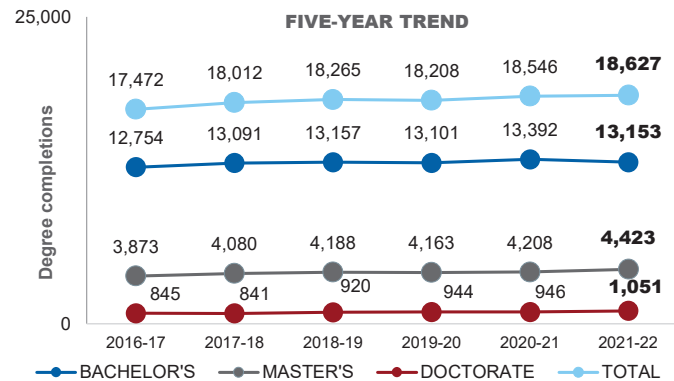
Total degree completions in 2021-22

▲ **0%**

One-year % change in total degree completions (vs. 2020-21)

▲ **7%**

Five-year % change in total degree completions (vs. 2016-17)



## UMASS DEGREES AS PERCENTAGE OF ALL MASSACHUSETTS DEGREES

**16%**

Of all MA degree completions awarded by UMass in 2021-22

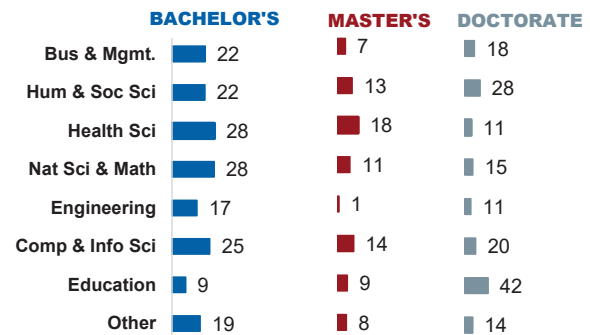
**17%**

Of all MA business degree completions awarded by UMass in 2021-22

**20%**

Of all MA engineering degree completions awarded by UMass in 2021-22

### % MA DEGREES AWARDED BY UMass



## TOTAL R&D EXPENDITURES

**\$813M**

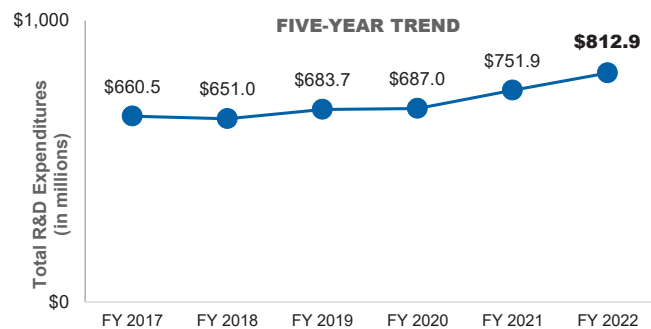
Total R&D Expenditures in FY 2022

▲ **8%**

One-year % change (vs. FY 2021)

▲ **23%**

Five-year % change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## PATENT APPLICATIONS

**250**

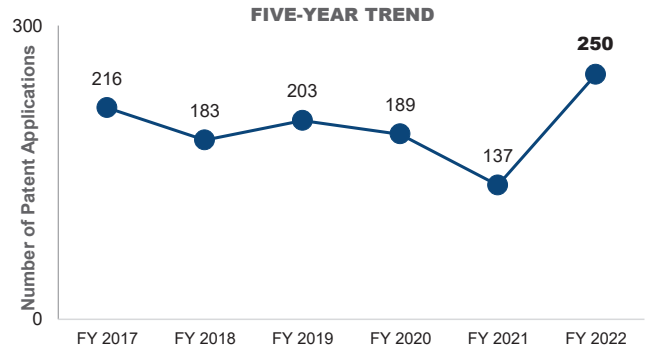
Patent Applications in FY 2022

▲ **82%**

One-year % change (vs. FY 2021)

▲ **16%**

Five-year % change (vs. FY 2017)



## LICENSE INCOME

**\$33**

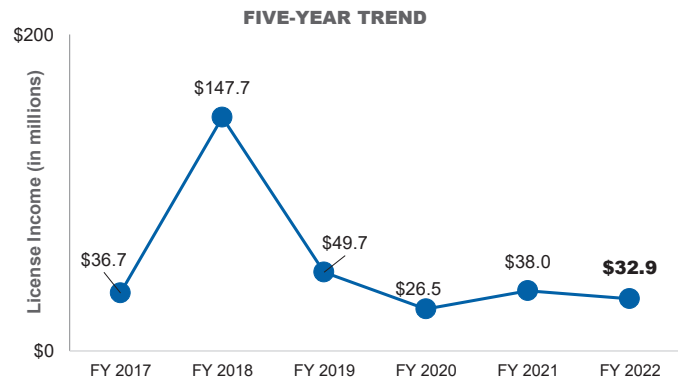
Million in FY 2022

▼ **13%**

One-year % change (vs. FY 2021)

▼ **10%**

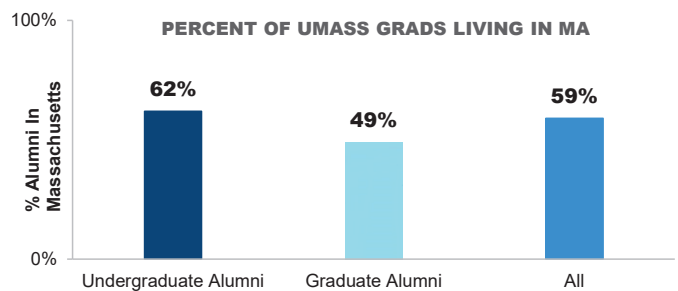
Five-year % change (vs. FY 2017)



## PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**59%**

Of all UMass Alumni live in the Commonwealth



# SERVICE TO THE COMMONWEALTH

## DEGREES AWARDED IN STEM FIELDS

**4.4k**

UG degrees awarded in STEM fields in 2021-22

▼ **2%**

One-year % change (vs. 2020-21)

▲ **15%**

Five-year % change (vs. 2016-17)

**33%**

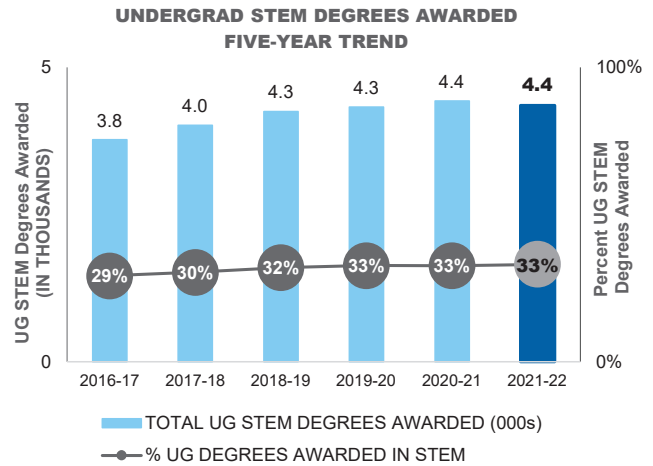
Percent of Total UG degrees awarded in STEM fields in 2021-22

● **0**

One-year % point change (vs. 2020-21)

▲ **4**

Five-year % point change (vs. 2016-17)



**1.5k**

GR degrees awarded in STEM fields in 2021-22

▼ **2%**

One-year % change (vs. 2020-21)

▲ **18%**

Five-year % change (vs. 2016-17)

**32%**

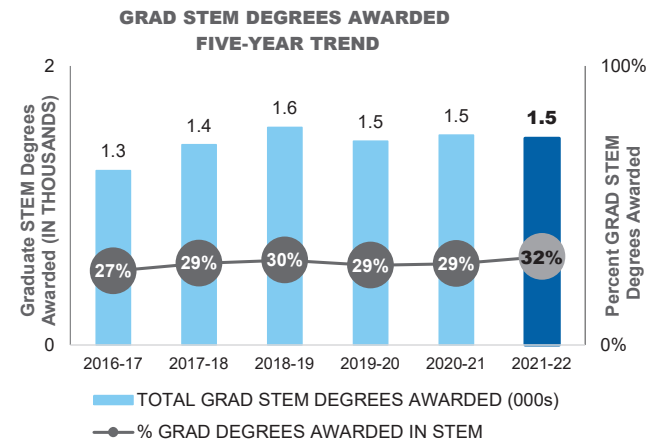
Percent of Total Grad degrees awarded in STEM fields in 2021-22

▲ **3**

One-year % point change (vs. 2020-21)

▲ **5**

Five-year % point change (vs. 2016-17)



\*Data for Years Prior to 2017-18 been updated to reflect Boston ReState

**5.9k**

Total degrees awarded in STEM fields in 2021-22

▼ **1%**

One-year % change (vs. 2020-21)

▲ **17%**

Five-year % change (vs. 2016-17)

**32%**

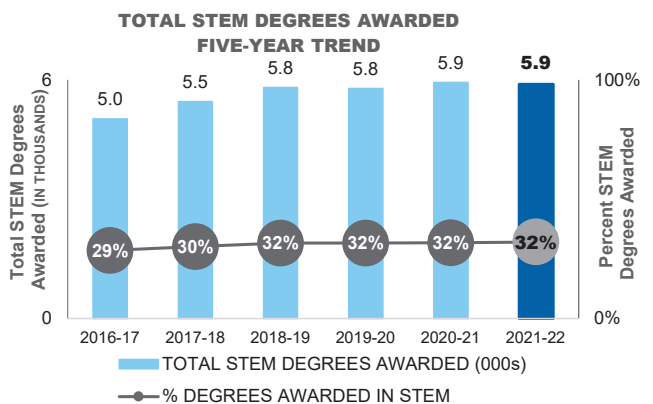
Percent of Total degrees awarded in STEM fields in 2021-22

● **0**

One-year % point change (vs. 2020-21)

▲ **3**

Five-year % point change (vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## CERTIFICATES AWARDED IN STEM FIELDS

**219**

Total certificates awarded in STEM fields in 2021-22

▲ **8%**

One-year % change (vs. 2020-21)

▼ **0%**

Five-year % change (vs. 2016-17)

**14%**

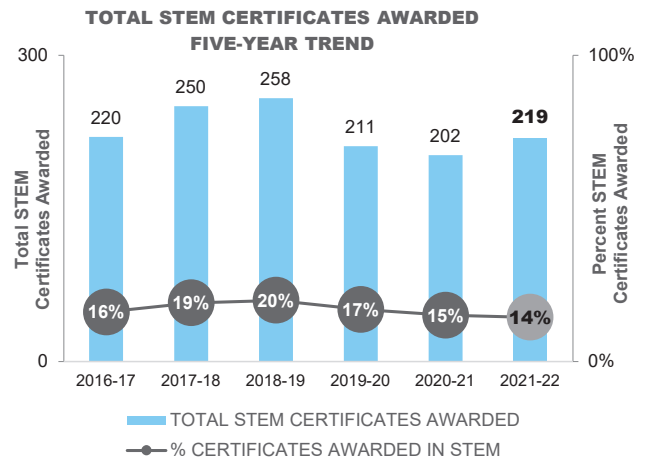
Percent of Total certificates awarded in STEM fields in 2021-22

▼ **1**

One-year % point change (vs. 2020-21)

▼ **2**

Five-year % point change (vs. 2016-17)



## DEGREES AWARDED IN HEALTHCARE FIELDS

**2.2k**

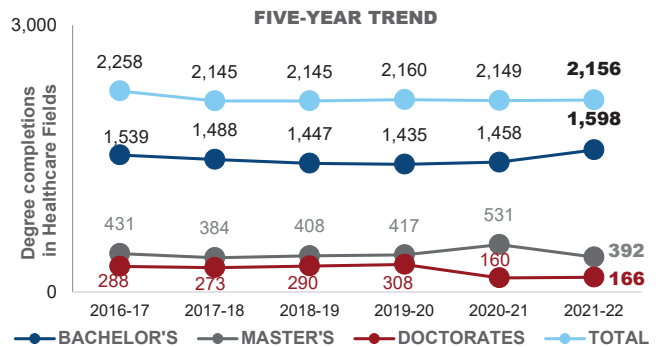
Total degrees awarded in Healthcare fields in 2021-22

▲ **0%**

One-year % change (vs. 2020-21)

▼ **5%**

Five-year % change (vs. 2016-17)



## CERTIFICATES AWARDED IN HEALTHCARE FIELDS

**209**

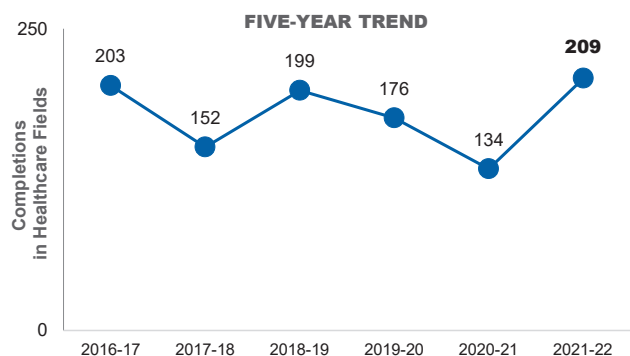
Total Certificates awarded in Healthcare fields in 2021-22

▲ **75**

One-year nominal change (vs. 2020-21)

▲ **6**

Five-year nominal change (vs. 2016-17)



\*Certificates Awarded data has been restated for Years before 2017-18.



# FINANCIAL HEALTH

## ENDOWMENT ASSETS

**\$1,118**

Million  
in FY 2022

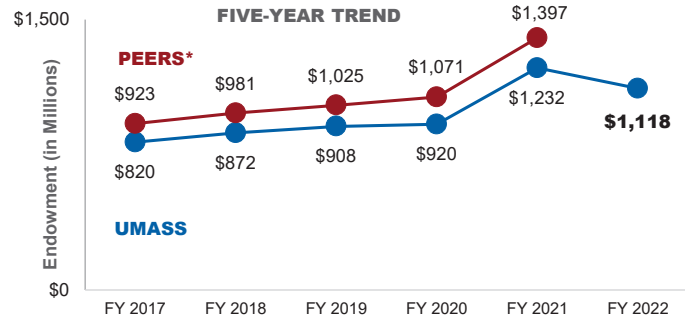
▼ **9%**

One-year  
% change  
(vs. FY 2021)

▲ **36%**

Five-year  
% change  
(vs. FY 2017)

\*Peer data for FY 2022 unavailable for reporting reasons.  
\*Peers include U Colorado, U Connecticut, U Illinois, U Maine, U Maryland, U Missouri, and U New Hampshire. Peer endowment changed in FY15.



**-9%**

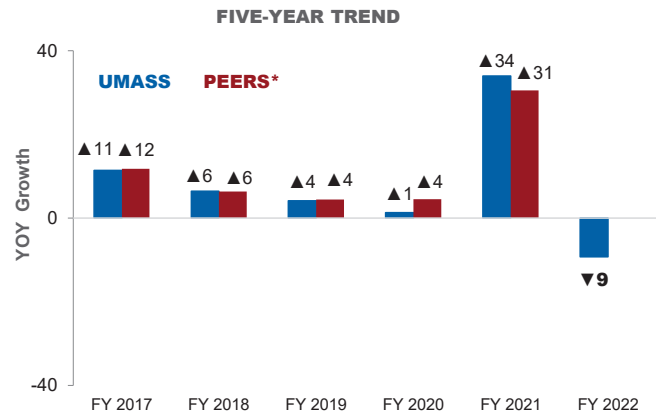
Annual Growth  
in FY 2022

▼ **43**

One-year  
% point change  
(vs. FY 2021)

▼ **20**

Five-year  
% point change  
(vs. FY 2017)



## PRIVATE FUNDS RAISED ANNUALLY\*

**\$430.1**

Million  
in FY 2022

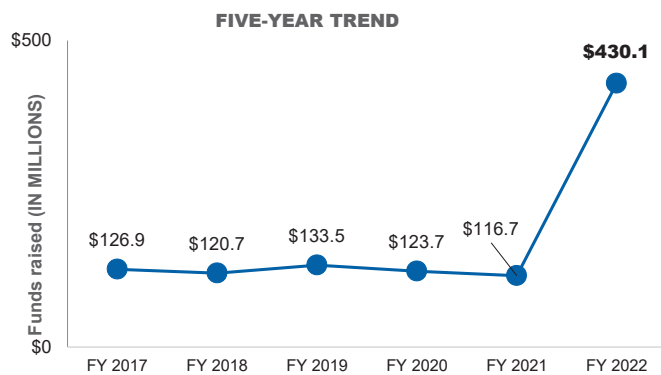
▲ **269%**

One-year  
% change  
(vs. FY 2021)

▲ **239%**

Five-year  
% change  
(vs. FY 2017)

\*Includes cash, pledges and grants



# FINANCIAL HEALTH

## LONG-TERM BOND CREDIT RATINGS

**Aa2**

Moody's Rating  
FY 2022

**AA-**

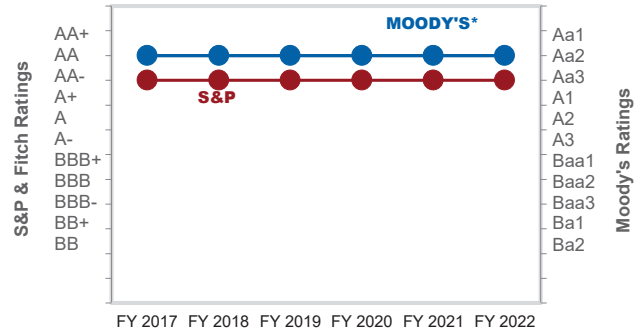
S&P Rating  
FY 2022

**AA**

Fitch Rating  
FY 2022

\*Fitch ratings equal AA for the entire period and overlap with Moody's Aa2 ratings.

### FIVE-YEAR TREND

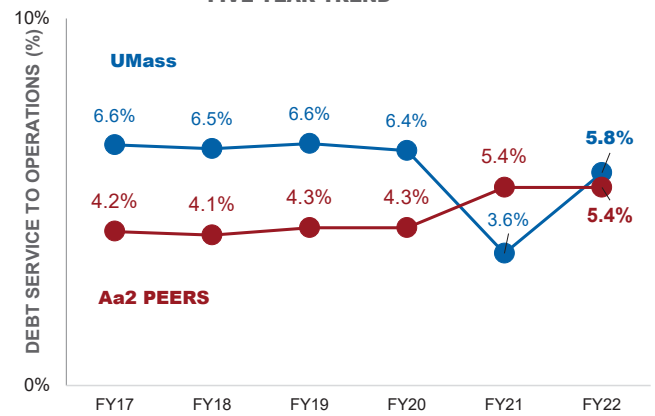


## DEBT SERVICE TO OPERATIONS

**6%**

UMass Debt Service to Operations in FY22

### FIVE-YEAR TREND

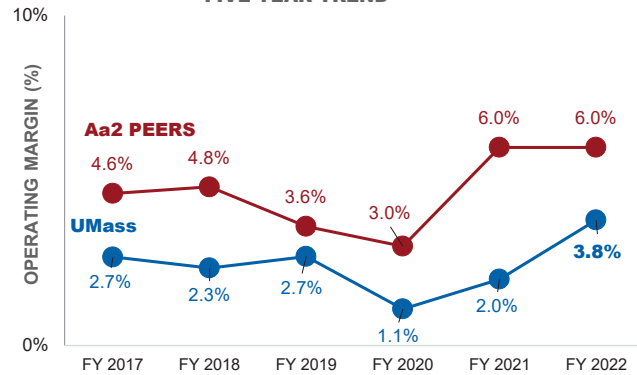


## OPERATING MARGIN (%)

**4%**

UMass Operating Margin in FY 2022

### FIVE-YEAR TREND

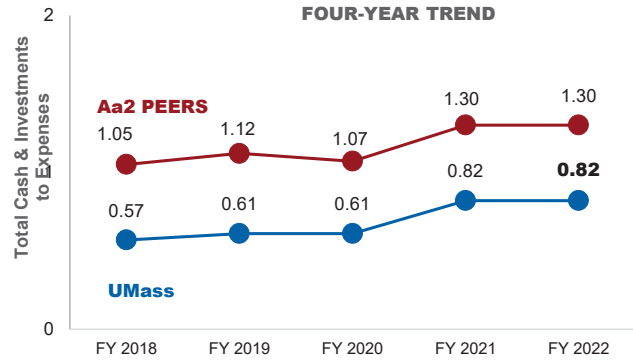


# FINANCIAL HEALTH

## TOTAL CASH & INVESTMENTS TO EXPENSES

**0.82**

Total Cash & Investments to Expenses in FY 2022



## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

#### Enrollment of Massachusetts

**Residents.** Number of first-year undergraduates enrolling at each institution who are residents of Massachusetts. Data are from the Fall IPEDS Enrollment student residency table

**Percentage of Undergraduate Students from Massachusetts.** Percentage of total undergraduate students who are residents of Massachusetts.

#### Undergraduate Students of Color.

Percent undergraduates who are Black/African American, Hispanic/Latino, Asian and/or Native American, divided by total U.S. citizens and permanent residents who report race/ethnicity. Comparative data for 2016 public high school graduates is from the MA Department of Education.

**Number of First-degree Bachelor-seeking Students Aged 25+.** Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of Sept 1 of the Fall semester.

#### Dual Enrollment Students (Headcount).

Headcount of current non-Degree dual-enrolled students on campus.

#### Tuition and Fees as a Percentage of Family Income.

Tuition and mandatory fees for in-state undergraduates (FY 2018) as a percentage of state-wide median family income as reported by US Census in 2017 inflation-adjusted dollars (latest available). Comparative data are from IPEDS and US Census.

#### Total Students Who Participated in a Study Abroad Program.

Number of students who participated in a credit-bearing study abroad program outside of the U.S. over the most recent academic year, either at UMass or elsewhere.

#### Online Course Registrations

Total course enrollments in online courses. Academic Year 2017-18 represents Fall 2017, Winter 2018, Spring 2018, and Summer 2018 enrollments. Data are for fully online (100%). Source: UMassOnline.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The total number of degrees (not including associates and certificates) awarded in the academic year, by degree level. As reported to IPEDS. Aggregated across all UMass campuses for System total.

**UMass Degrees as Percent of all Massachusetts Degrees.** Degrees awarded by UMass as percent of total degrees awarded by colleges and universities in the state, based on IPEDS Completions data.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF.

**Patent Applications.** The number of U.S. Patent applications filed per year. Data reported by campuses to UMass President's Office OTCV.

**License Income.** Amount of annual income from license agreements as reported to the Association of University Technology Managers for its annual survey.

**Percent of Alumni who live in Massachusetts.** Percentage of total UMass undergrad and grad degree recipients who currently reside in Massachusetts based on alumni records.

## DEFINITIONS AND SOURCES

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degrees and Certificates Awarded in STEM Fields.** Number of undergraduate and graduate degrees and certificates awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Aggregated across all UMass campuses for System total.

**Degrees and Certificates Awarded in Healthcare Fields.** Health Care designation as defined by Campus IR, and based on CIP classification. All of CIP 51 and specific 6-digit CIPs unique to each campus. Aggregated across all UMass campuses for System total.

### FINANCIAL HEALTH INDICATORS

**Endowment Assets and Annual Growth in Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual BOT report, and the percent change from the previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

**Private Funds Raised Annually.** Private funds raised includes restricted and unrestricted revenues from individuals, foundations, corporations and other organizations. Includes private grant revenues but not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions. Data from the UMass Foundation Advancement Report to the Board of Trustees.

**Bond Ratings.** A grade provided by an independent financial institution that is determined by examining an array of factors such as the credit worthiness, ability to pay

principal and interest, overall financial strength, etc. Agency bond ratings are from Moodys, S&P, and Fitch.

**Debt Service Burden.** Compares the relative cost of borrowing to overall expenditures.

Debt service (P&I) / Total expenses

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses).

(Total revenues – Total expenses)/Total revenues

**Total Cash & Investments to Expenses.** Indicates the university's financial flexibility and resilience, and its ability to generate investment income. (Cash & Investments – debt service reserve funds) / Total expenses

### PEER INSTITUTIONS FOR UMASS SYSTEM

#### Peer University Systems

University of Connecticut  
University of California  
University of Colorado  
University of Illinois  
University of Maryland  
University of Missouri

#### New England Public Universities

University of Connecticut  
University of Maine  
University of New Hampshire  
University of Rhode Island  
University of Vermont

## DEFINITIONS AND SOURCES

### PEER INSTITUTIONS FOR UMASS SYSTEM

#### Massachusetts Private Universities

Boston College

Boston University

Brandeis University

Clark University

Harvard University

Massachusetts Institute of Technology

Northeastern University

Suffolk University

Tufts University

University of Alabama at Birmingham, AL

University of Alabama, AL

University of Arizona, AZ

University of Arkansas, AR

University of California, CA

University of Florida, FL

University of Georgia, GA

University of Hawaii, HI

University of Houston System, TX

University of Kansas, KS

University of Kentucky, KY

University of Massachusetts, MA

University of North Texas System, TX

University of Oregon, OR

University of South Carolina, SC

University of Wyoming, WY

#### Moody's Aa2 Peers

Alamo Community College District, TX

Arizona State University, AZ

Auburn University, AL

Board of Regents of The University System of Georgia, GA

California State University, CA

City University of New York, NY

Clemson University, SC

Cuyahoga Community College District, OH

Florida State University, FL

Houston Community College System, TX

Iowa State University of Science & Technology, IA

Michigan State University, MI

Mississippi Institutions of Higher Learning, MS

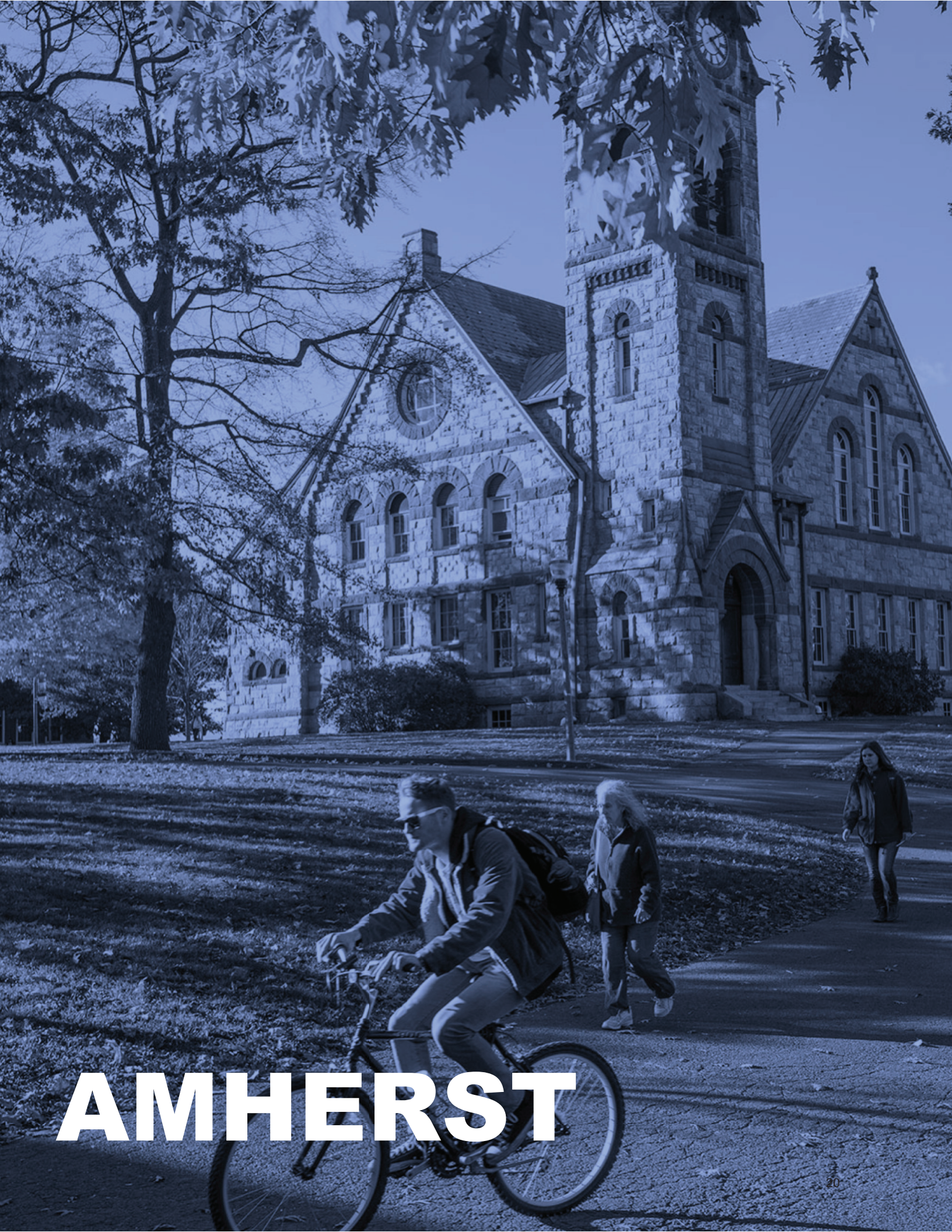
Nevada System of Higher Education, NV

State University of New York, NY

State University System of Florida, FL

Texas State University System, TX

*Please Note: Unless otherwise specified, all data are from the UMPO - Office of Institutional Research.*



# AMHERST

## HEADLINES

### ACADEMIC QUALITY

Over the past decade, the University of Massachusetts Amherst has continued its rise in both reputation and excellence. It is one of the most improved institutions among top-tier public universities in America, consistently ranking in the top 30 of U.S. News and World Report's Best Colleges for the last nine years. Indeed, UMass Amherst compares favorably with university peers in the Carnegie classification of doctoral institutions with very high research activity. The campus compares its progress to a group of ten peers.

All but two of the peers, the Universities of Connecticut and Delaware, are among 65 members of the Association of American Universities (AAU). AAU institutions are recognized for their excellence in research and education. Therefore, the benchmark for the Amherst campus is relatively high.

**Student Academic Quality.** The academic profile of entering students has made impressive gains in recent years, evidenced by the growth in high school GPA and test scores. The high school GPA of entering students increased from 3.73 in 2013 to 4.02 in 2022. Virtually all (over 99%) students entered UMass Amherst with a high school GPA of 3.0 and above. Like most peers, standardized tests are optional for entering applicants. Further, seniors report high satisfaction with their undergraduate experience. Results from the 2023 National Survey of Student Engagement (NSSE) show that 83% of seniors rated their UMass Amherst educational experience positively.

**Advanced Training.** The campus has demonstrated strength in the education and training of pre-and postdoctoral researchers. Though UMass Amherst is below the peer median for the number of doctoral degrees awarded, the awardees are just as diverse as our peers.

**Research and Creative Activity.** Total research dollars (R&D) are key measures of an institution's commitment to and success in research. UMass Amherst faculty have been successful in competing for these dollars. Total R&D spending increased to just over \$245 million. Per faculty, expenditures increased by 13% in the past five years.

The number of academic honors and awards earned by the faculty is another indicator of an institution's quality. The number of National Academy members has remained stable. A more comprehensive view of awards from Academic Analytics shows that UMass Amherst faculty have received over 1,400 nationally or internationally competitive awards. Of these, nearly 400 were received in the last five years, and nearly 400 are considered prestigious or highly prestigious.

The campus continues to invest in tenure-system faculty and their numbers remain steady over the last five years. In that same time frame, the total faculty has grown by 5%. Maintaining the size of the tenure-system faculty body will be required for the campus to make significant progress in improving academic quality and research productivity and advance in the research university rankings.

### ACCESS AND AFFORDABILITY

Providing an affordable and accessible education of high quality is central to the University's mission. The campus continues to recognize its commitment to students with financial needs and has increased institutional need-based aid accordingly. In Fall 2021, 24% of full-time, in-state students qualified for Pell grants. Eighty-five percent of financial need was met for in-state students who applied for aid. The proportion of students graduating with debt continues to decrease.

Most UMass Amherst students have a positive educational experience. Ninety percent of students return for their sophomore year, and 83% graduate within six years from UMass Amherst. The campus has seen improvement in the four-year graduation rate, which has increased from 66% for the Fall 2009 cohort to 75% for the Fall 2018 cohort. Retention and graduation rate improvements have closed the gap with peer institutions, with the graduation rate now exceeding the median peer rate.



## HEADLINES

### STUDENT SUCCESS AND SATISFACTION

The Undergraduate Student Success unit coordinated programs, resources, and cross-disciplinary teams which prioritize student persistence and success, with particular attention to students historically marginalized in higher education. The UMass campus-wide focus on student belonging is foundational to this shared success work and calls us to center inclusivity as we decrease barriers to academic progress.

Release of new UMass Amherst Climate Survey data over the past year reinforced the need to expand mentoring opportunities for all students. Particularly for the quarter of UMass undergraduates who are among the first in their family to attend college, providing the access, skills, and encouragement to seek out and engage mentors can be formative to students' academic and professional success. Partnering with the UMass Alumni Association and their Connect UMass platform, we helped first-generation college students find alumni who have walked a similar path. The "On Mentoring" video series provided models of first gen professionals and told the stories of mentors in their lives. Student Success's "I Am First Gen" outreach campaign celebrated the identity of first gen students, fostered social connections, and demystified college for all students. Transfer students are another priority population for Student Success. We offered Transfer Success seminars for new transfer students and will offer a Transfer Student Residential Academic Program again in fall 2023. We partnered actively with New Student Orientation & Transitions to help students cultivate academic preparedness as they onboard to the university.

Student Success supports hundreds of academic advisors, whether they are full-time professionals, or faculty who advise as part of their overall portfolio. Using the EAB Navigate platform we provided data analytics and best practice advising strategies to standardize proactive data-informed interventions. Our Success@UMass professional development series helped advisors, new or veteran, build their skills and cultivate empathy to support retention and timely degree completion, while fostering a culture of effective help-seeking. Using the Academic Alert system in Navigate, instructors' automated outreach to struggling students connected them with resources, including the Learning Resource Center's course-based

supplemental instruction (tutoring and peer-led study groups), their study skills coaching, and the Student Success unit's Success Toolkit series. We aligned and integrated this referral system with the Dean of Students Office case management system, and Student Success established standing membership on that office's Care Team.

Actively supporting students with financial insecurity helps foster an equitable university experience. In its second year, the Provost's Office directed the cross-unit Partnerships for Advancing Completion Equity (PACE), aimed at reducing the achievement gap in retention and completion for our students of color. Financial insecurity and low credit accumulation can multiply for some students from one semester to the next. PACE combined data-driven insights with individualized outreach to smooth the paths for vulnerable students. In conjunction with our Senior Completion Committee, PACE offered grants to students struggling to meet their final financial obligations and complete their degrees on time. Our financial literacy program, Smart About Money (SAM), educated students about the new financial independence they encounter in college. Through SAM, students met with a peer financial coach, attended workshops, and used online resources to learn about on-campus employment, budgeting, educational loans, and preparing financially for life after UMass.

The campus has seen an increase in the diversity of the student body. The Fall 2022 entering first-year class contains 36.5% ALANA students; overall, over three in ten undergraduates were students of color. Also, over one-fifth are the first in their families to pursue a bachelor's degree. The campus will continue to attract a diverse student body and encourage greater appreciation for diverse populations.

The hiring landscape has shifted over the past few years and colleges as well as employers have adjusted their hiring practices to meet the changing needs of job seekers. Students who are heading into the job market are interested in hybrid or flexible work schedules and greater work/life balance. A recent poll from Handshake indicated that "more than 7 in 10 [students] would prefer a hybrid work arrangement." Experiential learning through internships, practicum, co-ops, and civic engagement remains a priority for students who

## HEADLINES

### STUDENT SUCCESS AND SATISFACTION

who want to gain hands-on experience and explore career fields that match their interests and values.

Post pandemic career development at UMass Amherst includes expanded online programs, both in-person and online career fairs, information sessions and other recruitment events. We are

increasing opportunities for students to participate in internships throughout their college careers, both the Amherst and greater Boston areas. For the Class of 2022, full time job and graduate school attendance was 90%--a new high! (knowledge rate=76%).

### SERVICE TO THE COMMONWEALTH

UMass Amherst has invested in programs to promote the enrollment and graduation of undergraduate and graduate students in the sciences and mathematics. In Academic Year 2021-2022, 37% of degrees awarded at the undergraduate level and 33% awarded at the graduate level were in Science, Technology, Engineering, and Mathematics (STEM) programs.

There are several directed initiatives aimed at increasing the STEM talent pipeline for the Commonwealth by increasing the completion rates of our entering students. One example is our redesign of the required foundation lab course (Biology 153) for students majoring in the life sciences into a Course-based Undergraduate Research Experience (CURE; SEA-PHAGES), work supported by the Howard Hughes Medical Institute Inclusive Excellence award. Engaging in a CURE in the first two years of college leads to an increase in students doing traditional undergraduate research and to those experiences being longer, and correlates to improved outcomes

for all students, including historically minoritized students.

UMass Amherst houses the Institute of Diversity Sciences which is a multidisciplinary hub that brings together students and faculty across UMass Amherst and the Five College Consortium to address social justice issues through STEM research. By connecting STEM to social justice, IDS attracts large numbers of students and faculty from underrepresented groups into STEM higher education. By creating a critical mass of diverse students and faculty, IDS builds community, mentorship, and expands STEM career pathways for students. The Institute anchors a Massachusetts-wide network of STEM educators from high schools, community colleges, and higher education institutions as well as business leaders from STEM organizations to expand and diversify higher education to career pathways in engineering and computer science.

### FINANCIAL HEALTH

The financial indicators of the Amherst campus demonstrate a commitment to prudent use and investment of state appropriation, student tuition and fees, and other income streams. The campus continues to support the academic enterprise by increasing growth in net revenues from graduate programs, increasing summer and continuing and professional education revenue, attracting more donor support, and targeting small increases in out-of-state enrollment. Investment in capital infrastructure, strategic faculty growth, and student success initiatives remain cornerstones of the campus strategic plan. The strategic plan identifies three overarching themes: 1) establish the campus

as a "destination of choice" for academically accomplished students; 2) establish the campus as a "partner of choice" with a broad range of stakeholders vital to the campus; 3) establish the campus as a community of choice that attracts and retains contributors of all kinds. Mobilizing resources to achieve these goals remains a key strategy, and annual unit plans must demonstrate that they are aligned with these campus objectives.

## HEADLINES

### FINANCIAL HEALTH

UMass Amherst is in the quiet phase of a comprehensive campaign to secure private support for students, faculty, programs, and facilities. The UMass Amherst Foundation is partnering with stakeholders across the campus and volunteer leadership to secure lead gifts for the campaign. A transformational gift in support of faculty research at the Isenberg School of Management continued a series of extraordinary philanthropic investments made since fall 2021 and contributed to a highly successful fundraising year, with new gifts and commitments totaling more than \$75 million (fiscal year to date).

In addition to these extraordinary philanthropic investments, increases in the numbers of major gifts (\$25,000 - \$999,999) and principal gifts (\$1 million+) in recent years have helped keep the campaign ahead of pace. With one more quiet year planned as UMass Amherst welcomes a new chancellor, the campaign is approaching two-thirds of its working goal. As Amherst prepares for the public launch of the campaign, it is developing a strong case for support, adopting best practices that support fundraising, and strengthening its giving programs, all of which will help ensure we realize our goals.

Key contributors to Amherst's success in fundraising include the State of Massachusetts endowment matching program, which helped

UMass Amherst secure more than \$15 million in new endowment commitments this year, and the maturation of a Gift Planning program that helped donors maximize both their philanthropic potential and tax advantages while giving more than \$22M in cash, life income, realized and revocable bequests and qualified charitable distributions in 2022-2023.

Over the past year, our work to strengthen the donor pipeline has included in-person and virtual engagement events for alumni and students. With Advancement's online community, Connect UMass, over 10,000 alumni and students have registered to connect with other community members through mentoring activities, industry-based Career Communities, various regional and affinity groups, and the newly launched Alumni Business Directory.

In April 2023, the 10th annual UMassGives—a 48-hour online giving campaign—inspired more than 9,400 people to make gifts totaling over \$2.5 million to hundreds of programs on campus. UMassGives is a highly collaborative effort, encompassing annual and major gifts, marketing and communications, and connections with alumni networks that enables alumni, students, faculty, staff, parents, and friends to make gifts to the places that matter most to them at UMass Amherst.

## AT-A-GLANCE

### ACADEMIC QUALITY

• Average HS GPA of Freshmen	<b>4.02</b>	• Technology-Enhanced Classrooms	<b>345</b>
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	<b>68%</b>
<i>Arithmetic Mean</i>	<b>1358</b>	• Faculty FTE	<b>1,550</b>
<i>25<sup>th</sup> – 75<sup>th</sup> Percentile</i>	<b>1260-1480</b>	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	<b>3.42</b>	<i>Percent Faculty-of-Color</i>	<b>27%</b>
• Student-Faculty Ratio	<b>18:1</b>	<i>Percent Women Faculty</i>	<b>47%</b>

### ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	<b>74%</b>	• Percent In-State Pell Grant Recipients	<b>24%</b>
• Percent Undergraduates who are Students of Color	<b>34%</b>	• Percent of Need Met for In-State Students Awarded Need-Based Aid	<b>85%</b>
• Percent Undergraduates who are International	<b>7%</b>	• Average Debt of Students (UG Graduating Class)	<b>\$31,431</b>
• Percent First-Time Undergraduates who are First Generation in College	<b>20%</b>	• Percent Graduating Class with Debt (UG)	<b>60%</b>
• Percent First-Time Undergraduates with English as a Second Language	<b>14%</b>	• Total Students who Participated in a Study Abroad Program	<b>683</b>
• Percent Undergraduates Who Are Of Transfer Origin	<b>19%</b>	• Online Course Registrations	<b>34,875</b>
• Number of First-degree Bachelor-seeking Students Aged 25+	<b>1,045</b>	Percentage of degree-seeking students taking at least one online course who were full time and fully online.	<b>6%</b>
• Dual Enrollment Students (Headcount)	<b>5</b>		

### STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	<b>90%</b>	• Transfer (Full-time) One-Year Retention Rate	<b>87%</b>
• Freshmen Four-Year Graduation Rate	<b>75%</b>	• Transfer (Upper Division) Four-Year Graduation Rate	<b>82%</b>
• Freshmen Six-Year Graduation Rate	<b>83%</b>	• Student Satisfaction With Educational Experience	<b>83%</b>
• Freshmen Twelve-Semester Graduation Rate	<b>81%</b>	• Alumni Participation Rate	<b>7%</b>

## AT-A-GLANCE

## SERVICE TO THE COMMONWEALTH

• Degree Completions	<b>8,423</b>	• Degrees Awarded in STEM Fields	<b>3,030</b>
<i>Bachelor's</i>	<b>6,276</b>	<i>Undergraduate</i>	<b>2,317</b>
<i>Master's</i>	<b>1,752</b>	<i>Graduate</i>	<b>713</b>
<i>Doctorates</i>	<b>395</b>	• Certificates Awarded in STEM Fields	<b>100</b>
• Patent Applications	<b>35</b>	• Degrees Awarded in Healthcare Fields	<b>662</b>
• Total R&D Expenditures	<b>\$245M</b>	<i>Undergraduate</i>	<b>471</b>
• Total R&D Expenditures Ranking	<b>115</b>	<i>Graduate</i>	<b>191</b>
Total R&D Expenditures Ranking among Carnegie Peers, US Publics, Non- Medical	<b>12</b>	• Certificates Awarded in Healthcare Fields	<b>46</b>
• Total R&D Expenditures per Tenure System Faculty	<b>\$216,571</b>	• License Income	<b>\$677,290</b>
		• Percent Alumni who Remain in MA	<b>53%</b>

## FINANCIAL HEALTH

• Total Endowment	<b>\$442.5M</b>	• Total Cash & Investments to Expenses	<b>0.78</b>
• Annual Growth in Endowment	<b>-10.4%</b>	• Debt Service Burden	<b>5.4%</b>
• Endowment per Annualized Student FTE	<b>\$14,140</b>	• Operating Margin (%)	<b>6.9%</b>
• Private Funds Raised Annually	<b>\$119.1M</b>		

# ACADEMIC QUALITY

## AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

**4.02**

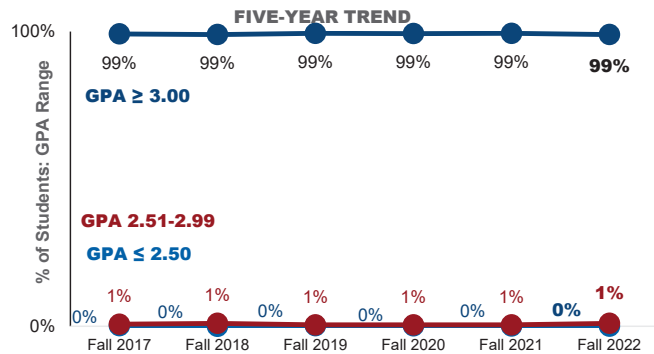
Average HS GPA in Fall 2022

▲ **0.03**

One-year nominal change (vs. Fall 2021)

▲ **0.13**

Five-year nominal change (vs. Fall 2017)



## SAT SCORES OF FRESHMEN

**1480**

SAT Scores of Freshmen 75th Percentile in Fall 2022

▲ **20**

One-year nominal change (vs. Fall 2021)

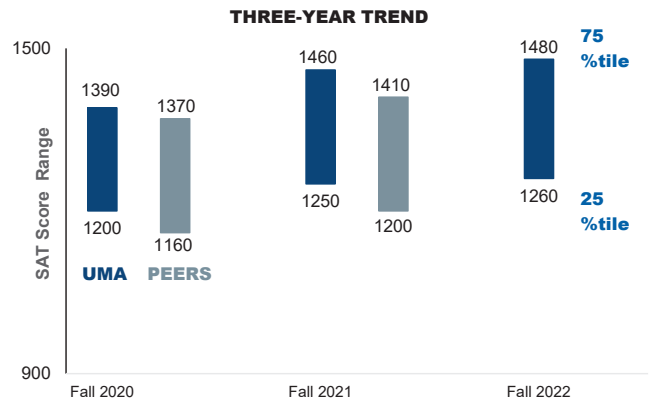
**1260**

SAT Scores of Freshmen 25th Percentile in Fall 2022

▲ **10**

One-year nominal change (vs. Fall 2021)

\*Test scores became optional in Fall 2021.



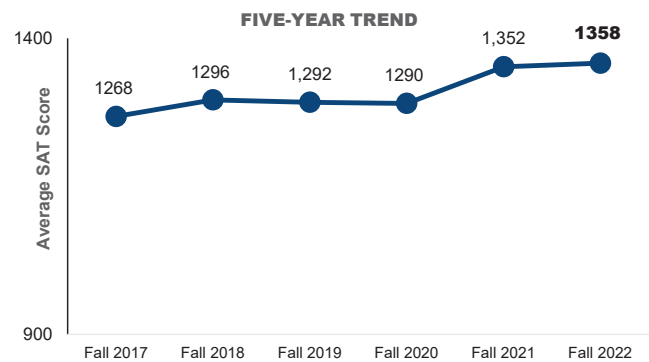
**1358**

Average SAT Scores of Freshmen in Fall 2022

▲ **6**

One-year nominal change (vs. Fall 2021)

\*Test scores became optional in Fall 2021.



# ACADEMIC QUALITY

## AVERAGE GPA OF ENTERING TRANSFER STUDENTS

**3.42**

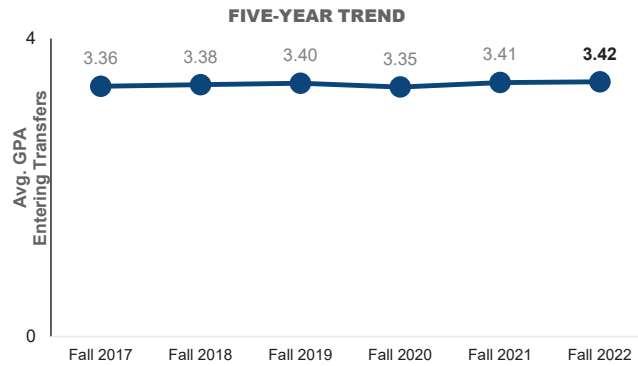
Average transfer GPA in Fall 2022

**▲ 0.01**

One-year nominal change (vs. Fall 2021)

**▲ 0.06**

Five-year nominal change (vs. Fall 2017)



## STUDENT-FACULTY RATIO

**18:1**

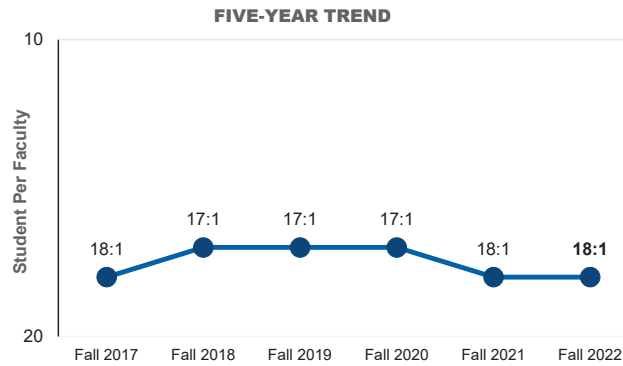
Student-Faculty Ratio in Fall 2022

**● 0**

One-year nominal change (vs. Fall 2021)

**● 0**

Five-year nominal change (vs. Fall 2017)



## TECHNOLOGY-ENHANCED CLASSROOMS

**345**

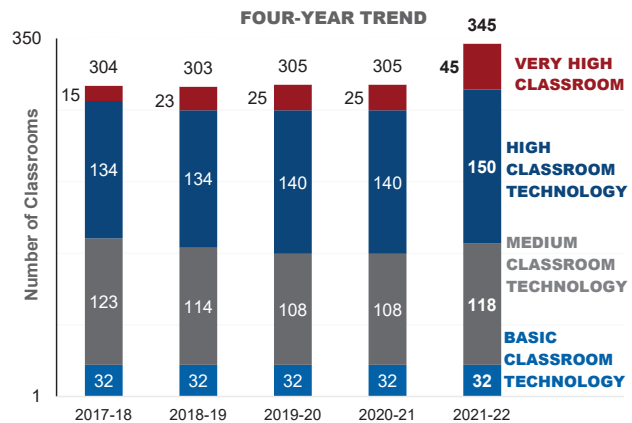
Total Technology Enhanced Classrooms in 2021-22

**▲ 13%**

One-year % change (vs. 2020-21)

**● 0%**

Four-year % change (vs. 2017-18)



# ACADEMIC QUALITY

## PERCENT TENURED/TENURE-TRACK FACULTY FTE

**68%**

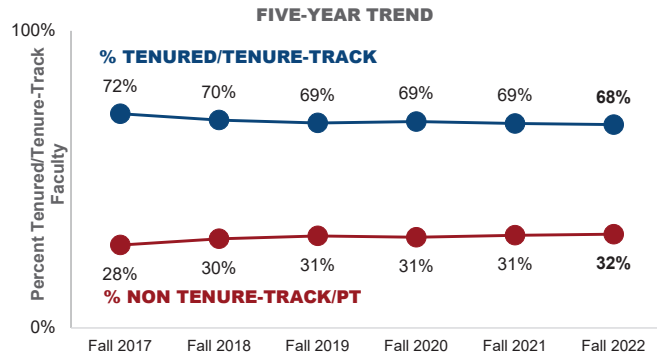
Percent Tenured/  
Tenure-track Faculty  
in Fall 2022

**0**

One-year  
% point change  
(vs. Fall 2021)

**▼ 4**

Five-year  
% point change  
(vs. Fall 2017)



## FACULTY FTE

**1,550**

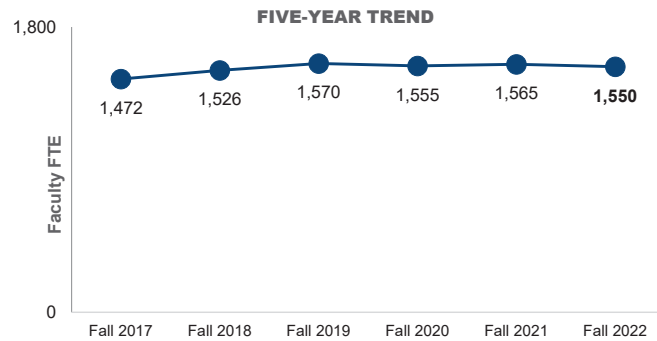
Faculty FTE  
in Fall 2022

**▼ 1%**

One-year  
% change  
(vs. Fall 2021)

**▲ 5%**

Five-year  
% change  
(vs. Fall 2017)



## FACULTY-OF-COLOR

**357**

Faculty Of Color  
in Fall 2022

**▲ 11**

One-year  
nominal change  
(vs. Fall 2021)

**▲ 66**

Five-year  
nominal change  
(vs. Fall 2017)

**27%**

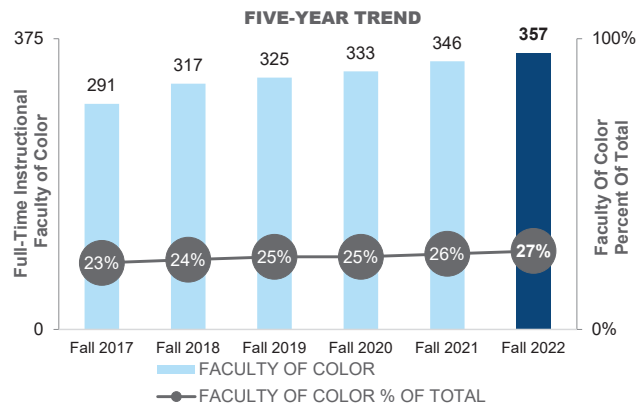
Percent of  
Faculty Of Color  
in Fall 2022

**▲ 1**

One-year  
% point  
(vs. Fall 2021)

**▲ 4**

Five-year  
% point  
(vs. Fall 2017)



Faculty-of-Color based on US Citizens/Permanent Residents reporting Race/Ethnicity according to new IPEDS definitions.



# ACADEMIC QUALITY

## WOMEN FACULTY

**678**

Women Faculty in Fall 2022

▲ **2**

One-year nominal change (vs. Fall 2021)

▲ **72**

Five-year nominal change (vs. Fall 2017)

**47%**

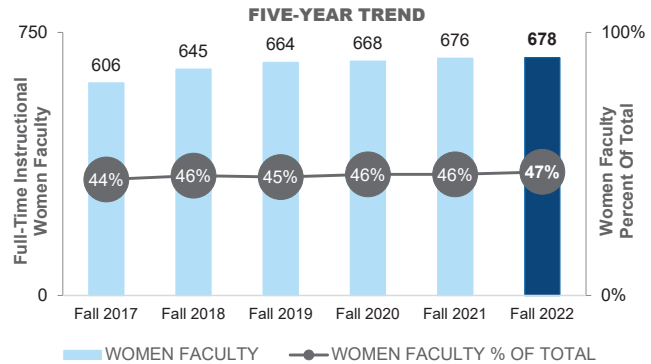
Percent of Women Faculty in Fall 2022

▲ **1**

One-year nominal change (vs. Fall 2021)

▲ **3**

Five-year nominal change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATES FROM MASSACHUSETTS

**18,078**

Undergraduates from Massachusetts in Fall 2022

▼ **2%**

One-year % change (vs. Fall 2021)

▲ **1%**

Five-year % change (vs. Fall 2017)

**74%**

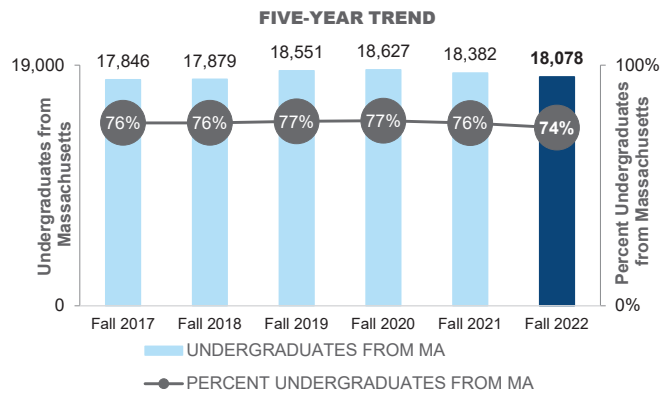
% Undergraduates from Massachusetts in Fall 2022

▼ **2**

One-year % point change (vs. Fall 2021)

▼ **2**

Five-year % point change (vs. Fall 2017)



## UNDERGRADUATE STUDENTS OF COLOR

**7,295**

Undergraduate Students of Color in Fall 2022

▲ **4%**

One-year % change (vs. Fall 2021)

▲ **32%**

Five-year % change (vs. Fall 2017)

**34%**

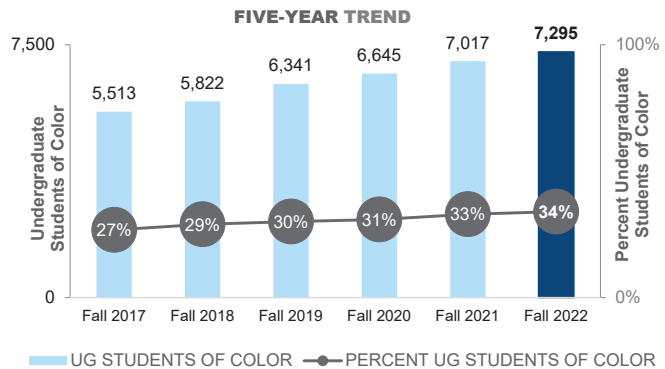
% Undergraduate Students of Color in Fall 2022

▲ **1**

One-year % point change (vs. Fall 2021)

▲ **7**

Five-year % point change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATES WHO ARE INTERNATIONAL

**1,813**

International UG Enrollment in Fall 2022

**▲ 7%**

One-year % change (vs. Fall 2021)

**▲ 25%**

Five-year % change (vs. Fall 2017)

**7%**

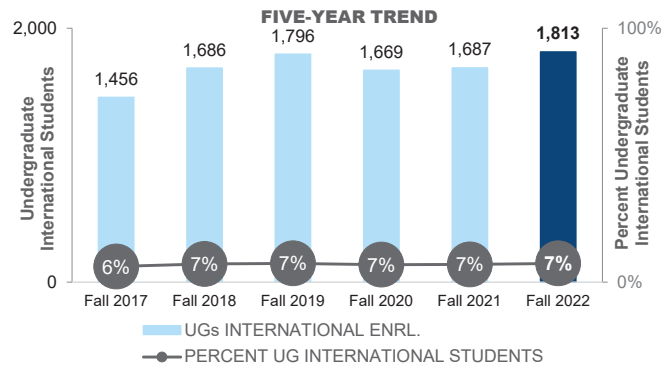
% International UG Enrollment in Fall 2022

**• 0**

One-year % point change (vs. Fall 2021)

**▲ 1**

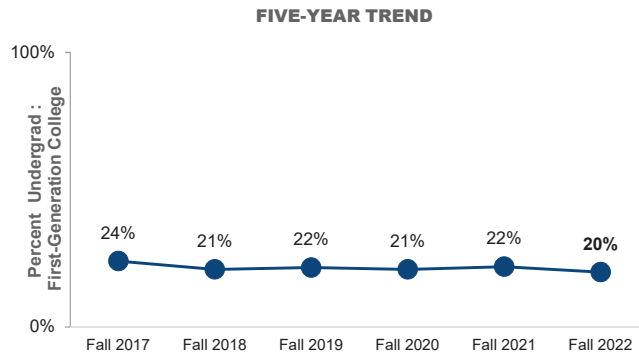
Five-year % point change (vs. Fall 2017)



## PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE

**20%**

Percent first-time Undergraduates who are First-Generation College in Fall 2022

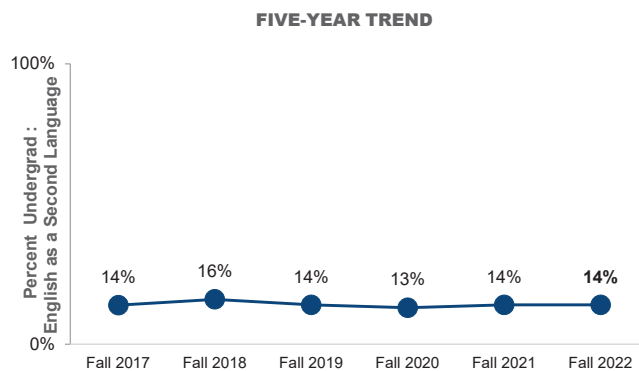


\*The data source prior to 2018 is based on survey responses, 2018 to present is based on Common Application responses.

## PERCENT FIRST-TIME UNDERGRADUATES WITH ENGLISH AS A SECOND LANGUAGE

**14%**

Percent Undergraduates Speak English as a Second Language in Fall 2022



\*The data source prior to 2018 is based on survey responses, 2018 to present is based on Common Application responses.

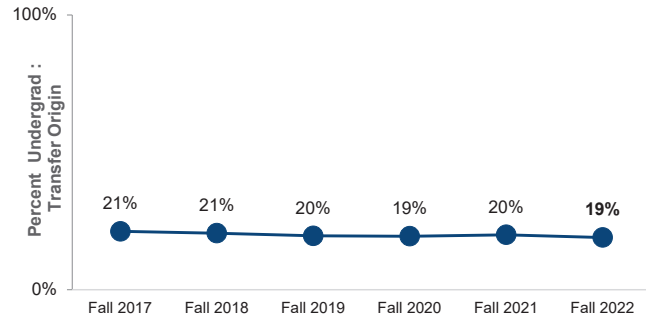
## ACCESS AND AFFORDABILITY

### PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

**19%**

Percent Undergraduates who are of Transfer-Origin in Fall 2022

FIVE-YEAR TREND



### NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

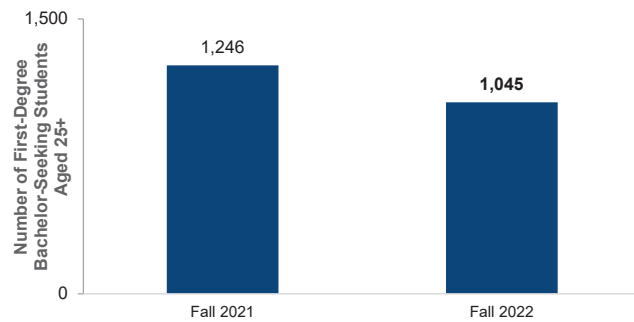
**1,045**

Number of First-Degree Bachelor-Seeking Students Aged 25+ in Fall 2022

**▼ 201**

One-year nominal change vs. Fall 2021

ONE-YEAR TREND

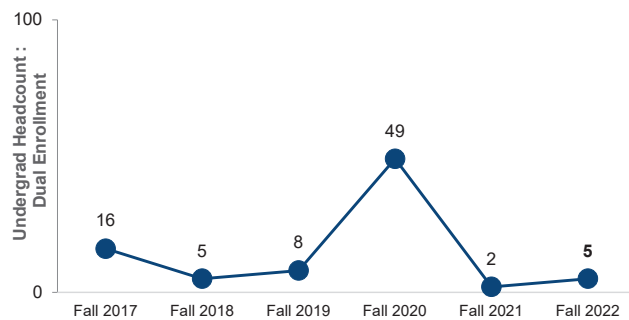


### DUAL ENROLLMENT STUDENTS (HEADCOUNT)

**5**

Dual Enrolled Students in Fall 2022

FIVE-YEAR TREND



## ACCESS AND AFFORDABILITY

### PERCENT IN-STATE PELL GRANT RECIPIENTS

**24%**

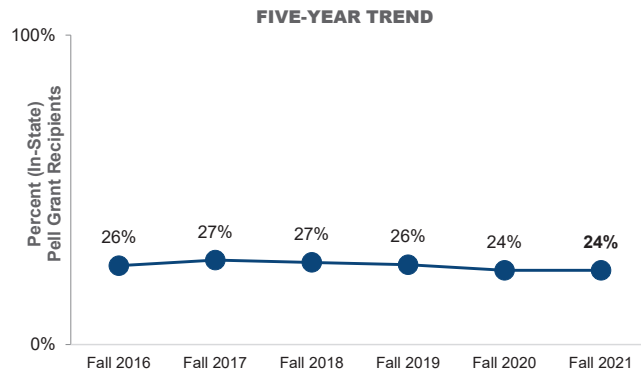
Percent (In-State)  
Pell Grant Recipients  
in Fall 2021

**0**

One-year  
% point change  
(vs. Fall 2020)

**▼ 2**

Five-year  
% point change  
(vs. Fall 2016)



### PERCENT NEED MET FOR IN-STATE STUDENTS AWARDED NEED-BASED AID

**85%**

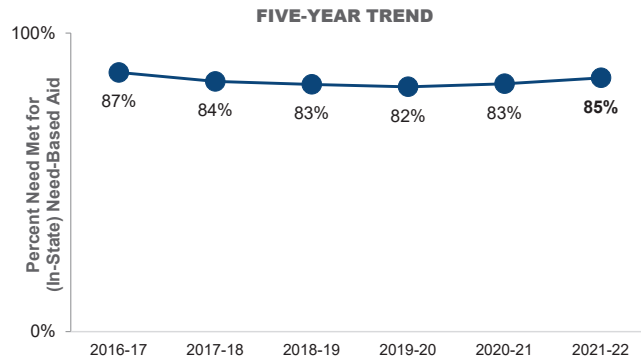
Percent Need Met for  
(In-State) Need-Based  
Aid in 2021-22

**▲ 2**

One-year  
% point change  
(vs. 2020-21)

**▼ 2**

Five-year  
% point change  
(vs. 2016-17)



### UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

**\$31.4k**

Average Debt Load  
in 2021

**▼ 1%**

One-year  
% change  
(vs. 2021)

**▼ 1%**

Five-year  
% change  
(vs. 2017)

**60%**

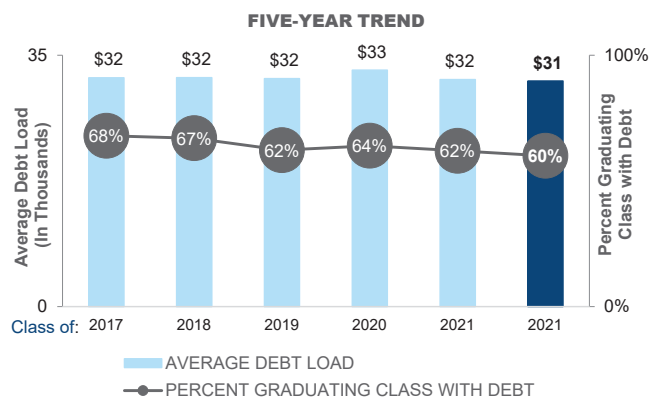
Percent Graduating  
Class with Debt  
in 2021

**▼ 2**

One-year  
% point change  
(vs. 2021)

**▼ 8**

Five-year  
% point change  
(vs. 2017)



## ACCESS AND AFFORDABILITY

### TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

**683**

Students who participated in Study Abroad in Fall 2021-Smr.22

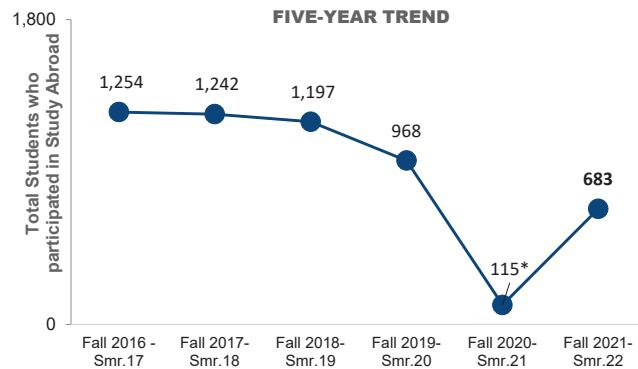
**▲ 568**

One-year nominal change vs. Fall 2020-Smr.21

**▼ 571**

Five-year nominal change vs. Fall 2016 -Smr.17

\*Terms affected by pandemic



### TOTAL ONLINE COURSE REGISTRATIONS

**34,875**

Online Course Registrations in FY 2021-22

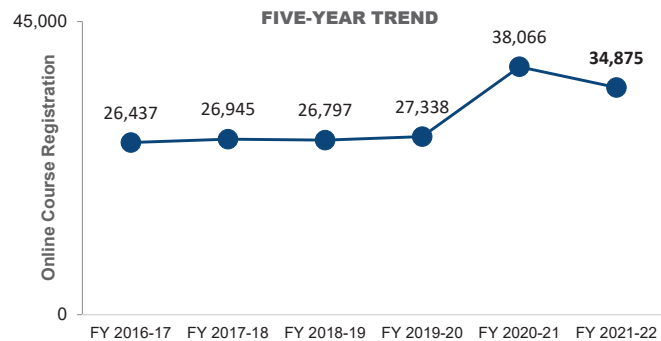
**▼ 8%**

One-year % change (vs. FY 2020-21)

**▲ 32%**

Five-year % change (vs. FY 2016-17)

\*Terms affected by pandemic

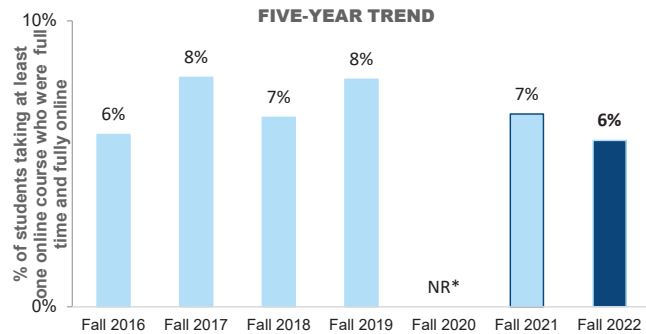


### PERCENTAGE OF DEGREE SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

**6%**

Students taking at least one online course who were full time and fully online in Fall 2021

\*Data not reported, as all students shifted to online learning during the pandemic



# STUDENT SUCCESS AND SATISFACTION

## FRESHMEN ONE-YEAR RETENTION RATE

**90%**

Freshmen One-Year Retention Rate in Fall 2022

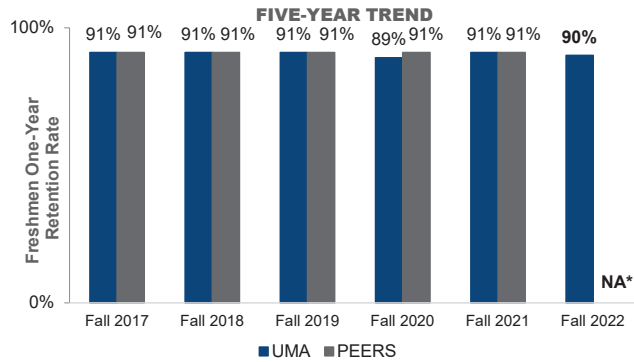
▼ **1**

One-year % point change (vs. Fall 2021)

▼ **1**

Five-year point (vs. Fall 2017)

\*Peer data for Fall 2022 not available for reporting purposes.



## FRESHMEN FOUR-YEAR GRADUATION RATES

**75%**

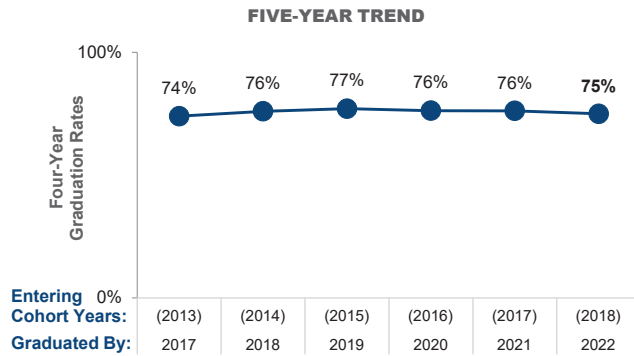
Freshmen Four-Year Graduation Rates in 2022

▼ **1**

One-year % point change (vs. 2021)

▲ **1**

Five-year % point change (vs. 2017)



## FRESHMEN SIX-YEAR GRADUATION RATE

**83%**

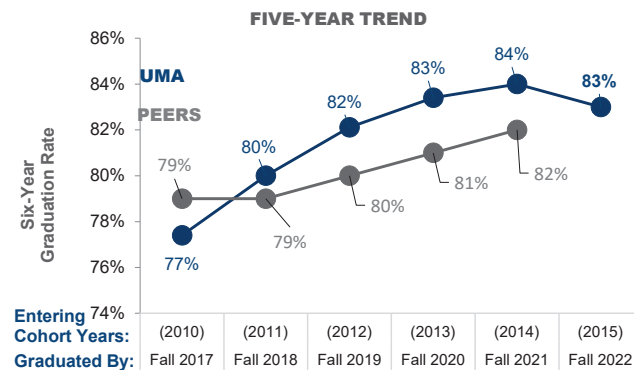
UMA Freshmen Six-Year Graduation Rates in Fall 2022

▼ **1**

One-year % point change (vs. Fall 2021)

▲ **6**

Five-year % point change (vs. Fall 2017)



# STUDENT SUCCESS AND SATISFACTION

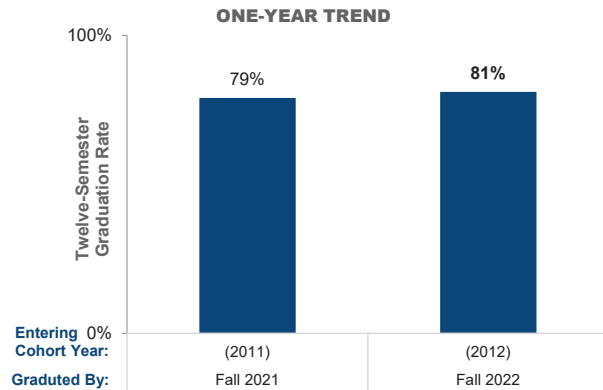
## FRESHMEN TWELVE-SEMESTER GRADUATION RATE

**81%**

UMA Freshmen  
Twelve-semester  
Graduation Rates  
in Fall 2022

**▲ 2**

One-year  
% point change  
(vs. Fall 2021)



## TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

**87%**

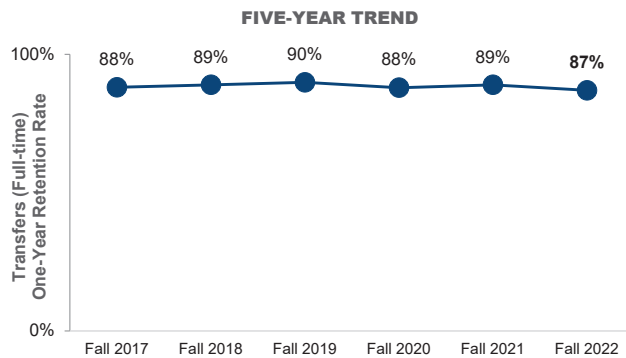
Transfers (Full-time)  
One-Year  
Retention Rate  
in Fall 2022

**▼ 2**

One-year  
% point change  
(vs. Fall 2021)

**▼ 1**

Five-year  
% point change  
(vs. Fall 2017)



## TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

**82%**

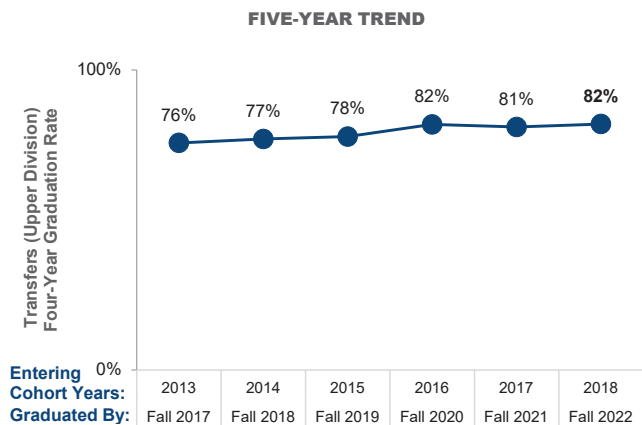
Transfers (Upper  
Division) Four-Year  
Graduation Rates  
in Fall 2022

**▲ 1**

One-year  
% point change  
(vs. Fall 2021)

**▲ 6**

Five-year  
% point change  
(vs. Fall 2017)



# STUDENT SUCCESS AND SATISFACTION

## STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2016-17

**80%**

Bachelor's Degree  
Within 4 Yrs. from  
any institution

**76%**

Bachelor's Degree  
Within 4 Yrs. from  
UMass Amherst

**88%**

Bachelor's Degree  
Within 5 Yrs. From  
any institution

**82%**

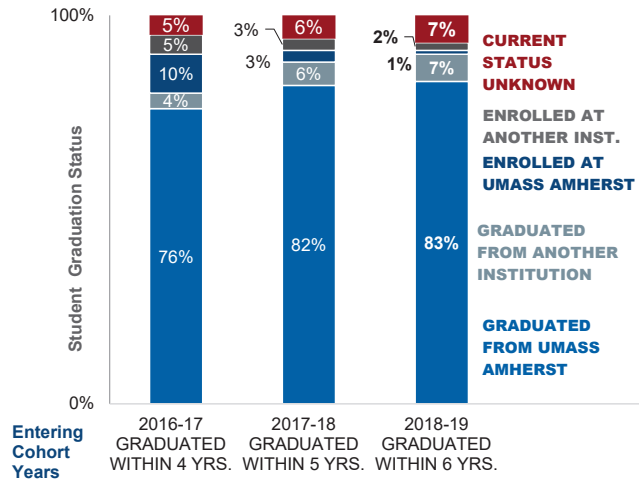
Bachelor's Degree  
Within 5 Yrs. From  
UMass Amherst

**90%**

Bachelor's Degree  
Within 6 Yrs. From  
any institution

**83%**

Bachelor's Degree  
Within 6 Yrs. From  
UMass Amherst



Source : Student Achievement Measure (SAM)

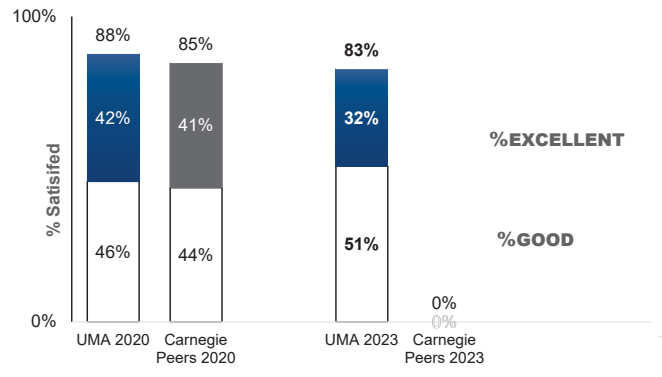
## STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

**83%**

Student Satisfaction  
as Good or Excellent  
in UMA 2023

**5**

Three-year  
% point change  
(vs. UMA 2020)



\*Peer data unavailable for FY 2022 due to reporting processes.

## ALUMNI PARTICIPATION RATE

**7%**

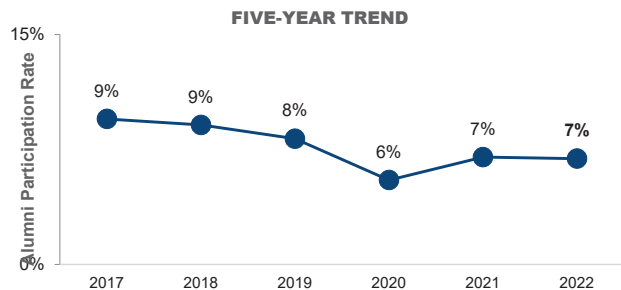
Alumni Participation  
Rate  
in 2022

**0**

One-year  
% point change  
(vs. 2021)

**2**

Five-year  
% point change  
(vs. 2017)





# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS

**8,423**

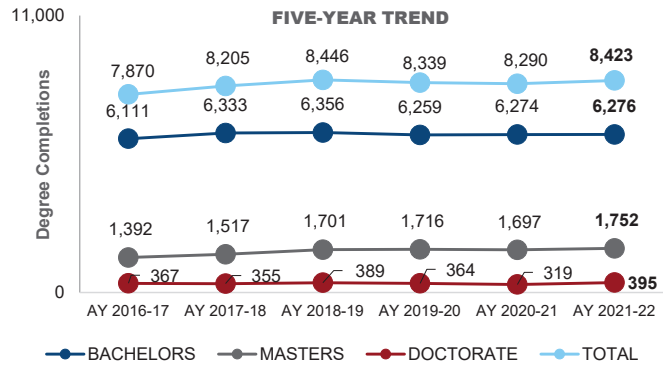
Total degree completions AY 2021-22

▲ **2%**

One-year % change in total degree completions (vs. AY 2020-21)

▲ **7%**

Five-year % change in total degree completions (vs. AY 2016-17)



## NUMBER OF PATENT APPLICATIONS

**35**

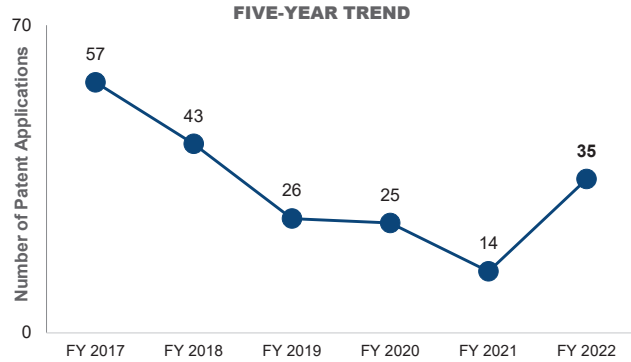
Patent Applications in FY 2022

▲ **21**

One-year nominal change (vs. FY 2021)

▼ **22**

Five-year nominal change (vs. FY 2017)



## TOTAL R&D EXPENDITURES

**\$245.2**

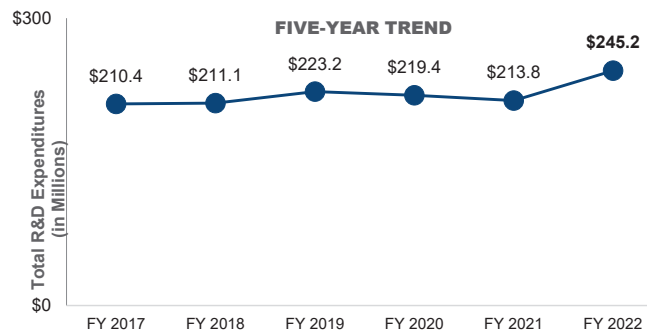
Million in FY 2022

▲ **15%**

One-year % change (vs. FY 2021)

▲ **20%**

Five-year % change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## TOTAL R&D EXPENDITURES RANKINGS

**115**

Total R&D Expenditures Overall Rankings in FY 2021

▼ **2**

One-year nominal change (vs. FY 2020)

▼ **14**

Five-year nominal change (vs. FY 2016)

**12**

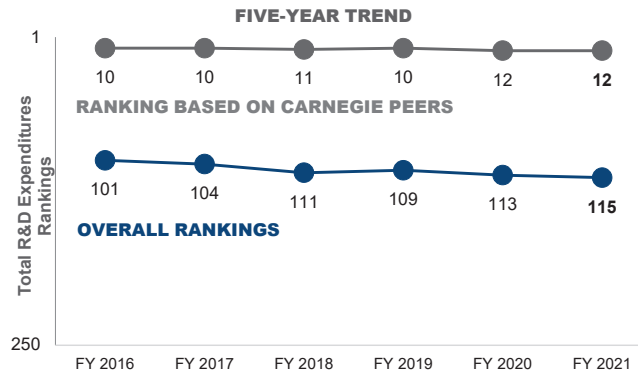
Rankings based on Carnegie Peers in FY 2021

▼ **0**

One-year nominal change (vs. FY 2020)

▼ **2**

Five-year nominal change (vs. FY 2016)



Overall Ranking Source: National Science Foundation Ranking by Total R&D Expenditures.

Ranking based on Carnegie Peers is further standardized by US Publics and Non-Medical Schools.

## TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

**\$217k**

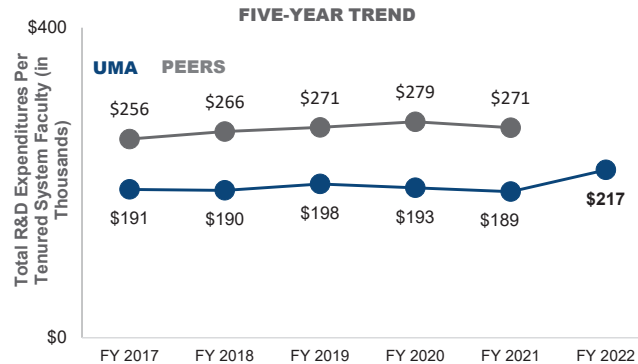
Total R&D Expenditure Per Tenured System Faculty in FY 2022

▲ **15%**

One-year % change (vs. FY 2021)

▲ **13%**

Five-year % change (vs. FY 2017)



\* Peer data for FY 2022 is currently not available.

## DEGREES AWARDED IN STEM FIELDS

**2,317**

UG degrees awarded in STEM fields in 2021-22

▲ **5%**

One-year % change (vs. 2020-21)

▲ **17%**

Five-year % change (vs. 2016-17)

**37%**

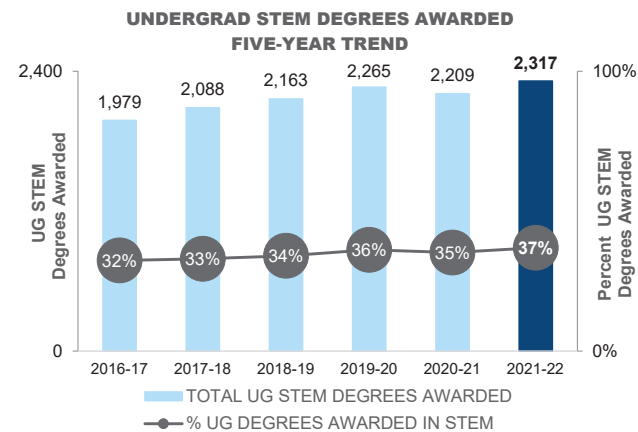
Percent of total UG degrees awarded in STEM fields in 2021-22

▲ **2**

One-year % point change (vs. 2020-21)

▲ **5**

Five-year % point change (vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## DEGREES AWARDED IN STEM FIELDS

**713**

Grad degrees awarded in STEM fields in 2021-22

▲ **4%**

One-year % change (vs. 2020-21)

▲ **37%**

Five-year % change (vs. 2016-17)

**33%**

Percent of total Grad degrees awarded in STEM fields in 2021-22

▼ **1**

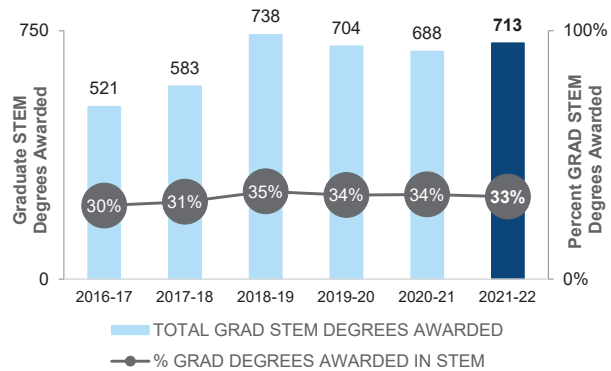
One-year % point change (vs. 2020-21)

▲ **4**

Five-year % point change (vs. 2016-17)

\*Prior years can look different now due to CIP code and STEM designation changes.

GRAD STEM DEGREES AWARDED FIVE-YEAR TREND



**3,030**

Total degrees awarded in STEM fields in 2021-22

▲ **5%**

One-year % change (vs. 2020-21)

▲ **21%**

Five-year % change (vs. 2016-17)

**36%**

Percent of Total degrees awarded in STEM fields in 2021-22

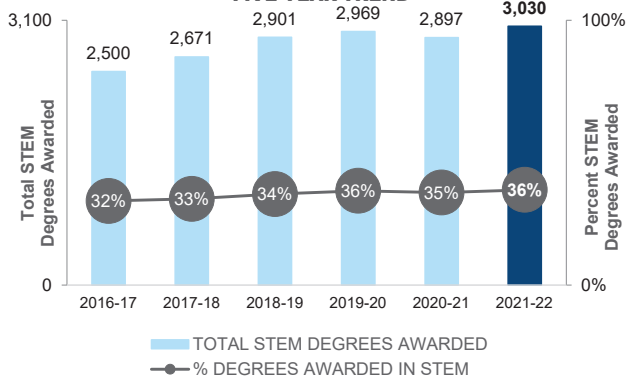
▲ **1**

One-year % point change (vs. 2020-21)

▲ **4**

Five-year % point change (vs. 2016-17)

TOTAL STEM DEGREES AWARDED FIVE-YEAR TREND



## CERTIFICATES AWARDED IN STEM FIELDS

**100**

Total Certificates awarded in STEM fields in 2021-22

▲ **23**

One-year nominal change (vs. 2020-21)

▲ **22**

Five-year nominal change (vs. 2016-17)

**11%**

Percent of Total Certificates awarded in STEM fields in 2021-22

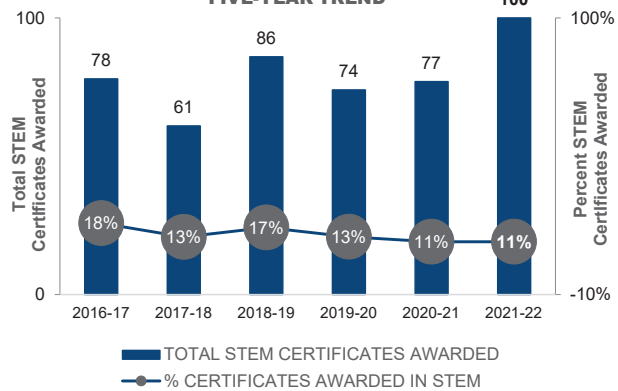
● **0**

One-year % point change (vs. 2020-21)

▼ **7**

Five-year % point change (vs. 2016-17)

TOTAL STEM CERTIFICATES AWARDED FIVE-YEAR TREND



# SERVICE TO THE COMMONWEALTH

## DEGREES AWARDED IN HEALTHCARE FIELDS

**662**

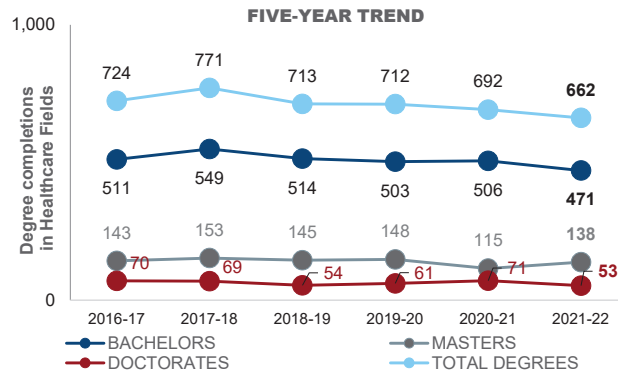
Total degrees awarded in HealthCare fields in 2021-22

▼ **4%**

One-year % point change (vs. 2020-21)

▼ **9%**

Five-year % point change (vs. 2016-17)



## CERTIFICATES AWARDED IN HEALTHCARE FIELDS

**46**

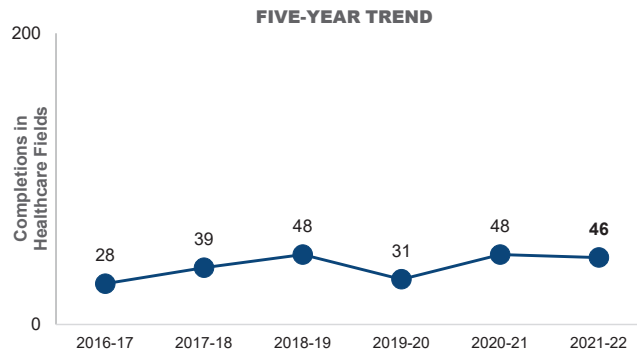
Total Certificates awarded in HealthCare fields in 2021-22

▼ **4%**

One-year % point change (vs. 2020-21)

▲ **64%**

Five-year % point change (vs. 2016-17)



## LICENSE INCOME

**\$677.3k**

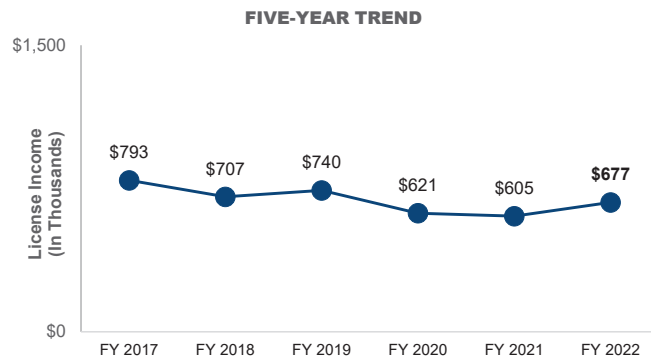
License Income in FY 2022

▲ **12%**

One-year % change (vs. FY 2021)

▼ **15%**

Five-year % change (vs. FY 2017)



## SERVICE TO THE COMMONWEALTH

### PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**53%**

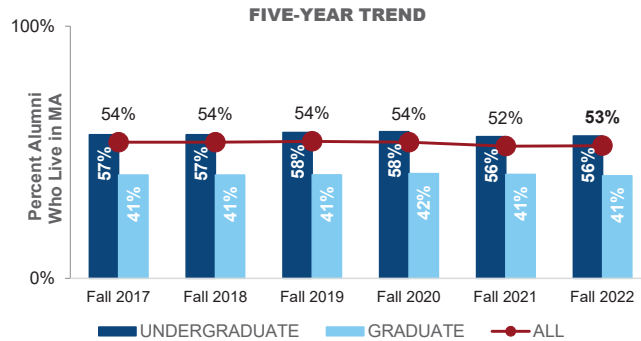
Of all UMass Alumni live in the Commonwealth in Fall 2022

**▲ 0**

One-year % point change (vs. Fall 2021)

**▼ 1**

Five-year % point change (vs. Fall 2017)



## FINANCIAL HEALTH

### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**\$443M**

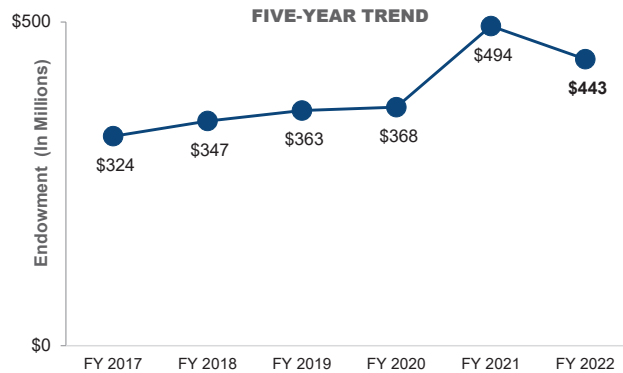
Endowment Assets in FY 2022

**▼ 10%**

One-year % change (vs. FY 2021)

**▲ 37%**

Five-year % change (vs. FY 2017)



### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**-10%**

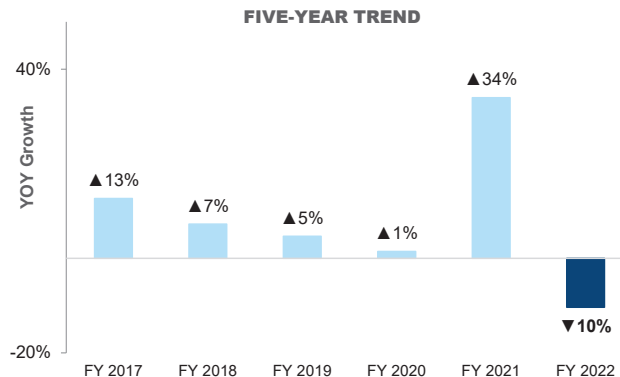
Annual Growth in FY 2022

**▼ 44**

One-year % point change (vs. FY 2021)

**▼ 23**

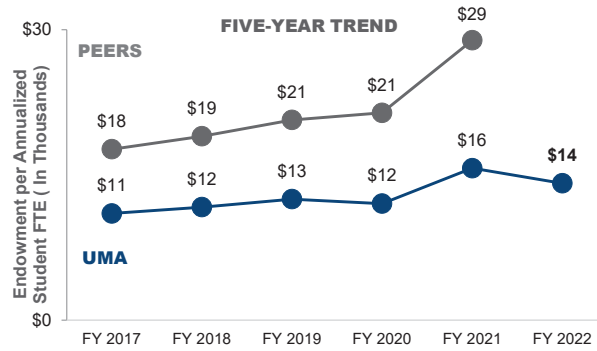
Five-year % point change (vs. FY 2017)



## FINANCIAL HEALTH

**ENDOWMENT PER ANNUALIZED STUDENT FTE**

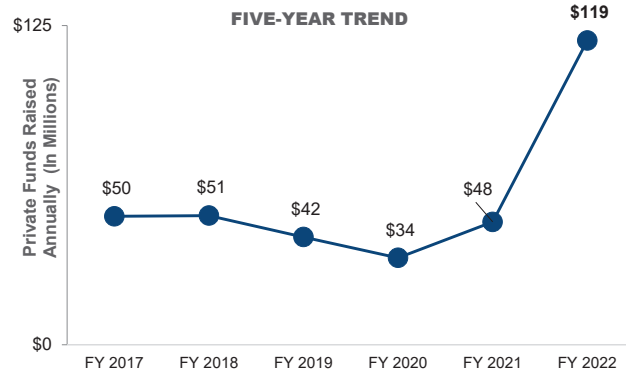
**\$14.1k** ▼ **10%** ▲ **28%**  
 Endowment per Annualized Student FTE in FY 2022 One-year % change (vs. FY 2021) Five-year % change (vs. FY 2017)



\* Peer data for FY 2022 not available for reporting purposes.

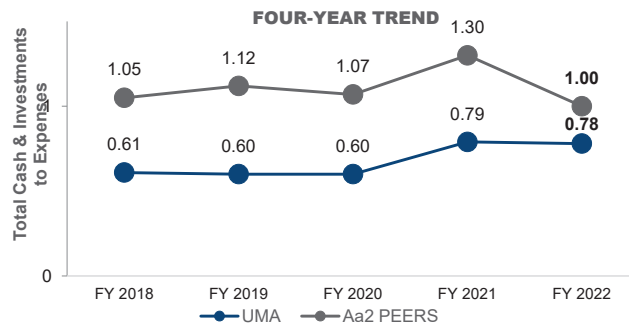
**PRIVATE FUNDS RAISED ANNUALLY**

**\$119M** ▲ **148%** ▲ **137%**  
 Private Funds Raised Annually in FY 2022 One-year % change (vs. FY 2021) Five-year % change (vs. FY 2017)



**TOTAL CASH & INVESTMENTS TO EXPENSES**

**0.78**  
 Total Cash & Investments to Expenses in FY 2022



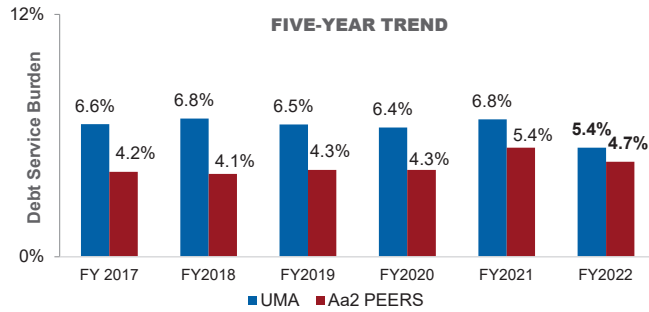
# FINANCIAL HEALTH

## DEBT SERVICE BURDEN

**5.4%**  
Debt Service Burden in FY2022

▼ **1.4**  
One-year % Point change (vs. FY2021)

▼ **1.2**  
Five-year % Point change (vs. FY 2017)

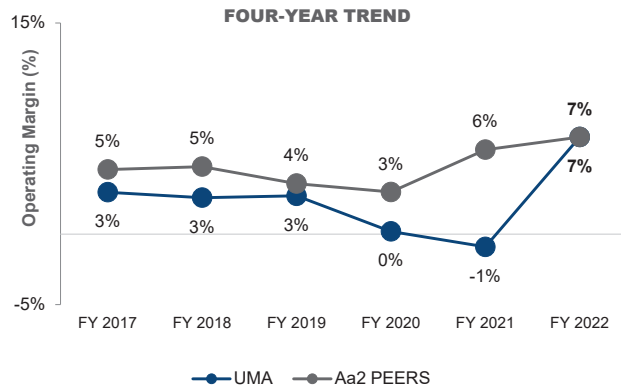


## OPERATING MARGIN (%)

**6.9%**  
Operating Margin (%) in FY 2022

▲ **8.0**  
One-year % Point change (vs. FY 2021)

▲ **4.0**  
Four-year % Point change (vs. FY 2018)



## DEFINITIONS AND SOURCES

### ACADEMIC QUALITY INDICATORS

#### **Average High School GPA of First-Time**

**Freshmen.** Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

**SAT Scores of Freshmen.** SAT scores of Freshmen. All reported SAT scores are based on the sum of the SAT MSS and the ERWS for entering freshmen. A redesigned SAT was used for Fall 2017 admissions. Test scores became optional in Fall 2021. The average is the arithmetic mean of these SAT scores. Peer data are from IPEDS.

#### **Average GPA of Entering Transfer**

**Students.** Average Cumulative GPA of entering transfer students according to DHE admissions policy.

**Student-Faculty Ratio.** The ratio of FTE students to FTE instructional faculty. Faculty and students in stand-alone graduate or professional programs such as medicine, law, veterinary, dentistry, social work, business, and public health in which faculty teach virtually only graduate-level students are excluded. Teaching assistants are not counted as faculty. Data and definition are from CDS.

#### **Technology-Enhanced Classrooms.**

Classification of the campus's total classroom capacity in terms of the level of technology-support.

#### **Percent Tenured/Tenure-Track Faculty**

**(FTE).** Percent based on the ratio of Tenured/Tenure-Track Faculty FTE to Total Faculty FTE.

**Faculty FTE.** Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

**Faculty-of-Color.** The proportion of full-time instructional faculty who are U.S. citizens or permanent residents and report their race/ethnicity to be one or more of the following: Hispanic/Latino, American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Other Pacific Islander, or Two or More Races. Race/ethnicity definition is based on IPEDS.

**Women Faculty.** The proportion of full-time instructional faculty who identify themselves as female.

### ACCESS AND AFFORDABILITY INDICATORS

#### **Percentage Undergraduates from**

**Massachusetts.** Percentage of total undergraduate students who are "In State" or residents of Massachusetts based on tuition residency. For state-supported (day) students, tuition classification is used, whereas for CPE students, the actual residency at time of matriculation is used.

#### **Percent Undergraduates who are Students**

**of Color.** Undergraduates who self-identify as either African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean

students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

#### **Percent Undergraduates who are**

**International.** Percentage of all undergraduates who are non-resident aliens, studying at the university on eligible visa types, and enrolled in credit courses. Does not include permanent residents, refugees, or US citizens.



## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

**Percent First-Time Undergraduates who are First Generation in College.** Percent of first-time, undergraduates where neither parent has earned a bachelor's degree. The source of this data field is the Common Application.

**Percent first-time, Undergraduates with English as a Second Language.** Percent of first-time, undergraduates who speak another language at home. The source of this data field is the Common Application.

**Percent Undergraduates Who Are of Transfer Origin.** Percent of all currently enrolled bachelor's degree-seeking undergraduate students who were admitted as transfer students at the institution.

**Number of First-degree Bachelor-seeking Students Aged 25+.** Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of campus census date of the Fall semester.

**Dual Enrollment Students (Headcount).** Headcount of current non-Degree dual-enrolled students on campus.

**Percent (In-State) Pell Grant Recipients.** Federal Pell Grants are awarded to low-income undergraduates based on their expected family contribution. Data as reported by campuses to the UMass President's Office of in-state, full-time students with Pell Grants in the Financial Aid Template.

**Percent of Need Met for In-State Students Awarded Need-Based Aid.** The average percentage of demonstrated financial need that is met by the institution's award of need-based financial aid to in-state undergraduate students. Data as reported to the UMass President's Office in the Financial Aid Template.

**Average Student Debt Load of Graduating Class (UG).** Average debt load is based on the total debt borrowed by an Institution's graduating class (bachelor's, first-time only) divided by the number of students of that cohort that carried any amount of debt. It does not include those students

with no debt load. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Percent Graduating Class with Debt (UG).** The total number of students in the graduating class (bachelor's, first-time only) that carried a debt load at the institution divided by the total number of graduating (bachelor's, first-time only) students in that institution. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Number of Students who Participated in a Study Abroad Program.** Number of students who participated in a credit-bearing study abroad program outside of the U.S. over the most recent academic year.

**Online Course Registrations.** Course registrations for the academic year for online credit courses. Academic year includes Summer, Fall, intersession, and Spring. These do not include hybrid courses, but fully online courses only offered via UMassOnline (courses offered via UWW on the Amherst campus).

**Percentage of degree-seeking students taking at least one online course who were full time and fully online.** Metric calculated using the formula below. Data from fall student headcount of degree-seeking students, split by full-time and part-time status, who fall into the following categories: Enrolled exclusively in online courses; Enrolled in at least one, but not all, online courses; and Not enrolled in any online courses. (As per IPEDS definition).  

$$\frac{\text{(Full time Enrolled exclusively in online courses)}}{\text{(Full time Enrolled in at least one, but not all, online courses + Full time Enrolled exclusively in online courses + part-time Enrolled in at least one, but not all, online courses + part-time Enrolled exclusively in online courses)}}$$

## DEFINITIONS AND SOURCES

### STUDENT SUCCESS AND SATISFACTION INDICATORS

**Freshmen One-Year Retention Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall and were still enrolled at the institution in the following Fall. Peer data as reported to IPEDS.

**Freshmen Four-Year Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution by the end of their fourth year. Associates degree and CPE students are excluded.

**Freshmen Six-Year Graduation Rate.** Percent of first-time, full-time freshmen who entered UMass in a given Fall term and had graduated from the institution within six years. Peer data are based on median as reported to IPEDS. Associates degree and CPE students are excluded.

**Freshmen Twelve-semester Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution within twelve active semesters (Fall and Spring semesters) within 10 years of their initial attendance. Associates degree and UWW students are excluded.

**Transfer (Full-Time) One-Year Retention Rate.** Percent of full-time transfer students at any level who entered UMass in a given Fall and were still enrolled at, or graduated from the institution as of the following Fall.

**Transfer (Upper-Division) Four-Year Graduation Rate.** Percent of full-time upper division transfers (60+ credits) who entered UMass in a given Fall term and had graduated from the institution within four years.

**Student Achievement Measure.** SAM tracks student movement across postsecondary institutions to provide a more complete picture of undergraduate student progress and completion within the higher education system. SAM is an alternative to the federal graduation rate, which is limited to tracking the completion of first-time, full-time students at one institution.

**Student Satisfaction with Educational Experience.** Percent of seniors who responded “good” or “excellent” to the question, “How would you evaluate your entire educational experience at this institution?” on the most recently conducted National Survey of Student Engagement (NSSE).

**Alumni Participation Rate.** The percentage of undergraduate alumni of record who donated money to the college or university. Alumni of record are former full- or part-time students who received an undergraduate degree and for whom the college or university has a current address. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. Graduates who earned only a graduate degree are excluded.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The number of degrees (not including certificates) awarded in the previous academic year, by degree level. As reported to IPEDS.

**Patent Applications.** Number of U.S. Patent applications filed per year. Data reported by campuses to UMass President’s Office, Office of OTCV.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local

governments, industry, private and institutional) as reported to NSF.

**Total R&D Expenditures Ranking.** Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. UMass Amherst’s rank in the annual NSF ranking of Total R&D expenditures among public institutions of higher education with a Carnegie classification of “Highest Research” and with no medical school. Data source NSF HERD data tables.

## DEFINITIONS AND SOURCES

### SERVICE TO THE COMMONWEALTH INDICATORS

#### **Total Research Expenditures per Tenure**

**System Faculty.** R&D expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF, divided by total tenure system faculty as reported to IPEDS. Peer data reported by NSF and IPEDS.

#### **Degrees and Certificates Awarded in**

**STEM Fields.** Number of undergraduate and graduate degrees awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Certificates data also included separately.

#### **Degrees and Certificates Awarded in**

**Healthcare Fields.** Number of undergraduate and graduate degrees awarded in Health Care fields. Healthcare designation as defined by Campus IR, and based on CIP classification. All of CIP 51, and specific 6-digit CIPs unique to each campus. Certificates data also included separately.

**License Income.** Amount of annual income from license agreements. Data Source: Data reported by campuses to UMass President's Office, Office of OTCV.

#### **Percent Alumni who Live in**

**Massachusetts.** Percentage of total alumni who currently reside in Massachusetts based on alumni records.

### FINANCIAL HEALTH INDICATORS

#### **Endowment Assets and Annual Growth in**

**Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual BOT report, and the percent change from previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

#### **Endowment per Annualized Student FTE.**

Total UMass Amherst endowments per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data are for the comparative peers from financial statements (current year) and IPEDS (prior years).

**Private Funds Raised Annually.** Private funds raised includes restricted and unrestricted revenues from individuals, foundations, corporations and other organizations. Includes private grant revenues but

not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions.

#### **Total Cash & Investments to Expenses.**

Indicates the university's financial flexibility and resilience, and its ability to generate investment income. (Cash & Investments – debt service reserve funds) / Total expenses

**Debt Service to Operations.** Debt service as a percentage of total operating expenditures (operating expenditures plus interest expense). Peer data are from published financial statements.

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses)

## DEFINITIONS AND SOURCES

### PEER INSTITUTIONS FOR UMASS AMHERST

Indiana University-Bloomington

\*Iowa State University

\*Rutgers University System

Stony Brook University

\*University of California-Santa Barbara

\*University of Colorado-Boulder

\*University of Connecticut System

University of Delaware

\*University of Maryland-College Park

University of Oregon

**\*Financial Peer**

#### Moody's Aa2 Peers

Alamo Community College District, TX

Arizona State University, AZ

Auburn University, AL

Board of Regents of The University System of Georgia, GA

California State University, CA

City University of New York, NY

Clemson University, SC

Cuyahoga Community College District, OH

Florida State University, FL

Houston Community College System, TX

Iowa State University of Science & Technology, IA

Michigan State University, MI

Mississippi Institutions of Higher Learning, MS

Nevada System of Higher Education, NV

State University of New York, NY

State University System of Florida, FL

Texas State University System, TX

University of Alabama at Birmingham, AL

University of Alabama, AL

University of Arizona, AZ

University of Arkansas, AR

University of California, CA

University of Florida, FL

University of Georgia, GA

University of Hawaii, HI

University of Houston System, TX

University of Kansas, KS

University of Kentucky, KY

University of Massachusetts, MA

University of North Texas System, TX

University of Oregon, OR

University of South Carolina, SC

University of Wyoming, WY

*Please Note: Unless otherwise specified, all data are from UMass Amherst University Analytics and Institutional Research.*



# BOSTON

## HEADLINES

### ACADEMIC QUALITY

#### Improve Student Learning Experience

We continue to attract well-qualified first-year students and transfers to our entering classes in greater numbers. We emphasize the high school GPA for admissions decisions and have successfully maintained an average GPA of over 3.3 for the last five entering classes, rising to 3.38 in Fall 2022.

UMass Boston stands out as a model of excellence for urban universities. The *U.S. News & World Report's* 2023-24 Best Graduate Schools ranks UMass Boston's graduate programs in education, nursing, rehabilitation counseling, and public affairs among the top 100 programs. Six UMass Boston programs had new top 100 rankings, with Rehabilitation Counseling at No. 17, graduate programs in education at No. 43, Master's programs in public affairs at No. 63, Master of Nursing at No. 66, Doctor of Nursing Practice at No. 78, and part-time MBA program at No. 98. In the 2022 Best National University Rankings the university also ranks No. 36 in the nation for social mobility, No. 19 for ethnic diversity, and No. 112 overall among national public universities. Additionally, the undergraduate nursing program was ranked among the best in the country, coming in at No. 43. *U.S. News* also ranked UMass Boston's engineering program and computer science program among the best in the country, at No. 62 and No. 178, respectively.

#### Strengthen Research and Development

UMass Boston continues to advance as an increasingly sophisticated research university. UMass Boston's annual R&D expenditures have remained above \$60 million for the last ten years. In terms of sponsored instruction and outreach per faculty, this figure has increased to over \$140,000 per faculty member in FY22 (a 17% increase over FY15).

The U.S. Department of Education awarded faculty from UMass Boston's Department of Counseling and School Psychology a five-year \$5.7 million award to increase representation and diversity among mental health clinicians working in Brockton, Lawrence, and Quincy public schools. While almost half of the children who attend Massachusetts public schools are considered to be from underserved communities, less than 10

percent of school personnel share a similar background. The goal of *Project Beacon: Training School Mental Health Providers in Transformative Social Emotional Learning and Advocacy* is to both increase the number of diverse school mental health clinicians in Massachusetts and to increase students' access to school mental health services.

Over three dozen UMass Boston current and past researchers appear on the 2022 Stanford-Elsevier list of the world's most-cited scholars. Being included on this list is a powerful testament to the reach and impact of the research taking place at the university. To create the publicly available database of top-cited scientists, a group of scientists at Stanford University developed a ranking method based on standardized citation metrics that considers total author number and author position.

A report released this winter from the Sustainable Solutions Lab at UMass Boston examines the relationship between racial and ethnic inequalities and climate interventions. The report, *Voices that Matter: Boston Area Residents of Color Discuss Climate Change*, looks at climate change from the perspective of Asian American, Black, Latino, and Native American Boston residents with a focus on health impacts, preparedness, and the ways individuals, groups, and government can address it. Creating opportunities for residents to share their insights into their experiences and input into how to address issues is an essential element for creating successful interventions for residents and communities. The research, conducted by Assistant Professor Lorena Estrada Martinez (School for the Environment), Professor and Director of the Institute for Asian American Studies Paul Watanabe, and PhD candidate Katsyris Rivera-Kientz, is a continuation of their 2020 *Views that Matter: Race and Opinions on Climate Change of Boston Area Residents*. In their latest report, the authors further amplify the voices of Greater Boston's residents of color through in-depth focus groups built on their previous survey findings.

U.S. Department of Education's National Professional Development program has awarded UMass Boston Associate Professor of Applied Linguistics Avary Carhill-Poza and Professor of

## HEADLINES

### ACADEMIC QUALITY

Applied Linguistics Panayota Gounari a prestigious five-year, \$2.9 million grant. The project, Centering Relationships, Equity, and Access for Teachers of English Learners (CREATE), is a rigorous professional development program that offers a practical solution for the shortage of qualified, diverse teachers of English learners in eight urban high-needs public school districts in Greater Boston. The project will enable designated school districts to increase their capacity to serve multilingual students and their families. The project will recruit and train 120 teachers over the next five years. Recruitment will focus on Black, Indigenous, People of Color (BIPOC), bilingual teachers, and paraprofessionals who typically lack direct pathways to licensure and long-term careers in schools.

Among other awards, principal investigator Liya Escalera/Academic Support Services received \$1,900,000 from the Richard & Susan Smith Family Foundation for *Early College-Smith Family Foundation*. PI Jill Macoska/Center for Personalized Cancer Therapy received \$1,288,464 from Massachusetts Life Sciences Center for *Spatial Transcriptomics: In Situ Tissue-Based Gene Expression Profiling at the Cellular Level*. And PI Jessica Whiteley/Nursing and Health Sciences received \$771,500 from Massachusetts General Hospital for *2.2 Clinical Leadership Collaborative for Diversity in Nursing (CLCDN)*.

### ACCESS AND AFFORDABILITY

We continue to serve residents of Greater Boston communities and communities throughout the Commonwealth, fulfilling our mission of access to diverse populations. Many of our undergraduates are from Massachusetts (87%).

Our students' social and economic diversity is illustrated by the fact that 45 percent of our full-time undergraduate students from Massachusetts receive Pell grants, federal funds targeted toward students in greatest financial need.

UMass Boston serves large numbers of racial minority students (62%), first-generation college students (57%), transfers (57%), and students who are immigrants or children of immigrants who speak languages other than English at home or with families (51%). Our students are also diverse in age and national origin. In keeping with UMass Boston's strategic goal of global engagement, more than 10% of the students are international.

After a jump during Covid, UMass Boston's online course registrations have returned to around 12% of enrollments. UMass Boston's online bachelor's degree and online graduate programs, including the MBA and master's in education, were listed among the nation's best in the *U.S. News and World Report 2023 Best Online Programs* rankings.

### STUDENT SUCCESS AND SATISFACTION

#### Diversity and Positive Climate

UMass Boston serves a vital function in the region as the only public research university in Boston. The campus is well known for the diversity of its student population, which exceeds the population diversity of the region. With more than 7600 undergraduates who identify as ALANA (Asian, Latinx, African American / Black, or Native American). UMass Boston has the most diverse undergraduate student population of any four-year research university in New England. In Fall 2022, 58 percent of our U.S. undergraduate students identified as ALANA.

have remained comparable to our peers over the past five years, 72 percent for full-time undergraduates who entered Fall 2021 and 81% for full-time transfer students. The six-year graduation rate for the first-time, full-time cohort that started in Fall 2016 reached an all-time high of 51 percent. The four-year graduation rate for undergraduates who transferred to UMB in Fall 2018 was 75%.

The one-year retention rates for first-year students

In February, UMass Boston received its fifth grant, totaling \$9.5 million, as an Asian American and Native American Pacific Islander-Serving Institution (AANAPISI). This grant will facilitate collaborations

## HEADLINES

### STUDENT SUCCESS AND SATISFACTION

with Bunker Hill Community College (BHCC) to implement a culturally sustaining transfer pathway. These grants strengthen UMass Boston's capacity as the only AANAPISI-designated research university in New England and one of a handful in the country—a status held by the university since 2008. Since 2010 UMass Boston has received five five-year and four one-year AANAPISI grants to develop, pilot, institutionalize, and disseminate a wide range of activities to increase college access, retention, and graduation for low-income, first-generation Asian American students, who comprise 14 percent of the student body. The aim is to increase the academic performance and retention, persistence and graduation rates of high-need, low-income, first-generation Asian American students; develop capacity of faculty to meet the needs of students; and align the university's research efforts to contribute to this effort.

This Spring Think College, a center at UMass Boston's Institute for Community Inclusion dedicated to expanding college options for students with intellectual disability, launched a public awareness campaign, Think Higher. The campaign aims to expand college access for students with intellectual disability (I.D.) by

ensuring students explore a variety of college options during transition planning, increasing the number of institutions of higher education offering programs for students with I.D., and preparing students for college while in high school. Think college is supported by a five year, \$10 million grant from the U.S. Department of Education to serve as a National Coordinating Center for institutions of higher education that offer postsecondary education programs for students with intellectual disabilities. The Coordinating Center will support increased knowledge about the impact and outcomes of postsecondary education for students with intellectual disability through collection and analyses of national data on effective and high-quality practices. It will also serve as a national technical assistance entity for faculty and staff, local education agency staff, students, families, and other stakeholders. A major outcome of the center will be to establish a process to implement national program accreditation standards to ensure the quality and accountability of college programs for students with intellectual disability.

### SERVICE TO THE COMMONWEALTH

Seventy percent of UMass Boston alumni reside in Massachusetts, contributing to the Commonwealth's economy and civic life.

UMass Boston devotes a high proportion of research and public service activities to the Commonwealth's cultural, social, and economic development and the global community.

Enrollments continue to grow steadily in Science, Technology, Engineering, and Mathematics (STEM), with roughly 5000 students in these disciplines in Fall 2022 and 32 percent of undergraduate students pursuing a STEM discipline. In the last ten years, STEM degrees and certificates increased from 15% of degrees to 19%, while the total number of STEM degrees conferred grew by 50%.

On May 17, 2023, UMass Boston announced the creation of The Paul English Applied Artificial Intelligence (A.I.) Institute, the nation's first university-based institute dedicated to optimizing

and democratizing the use of A.I. tools across a broad range of professions. Conceived and funded by tech entrepreneur and UMass Boston alumnus Paul English '87, G'89, H'19, the new institute will formally launch during the academic year 2023-2024.

UMass Boston has launched a pilot project to increase broadband access and additional services for students and anchor communities with funding from a two-year, \$2.97 million grant from the Department of Commerce's National Telecommunications and Information Administration's (NTIA) Connecting Minority Communities Pilot Program. UMass Boston is one of 12 schools to receive the NTIA funding designated for Minority-Serving Institutions (MSIs). Vice Provost for Research Bala Sundaram and Associate CIO Apurva Mehta conceived the UMass Boston project, Addressing Digital Access Gaps in Education (ADAGE), during the COVID-19 pandemic. Early in the pandemic, the university was able to pivot from traditional classroom



## HEADLINES

### SERVICE TO THE COMMONWEALTH

instruction to synchronous online classes and implemented a Chromebook loaner program. The project now aims to retool 58 classrooms for hybrid instruction, and provide students and families with digital technology and resources.

The Massachusetts Executive Office of Health and Human Services has awarded UMass Boston Gerontology a \$410,000 grant to pilot Pathways to Building an Aging Services Workforce. The new program will offer training and continued education to current undergraduate students at UMass Boston and workers in the aging services field in the Commonwealth.

New technologies aimed at improving prostate cancer diagnosis, enhancing employment services for job seekers with disabilities, and optimizing clinical use treatments for melanoma patients could get closer to market thanks to \$250,000 in seed funding announced today by the University of Massachusetts.

A research team from UMass Boston's Institute for Community Inclusion (ICI) will receive one of ten \$25,000 grants from the Technology Development

Fund, an initiative of the Office of Technology Commercialization and Ventures (OTCV) at the UMass President's Office. The grant will support the development of the ES-Coach by ICI's Alberto Migliore and John Butterworth, a smartphone-based tool that helps manage services for adults with disabilities.

In January, UMass Boston received \$3 million in new federal funds for the Manning College of Nursing and Health Sciences to create a Home Care Digital and Simulation Lab. The Lab will train the next generation of nurses in evolving home care technologies with a particular emphasis on patients who are aging or disabled.

The Geneviève McMillan-Reba Stewart Foundation has partnered with UMass Boston to create a \$900,000 endowed fund supporting Boston Public School (BPS) students seeking university degrees.

Professor Shirley Tang has been appointed the Inaugural Endowed Distinguished Professor for Asian American Studies, a newly created professorship funded by a recent \$6 million anonymous gift to UMass Boston.

### FINANCIAL HEALTH

Endowment assets totaled \$126.4 million at year-end FY22, up slightly from the prior year-end of \$124.6 million. New gifts and additions totaled \$27.3 million while net investment returns declined \$22.3 million. This performance, combined with regular annual spending distributions, almost completely negated new funds added in FY22.

Total private funds raised increased to \$40.6 million in FY22 – an 188% increase from the prior year and 68% over the prior record in FY20 of \$24.2 million. The amount raised in the four years since FY19 is on par with the total amount raised in the nine years prior. Additionally, the campus surpassed its ambitious goal of raising \$100 million through the Just Imagine campaign that commenced in 2011.

The campus emerged from remote operations in the fall 2021 (FY22) with a decline of total enrolled student FTE of over 600, or almost 5%, which in turn reduced gross tuition & fee revenue by more than \$11 million. The return to campus of the

remaining students and staff did result in recovery of Auxiliary revenue in Parking and Dining, as well as Educational Sales & Services revenue. Wage and Salary expense remained relatively flat despite a scheduled COLA increase, but non-Personnel expenses increased by over 30% largely due to activity resulting from the return to campus in the form of increased cost and consumption of utilities.

The campus finished FY22 with a positive operating margin of 0.9%.

The financial impact of COVID stimulus had its maximum impact in FY21 in terms of direct aid to students, but there were still \$18.8 million in HEERF direct emergency grants to students and \$18.2 million of institutional funds for lost out of state and international tuition & fee revenue being utilized in FY22. \$6.1 million of the institutional aid was used to extinguish balances owed on student accounts accumulated during the first year of COVID.

## HEADLINES

### FINANCIAL HEALTH

UMB planned for a balanced budget for the current fiscal year and submitted an FY23 budget, that is balanced partly, using the campus' remaining Federal aid to continue the glide path to financial stability after COVID. Since that submission, the campus' fall enrollment fell short of target but tuition and fee revenue exceeded expectations due to shifts in student composition and a change to the structure of tuition & fees to a more rational approach. State appropriation funding has increased substantially from initial planning – adding nearly \$16 million to revenue, in part to support key needs of students in a post-pandemic world, such as mental health, financial aid and inflation support. These improvements result in a projected surplus for FY23 of approximately 1.8% as of the 3rd quarter.

Construction activity has continued to be robust in FY22, with the primary project being the \$181.7 million Substructure Demolition and Quadrangle Development ("SDQD") project. Work on the plaza and quad continued in FY22 and the project

is now scheduled for substantial completion in November 2023. This project is funded with the Commonwealth paying \$78M and the Campus funding the remaining over a four-year period.

The university, in partnership with the UMass Building Authority ("UMBA") and the UMass President's Office, continued the plan for the financial proceeds of the Dorchester Bay City project as \$192.5 million will be due to the campus when the project is permitted. Selected developer Accordia continued to work with the Boston Planning and Development Agency ("BPDA") to advance the permitting for the project under the City of Boston's Article 80 process.

The campus, in partnership with UMBA and the President's Office, also continues to explore alternative financing solutions for its Calf Pasture Pump Station, using the experience from the permitting of the Dorchester Bay City project to help inform next steps for the future development of this 10-acre site.

## AT-A-GLANCE

### ACADEMIC QUALITY

• Average HS GPA of Freshmen	<b>3.48</b>	• Technology-Enhanced Classrooms	<b>288</b>
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	<b>54%</b>
<i>Arithmetic Mean</i>	<b>1190</b>	• Faculty FTE	<b>827</b>
<i>25<sup>th</sup> – 75<sup>th</sup> Percentile</i>	<b>1100-1290</b>	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	<b>3.10</b>	<i>Percent Faculty-of-Color</i>	<b>31%</b>
• Student-Faculty Ratio	<b>16:1</b>	<i>Percent Women Faculty</i>	<b>52%</b>

### ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	<b>86%</b>	• Percent In-State Pell Grant Recipients	<b>47%</b>
• Percent Undergraduates who are Students of Color	<b>63%</b>	• Percent of Need Met for In-State Students Awarded Need-Based Aid	<b>86%</b>
• Percent Undergraduates who are International	<b>6%</b>	• Average Debt of Students (UG Graduating Class)	<b>\$27,117</b>
• Percent First-Time Undergraduates who are First Generation in College	<b>55%</b>	• Percent Graduating Class with Debt (UG)	<b>66%</b>
• Percent First-Time Undergraduates with English as a Second Language	<b>59%</b>	• Total Students who Participated in a Study Abroad Program	<b>87</b>
• Percent Undergraduates Who Are Of Transfer Origin	<b>36%</b>	• Online Course Registrations	<b>22,482</b>
• Number of First-degree Bachelor-seeking Students Aged 25+	<b>2,163</b>	• Percentage of degree-seeking students taking at least one online course who were full time and fully online.	<b>15%</b>
• Dual Enrolled Students (Headcount)	<b>121</b>		

### STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	<b>72%</b>	• Transfer (Full-time) One-Year Retention Rate	<b>81%</b>
• Freshmen Four-Year Graduation Rate	<b>33%</b>	• Transfer (Upper Division) Four-Year Graduation Rate	<b>75%</b>
• Freshmen Six-Year Graduation Rate	<b>51%</b>	• Student Satisfaction With Educational Experience	<b>76%</b>
• Freshmen Twelve-Semester Graduation Rate	<b>58%</b>	• Alumni Participation Rate	<b>4%</b>

## AT-A-GLANCE

### SERVICE TO THE COMMONWEALTH

• Degree Completions	<b>3,670</b>	• Degrees Awarded in STEM Fields	<b>667</b>
<i>Bachelor's</i>	<b>2,754</b>	<i>Undergraduate</i>	<b>565</b>
<i>Master's</i>	<b>812</b>	<i>Graduate</i>	<b>102</b>
<i>Doctorates</i>	<b>104</b>	• Certificates Awarded in STEM Fields	<b>1</b>
• Patent Applications	<b>2</b>	• Degrees Awarded in Healthcare Fields	<b>814</b>
• Total R&D Expenditures	<b>\$65M</b>	<i>Undergraduate</i>	<b>640</b>
• Total R&D Expenditures Ranking	<b>187</b>	<i>Graduate</i>	<b>174</b>
• Total R&D Expenditures Ranking among Carnegie Peers, US Publics, Non-Medical	<b>17</b>	• Certificates Awarded in Healthcare Fields	<b>92</b>
• Total R&D Expenditures per Tenure System Faculty	<b>\$140,549</b>	• License Income	<b>\$7,389</b>
		• Percent Alumni who Remain in MA	<b>70%</b>

### FINANCIAL HEALTH

• Total Endowment	<b>\$126.4M</b>	• Total Cash & Investments to Expenses	<b>0.59</b>
• Annual Growth in Endowment	<b>0.0%</b>	• Debt Service Burden	<b>6.6%</b>
• Endowment per Annualized Student FTE	<b>\$9,758</b>	• Operating Margin (%)	<b>0.9%</b>
• Private Funds Raised Annually	<b>\$40.6M</b>		

# ACADEMIC QUALITY

## AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

**3.48**

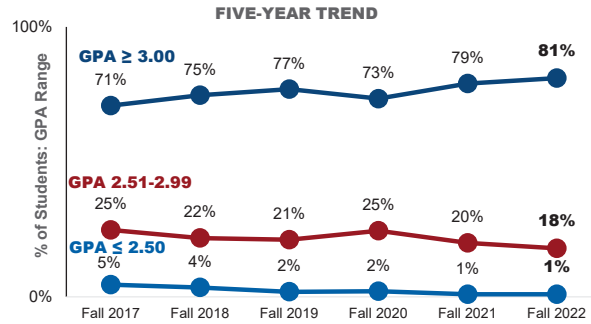
Average HS GPA in Fall 2022

▲ **0.04**

One-year nominal change (vs. Fall 2021)

▲ **0.20**

Five-year nominal change (vs. Fall 2017)



## SAT SCORES OF FRESHMEN

**1290**

SAT Scores of Freshmen 75th Percentile in Fall 2022

▲ **20**

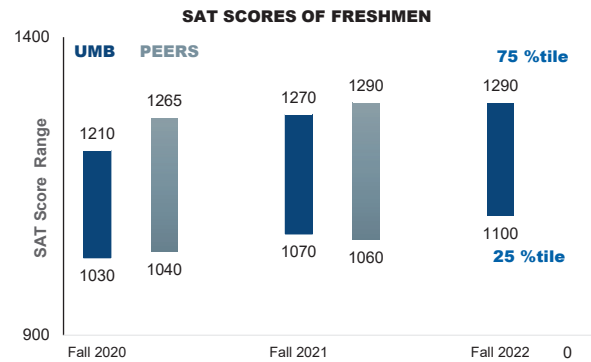
One-year nominal change (vs. Fall 2021)

**1100**

SAT Scores of Freshmen 25th Percentile in Fall 2022

▲ **30**

One-year nominal change (vs. Fall 2021)

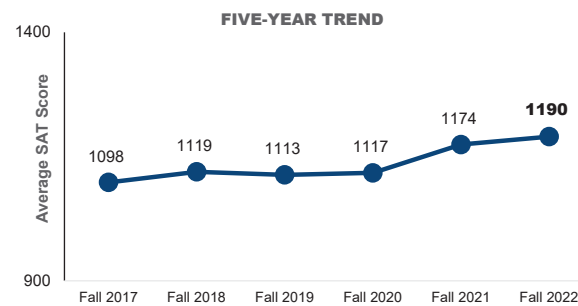


**1190**

Average SAT Scores of Freshmen in Fall 2022

▲ **16**

One-year nominal change (vs. Fall 2021)



## ACADEMIC QUALITY

### AVERAGE GPA OF ENTERING TRANSFER STUDENTS

**3.10**

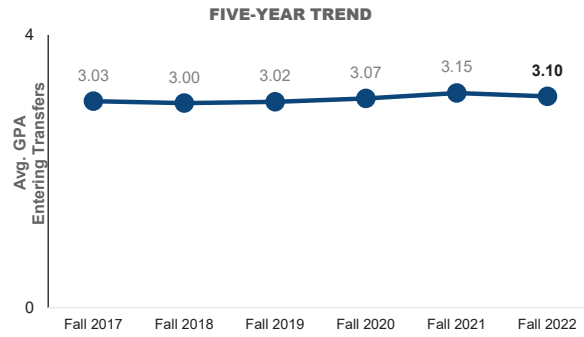
Average transfer GPA in Fall 2022

▼ **0.05**

One-year nominal change (vs. Fall 2021)

▲ **0.07**

Five-year nominal change (vs. Fall 2017)



### STUDENT-FACULTY RATIO

**16:1**

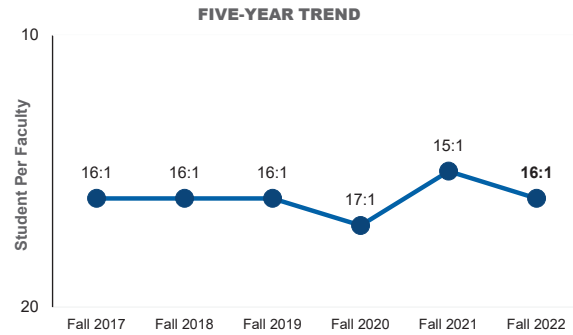
Student-Faculty Ratio in Fall 2022

▼ **1**

One-year nominal change (vs. Fall 2021)

● **0**

Five-year nominal change (vs. Fall 2017)



### TECHNOLOGY-ENHANCED CLASSROOMS

**288**

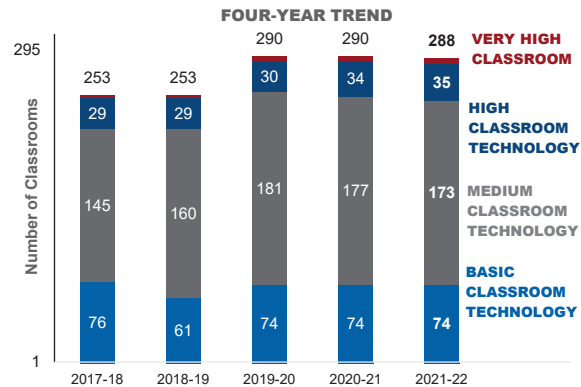
Total Technology Enhanced Classrooms in 2021-22

▼ **1%**

One-year % change (vs. 2020-21)

▲ **14%**

Four-year % change (vs. 2017-18)



# ACADEMIC QUALITY

## PERCENT TENURED/TENURE-TRACK FACULTY FTE

**54%**

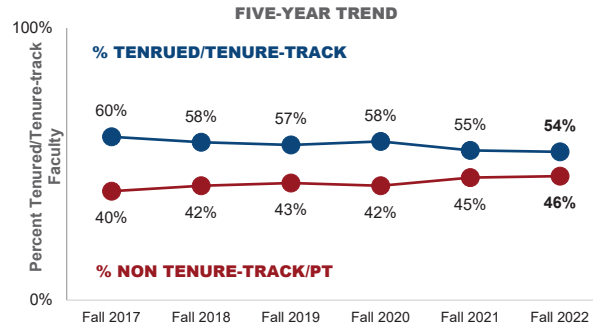
Percent Tenured/  
Tenure-track Faculty  
in Fall 2022

**▼ 1**

One-year  
% point change  
(vs. Fall 2021)

**▼ 6**

Five-year  
% point change  
(vs. Fall 2017)



## FACULTY FTE

**827**

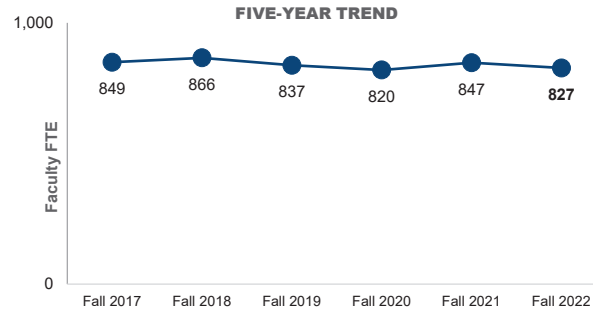
Faculty FTE  
in Fall 2022

**▼ 2%**

One-year  
% change  
(vs. Fall 2021)

**▼ 3%**

Five-year  
% change  
(vs. Fall 2017)



## FACULTY-OF-COLOR

**206**

Faculty Of Color  
in Fall 2022

**▼ 9**

One-year  
nominal change  
(vs. Fall 2021)

**▲ 40**

Five-year  
nominal change  
(vs. Fall 2017)

**31%**

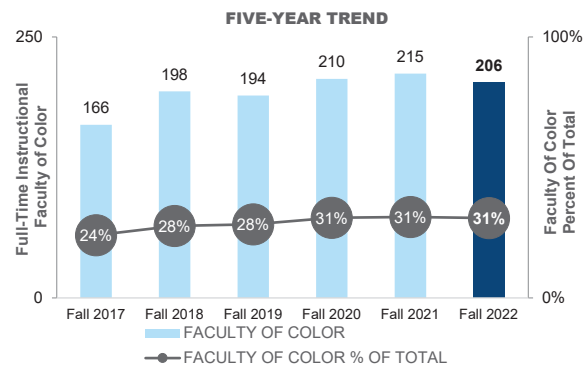
Percent of  
Faculty Of Color  
in Fall 2022

**▼ 0**

One-year  
% point  
(vs. Fall 2021)

**▲ 7**

Five-year  
% point  
(vs. Fall 2017)



Faculty-of-Color based on US Citizens/Permanent Residents reporting Race/Ethnicity according to new IPEDS definitions.

## ACADEMIC QUALITY

### WOMEN FACULTY

**351**

Women Faculty  
in Fall 2022

▼ **20**

One-year  
nominal change  
(vs. Fall 2021)

▼ **2**

Five-year  
nominal change  
(vs. Fall 2017)

**52%**

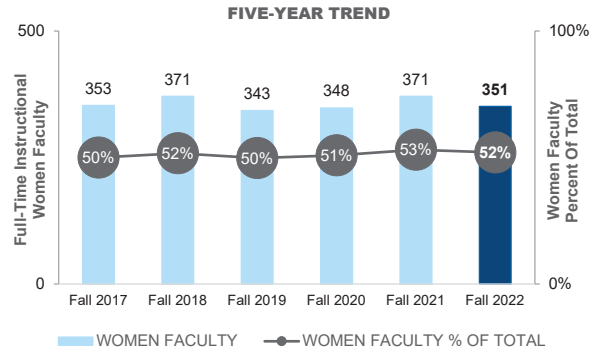
Percent of  
Women Faculty  
in Fall 2022

▼ **1**

One-year  
nominal change  
(vs. Fall 2021)

▲ **2**

Five-year  
nominal change  
(vs. Fall 2017)



Source : The Top American Research Universities

## ACCESS AND AFFORDABILITY

### UNDERGRADUATES FROM MASSACHUSETTS

**10,462**

Undergraduates from  
Massachusetts  
in Fall 2022

▼ **3%**

One-year  
% change  
(vs. Fall 2021)

• **0%**

Five-year  
% change  
(vs. Fall 2017)

**86%**

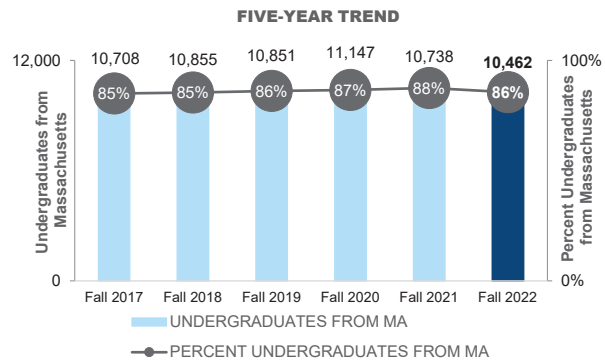
% Undergraduates  
from Massachusetts  
in Fall 2022

▼ **2**

One-year  
% point change  
(vs. Fall 2021)

• **0**

Five-year  
% point change  
(vs. Fall 2017)



### UNDERGRADUATE STUDENTS OF COLOR

**6,769**

Undergraduates  
Students of Color  
in Fall 2022

• **0%**

One-year  
% change  
(vs. Fall 2021)

▲ **12%**

Five-year  
% change  
(vs. Fall 2017)

**63%**

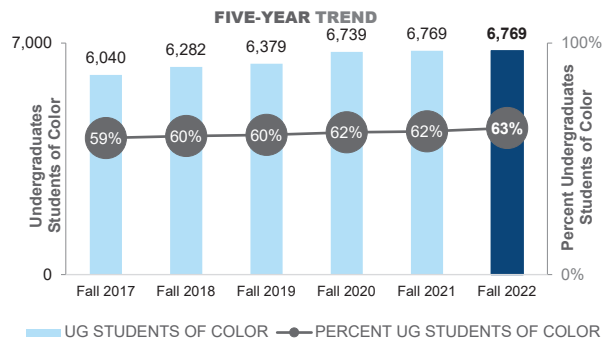
% Undergraduates  
Students of Color  
in Fall 2022

▲ **1**

One-year  
% point change  
(vs. Fall 2021)

▲ **4**

Five-year  
% point change  
(vs. Fall 2017)





# ACCESS AND AFFORDABILITY

## UNDERGRADUATES WHO ARE INTERNATIONAL

**784**

International UG Enrollment in Fall 2022

**▲ 3%**

One-year % change (vs. Fall 2021)

**▼ 48%**

Five-year % change (vs. Fall 2017)

**6%**

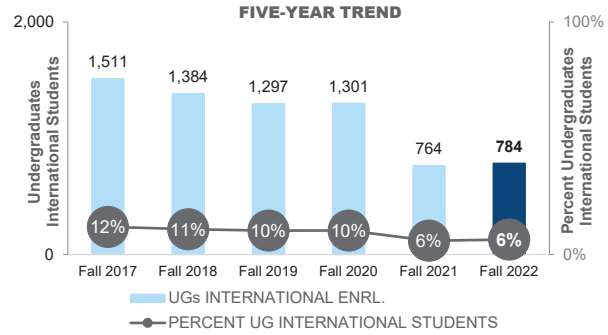
% International UG Enrollment in Fall 2022

**● 0**

One-year % point change (vs. Fall 2021)

**▼ 5**

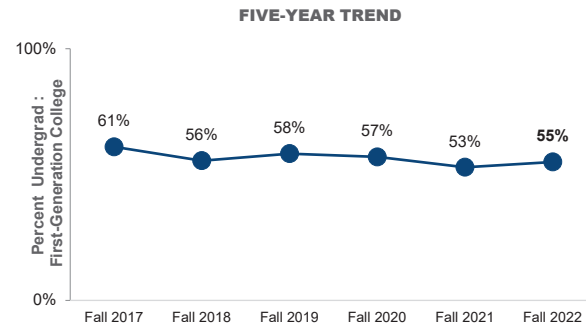
Five-year % point change (vs. Fall 2017)



## PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE

**55%**

Percent first-time Undergraduates who are First-Generation College in Fall 2022

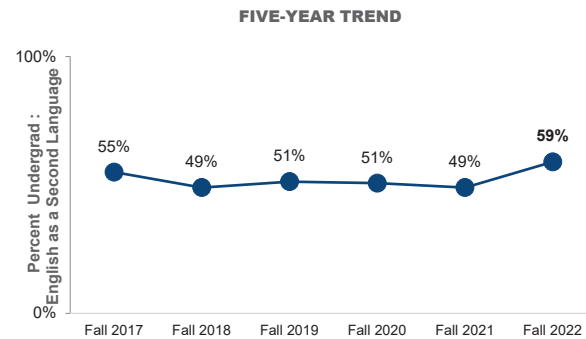


\*The data source from Fall 2018 updated to Common Application responses.

## PERCENT FIRST-TIME, FULL-TIME UNDERGRADUATES WITH ENGLISH AS A SECOND LANGUAGE

**59%**

Percent Undergraduates Speak English as a Second Language in Fall 2022



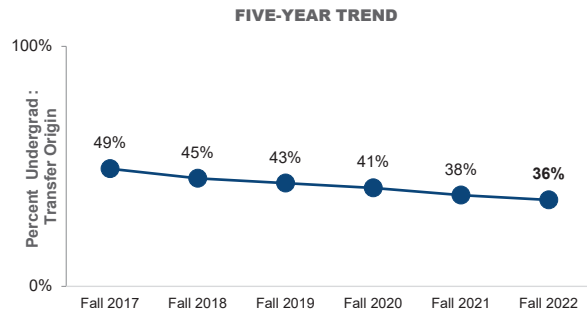
\*The data source from Fall 2018 updated to Common Application responses.

## ACCESS AND AFFORDABILITY

### PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

**36%**

Percent Undergraduates who are of Transfer-Origin in Fall 2022



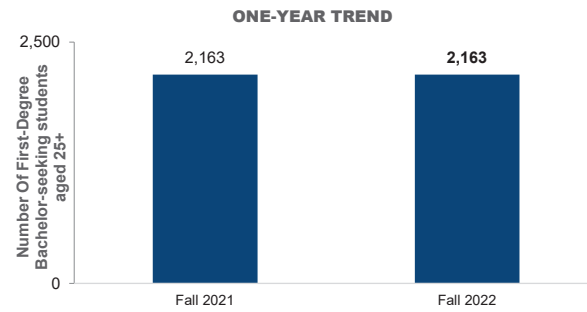
### NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

**2163**

Number of First-Degree Bachelor-Seeking Students Aged 25+ in Fall 2022

**0**

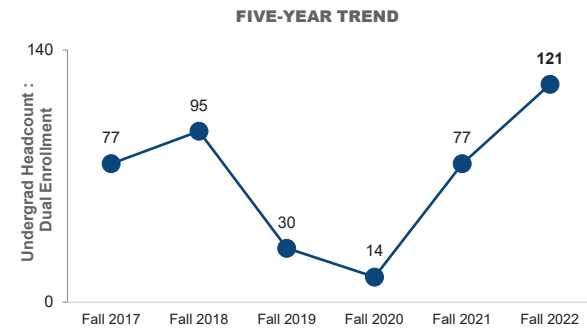
One-year nominal change vs. Fall 2021



### DUAL ENROLLMENT STUDENTS (HEADCOUNT)

**121**

Dual Enrolled Students in Fall 2022



# ACCESS AND AFFORDABILITY

## PERCENT IN-STATE PELL GRANT RECIPIENTS

**47%**

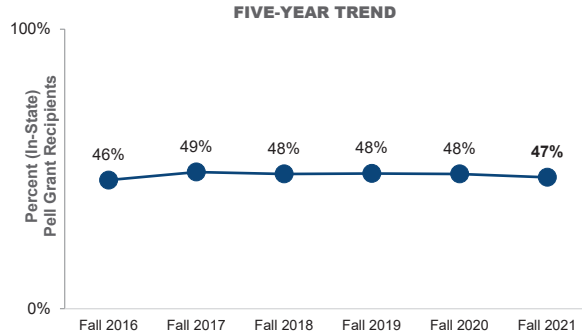
Percent (In-State) Pell Grant Recipients in Fall 2021

▼ **1**

One-year % point change (vs. Fall 2020)

▲ **1**

Five-year % point change (vs. Fall 2016)



## PERCENT NEED MET FOR IN-STATE STUDENTS AWARDED NEED-BASED AID

**86%**

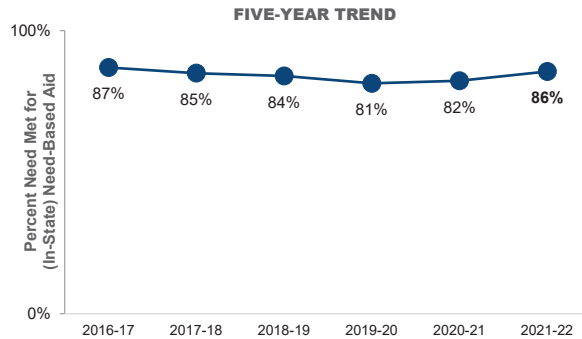
Percent Need Met for (In-State) Need-Based Aid in 2021-22

▲ **3**

One-year % point change (vs. 2020-21)

▼ **1**

Five-year % point change (vs. 2016-17)



## UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

**\$27.1k**

Average Debt Load in 2022

▲ **6%**

One-year % change (vs. 2021)

▲ **0%**

Five-year % change (vs. 2017)

**66%**

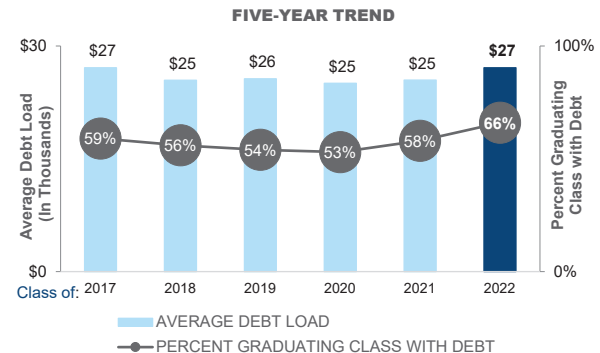
Percent Graduating Class with Debt in 2022

▲ **8**

One-year % point change (vs. 2021)

▲ **7**

Five-year % point change (vs. 2017)



## ACCESS AND AFFORDABILITY

### TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

**87**

Students who participated in Study Abroad in Fall 2021-Smr.22

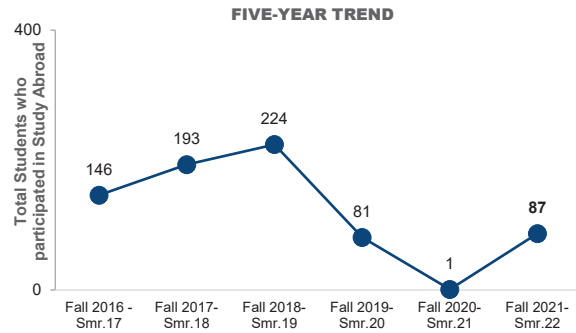
\*Fall 2020 - Smr. 21 decreased due to pandemic.

**▲ 86**

One-year nominal change vs. Fall 2020-Smr.21

**▼ 59**

Five-year nominal change vs Fall 2016 -Smr.17



### TOTAL ONLINE COURSE REGISTRATIONS

**22,482**

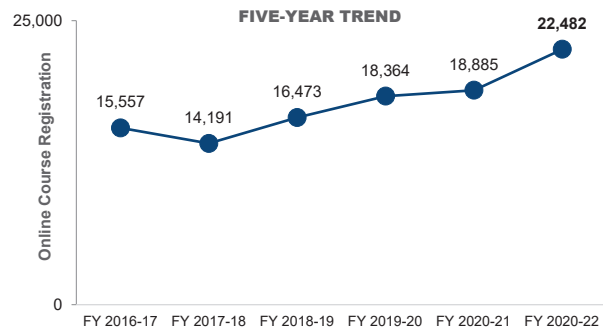
Online Course Registrations in FY 2020-22

**▲ 19%**

One-year % change (vs. FY 2020-21)

**▲ 45%**

Five-year % change (vs. FY 2016-17)

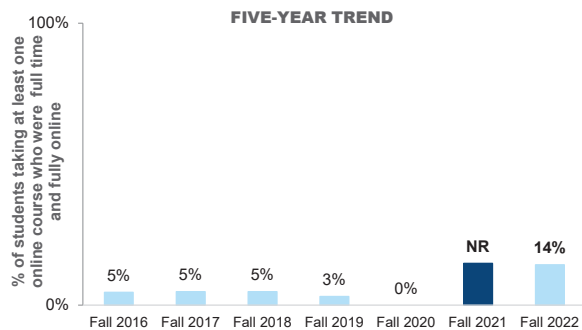


### PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

**14%**

Students taking at least one online course who were full time and fully online in Fall 2021

\*Data not reported, as all students shifted to online learning during the pandemic



# STUDENT SUCCESS AND SATISFACTION

## FRESHMEN ONE-YEAR RETENTION RATE

**72%**

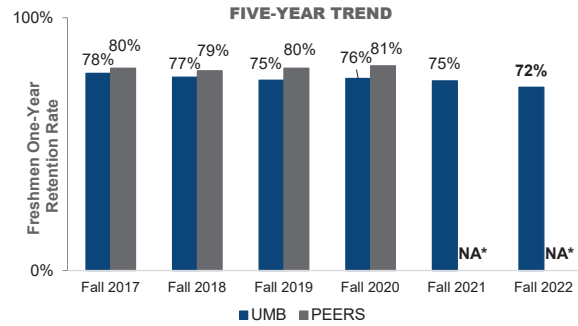
Freshmen One-Year Retention Rate in Fall 2022

▼ **3**

One-year % point change (vs. Fall 2021)

▼ **6**

Five-year point (vs. Fall 2017)



\*Peer data for Fall 2022 not available for reporting purposes.

## FRESHMEN FOUR-YEAR GRADUATION RATES

**33%**

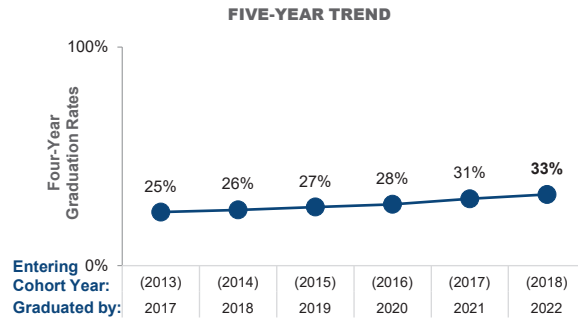
Freshmen Four-Year Graduation Rates in 2022

▲ **2**

One-year % point change (vs. 2021)

▲ **8**

Five-year % point change (vs. 2017)



Entering Cohort Year:	(2013)	(2014)	(2015)	(2016)	(2017)	(2018)
Graduated by:	2017	2018	2019	2020	2021	2022

## FRESHMEN SIX-YEAR GRADUATION RATE

**51%**

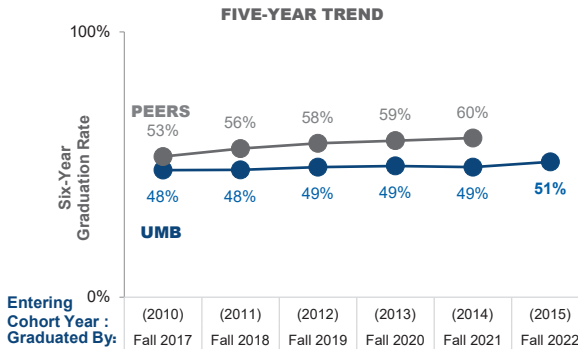
UMB Freshmen Six-Year Graduation Rates in Fall 2022

▲ **2**

One-year % point change (vs. Fall 2021)

▲ **3**

Five-year % point change (vs. Fall 2017)



Entering Cohort Year:	(2010)	(2011)	(2012)	(2013)	(2014)	(2015)
Graduated By:	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022

# STUDENT SUCCESS AND SATISFACTION

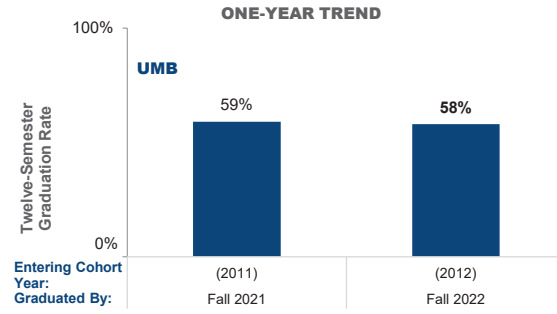
## FRESHMEN TWELVE-SEMESTER GRADUATION RATE

**58%**

UMB Freshmen  
Twelve-semester  
Graduation Rates  
in Fall 2022

▼ **1**

One-year  
% point change  
(vs. Fall 2021)



## TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

**81%**

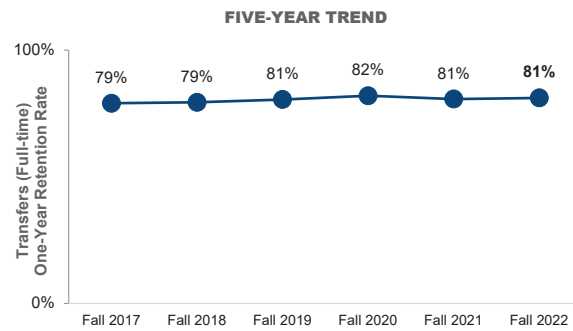
Transfers (Full-time)  
One-Year  
Retention Rate  
in Fall 2022

▲ **0**

One-year  
% point change  
(vs. Fall 2021)

▲ **2**

Five-year  
% point change  
(vs. Fall 2017)



## TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

**75%**

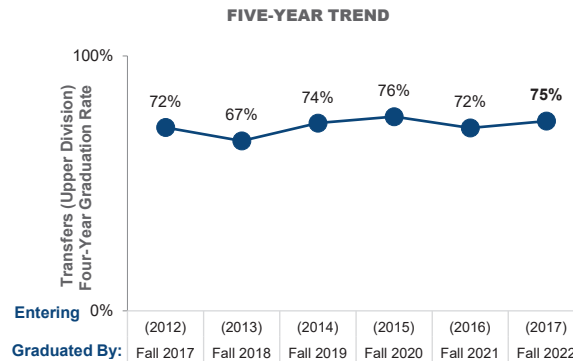
Transfers (Upper  
Division) Four-Year  
Graduation Rates  
in Fall 2022

▲ **3**

One-year  
% point change  
(vs. Fall 2021)

▲ **3**

Five-year  
% point change  
(vs. Fall 2017)



# STUDENT SUCCESS AND SATISFACTION

## STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2016-17

**34%**

Bachelor's Degree Within 4 Yrs. from any institution

**57%**

Bachelor's Degree Within 5 Yrs. From any institution

**63%**

Bachelor's Degree Within 6 Yrs. From any institution

**28%**

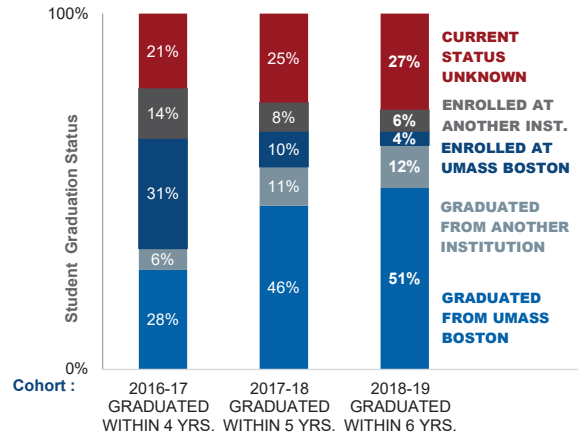
Bachelor's Degree Within 4 Yrs. from UMass Boston

**46%**

Bachelor's Degree Within 5 Yrs. From UMass Boston

**51%**

Bachelor's Degree Within 6 Yrs. From UMass Boston



Source : Student Achievement Measure (SAM)

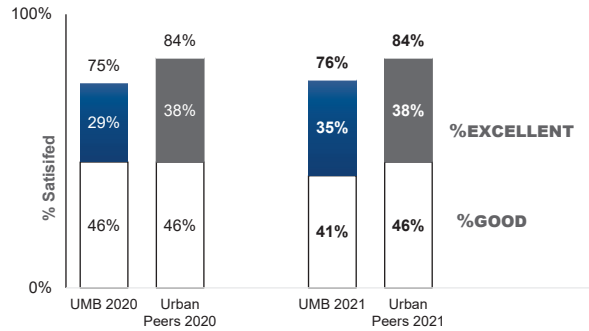
## STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

**76%**

Student Satisfaction as Good or Excellent in UMB 2021

**▲ 1**

Three-year % point change (vs. UMB 2020)



## ALUMNI PARTICIPATION RATE

**4%**

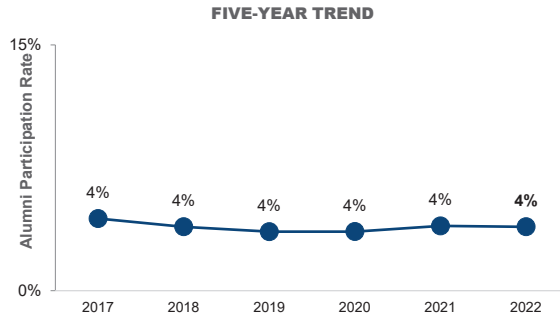
Alumni Participation Rate in 2022

**• 0**

One-year % point change (vs. 2021)

**• 0**

Five-year % point change (vs. 2017)



## SERVICE TO THE COMMONWEALTH

### DEGREE COMPLETIONS

**3,670**

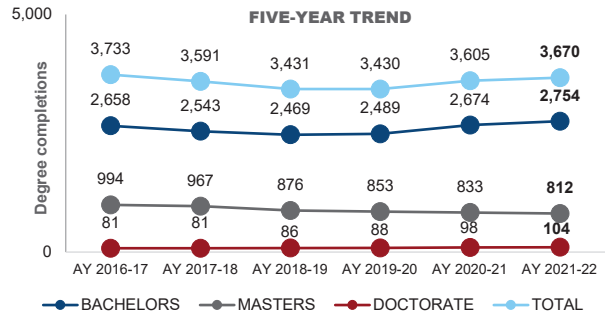
Total degree completions AY 2021-22

**▲ 2%**

One-year % change in total degree completions (vs. AY 2020-21)

**▼ 2%**

Five-year % change in total degree completions (vs. AY 2016-17)



### NUMBER OF PATENT APPLICATIONS

**2**

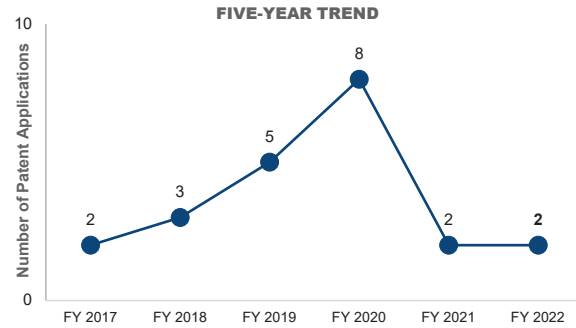
Patent Applications in FY 2022

**• 0**

One-year nominal change (vs. FY 2021)

**• 0**

Five-year nominal change (vs. FY 2017)



### TOTAL R&D EXPENDITURES

**\$65.2**

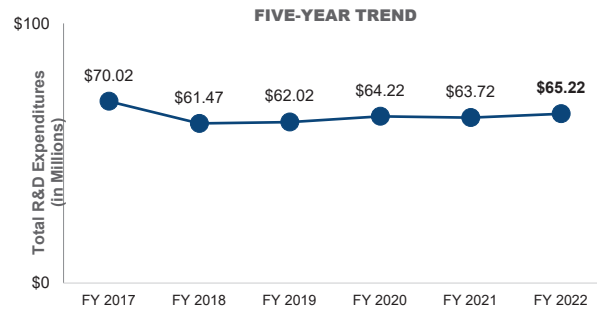
Million in FY 2022

**▲ 2%**

One-year % change (vs. FY 2021)

**▼ 7%**

Five-year % change (vs. FY 2017)





# SERVICE TO THE COMMONWEALTH

## TOTAL R&D EXPENDITURES RANKINGS

**187**

Total R&D Expenditures  
Overall Rankings  
in FY 2021

▼ **3**

One-year  
nominal change  
(vs. FY 2020)

▼ **12**

Five-year  
nominal change  
(vs. FY 2016)

**17**

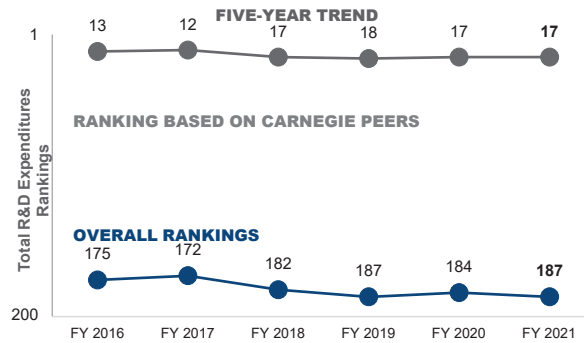
Rankings based on  
Carnegie Peers  
in FY 2021

▼ **0**

One-year  
nominal change  
(vs. FY 2020)

▼ **4**

Five-year  
nominal change  
(vs. FY 2016)



Overall Ranking Source: National Science Foundation Ranking by Total R&D Expenditures.  
Ranking based on Carnegie Peers is further standardized by US Publics and Non-Medical Schools.

## TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

**\$141k**

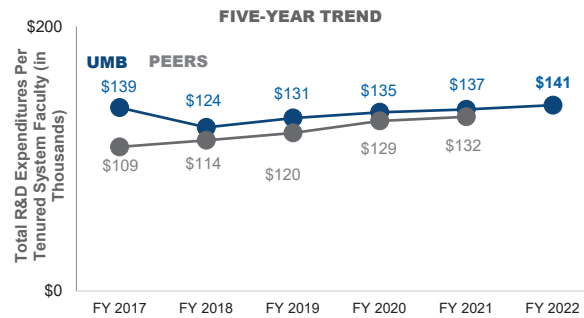
Total R&D Expenditure  
Per Tenured  
System Faculty  
in FY 2022

▲ **2%**

One-year  
% change  
(vs. FY 2021)

▲ **1%**

Five-year  
% change  
(vs. FY 2017)



\*Peer data for FY 2022 is currently not available.

## DEGREES AWARDED IN STEM FIELDS

**565**

UG degrees awarded  
in STEM fields  
in 2021-22

▲ **1%**

One-year  
% change  
(vs. 2020-21)

▲ **27%**

Five-year  
% change  
(vs. 2016-17)

**20%**

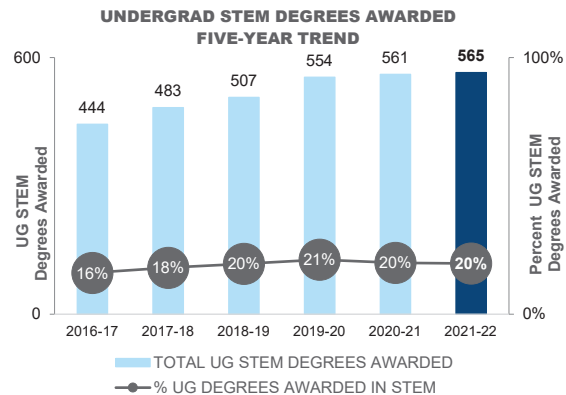
Percent of total UG  
degrees awarded in  
STEM fields  
in 2021-22

▲ **0**

One-year  
% point change  
(vs. 2020-21)

▲ **4**

Five-year  
% point change  
(vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## DEGREES AWARDED IN STEM FIELDS

**102**

Grad degrees awarded in STEM fields in 2021-22

**▼ 20%**

One-year % change (vs. 2020-21)

**▼ 17%**

Five-year % change (vs. 2016-17)

**11%**

Percent of total Grad degrees awarded in STEM fields in 2021-22

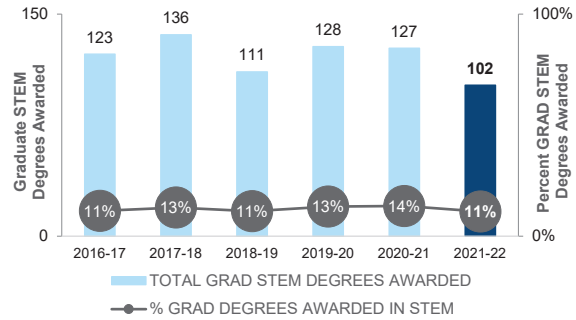
**▲ 2.5**

One-year % point change (vs. 2020-21)

**▲ 0**

Five-year % point change (vs. 2016-17)

**GRAD STEM DEGREES AWARDED FIVE-YEAR TREND**



**667**

Total degrees awarded in STEM fields in 2021-22

**▼ 3%**

One-year % change (vs. 2020-21)

**▲ 18%**

Five-year % change (vs. 2016-17)

**18%**

Percent of Total degrees awarded in STEM fields in 2021-22

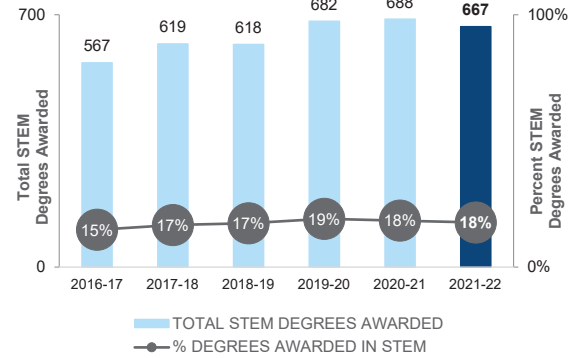
**▲ 0.7**

One-year % point change (vs. 2020-21)

**▲ 3**

Five-year % point change (vs. 2016-17)

**TOTAL STEM DEGREES AWARDED FIVE-YEAR TREND**



## CERTIFICATES AWARDED IN STEM FIELDS

**1**

Total Certificates awarded in STEM fields in 2021-22

**.0**

One-year nominal change (vs. 2020-21)

**▼ 3**

Five-year nominal change (vs. 2016-17)

**0%**

Percent of Total Certificates awarded in STEM fields in 2021-22

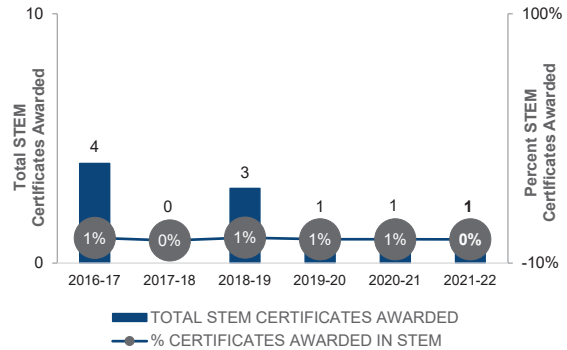
**▼ 0**

One-year % point change (vs. 2020-21)

**▼ 1**

Five-year % point change (vs. 2016-17)

**TOTAL STEM CERTIFICATES AWARDED FIVE-YEAR TREND**



## SERVICE TO THE COMMONWEALTH

### DEGREES AWARDED IN HEALTHCARE FIELDS

**814**

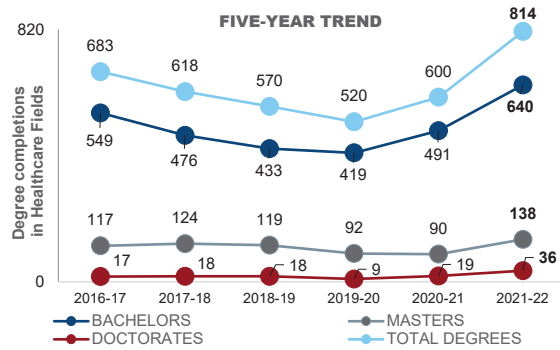
Total degrees awarded in HealthCare fields in 2021-22

**▲ 36%**

One-year % point change (vs. 2020-21)

**▲ 19%**

Five-year % point change (vs. 2016-17)



### CERTIFICATES AWARDED IN HEALTHCARE FIELDS

**92**

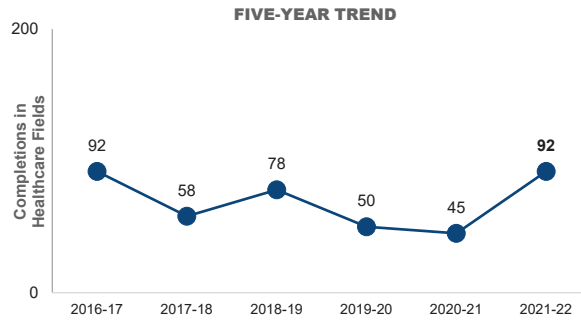
Total Certificates awarded in HealthCare fields in 2021-22

**▲ 104%**

One-year % point change (vs. 2020-21)

**• 0%**

Five-year % point change (vs. 2016-17)



### LICENSE INCOME

**\$ 7,389**

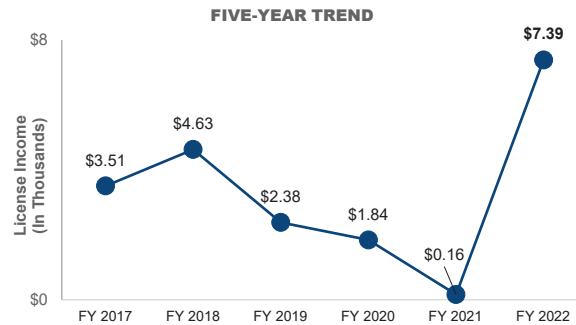
License Income in FY 2022

**▲ 4418%**

One-year % change (vs. FY 2021)

**▲ 111%**

Five-year % change (vs. FY 2017)



## SERVICE TO THE COMMONWEALTH

### PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**70%**

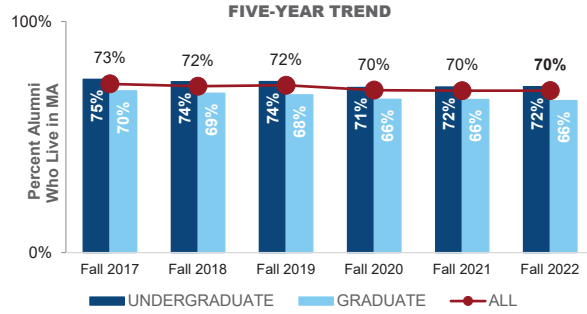
Of all UMass Alumni live in the Commonwealth in Fall 2022

**0**

One-year % point change (vs. Fall 2021)

**3**

Five-year % point change (vs. Fall 2017)



### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**\$126.4M**

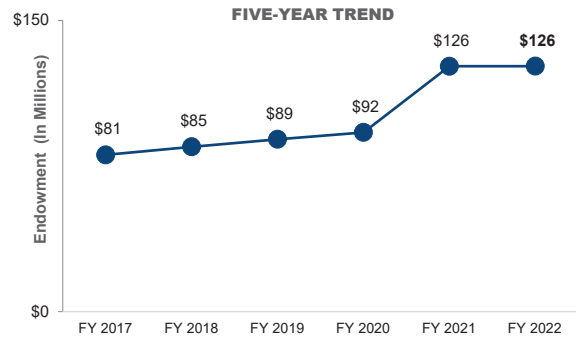
Endowment Assets in FY 2022

**0%**

One-year % change (vs. FY 2021)

**57%**

Five-year % change (vs. FY 2017)



### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**0%**

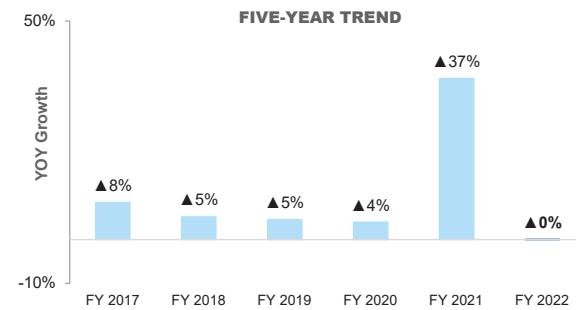
Annual Growth in FY 2022

**37**

One-year % point change (vs. FY 2021)

**8**

Five-year % point change (vs. FY 2017)



# FINANCIAL HEALTH

## ENDOWMENT PER ANNUALIZED STUDENT FTE

**\$9.8k**

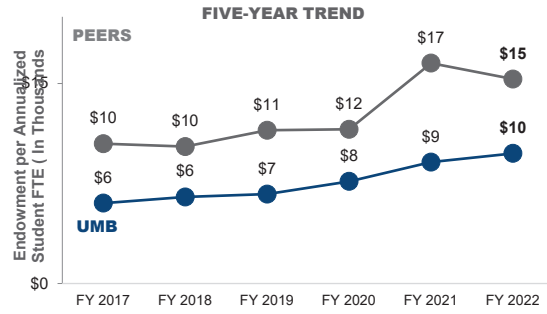
Endowment per Annualized Student FTE in FY 2022

**▲ 7%**

One-year % change (vs. FY 2021)

**▲ 62%**

Five-year % change (vs. FY 2017)



## PRIVATE FUNDS RAISED ANNUALLY

**\$40.6M**

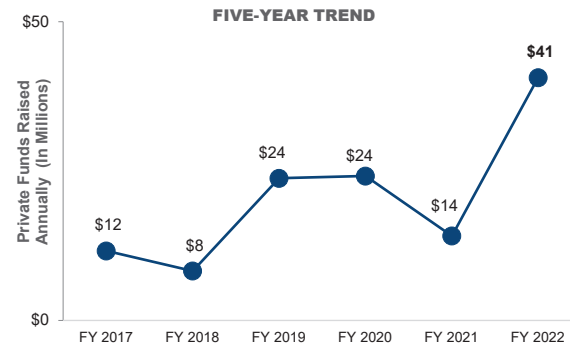
Private Funds Raised Annually in FY 2022

**▲ 188%**

One-year % change (vs. FY 2021)

**▲ 249%**

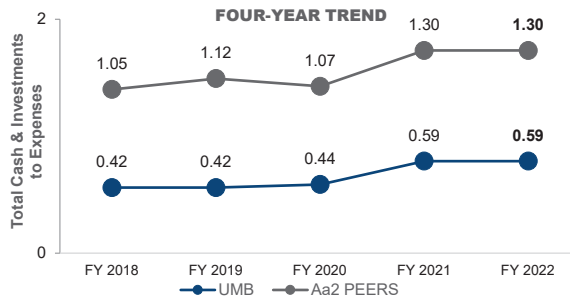
Five-year % change (vs. FY 2017)



## TOTAL CASH & INVESTMENTS TO EXPENSES

**0.59**

Total Cash & Investments to Expenses in FY 2022



# FINANCIAL HEALTH

## DEBT SERVICE BURDEN

**6.6%**

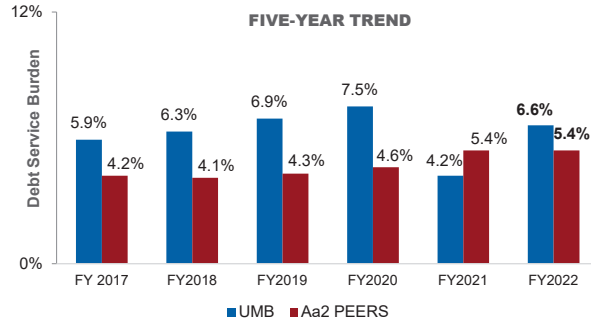
Debt Service Burden in FY2022

▲ **2.4**

One-year % Point change (vs. FY2021)

▲ **0.7**

Five-year % Point change (vs. FY 2017)



## OPERATING MARGIN (%)

**0.9%**

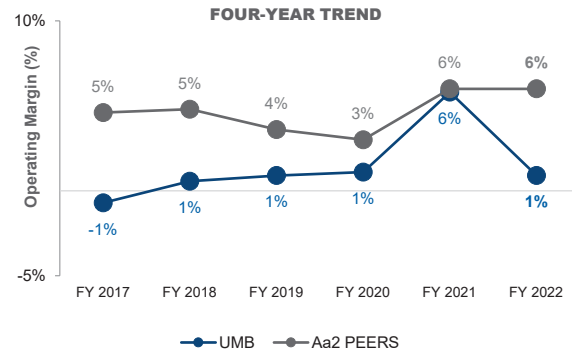
Operating Margin (%) in FY 2022

● **0.0**

One-year % Point change (vs. FY 2021)

▲ **1.6**

Four-year % Point change (vs. FY 2018)



## DEFINITIONS AND SOURCES

### ACADEMIC QUALITY INDICATORS

#### **Average High School GPA of First-Time**

**Freshmen.** Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

**SAT Scores of Freshmen.** SAT scores of Freshmen. All reported SAT scores are based on the sum of the SAT MSS and the ERWS for entering freshmen. A redesigned SAT was used for Fall 2017 admissions; therefore, scores for Fall 2016 and before cannot be compared to scores for Fall 2017 and later. The average is the arithmetic mean of these SAT scores. Peer data are from IPEDS.

#### **Average GPA of Entering Transfer Students.**

Average Cumulative GPA of entering transfer students according to DHE admissions policy.

**Student-Faculty Ratio.** The ratio of FTE students to FTE instructional faculty. Faculty and students in stand-alone graduate or professional programs such as medicine, law, veterinary, dentistry, social work, business, and public health in which faculty teach virtually only graduate-level students are excluded. Teaching assistants are not counted as faculty. Data and definition are from CDS.

#### **Technology-Enhanced Classrooms.**

Classification of the campus's total classroom capacity in terms of the level of technology-support.

#### **Percent Tenured/Tenure-Track Faculty (FTE).**

Percent based on the ratio of Tenured/Tenure-Track Faculty FTE to Total Faculty FTE.

**Faculty FTE.** Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

**Faculty-of-Color.** The proportion of full-time instructional faculty who are U.S. citizens or permanent residents and report their race/ethnicity to be one or more of the following: Hispanic/Latino, American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Other Pacific Islander, or Two or More Races. Race/ethnicity definition is based on IPEDS.

**Women Faculty.** The proportion of full-time instructional faculty who identify themselves as female.

### ACCESS AND AFFORDABILITY INDICATORS

#### **Percentage Undergraduates from**

**Massachusetts.** Percentage of total undergraduate students who are "In State" or residents of Massachusetts based on tuition residency. For state-supported (day) students, tuition classification is used, whereas for CPE students, the actual residency at time of matriculation is used.

#### **Percent Undergraduates who are Students**

**of Color.** Undergraduates who self-identify as either African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean

students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

#### **Percent Undergraduates who are**

**International.** Percentage of all undergraduates who are non-resident aliens, studying at the university on an eligible visa types, and enrolled in credit courses. Does not include permanent residents, refugees, or US citizens.

## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

**Percent Undergraduates who are First Generation in College.** Percent of first-time, full-time undergraduates where neither parent has earned a bachelor's degree. The source of this data field is the Common Application.

**Percent first-time, full-time Undergraduates with English as a Second Language.** Percent of first-time, full-time undergraduates who speak another language at home. The source of this data field will be from the Common Application.

**Percent Undergraduates Who Are of Transfer Origin.** Percent of all currently enrolled bachelor's degree-seeking undergraduate students who were admitted as transfer students at the institution.

**Number of First-degree Bachelor-seeking Students Aged 25+.** Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of Sept 1 of the Fall semester.

**Dual Enrollment Students (Headcount).** Headcount of current non-Degree dual-enrolled students on campus.

**Percent (In-State) Pell Grant Recipients.** Federal Pell Grants are awarded to low-income undergraduates based on their expected family contribution. Data as reported by campuses to the UMass President's Office of in-state, full-time students with Pell Grants in the Financial Aid Template.

**Percent of Need Met for In-State Students Awarded Need-Based Aid.** The average percentage of demonstrated financial need that is met by the institution's award of need-based financial aid to in-state undergraduate students. Data as reported to the UMass President's Office in the Financial Aid Template.

**Average Student Debt Load of Graduating Class (UG).** Average debt load is based on the total debt borrowed by an Institution's graduating class (bachelor's, first-time only) divided by the number of students of that cohort that carried any

amount of debt. It does not include those students with no debt load. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Percent Graduating Class with Debt (UG).** The total number of students in the graduating class (bachelor's, first-time only) that carried a debt load at the institution divided by the total number of graduating (bachelor's, first-time only) students in that institution. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Number of Students who Participated in a Study Abroad Program.** Number of students who participated in a credit-bearing study abroad program outside of the U.S. over the most recent academic year, either at UMass or elsewhere.

**Online Course Registrations.** Course registrations for the academic year for online credit courses. Academic year includes Summer, Fall, intersession, and Spring. These do not include hybrid courses, but fully online courses only offered via UMassOnline.

**Percentage of degree-seeking students taking at least one online course who were full time and fully online.** Metric calculated using the formula below. Data from fall student headcount of degree-seeking students, split by full-time and part-time status, who fall into the following categories: Enrolled exclusively in online courses; Enrolled in at least one, but not all, online courses; and Not enrolled in any online courses. (As per IPEDS definition).  

$$\frac{\text{(Full time Enrolled exclusively in online courses)}}{\text{(Full time Enrolled in at least one, but not all, online courses + Full time Enrolled exclusively in online courses + part-time Enrolled in at least one, but not all, online courses + part-time Enrolled exclusively in online courses)}}$$



## DEFINITIONS AND SOURCES

### STUDENT SUCCESS AND SATISFACTION INDICATORS

**Freshmen One-Year Retention Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall and were still enrolled at the institution in the following Fall. Peer data as reported to IPEDS.

**Freshmen Four-Year Graduation Rate.**

Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution by the end of their fourth year. Associates degree and CPE students are excluded.

**Freshmen Six-Year Graduation Rate.**

Percent of first-time, full-time freshmen who entered UMass in a given Fall term and had graduated from the institution within six years. Peer data are based on median as reported to IPEDS. Associates degree and CPE students are excluded.

**Freshmen Twelve-semester Graduation**

**Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution within twelve active semesters (Fall and Spring semesters) within 10 years of their initial attendance. Associates degree and CPE students are excluded.

**Transfer (Full-Time) One-Year Retention**

**Rate.** Percent of full-time transfer students at any level who entered UMass in a given Fall and were still enrolled at, or graduated from the institution as of the following Fall.

**Transfer (Upper-Division) Four-Year**

**Graduation Rate.** Percent of full-time upper division transfers (60+ credits) who entered UMass in a given Fall term and had graduated from the institution within four years.

**Student Achievement Measure.** SAM tracks student movement across postsecondary institutions to provide a more complete picture of undergraduate student progress and completion within the higher education system. SAM is an alternative to the federal graduation rate, which is limited to tracking the completion of first-time, full-time students at one institution.

**Student Satisfaction with Educational**

**Experience.** Percent of seniors who responded “good” or “excellent” to the question, “How would you evaluate your entire educational experience at this institution?” on the most recently conducted National Survey of Student Engagement (NSSE).

**Alumni Participation Rate.** The percentage of undergraduate alumni of record who donated money to the college or university. Alumni of record are former full- or part-time students who received an undergraduate degree and for whom the college or university has a current address. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. Graduates who earned only a graduate degree are excluded.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The number of degrees (not including certificates) awarded in the previous academic year, by degree level. As reported to IPEDS.

**Patent Applications.** Number of U.S. Patent applications filed per year. Data reported by campuses to UMass President’s Office, Office of OTCV.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local

governments, industry, private and institutional) as reported to NSF.

**Total R&D Expenditures Ranking.** Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. UMass Boston’s rank in the annual NSF ranking of Total R&D expenditures among public institutions of higher education with a Carnegie classification of “Highest Research” and with no medical school. Data source NCES WebCaspar/NSF HERD data tables.

## DEFINITIONS AND SOURCES

### SERVICE TO THE COMMONWEALTH INDICATORS

#### **Total Research Expenditures per Tenure**

**System Faculty.** R&D expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF, divided by total tenure system faculty as reported to IPEDS. Peer data reported by NSF and IPEDS.

#### **Degrees and Certificates Awarded in**

**STEM Fields.** Number of undergraduate and graduate degrees awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Certificates data also included separately.

#### **Degrees and Certificates Awarded in**

**Healthcare Fields.** Number of undergraduate and graduate degrees awarded in Health Care fields. Healthcare designation as defined by Campus IR, and based on CIP classification. All of CIP 51, and specific 6-digit CIPs unique to each campus. Certificates data also included separately.

**License Income.** Amount of annual income from license agreements. Data Source: Data reported by campuses to UMass President's Office, Office of OTCV.

#### **Percent Alumni who Live in**

**Massachusetts.** Percentage of total alumni who currently reside in Massachusetts based on alumni records.

### FINANCIAL HEALTH INDICATORS

#### **Endowment Assets and Annual Growth in**

**Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual BOT report, and the percent change from previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

#### **Endowment per Annualized Student FTE.**

Total UMass Boston endowments per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data are for the comparative peers from financial statements (current year) and IPEDS (prior years).

**Private Funds Raised Annually.** Private funds raised includes restricted and unrestricted revenues from individuals, foundations, corporations and other organizations. Includes

private grant revenues but not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions.

#### **Total Cash & Investments to Expenses.**

Indicates the university's financial flexibility and resilience, and its ability to generate investment income. (Cash & Investments – debt service reserve funds) / Total expenses.

**Debt Service to Operations.** Debt service as a percentage of total operating expenditures (operating expenditures plus interest expense). Peer data are from published financial statements.

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses).

## DEFINITIONS AND SOURCES

### PEER INSTITUTIONS FOR UMASS BOSTON

Cleveland State University	University of Nevada-Reno
University of Memphis	University of Missouri-Kansas City
University of Illinois at Chicago	University of Maryland Baltimore County
University of Louisville	University of Massachusetts Lowell

#### Moody's Aa2 Peers

Alamo Community College District, TX	University of California, CA
Arizona State University, AZ	University of Florida, FL
Auburn University, AL	University of Georgia, GA
Board of Regents of The University System of Georgia, GA	University of Hawaii, HI
California State University, CA	University of Houston System, TX
City University of New York, NY	University of Kansas, KS
Clemson University, SC	University of Kentucky, KY
Cuyahoga Community College District, OH	University of Massachusetts, MA
Florida State University, FL	University of North Texas System, TX
Houston Community College System, TX	University of Oregon, OR
Iowa State University of Science & Technology, IA	University of South Carolina, SC
Michigan State University, MI	University of Wyoming, WY
Mississippi Institutions of Higher Learning, MS	
Nevada System of Higher Education, NV	
State University of New York, NY	
State University System of Florida, FL	
Texas State University System, TX	
University of Alabama at Birmingham, AL	
University of Alabama, AL	
University of Arizona, AZ	
University of Arkansas, AR	

*Please Note: Unless otherwise specified, all data are coordinated by the UMass Boston Office of Institutional Research, Assessment, and Planning*



# DARTMOUTH

## HEADLINES

### ACADEMIC QUALITY

UMass Dartmouth's wide range of undergraduate and graduate programs in fields such as business, engineering, arts and sciences, nursing, law, marine science, computer science, continue to gain recognition as high-quality programs.

Since its inclusion in *US News & World Report's* National Public Universities rankings in 2013, UMass Dartmouth has maintained a strong position among academic program rankings. In *US News & World Report's* 2023 rankings of colleges and universities, the Charlton College of Business (CCB) ranked 144 in the country for Top Business Programs overall, a 51-spot rise since 2020. CCB's online bachelor's in business program also ranked second in New England and 12<sup>th</sup> overall out of 214 universities—among the top 6% of all online bachelor's in business programs.

UMass Dartmouth's College of Engineering climbed 10 spots to 137 among Best Undergraduate Engineering Programs (Offering Doctorates), and the College of Nursing & Health Sciences moved up three spots to 93 among Undergraduate Nursing Programs and ranks in the top 13% of nursing schools nationwide for its Bachelor of Science in Nursing (BSN) Program.

UMass Dartmouth's undergraduate computer science program also ranks in the top third among

program of its kind nationwide by *US News & World Report*, and *Best Value Schools* ranked UMass Dartmouth's master's in data science program #7 in the United States.

UMass Dartmouth is one of only 93 public universities in the country to achieve the Carnegie R2 designation for high research activity. The university boasts a dedicated faculty comprised of accomplished scholars and professionals in their respective fields, whose research focuses on key areas of marine science and technology, high-performance computing, renewable energy, biomedical engineering, fisheries and coastal sustainability, cybersecurity, and more.

During FY22, UMassD's research portfolio exceeded \$82M, with new awards growing by 37% from FY20, with NSF and the Department of Defense continuing to be the primary funding sources.

UMass Dartmouth continues to see strong average GPAs in its recent entering classes, reflecting the university's commitment to attracting and admitting top-tier talent. Additionally, in Fall 2022, the Law School enrolled the most academically qualified class in its history, as measured by median entering LSAT (Law School Admission Test) score and undergraduate GPA.

### ACCESS AND AFFORDABILITY

UMass Dartmouth has remained committed to promoting access and affordability by offering low tuition rates, a range of financial aid options, including scholarships and grants, and exploring affordability initiatives to make it easier for students to pursue their academic goals while managing their financial obligations and graduating college with minimal debt. In 2022, the university met 80% of the financial need for in-state students.

Moreover, the university has made progress in reducing the undergraduate student debt burden, with the 2022 graduating class experiencing a 6% decrease in average debt, equating to approximately \$31,000, and a six percentage-point drop to 77% of the total number of students in the 2022 graduating class carrying debt.

UMass Dartmouth celebrates its unique and diverse student body, which encompasses various backgrounds, perspectives, and experiences, with students from various cultural and socioeconomic backgrounds. 88% of UMass Dartmouth students are from Massachusetts, 40% of undergraduates are students of color, and 10% of students identify English as their second language.

More than half (57%) of students in the university's recent entering class are the first in their families to attend college; 39% of in-state students are Pell Grant recipients. In its 2023 rankings, *US News & World Report* ranked UMass Dartmouth 69<sup>th</sup> among national universities, third in New England, and second in Massachusetts for social mobility.

## HEADLINES

### ACCESS AND AFFORDABILITY

UMass Dartmouth also was ranked 11<sup>th</sup> in the Highest Percentage of Engineering Doctoral Degrees to Women, according to the American Society for Engineering Education.

### STUDENT SUCCESS AND SATISFACTION

Measures to improve retention rates take time to yield results, and although the one-year retention rate experienced a slight decrease of one percent, dropping from 68% to 67% since 2021, this decline is less significant than the average year-to-year trend seen over the past decade. Encouragingly, the four-year graduation rate has increased to 38%, and the six-year graduation rate has also seen improvement, now at 55%.

The retention rate for transfer students is currently at its highest in the last decade, now at 84%, with a 75% four-year upper-division transfer graduation rate. While UMass Dartmouth has seen decreasing

retention rates over the past decade, the strategic focus on retention in recent years is starting to produce positive outcomes, evident in the upward trend of graduation rates.

UMass Dartmouth's impact on students' academic journeys extends beyond those who graduate from the university, as evidenced by the Student Achievement Measurement (SAM) findings. Among the Fall 2016 first-year class, it was reported that 13% of students who left UMass Dartmouth went on to earn a degree from another institution.

### SERVICE TO THE COMMONWEALTH

In AY2022, UMass Dartmouth graduated 1,866 students, awarding 1,949 degrees and certificates. Because 68% of UMassD graduates remain in Massachusetts, the degrees granted directly and significantly contribute to the Commonwealth's economy.

The indicators for enrollments and degrees granted in Science, Technology, Engineering and Mathematics, and Health Care highlight UMass Dartmouth's significant contributions to building the STEM workforce pipeline. In response to the healthcare needs of the SouthCoast, the Commonwealth, and nationally, the College of Nursing & Health Science's Doctor of Nursing Practice program has developed two new Certificates of Advanced Graduate Study, one to address the shortage of psychiatric providers in our region, and the other to address the shortage of

primary care providers for the aging population. Additionally, the Law School ranks 7th among all 15 ABA- accredited law schools in New England for the percentage of graduates going into public service employment (32%).

UMass Dartmouth goes beyond producing graduates by cultivating engaged citizens who actively contribute to their communities during their time as students through service-learning projects, community service, and *pro bono* legal work. In 2022 alone, UMassD students committed 211,000 hours of service to the community, and since 2010, UMass Law students have dedicated over 180,000 to providing valuable *pro bono* legal services, exemplifying the university's strong commitment to public service and addressing the needs of the Commonwealth.

## HEADLINES

### FINANCIAL HEALTH

UMass Dartmouth continues to explore new ways to grow revenues and control spending to create efficiencies, and a set of fiscal controls and processes are in place to ensure the achievement of full fiscal stability. UMass Dartmouth has achieved a positive financial cushion during a time of constrained resources. The primary reserve has contributed to more financial strength and flexibility.

The University, in partnership with non-profit Provident, opened a \$140 million, 267,500 sq. ft., 1210-bedroom resident hall and a state-of-the-art 38,000 sq. ft., 800-seat dining facility in 2020,

which enhances the university's ability to attract new students. UMass Dartmouth received \$43M in new funding from the Division of Capital Asset Management and Maintenance (DCAMM) to continue upgrades planned to the campus's main academic facilities, the Liberal Arts Building (LARTS).

In addition to the recently awarded \$30M, this funding will enhance classrooms, labs, office spaces, and student meeting spaces within the Liberal Arts Building and Campus Center Building that houses the auditorium and other instructional spaces.

AT-A-GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	<b>3.27</b>	• Technology-Enhanced Classrooms	<b>142</b>
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	<b>60%</b>
<i>Arithmetic Mean</i>	<b>1140</b>	• Faculty FTE	<b>452</b>
<i>25<sup>th</sup> – 75<sup>th</sup> Percentile</i>	<b>1030-1248</b>	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	<b>3.23</b>	<i>Percent Faculty-of-Color</i>	<b>23%</b>
• Student-Faculty Ratio	<b>15:1</b>	<i>Percent Women Faculty</i>	<b>48%</b>

ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	<b>88%</b>	• Percent In-State Pell Grant Recipients	<b>39%</b>
• Percent Undergraduates who are Students of Color	<b>40%</b>	• Percent of Need Met for In-State Students Awarded Need-Based Aid	<b>80%</b>
• Percent Undergraduates who are International	<b>1%</b>	• Average Debt of Students (UG Graduating Class)	<b>\$31,651</b>
• Percent First-Time Undergraduates who are First Generation in College	<b>57%</b>	• Percent Graduating Class with Debt (UG)	<b>77%</b>
• Percent First-time Undergraduates with English as a Second Language	<b>10%</b>	• Total Students who Participated in a Study Abroad Program	<b>18</b>
• Percent Undergraduates Who Are Of Transfer Origin	<b>26%</b>	• Online Course Registrations	<b>12,958</b>
• Number of First-degree Bachelor-seeking Students Aged 25+	<b>9</b>	Percentage of degree-seeking students taking at least one online course who were full time and fully online.	<b>16%</b>
• Dual Enrollment Students (Headcount)	<b>90</b>		

STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	<b>67%</b>	• Transfer (Full-time) One-Year Retention Rate	<b>84%</b>
• Freshmen Four-Year Graduation Rate	<b>38%</b>	• Transfer (Upper Division) Four-Year Graduation Rate	<b>75%</b>
• Freshmen Six-Year Graduation Rate	<b>55%</b>	• Alumni Participation Rate	<b>1%</b>
• Freshmen Twelve-Semester Graduation Rate	<b>54%</b>	• Student Satisfaction With Educational Experience	<b>82%</b>



## AT-A-GLANCE

## SERVICE TO THE COMMONWEALTH

• Degree Completions	<b>1,867</b>	• Degrees Awarded in STEM Fields	<b>422</b>
<i>Bachelor's</i>	<b>1,285</b>	<i>Undergraduate</i>	<b>295</b>
<i>Master's</i>	<b>454</b>	<i>Graduate</i>	<b>127</b>
<i>Doctorates</i>	<b>128</b>	• Certificates Awarded in STEM Fields	<b>4</b>
• Patent Applications	<b>4</b>	• Degrees Awarded in Healthcare Fields	<b>222</b>
• Total R&D Expenditures	<b>\$33M</b>	<i>Undergraduate</i>	<b>190</b>
• Total R&D Expenditures Ranking	<b>242</b>	<i>Graduate</i>	<b>32</b>
• Total R&D Expenditures Ranking among Carnegie Peers, US Publics, Non- Medical	<b>37</b>	• Certificates Awarded in Healthcare Fields	<b>24</b>
• Total R&D Expenditures per Tenure System Faculty	<b>\$118,343</b>	• License Income	<b>\$66,192</b>
		• Percent Alumni who Remain in MA	<b>68%</b>

## FINANCIAL HEALTH

• Total Endowment	<b>\$67.1M</b>	• Total Cash & Investments to Expenses	<b>0.70</b>
• Annual Growth in Endowment	<b>-14.9%</b>	• Debt Service Burden	<b>5.8%</b>
• Endowment per Annualized Student FTE	<b>\$10,272</b>	• Operating Margin (%)	<b>0.7%</b>
• Private Funds Raised Annually	<b>\$6.1M</b>		

# ACADEMIC QUALITY

## AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

**3.27**

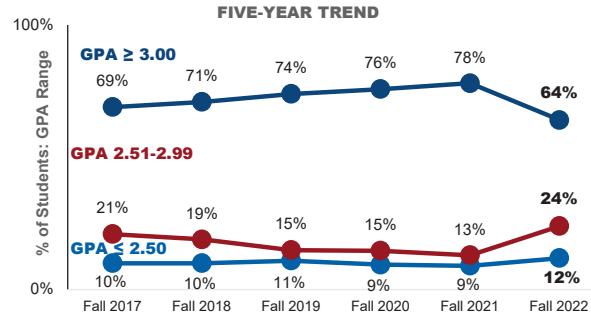
Average HS GPA in Fall 2022

▼ **0.10**

One-year nominal change (vs. Fall 2021)

▲ **0.04**

Five-year nominal change (vs. Fall 2017)



## SAT SCORES OF FRESHMEN

**1248**

SAT Scores of Freshmen 75th Percentile in Fall 2022

▼ **2**

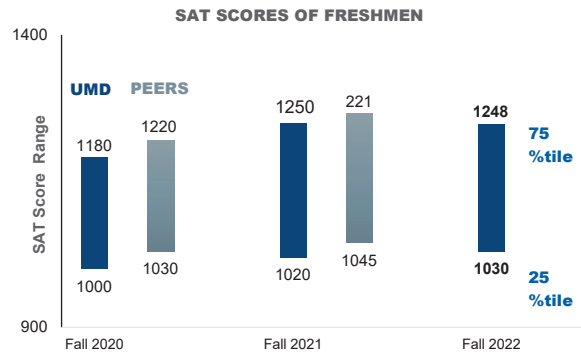
One-year nominal change (vs. Fall 2021)

**1030**

SAT Scores of Freshmen 25th Percentile in Fall 2022

● **10**

One-year nominal change (vs. Fall 2021)



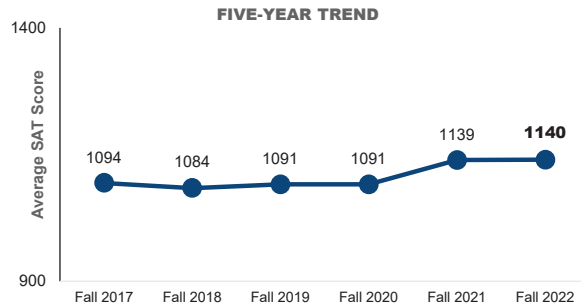
\*Peer data for Fall 2022 not available for reporting purposes.

**1140**

Average SAT Scores of Freshmen in Fall 2022

▲ **1**

One-year nominal change (vs. Fall 2021)



# ACADEMIC QUALITY

## AVERAGE GPA OF ENTERING TRANSFER STUDENTS

**3.23**

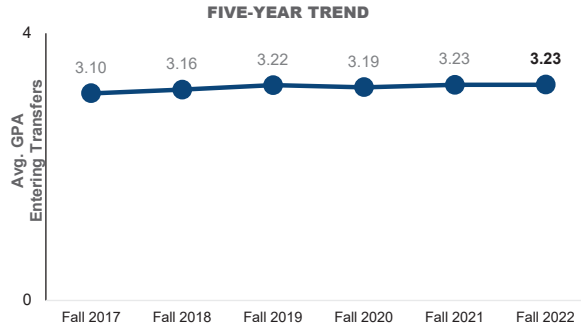
Average transfer GPA in Fall 2022

▲ **0.00**

One-year nominal change (vs. Fall 2021)

▲ **0.13**

Five-year nominal change (vs. Fall 2017)



## STUDENT-FACULTY RATIO

**15:1**

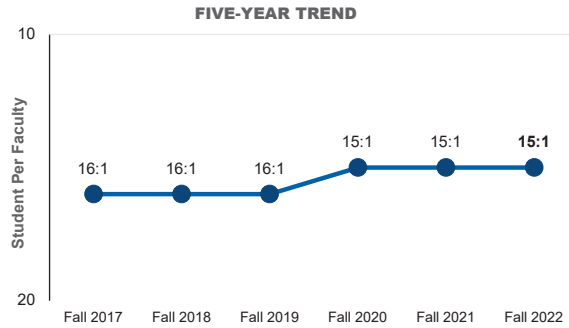
Student-Faculty Ratio in Fall 2022

● **0**

One-year nominal change (vs. Fall 2021)

▲ **1**

Five-year nominal change (vs. Fall 2017)



## TECHNOLOGY-ENHANCED CLASSROOMS

**142**

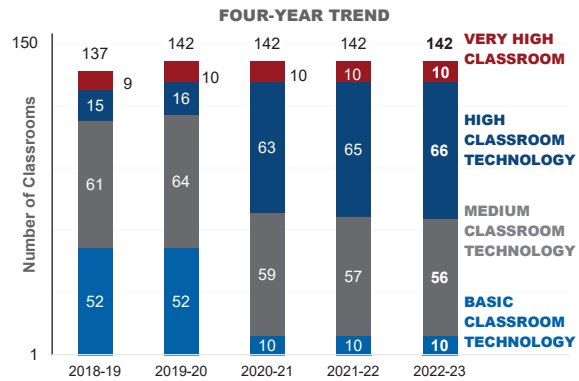
Total Technology Enhanced Classrooms in 2022-23

● **0%**

One-year % change (vs. 2021-22)

▲ **4%**

Four-year % change (vs. 2018-19)



# ACADEMIC QUALITY

## PERCENT TENURED/TENURE-TRACK FACULTY FTE

**60%**

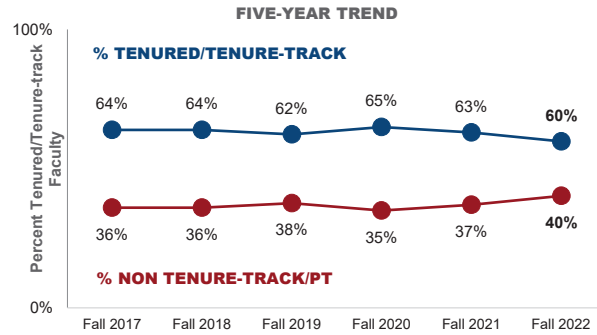
Percent Tenured/  
Tenure-track Faculty FTE  
in Fall 2022

**▼ 3**

One-year  
% point change  
(vs. Fall 2021)

**▼ 4**

Five-year  
% point change  
(vs. Fall 2017)



## FACULTY FTE

**452**

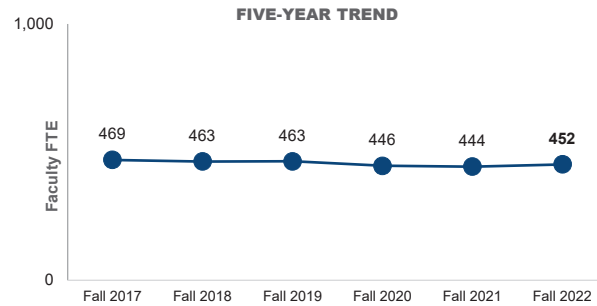
Faculty FTE  
in Fall 2022

**▲ 2%**

One-year  
% change  
(vs. Fall 2021)

**▼ 4%**

Five-year  
% change  
(vs. Fall 2017)



## FACULTY-OF-COLOR

**125**

Faculty Of Color  
in Fall 2022

**▲ 3**

One-year  
nominal change  
(vs. Fall 2021)

**▲ 40**

Five-year  
nominal change  
(vs. Fall 2017)

**23%**

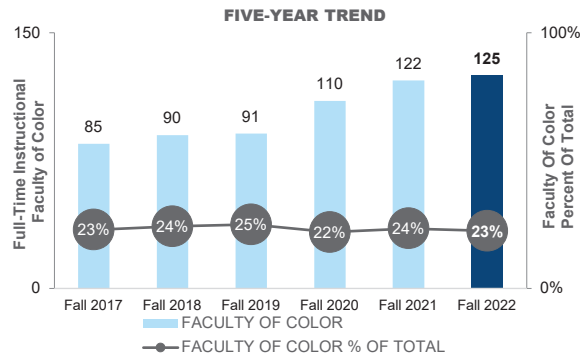
Percent of  
Faculty Of Color  
in Fall 2022

**▼ 1**

One-year  
% point  
(vs. Fall 2021)

**▼ 0**

Five-year  
% point  
(vs. Fall 2017)



Faculty-of-Color based on US Citizens/Permanent Residents reporting Race/Ethnicity according to new IPEDS definitions.

# ACADEMIC QUALITY

## WOMEN FACULTY

**184**

Women Faculty in Fall 2022

▼ **2**

One-year nominal change (vs. Fall 2021)

▼ **6**

Five-year nominal change (vs. Fall 2017)

**48%**

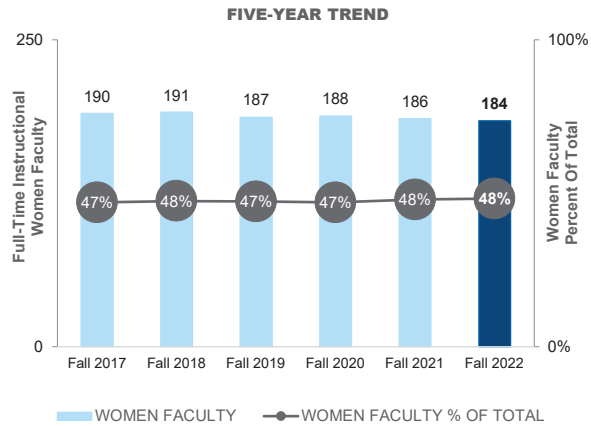
Percent of Women Faculty in Fall 2022

▲ **0**

One-year nominal change (vs. Fall 2021)

▲ **1**

Five-year nominal change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATES FROM MASSACHUSETTS

**4,839**

Undergraduates from Massachusetts in Fall 2022

▼ **7%**

One-year % change (vs. Fall 2021)

▼ **21%**

Five-year % change (vs. Fall 2017)

**88%**

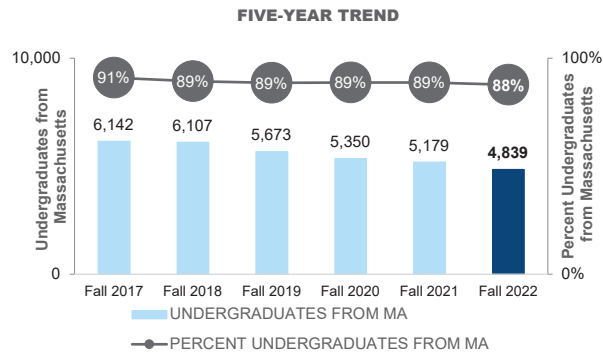
% Undergraduates from Massachusetts in Fall 2022

▼ **1**

One-year % point change (vs. Fall 2021)

▼ **3**

Five-year % point change (vs. Fall 2017)



## UNDERGRADUATE STUDENTS OF COLOR

**2,127**

Undergraduates Students of Color in Fall 2022

▲ **1%**

One-year % change (vs. Fall 2021)

▼ **2%**

Five-year % change (vs. Fall 2017)

**40%**

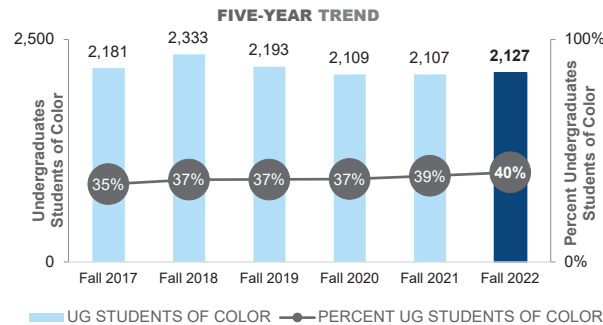
% Undergraduates Students of Color in Fall 2022

▲ **1**

One-year % point change (vs. Fall 2021)

▲ **5**

Five-year % point change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATES WHO ARE INTERNATIONAL

**71**

International UG Enrollment in Fall 2022

▼ **8%**

One-year % change (vs. Fall 2021)

▼ **59%**

Five-year % change (vs. Fall 2017)

**1%**

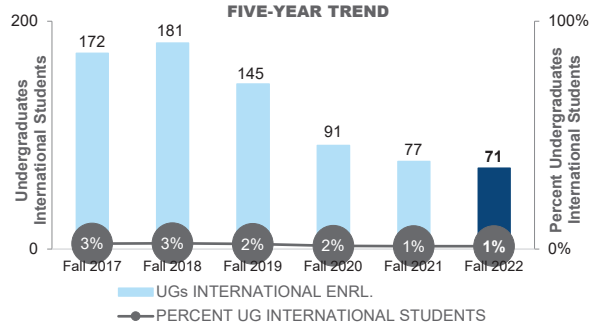
% International UG Enrollment in Fall 2022

• **0**

One-year % point change (vs. Fall 2021)

▼ **2**

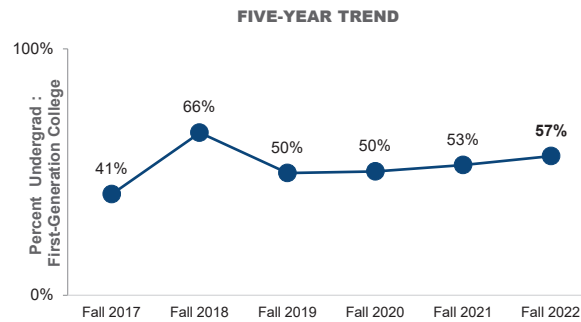
Five-year % point change (vs. Fall 2017)



## PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE

**57%**

Percent first-time Undergraduates who are First-Generation in College in Fall 2022

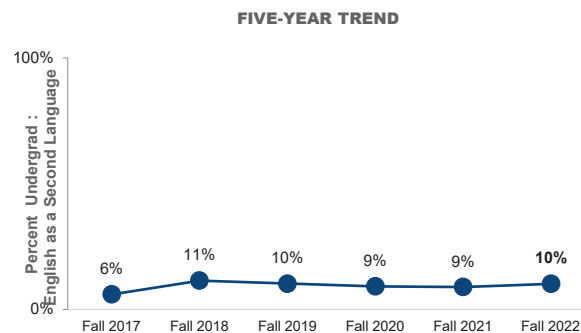


\* The data source from Fall 2018 updated to Common Application responses.

## PERCENT FIRST-TIME, FULL-TIME UNDERGRADUATES WITH ENGLISH AS A SECOND LANGUAGE

**10%**

Percent Undergraduates Speak English as a Second Language in Fall 2022



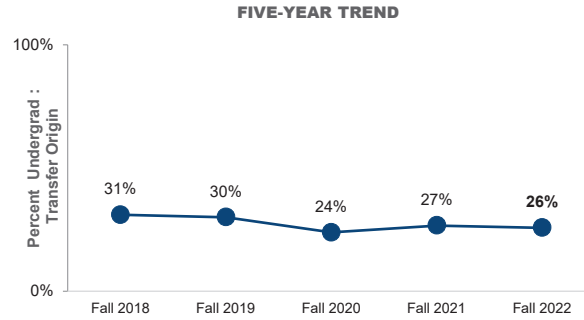
\* The data source from Fall 2018 updated to Common Application responses.

## ACCESS AND AFFORDABILITY

### PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

**26%**

Percent Undergraduates who are of Transfer-Origin in Fall 2022



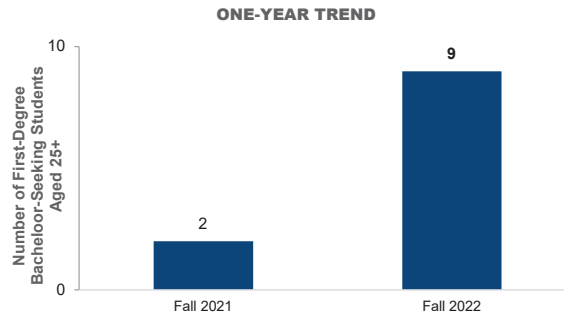
### NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

**9**

Number of First-Degree Bachelor-Seeking Students Aged 25+ in Fall 2022

**7**

One-year nominal change (vs. Fall 2021)

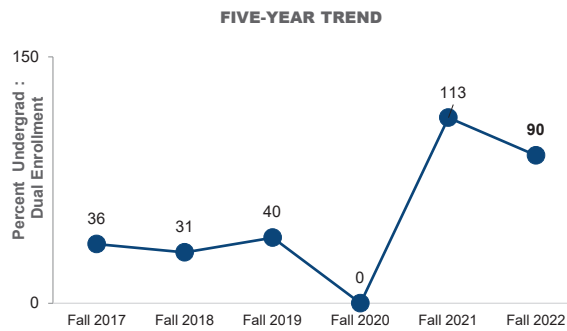


### DUAL ENROLLMENT STUDENTS (HEADCOUNT)

**90**

Dual Enrolled Students in Fall 2022

\*No Dual enrollment in Fall 2020 due to COVID



## ACCESS AND AFFORDABILITY

### PERCENT IN-STATE PELL GRANT RECIPIENTS

**39%**

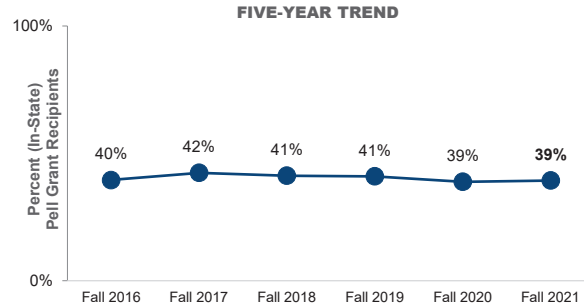
Percent (In-State) Pell Grant Recipients in Fall 2021

**.0**

One-year % point change (vs. Fall 2020)

**▼ 1**

Five-year % point change (vs. Fall 2016)



### PERCENT NEED MET FOR IN-STATE STUDENTS AWARDED NEED-BASED AID

**80%**

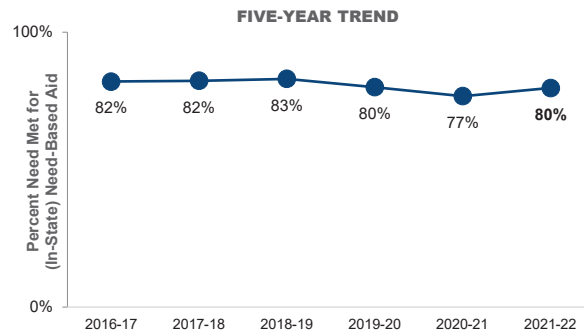
Percent Need Met for (In-State) Need-Based Aid in 2021-22

**▲ 3**

One-year % point change (vs. 2020-21)

**▼ 2**

Five-year % point change (vs. 2016-17)



### UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

**\$31.7k**

Average Debt Load in 2022

**▼ 6%**

One-year % change (vs. 2021)

**▲ 11%**

Five-year % change (vs. 2017)

**77%**

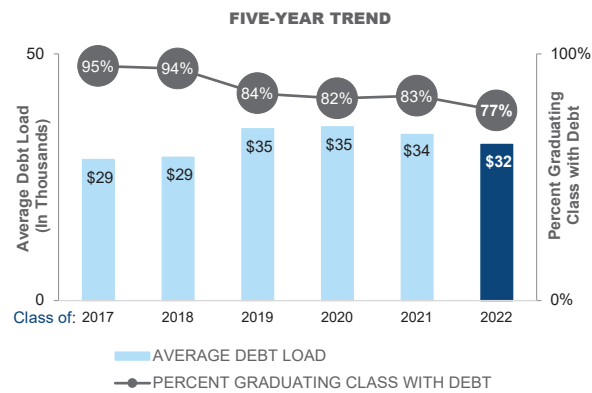
Percent Graduating Class with Debt in 2022

**▼ 6**

One-year % point change (vs. 2021)

**▼ 18**

Five-year % point change (vs. 2017)





## ACCESS AND AFFORDABILITY

### TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

**18**

Students who participated in Study Abroad in Fall 2021-Smr.22

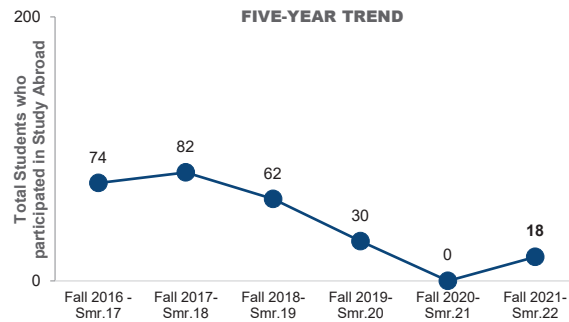
\* Fall 2020-Smr. 21 was during COVID

▲ **18**

One-year nominal change vs. Fall 2020-Smr.21

▼ **56**

Five-year nominal change vs Fall 2016 -Smr.17



### TOTAL ONLINE COURSE REGISTRATIONS

**12,958**

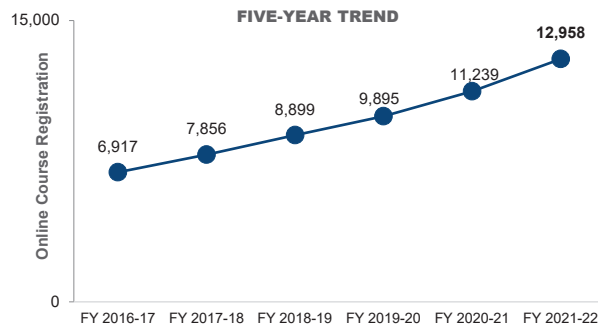
Online Course Registrations in FY 2021-22

▲ **15%**

One-year % change (vs. FY 2020-21)

▲ **87%**

Five-year % change (vs. FY 2016-17)

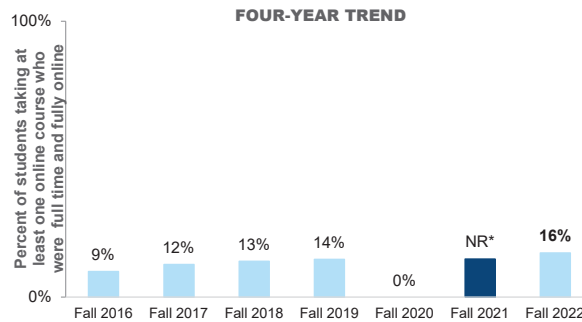


### PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

**16%**

Students taking at least one online course who were full time and fully online in Fall 2022

\* Data not reported, as all students shifted to online learning during the pandemic



# STUDENT SUCCESS AND SATISFACTION

## FRESHMEN ONE-YEAR RETENTION RATE

**67%**

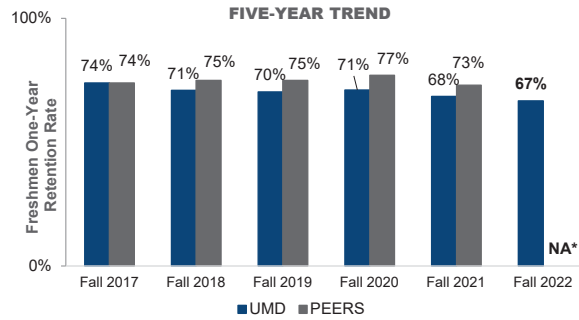
Freshmen One-Year Retention Rate in Fall 2022

**▼ 1**

One-year % point change (vs. Fall 2021)

**▼ 7**

Five-year point (vs. Fall 2017)



\* Peer data for Fall 2022 not available for reporting purposes.

## FRESHMEN FOUR-YEAR GRADUATION RATES

**38%**

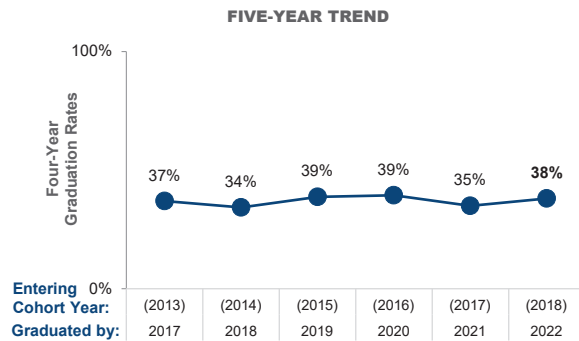
Freshmen Four-Year Graduation Rates in 2022

**▲ 3**

One-year % point change (vs. 2021)

**▲ 1**

Five-year % point change (vs. 2017)



## FRESHMEN SIX-YEAR GRADUATION RATE

**55%**

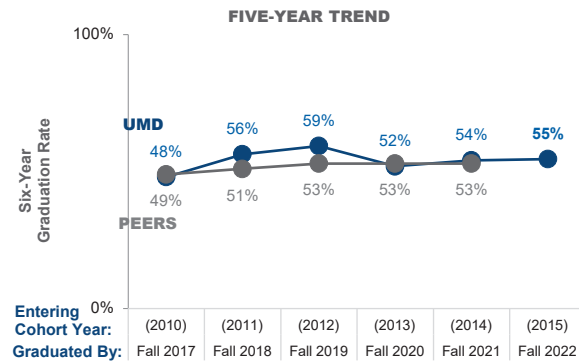
UMD Freshmen Six-Year Graduation Rates in Fall 2022

**. 0**

One-year % point change (vs. Fall 2021)

**▲ 7**

Five-year % point change (vs. Fall 2017)



\*Peer data for Fall 2022 not currently available.

## STUDENT SUCCESS AND SATISFACTION

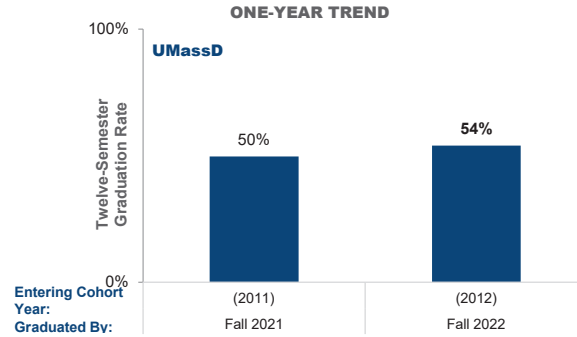
### FRESHMEN TWELVE-SEMESTER GRADUATION RATE

**54%**

UMD Freshmen  
Twelve-semester  
Graduation Rates  
in Fall 2022

▲ **4**

One-year  
% point change  
(vs. Fall 2011)



### TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

**84%**

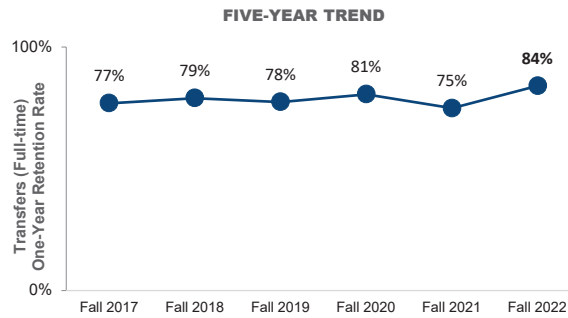
Transfers (Full-time)  
One-Year  
Retention Rate  
in Fall 2022

▲ **9**

One-year  
% point change  
(vs. Fall 2021)

▲ **7**

Five-year  
% point change  
(vs. Fall 2017)



## STUDENT SUCCESS AND SATISFACTION

### TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

**75%**

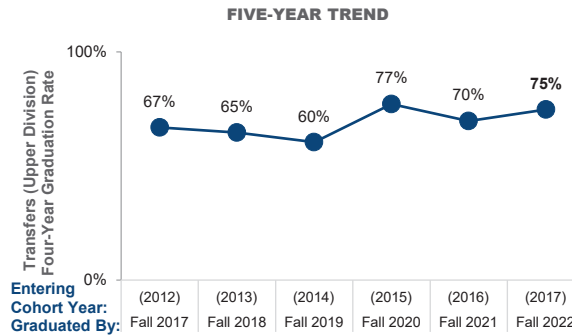
Transfers (Upper  
Division) Four-Year  
Graduation Rates  
in Fall 2022

▲ **5**

One-year  
% point change  
(vs. Fall 2021)

▲ **8**

Five-year  
% point change  
(vs. Fall 2017)



# STUDENT SUCCESS AND SATISFACTION

## STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2016-17

**44%**

Bachelor's Degree  
Within 4 Yrs. from  
any institution

**38%**

Bachelor's Degree  
Within 4 Yrs. from  
UMass Dartmouth

**62%**

Bachelor's Degree  
Within 5 Yrs. From  
any institution

**51%**

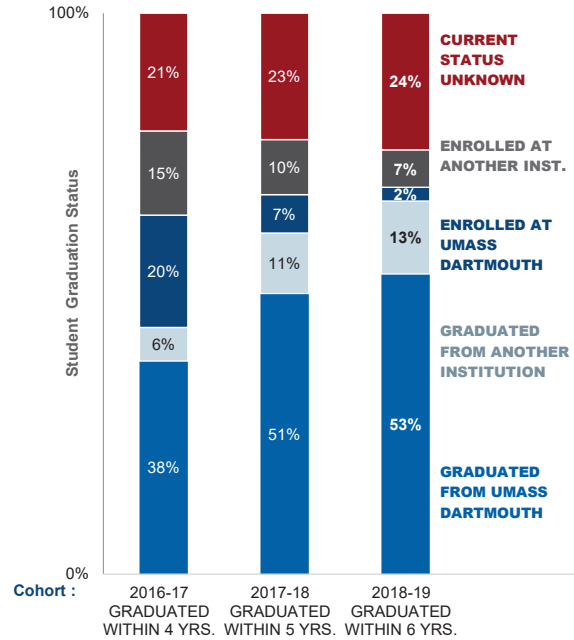
Bachelor's Degree  
Within 5 Yrs. From  
UMass Dartmouth

**67%**

Bachelor's Degree  
Within 6 Yrs. From  
any institution

**53%**

Bachelor's Degree  
Within 6 Yrs. From  
UMass Dartmouth



Source : Student Achievement Measure (SAM)

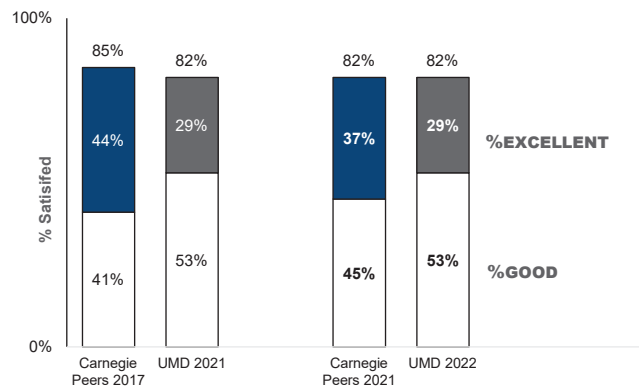
## STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

**82%**

Student Satisfaction  
as Good or Excellent  
in Carnegie Peers 2021

**▼ 3**

Three-year  
% point change  
(vs. Carnegie Peers 2017)



# STUDENT SUCCESS AND SATISFACTION

## ALUMNI PARTICIPATION RATE

**1%**

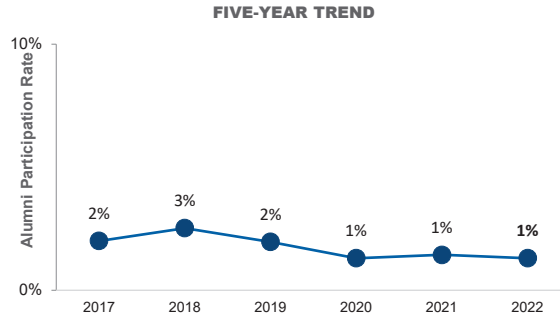
Alumni Participation Rate in 2022

**.0**

One-year % point change (vs. 2021)

**▼ 1**

Five-year % point change (vs. 2017)



# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS

**1,867**

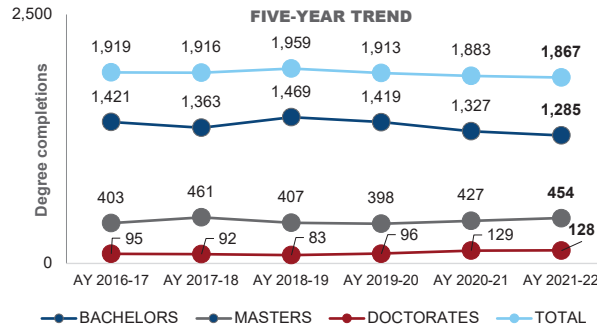
Total degree completions AY 2021-22

**▼ 1%**

One-year % change in total degree completions (vs. AY 2020-21)

**▼ 3%**

Five-year % change in total degree completions (vs. AY 2016-17)



## NUMBER OF PATENT APPLICATIONS

**4**

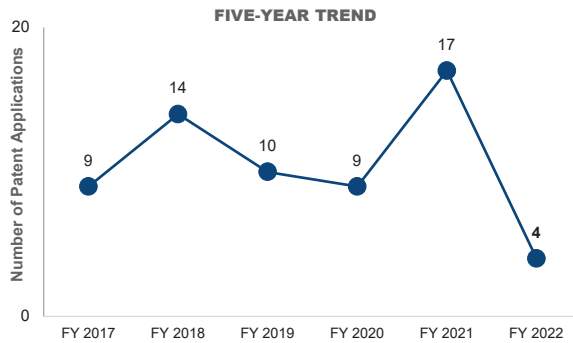
Patent Applications in FY 2022

**▼ 13**

One-year nominal change (vs. FY 2021)

**▼ 5**

Five-year nominal change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## TOTAL R&D EXPENDITURES

**\$33.1**

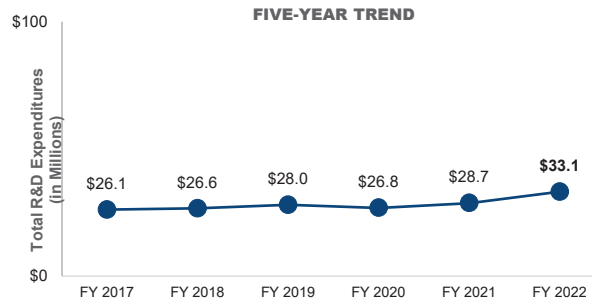
Million  
in FY 2022

**▲ 15%**

One-year  
% change  
(vs. FY 2021)

**▲ 27%**

Five-year  
% change  
(vs. FY 2017)



## TOTAL R&D EXPENDITURES RANKINGS

**242**

Total R&D Expenditures  
Overall Rankings  
in FY 2022

**• 0**

One-year  
nominal change  
(vs. FY 2021)

**▲ 2**

Five-year  
nominal change  
(vs. FY 2017)

**37**

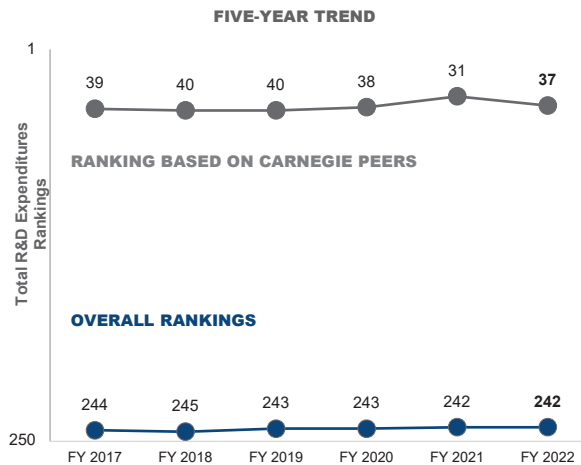
Rankings based on  
Carnegie Peers  
in FY 2022

**▼ 6**

One-year  
nominal change  
(vs. FY 2021)

**▲ 2**

Five-year  
nominal change  
(vs. FY 2017)



NOTE: FY15 were Master's Carnegie.

Overall Ranking Source: National Science Foundation Ranking by Total R&D Expenditures.  
Ranking based on Carnegie Peers is further standardized by US Publics and Non-Medical Schools.

## TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

**\$118k**

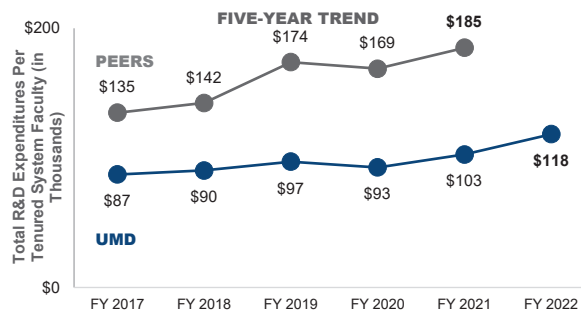
Total R&D Expenditure  
Per Tenured  
System Faculty  
in FY 2022

**▲ 15%**

One-year  
% change  
(vs. FY 2021)

**▲ 36%**

Five-year  
% change  
(vs. FY 2017)



\* Peer data for FY 2022 is currently not available.

# SERVICE TO THE COMMONWEALTH

## DEGREES AWARDED IN STEM FIELDS

**295**

UG degrees awarded in STEM fields in 2021-22

▼ **5%**

One-year % change (vs. 2020-21)

▼ **13%**

Five-year % change (vs. 2016-17)

**23%**

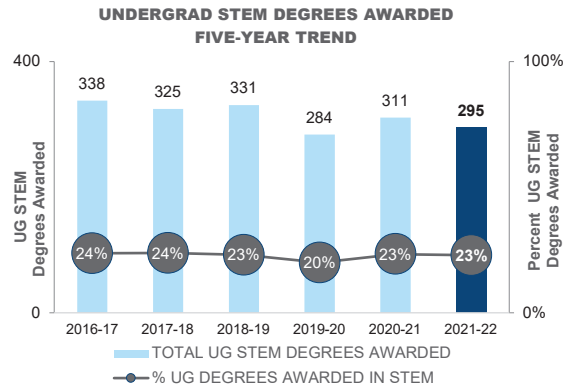
Percent of total UG degrees awarded in STEM fields in 2021-22

• **0**

One-year % point change (vs. 2020-21)

▼ **1**

Five-year % point change (vs. 2016-17)



**127**

Grad degrees awarded in STEM fields in 2021-22

▲ **9%**

One-year % change (vs. 2020-21)

▲ **2%**

Five-year % change (vs. 2016-17)

**22%**

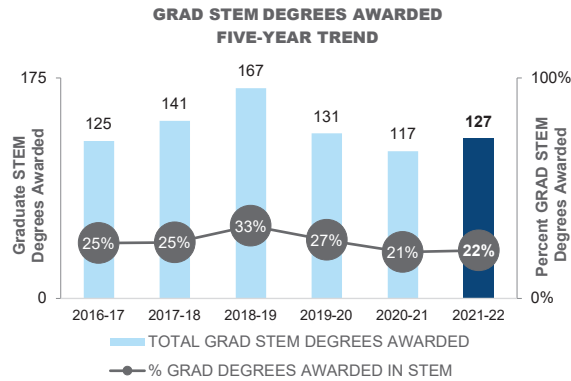
Percent of total Grad degrees awarded in STEM fields in 2021-22

▲ **1**

One-year % point change (vs. 2020-21)

▼ **3**

Five-year % point change (vs. 2016-17)



**422**

Total degrees awarded in STEM fields in 2021-22

▼ **1%**

One-year % change (vs. 2020-21)

▼ **9%**

Five-year % change (vs. 2016-17)

**23%**

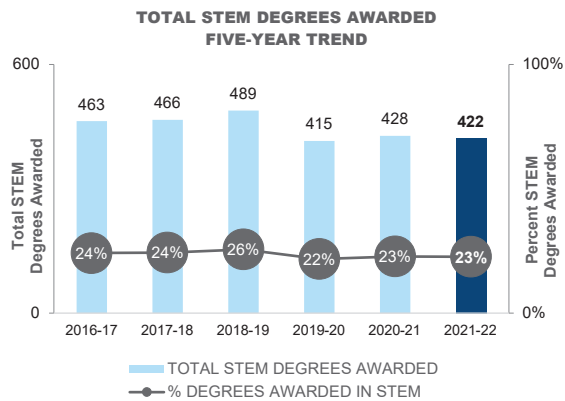
Percent of Total degrees awarded in STEM fields in 2021-22

• **0**

One-year % point change (vs. 2020-21)

▼ **2**

Five-year % point change (vs. 2016-17)



## SERVICE TO THE COMMONWEALTH

### CERTIFICATES AWARDED IN STEM FIELDS

**4**  
Total Certificates awarded in STEM fields in 2021-22

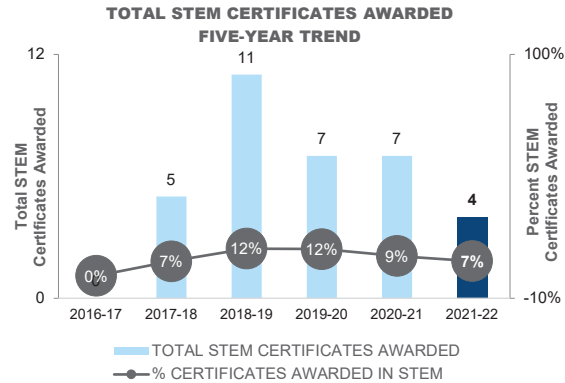
**7%**  
Percent of Total Certificates awarded in STEM fields in 2021-22

**▼ 3**  
One-year nominal change (vs. 2020-21)

**▼ 2**  
One-year % point change (vs. 2020-21)

**▲ 4**  
Five-year nominal change (vs. 2016-17)

**▲ 7**  
Five-year % point change (vs. 2016-17)

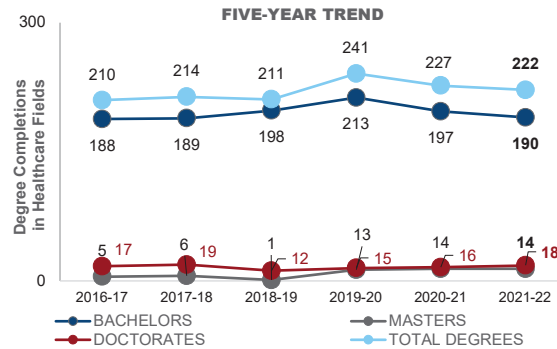


### DEGREES AWARDED IN HEALTHCARE FIELDS

**222**  
Total degrees awarded in HealthCare fields in 2021-22

**▼ 2%**  
One-year % point change (vs. 2020-21)

**▲ 6%**  
Five-year % point change (vs. 2016-17)

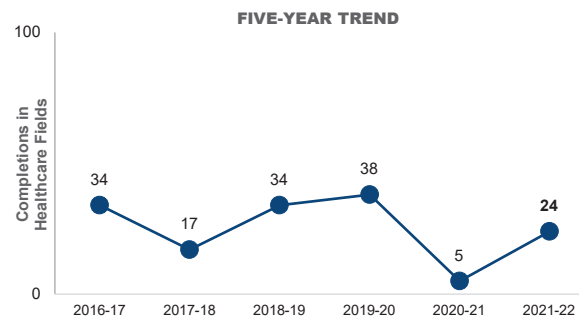


### CERTIFICATES AWARDED IN HEALTHCARE FIELDS

**24**  
Total Certificates awarded in HealthCare fields in 2021-22

**▲ 380%**  
One-year % point change (vs. 2020-21)

**▼ 29%**  
Five-year % point change (vs. 2016-17)





## SERVICE TO THE COMMONWEALTH

### LICENSE INCOME

**\$66.2k**

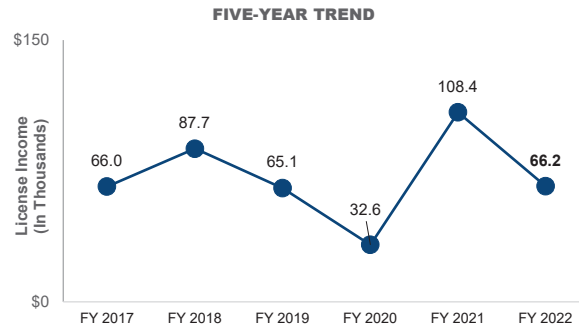
License Income  
in FY 2022

**▼ 39%**

One-year  
% change  
(vs. FY 2021)

**▲ 0%**

Five-year  
% change  
(vs. FY 2017)



### PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**68%**

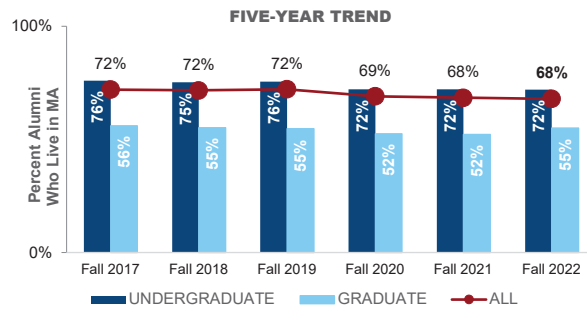
Of all UMass Alumni  
live in the Commonwealth  
in Fall 2022

**. 0**

One-year  
% point change  
(vs. Fall 2021)

**▼ 4**

Five-year  
% point change  
(vs. Fall 2017)



## FINANCIAL HEALTH

### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**\$67.1M**

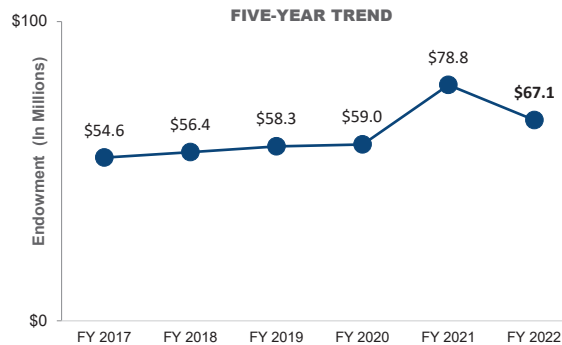
Endowment Assets  
in FY 2022

**▼ 15%**

One-year  
% change  
(vs. FY 2021)

**▲ 23%**

Five-year  
% change  
(vs. FY 2017)



## FINANCIAL HEALTH

### ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**-15%**

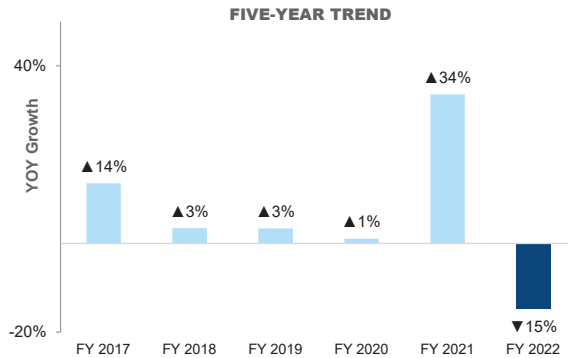
Annual Growth  
in FY 2022

**▼ 49**

One-year  
% point change  
(vs. FY 2021)

**▼ 29**

Five-year  
% point change  
(vs. FY 2017)



### ENDOWMENT PER ANNUALIZED STUDENT FTE

**\$10.3k**

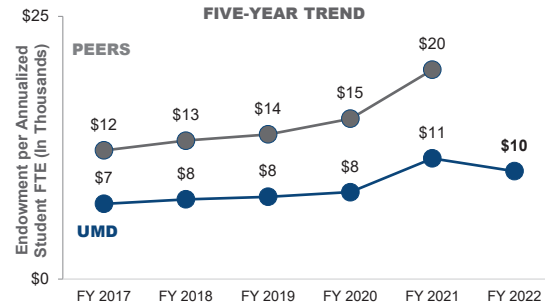
Endowment per Annualized  
Student FTE  
in FY 2022

**▼ 11%**

One-year  
% change  
(vs. FY 2021)

**▲ 43%**

Five-year  
% change  
(vs. FY 2017)



\* Peer data for FY 2022 not available for reporting purposes.

### PRIVATE FUNDS RAISED ANNUALLY

**\$6.1M**

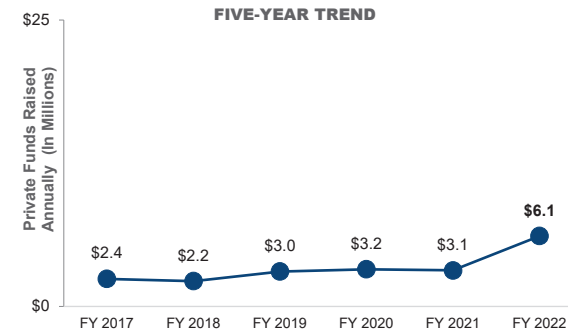
Private Funds  
Raised Annually  
in FY 2022

**▲ 95%**

One-year  
% change  
(vs. FY 2021)

**▲ 156%**

Five-year  
% change  
(vs. FY 2017)

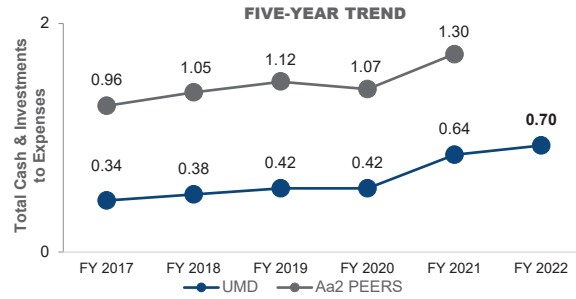


# FINANCIAL HEALTH

## TOTAL CASH & INVESTMENTS TO EXPENSES

**0.70**

Total Cash & Investments to Expenses in FY 2022



\*Peer data for Fall 2022 not available for reporting purposes.

## DEBT SERVICE BURDEN

**5.8%**

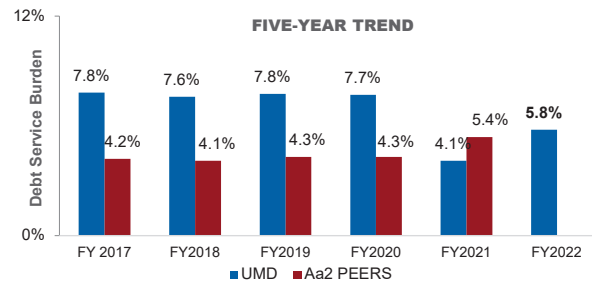
Debt Service Burden in FY2022

**▲ 1.7**

One-year % Point change (vs. FY 2021)

**▼ 2.0**

Five-year % Point change (vs. FY 2017)



\*Peer data for Fall 2022 not available for reporting purposes.

## OPERATING MARGIN (%)

**0.7%**

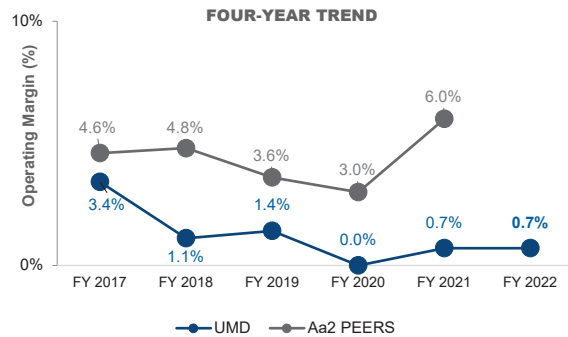
Operating Margin (%) in FY 2022

**• 0.0**

One-year % Point change (vs. FY 2021)

**▼ 2.7**

Four-year % Point change (vs. FY 2018)



\*Peer data for Fall 2022 not available for reporting purposes.

## DEFINITIONS AND SOURCES

### ACADEMIC QUALITY INDICATORS

#### **Average High School GPA of First-Time**

**Freshmen.** Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

**SAT Scores of Freshmen.** SAT scores of Freshmen. All reported SAT scores are based on the sum of the SAT MSS and the ERWS for entering freshmen. A redesigned SAT was used for Fall 2017 admissions; therefore, scores for Fall 2016 and before cannot be compared to scores for Fall 2017 and later. The average is the arithmetic mean of these SAT scores. Peer data are from IPEDS.

#### **Average GPA of Entering Transfer Students.**

Average Cumulative GPA of entering transfer students according to DHE admissions policy.

**Student-Faculty Ratio.** The ratio of FTE students to FTE instructional faculty. Faculty and students in stand-alone graduate or professional programs such as medicine, law, veterinary, dentistry, social work, business, and public health in which faculty teach virtually only graduate-level students are excluded. Teaching assistants are not counted as faculty. Data and definition are from CDS.

#### **Technology-Enhanced Classrooms.**

Classification of the campus's total classroom capacity in terms of the level of technology-support.

#### **Percent Tenured/Tenure-Track Faculty (FTE).**

Percent based on the ratio of Tenured/Tenure-Track Faculty FTE to Total Faculty FTE.

**Faculty FTE.** Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

**Faculty-of-Color.** The proportion of full-time instructional faculty who are U.S. citizens or permanent residents and report their race/ethnicity to be one or more of the following: Hispanic/Latino, American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Other Pacific Islander, or Two or More Races. Race/ethnicity definition is based on IPEDS.

**Women Faculty.** The proportion of full-time instructional faculty who identify themselves as female.

### ACCESS AND AFFORDABILITY INDICATORS

#### **Percentage Undergraduates from**

**Massachusetts.** Percentage of total undergraduate students who are "In State" or residents of Massachusetts based on tuition residency. For state-supported (day) students, tuition classification is used, whereas for CPE students, the actual residency at time of matriculation is used.

#### **Percent Undergraduates who are Students**

**of Color.** Undergraduates who self-identify as either African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean

students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

#### **Percent Undergraduates who are**

**International.** Percentage of all undergraduates who are non-resident aliens, studying at the university on an eligible visa types, and enrolled in credit courses. Does not include permanent residents, refugees, or US citizens.

## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

**Percent Undergraduates who are First Generation in College.** Percent of first-time, full-time undergraduates where neither parent has earned a bachelor's degree. The source of this data field is the Common Application.

**Percent first-time, full-time Undergraduates with English as a Second Language.** Percent of first-time, full-time undergraduates who speak another language at home. The source of this data field will be from the Common Application.

**Percent Undergraduates Who Are of Transfer Origin.** Percent of all currently enrolled bachelor's degree-seeking undergraduate students who were admitted as transfer students at the institution.

**Number of First-degree Bachelor-seeking Students Aged 25+.** Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of Sept 1 of the Fall semester.

**Dual Enrollment Students (Headcount).** Headcount of current non-Degree dual-enrolled students on campus.

**Percent (In-State) Pell Grant Recipients.** Federal Pell Grants are awarded to low-income undergraduates based on their expected family contribution. Data as reported by campuses to the UMass President's Office of in-state, full-time students with Pell Grants in the Financial Aid Template.

**Percent of Need Met for In-State Students Awarded Need-Based Aid.** The average percentage of demonstrated financial need that is met by the institution's award of need-based financial aid to in-state undergraduate students. Data as reported to the UMass President's Office in the Financial Aid Template.

**Average Student Debt Load of Graduating Class (UG).** Average debt load is based on the total debt borrowed by an Institution's graduating class (bachelor's, first-time only) divided by the number of students of that cohort that carried any

amount of debt. It does not include those students with no debt load. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Percent Graduating Class with Debt (UG).** The total number of students in the graduating class (bachelor's, first-time only) that carried a debt load at the institution divided by the total number of graduating (bachelor's, first-time only) students in that institution. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Number of Students who Participated in a Study Abroad Program.** Number of students who participated in a credit-bearing study abroad program outside of the U.S. over the most recent academic year, either at UMass or elsewhere.

**Online Course Registrations.** Course registrations for the academic year for online credit courses. Academic year includes Summer, Fall, intersession, and Spring. These do not include hybrid courses, but fully online courses only offered via UMassOnline.

**Percentage of degree-seeking students taking at least one online course who were full time and fully online.** Metric calculated using the formula below. Data from fall student headcount of degree-seeking students, split by full-time and part-time status, who fall into the following categories: Enrolled exclusively in online courses; Enrolled in at least one, but not all, online courses; and Not enrolled in any online courses. (As per IPEDS definition).  

$$\frac{\text{(Full time Enrolled exclusively in online courses)}}{\text{(Full time Enrolled in at least one, but not all, online courses + Full time Enrolled exclusively in online courses + part-time Enrolled in at least one, but not all, online courses + part-time Enrolled exclusively in online courses)}}$$

## DEFINITIONS AND SOURCES

### STUDENT SUCCESS AND SATISFACTION INDICATORS

**Freshmen One-Year Retention Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall and were still enrolled at the institution in the following Fall. Peer data as reported to IPEDS.

**Freshmen Four-Year Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution by the end of their fourth year. Associates degree and CPE students are excluded.

**Freshmen Six-Year Graduation Rate.** Percent of first-time, full-time freshmen who entered UMass in a given Fall term and had graduated from the institution within six years. Peer data are based on median as reported to IPEDS. Associates degree and CPE students are excluded.

**Freshmen Twelve-semester Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution within twelve active semesters (Fall and Spring semesters) within 10 years of their initial attendance. Associates degree and CPE students are excluded.

**Transfer (Full-Time) One-Year Retention Rate.** Percent of full-time transfer students at any level who entered UMass in a given Fall and were still enrolled at, or graduated from the institution as of the following Fall.

**Transfer (Upper-Division) Four-Year Graduation Rate.** Percent of full-time upper division transfers (60+ credits) who entered UMass in a given Fall term and had graduated from the institution within four years.

**Student Achievement Measure.** SAM tracks student movement across postsecondary institutions to provide a more complete picture of undergraduate student progress and completion within the higher education system. SAM is an alternative to the federal graduation rate, which is limited to tracking the completion of first-time, full-time students at one institution.

**Student Satisfaction with Educational Experience.** Percent of seniors who responded “good” or “excellent” to the question, “How would you evaluate your entire educational experience at this institution?” on the most recently conducted National Survey of Student Engagement (NSSE).

**Alumni Participation Rate.** The percentage of undergraduate alumni of record who donated money to the college or university. Alumni of record are former full- or part-time students who received an undergraduate degree and for whom the college or university has a current address. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. Graduates who earned only a graduate degree are excluded.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The number of degrees (not including certificates) awarded in the previous academic year, by degree level. As reported to IPEDS.

**Patent Applications.** Number of U.S. Patent applications filed per year. Data reported by campuses to UMass President’s Office, Office of OTCV.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local

governments, industry, private and institutional) as reported to NSF.

**Total R&D Expenditures Ranking.** Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. UMass Dartmouth’s rank in the annual NSF ranking of Total R&D expenditures among public institutions of higher education with a Carnegie classification of “Highest Research” and with no medical school. Data source NCES WebCaspar/NSF HERD data tables.

## DEFINITIONS AND SOURCES

### SERVICE TO THE COMMONWEALTH INDICATORS

#### **Total Research Expenditures per Tenure**

**System Faculty.** R&D expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF, divided by total tenure system faculty as reported to IPEDS. Peer data reported by NSF and IPEDS.

#### **Degrees and Certificates Awarded in**

**STEM Fields.** Number of undergraduate and graduate degrees awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Certificates data also included separately.

#### **Degrees and Certificates Awarded in**

**Healthcare Fields.** Number of undergraduate and graduate degrees awarded in Health Care fields. Healthcare designation as defined by Campus IR, and based on CIP classification. All of CIP 51, and specific 6-digit CIPs unique to each campus. Certificates data also included separately.

**License Income.** Amount of annual income from license agreements. Data Source: Data reported by campuses to UMass President's Office, Office of OTCV.

#### **Percent Alumni who Live in**

**Massachusetts.** Percentage of total alumni who currently reside in Massachusetts based on alumni records.

### FINANCIAL HEALTH INDICATORS

#### **Endowment Assets and Annual Growth in**

**Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual BOT report, and the percent change from previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

#### **Endowment per Annualized Student FTE.**

Total UMass Dartmouth endowments per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data are for the comparative peers from financial statements (current year) and IPEDS (prior years).

**Private Funds Raised Annually.** Private funds raised includes restricted and unrestricted revenues from individuals, foundations, corporations and other organizations. Includes private grant revenues but

not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions.

#### **Total Cash & Investments to Expenses.**

Indicates the university's financial flexibility and resilience, and its ability to generate investment income. (Cash & Investments – debt service reserve funds) / Total expenses

**Debt Service to Operations.** Debt service as a percentage of total operating expenditures (operating expenditures plus interest expense). Peer data are from published financial statements.

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses)

## DEFINITIONS AND SOURCES

### PEER INSTITUTIONS FOR UMASS DARTMOUTH

Cleveland State University (OH)*	University of Idaho
Idaho State University	University of New Orleans (LA)
Louisiana Tech University	University of North Dakota*
Marshall University (WV)	University of South Dakota
SUNY at Binghamton (NY)*	University of Southern Maine
The University of Montana*	Wichita State University (KS)*
The University of Texas at Dallas*	<i>*Aspirant Peers</i>
University of Arkansas at Little Rock	

#### Moody's Aa2 Peers

Alamo Community College District, TX	University of Arkansas, AR
Arizona State University, AZ	University of California, CA
Auburn University, AL	University of Florida, FL
Board of Regents of The University System of Georgia, GA	University of Georgia, GA
California State University, CA	University of Hawaii, HI
City University of New York, NY	University of Houston System, TX
Clemson University, SC	University of Kansas, KS
Cuyahoga Community College District, OH	University of Kentucky, KY
Florida State University, FL	University of Massachusetts, MA
Houston Community College System, TX	University of North Texas System, TX
Iowa State University of Science & Technology, IA	University of Oregon, OR
Michigan State University, MI	University of South Carolina, SC
Mississippi Institutions of Higher Learning, MS	University of Wyoming, WY
Nevada System of Higher Education, NV	
State University of New York, NY	
State University System of Florida, FL	
Texas State University System, TX	
University of Alabama at Birmingham, AL	
University of Alabama, AL	
University of Arizona, AZ	

*Please Note: Unless otherwise specified, all data are from the UMass Dartmouth Office of Institutional Research.*





# LOWELL

## HEADLINES

### ACADEMIC QUALITY

UMass Lowell continues to distinguish itself for quality of student learning and excellence of academic programs.

The Fall 2022 cohort's average high school GPA was 3.69, and the average SAT score was 1265. UML's transfer students posted an average entering GPA of 3.23, slightly down from last year. Graduate enrollment has shown increased growth almost 5,000 students in Fall 2022. The Honors College at UMass Lowell continues to grow over 1,900 students in Fall 2022.

Externally sponsored research per faculty member is important to UMass Lowell both as a measure of faculty scholarship and as a measure of assisting innovation in the regional economy. In FY 2022, the average amount of R&D expenditures per tenure-stream faculty member was \$242,144. UMass Lowell ranked 169 in R&D Expenditures in FY 2021, on par with the prior year. When compared to public Carnegie class peers without a

medical school, UMass Lowell increased by eight spots from last year, ranked 8<sup>th</sup>.

UMass Lowell has placed a strategic emphasis on research partnerships that feature co-location with industry and government, with examples including the Raytheon-UMass Lowell Research Institute (RURI), the Printed Electronics Research Collaborative (PERC), and the Harnessing Emerging Research Opportunities to Empower Soldiers (HEROES) partnership with the U.S. Army Natick Soldier Research Development and Engineering Center (NSRDEC).

UMass Lowell's focus on strengthening research and building new academic programs has been assisted by the increased size of the faculty. The percent of tenured/tenure-track faculty FTE remains steady at 58%. The proportion of faculty of color in Fall 2022 was 30%, continuing to rise from prior years.

### ACCESS AND AFFORDABILITY

UMass Lowell strives to provide affordable, accessible, and experience-based education. By providing financial need assistance and increasing merit awards for new freshmen and grants for transfer students, UMass Lowell aims to maintain affordability and increase accessibility. On average 88% of in-state undergraduate students need was met in FY22. One in three (30%) UMass Lowell undergraduate students receive Federal Pell Grants, which are based on student need.

UMass Lowell has increased access to college for those populations that do not traditionally consider attending a postsecondary institution. Forty-five percent of UMass Lowell incoming first-year undergraduate students self-identified as the first in their family to attend college in Fall 2022. Forty-two percent of undergraduates identify themselves as students of color.

### STUDENT SUCCESS AND SATISFACTION

UMass Lowell is committed to providing a world-class student experience that promotes healthy, responsible, and civically engaged students who are prepared to lead in the 21<sup>st</sup> century.

Student success indicators increased this year for our students. For those who entered directly out of high school, UMass Lowell's one-year retention rate was 84%. The four-year graduation rate dropped slightly to 44%, however the six-year graduation rate jumped two percentage points, to 71%, representing the University's highest six-year

graduation rate. For students who entered as transfers, 80% returned for their second year at UMass Lowell while the comparable graduation rate (four-year) for transfer students was 82%, representing the University's highest graduation rate for transfers.

## HEADLINES

### SERVICE TO THE COMMONWEALTH

UMass Lowell's *2020 Strategic Plan* calls for a comprehensive approach to economic and community engagement in its host city and throughout the Merrimack Valley, the Commonwealth, and beyond.

According to the UMass Donahue Institute, UMass Lowell's annual economic impact in FY 2016 was \$921.9 million. In recognition of this work, the Carnegie Foundation designated UMass Lowell as a "Community Engaged University," and since 2009 UMass Lowell has appeared each year on the President's Higher Education Community Service Honor Roll. More than 50 UMass Lowell courses each academic year have a service learning component, giving students the opportunity to contribute to the work of community organizations.

UMass Lowell's contribution to workforce development in the Commonwealth is also

evidenced in the number of students it graduates in STEM and Healthcare programs. Over one-third of all degrees awarded at UMass Lowell in AY 2021-22 were in STEM fields. Over ten percent of all degrees awarded were in health-care fields. UMass Lowell's Division of Graduate and Professional Studies (GPS) provides high-quality professional studies in innovative formats including campus-based classes, online education, and customized corporate training. Numerous GPS programs serve various economic sectors, partnering with companies to deliver customized education and training programs for their employees, often on-site. The result is continued significant growth in the number of online course enrollments at UMass Lowell. AY 2021-22 enrollments remained on par the previous year with the largest number of online course registrations to date, at 40,730, seeing 41% change in online course registrations compared to AY2016-17.

### FINANCIAL HEALTH

New efforts to grow revenues and control expenditures are implemented each year. Growth in revenues will further contribute to UMass Lowell's primary reserve and improving financial health. The endowment remained strong this year, over \$130 million. This affected the endowment per annualized FTE metric, which came in just under \$11T. Private funds raised annually almost doubled from last year, reaching \$41.6M.

UMass Lowell's alumni giving rate this year remained on par with last year at 4.7%. About a third of UMass Lowell faculty and staff give to the University, about two times the national average. In early 2023, the events surrounding the inauguration of Chancellor Chen raised \$2.6M for the Student Success fund.

*n.b. All peer comparisons throughout the 2023 "Annual Indicators" document were generated using UMass Lowell's peers as of 2012. These are listed at the end of the "Definitions" section.*

## AT-A-GLANCE

## ACADEMIC QUALITY

• Average HS GPA of Freshmen	<b>3.69</b>	• Technology-Enhanced Classrooms	<b>192</b>
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	<b>58%</b>
<i>Arithmetic Mean</i>	<b>1265</b>	• Faculty FTE	<b>765</b>
<i>25<sup>th</sup> – 75<sup>th</sup> Percentile</i>	<b>1180-1330</b>	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	<b>3.23</b>	<i>Percent Faculty-of-Color</i>	<b>30%</b>
• Student-Faculty Ratio	<b>17:1</b>	<i>Percent Women Faculty</i>	<b>46%</b>

## ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	<b>87%</b>	• Percent In-State Pell Grant Recipients	<b>30%</b>
• Percent Undergraduates who are Students of Color	<b>42%</b>	• Percent of Need Met for In-State Students Awarded Need-Based Aid	<b>88%</b>
• Percent Undergraduates who are International	<b>3%</b>	• Average Debt of Students (UG Graduating Class)	<b>\$31,528</b>
• Percent First-Time Undergraduates who are First Generation in College	<b>45%</b>	• Percent Graduating Class with Debt (UG)	<b>74%</b>
• Percent First-Time Undergraduates with English as a Second Language	<b>NA*</b>	• Total Students who Participated in a Study Abroad Program	<b>237</b>
• Percent Undergraduates Who Are Of Transfer Origin	<b>27%</b>	• Online Course Registrations	<b>40,730</b>
• Number of First-degree Bachelor-seeking Students Aged 25+	<b>1,714</b>	Percentage of degree-seeking students taking at least one online course who were full time and fully online	<b>17%</b>
• Dual Enrolled Students (Headcount)	<b>145</b>		

## STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	<b>84%</b>	• Transfer (Full-time) One-Year Retention Rate	<b>80%</b>
• Freshmen Four-Year Graduation Rate	<b>44%</b>	• Transfer (Upper Division) Four-Year Graduation Rate	<b>82%</b>
• Freshmen Six-Year Graduation Rate	<b>71%</b>	• Student Satisfaction With Educational Experience	<b>0%</b>
• Freshmen Twelve-Semester Graduation Rate	<b>65%</b>	• Alumni Participation Rate	<b>5%</b>

## AT-A-GLANCE

### SERVICE TO THE COMMONWEALTH

• Degree Completions	<b>4,370</b>	• Degrees Awarded in STEM Fields	<b>1,718</b>
<i>Bachelor's</i>	<b>2,838</b>	<i>Undergraduate</i>	<b>1,178</b>
<i>Master's</i>	<b>1,361</b>	<i>Graduate</i>	<b>540</b>
<i>Doctorates</i>	<b>171</b>	• Certificates Awarded in STEM Fields	<b>114</b>
• Patent Applications	<b>50</b>	• Degrees Awarded in Healthcare Fields	<b>458</b>
• Total R&D Expenditures	<b>\$111M</b>	<i>Undergraduate</i>	<b>297</b>
• Total R&D Expenditures Ranking	<b>169</b>	<i>Graduate</i>	<b>161</b>
• Total R&D Expenditures Ranking among Carnegie Peers, US Publics, Non-Medical	<b>7</b>	• Certificates Awarded in Healthcare Fields	<b>47</b>
• Total R&D Expenditures per Tenure System Faculty	<b>\$242,144</b>	• License Income	<b>\$177,265</b>
		• Percent Alumni who Remain in MA	<b>58%</b>

### FINANCIAL HEALTH

• Total Endowment	<b>\$130.5M</b>	• Total Cash & Investments to Expenses	<b>0.63</b>
• Annual Growth in Endowment	<b>-6.5%</b>	• Debt Service Burden	<b>6.6%</b>
• Endowment per Annualized Student FTE	<b>\$10,972</b>	• Operating Margin (%)	<b>0.9%</b>
• Private Funds Raised Annually	<b>\$41.6M</b>		

# ACADEMIC QUALITY

## AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

**3.69**

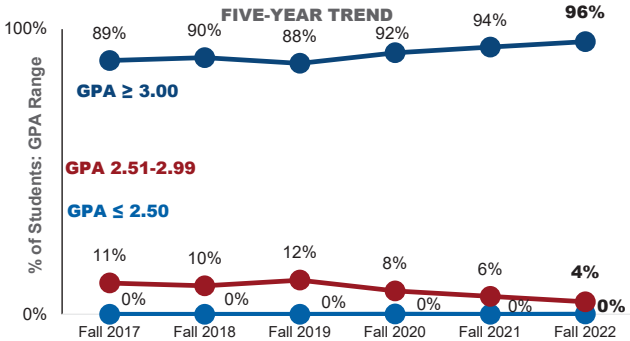
Average HS GPA in Fall 2022

▲ **0.02**

One-year nominal change (vs. Fall 2021)

▲ **0.14**

Five-year nominal change (vs. Fall 2017)



## SAT SCORES OF FRESHMEN

**1330**

SAT Scores of Freshmen 75th Percentile in Fall 2022

▲ **10**

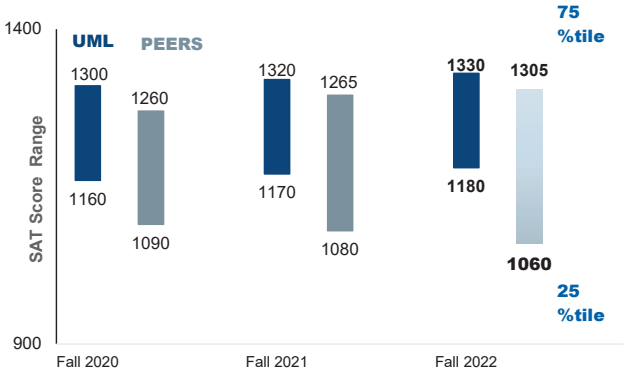
One-year nominal change (vs. Fall 2021)

**1180**

SAT Scores of Freshmen 25th Percentile in Fall 2022

▲ **10**

One-year nominal change (vs. Fall 2021)

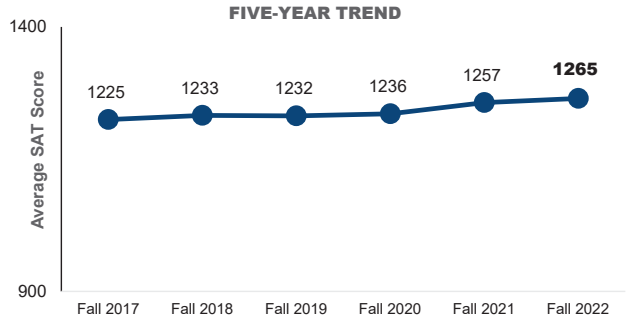


**1265**

Average SAT Scores of Freshmen in Fall 2022

▲ **8**

One-year nominal change (vs. Fall 2021)



# ACADEMIC QUALITY

## AVERAGE GPA OF ENTERING TRANSFER STUDENTS

**3.23**

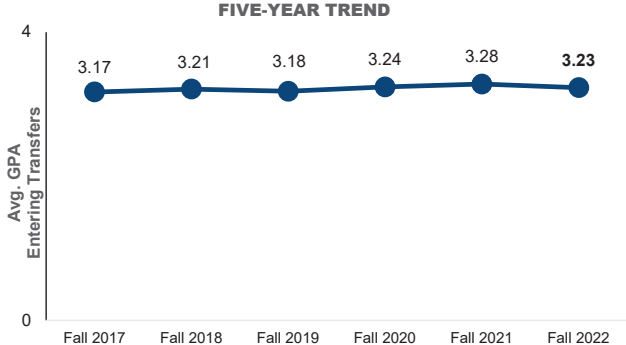
Average transfer GPA in Fall 2022

▼ **0.05**

One-year nominal change (vs. Fall 2021)

▲ **0.06**

Five-year nominal change (vs. Fall 2017)



## STUDENT-FACULTY RATIO

**17:1**

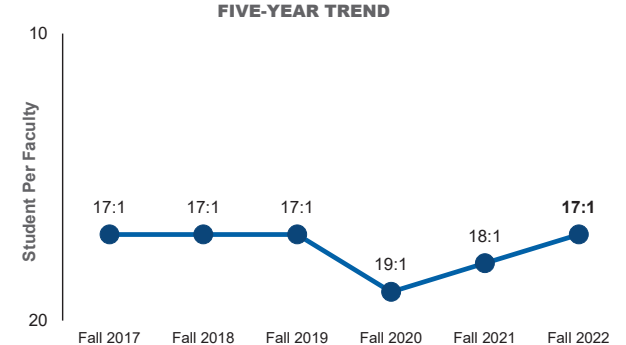
Student-Faculty Ratio in Fall 2022

▲ **1**

One-year nominal change (vs. Fall 2021)

● **0**

Five-year nominal change (vs. Fall 2017)



## TECHNOLOGY-ENHANCED CLASSROOMS

**192**

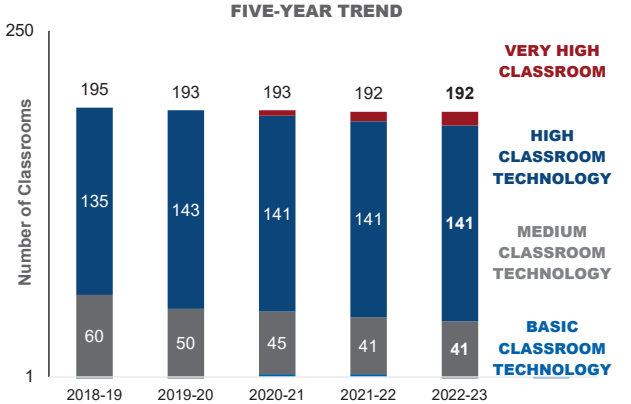
Total Technology Enhanced Classrooms in 2022-23

● **0%**

One-year % change (vs. 2021-22)

▼ **2%**

Four-year % change (vs. 2018-19)



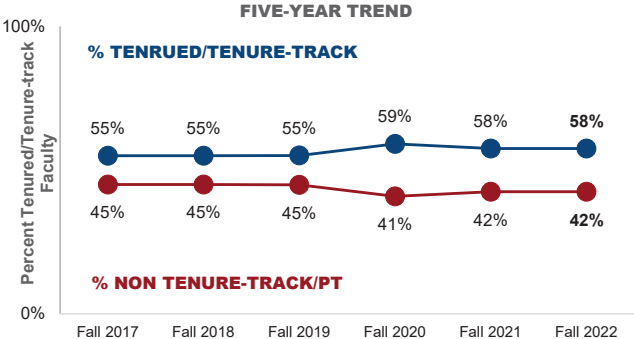
# ACADEMIC QUALITY

## PERCENT TENURED/TENURE-TRACK FACULTY FTE

**58%**  
Percent Tenured/  
Tenure-track Faculty  
in Fall 2022

**0**  
One-year  
% point change  
(vs. Fall 2021)

**3**  
Five-year  
% point change  
(vs. Fall 2017)

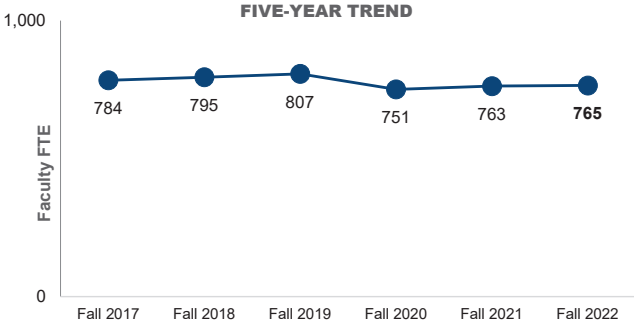


## FACULTY FTE

**765**  
Faculty FTE  
in Fall 2022

**0%**  
One-year  
% change  
(vs. Fall 2021)

**2%**  
Five-year  
% change  
(vs. Fall 2017)



## FACULTY-OF-COLOR

**178**  
Faculty Of Color  
in Fall 2022

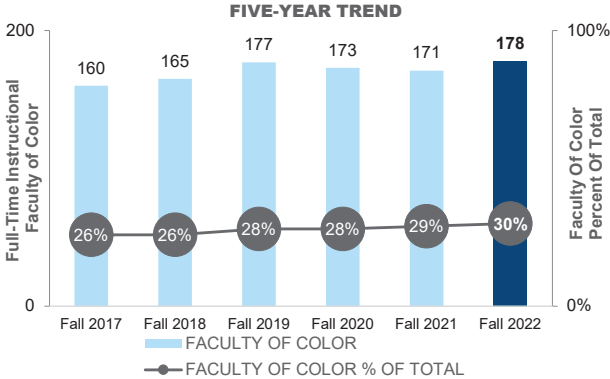
**7**  
One-year  
nominal change  
(vs. Fall 2021)

**18**  
Five-year  
nominal change  
(vs. Fall 2017)

**30%**  
Percent of  
Faculty Of Color  
in Fall 2022

**1**  
One-year  
% point  
(vs. Fall 2021)

**4**  
Five-year  
% point  
(vs. Fall 2017)



Faculty-of-Color based on US Citizens/Permanent Residents reporting Race/Ethnicity according to new IPEDS definitions.



# ACADEMIC QUALITY

## WOMEN FACULTY

**290**

Women Faculty in Fall 2022

**▲ 6**

One-year nominal change (vs. Fall 2021)

**▲ 19**

Five-year nominal change (vs. Fall 2017)

**46%**

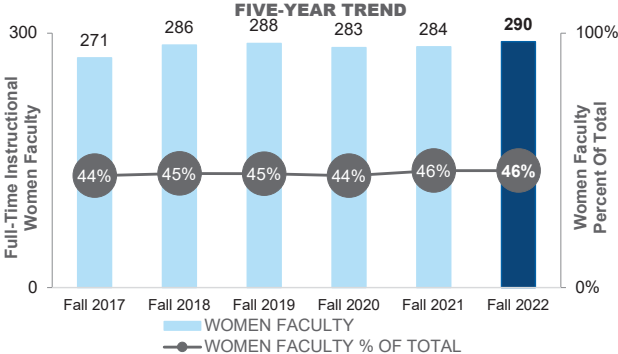
Percent of Women Faculty in Fall 2022

**● 0**

One-year nominal change (vs. Fall 2021)

**▲ 2**

Five-year nominal change (vs. Fall 2017)



## UNDERGRADUATES FROM MASSACHUSETTS

**10,755**

Undergraduates from Massachusetts in Fall 2022

**▼ 3%**

One-year % change (vs. Fall 2021)

**▼ 8%**

Five-year % change (vs. Fall 2017)

**87%**

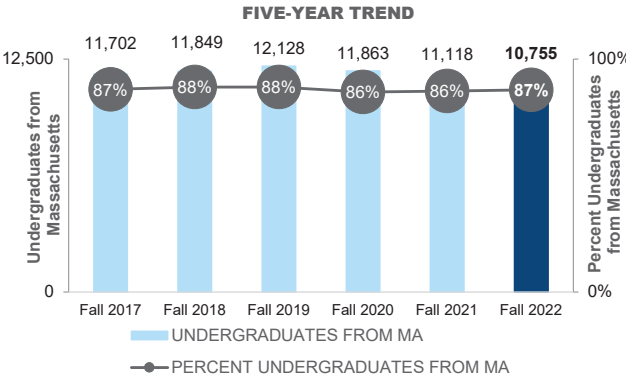
% Undergraduates from Massachusetts in Fall 2022

**● 0**

One-year % point change (vs. Fall 2021)

**● 0**

Five-year % point change (vs. Fall 2017)



## UNDERGRADUATE STUDENTS OF COLOR

**4,910**

Undergraduates Students of Color in Fall 2022

**▲ 1%**

One-year % change (vs. Fall 2021)

**▲ 16%**

Five-year % change (vs. Fall 2017)

**42%**

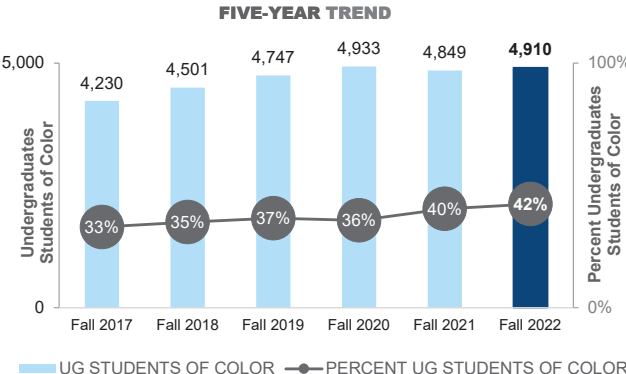
% Undergraduates Students of Color in Fall 2022

**▲ 2**

One-year % point change (vs. Fall 2021)

**▲ 9**

Five-year % point change (vs. Fall 2017)



# ACCESS AND AFFORDABILITY

## UNDERGRADUATES WHO ARE INTERNATIONAL

**337**  
International UG Enrollment in Fall 2022

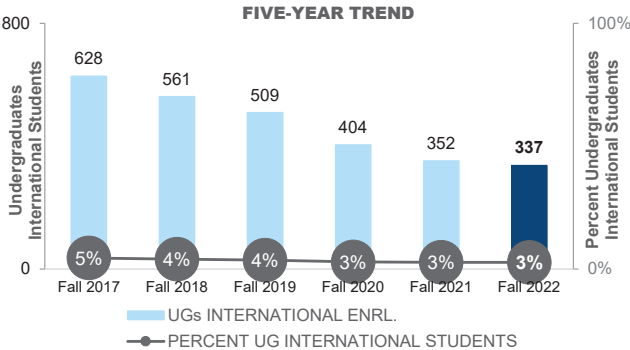
▼ **4%**  
One-year % change (vs. Fall 2021)

▼ **46%**  
Five-year % change (vs. Fall 2017)

**3%**  
% International UG Enrollment in Fall 2022

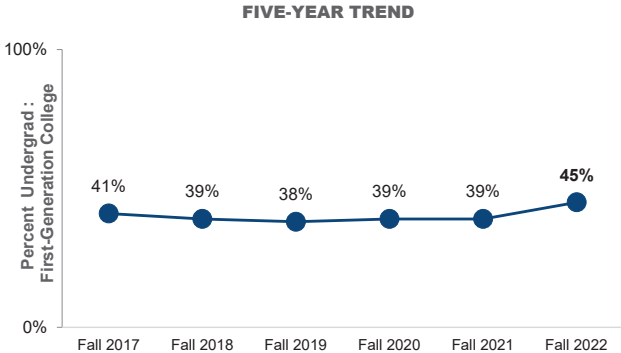
• **0**  
One-year % point change (vs. Fall 2021)

▼ **2**  
Five-year % point change (vs. Fall 2017)



## PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE

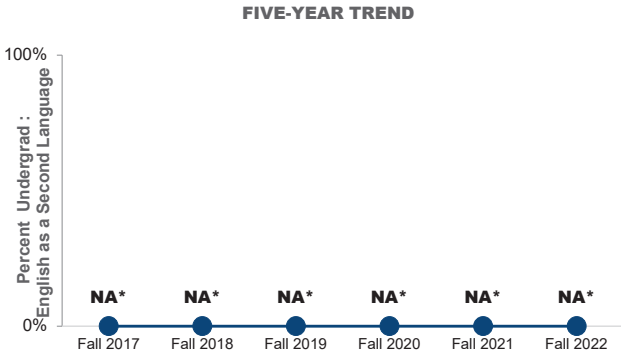
**45%**  
Percent first-time Undergraduates who are First-Generation College in Fall 2022



\*The data source from Fall 2018 updated to Common Application responses.

## PERCENT FIRST-TIME, FULL-TIME UNDERGRADUATES WITH ENGLISH AS A SECOND LANGUAGE

**NA\***  
Percent Undergraduates Speak English as a Second Language in Fall 2022



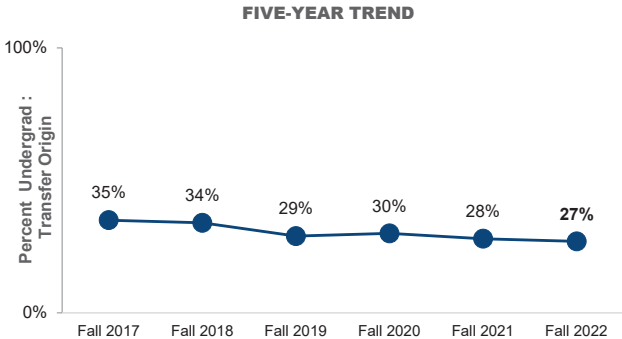
\*The data source from Fall 2018 updated to Common Application responses.

# ACCESS AND AFFORDABILITY

## PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

**27%**

Percent Undergraduates who are of Transfer-Origin in Fall 2022



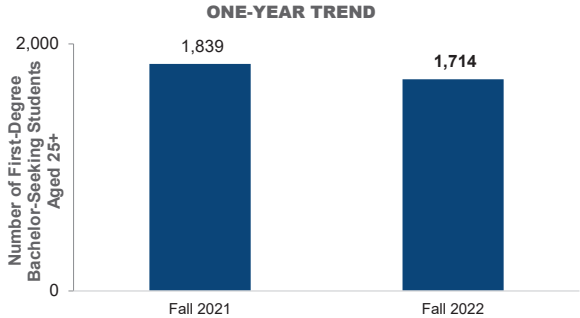
## NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

**1,714**

Number of First-Degree Bachelor-Seeking Students Aged 25+ in Fall 2022

**▼ 125**

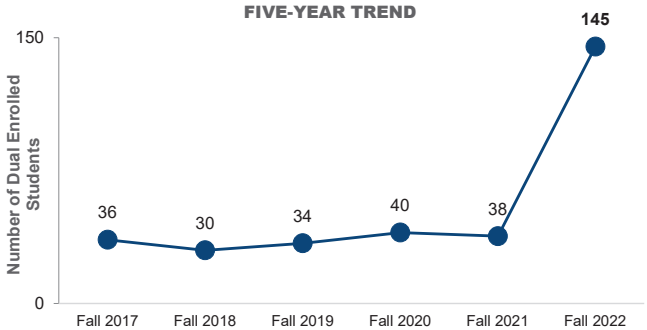
One-year nominal change (vs. Fall 2021)



## DUAL ENROLLMENT STUDENTS (HEADCOUNT)

**145**

Dual Enrolled Students in Fall 2022



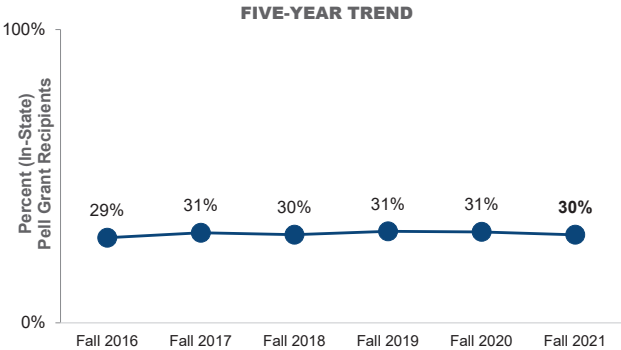
# ACCESS AND AFFORDABILITY

## PERCENT IN-STATE PELL GRANT RECIPIENTS

**30%**  
Percent (In-State) Pell Grant Recipients in Fall 2021

▼ **1**  
One-year % point change (vs. Fall 2020)

▲ **1**  
Five-year % point change (vs. Fall 2016)

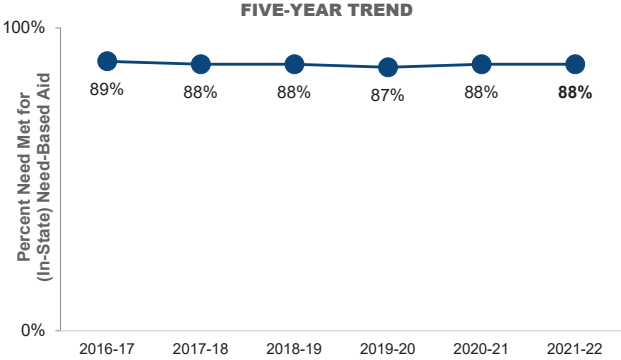


## PERCENT NEED MET FOR IN-STATE STUDENTS AWARDED NEED-BASED AID

**88%**  
Percent Need Met for (In-State) Need-Based Aid in 2021-22

◦ **0**  
One-year % point change (vs. 2020-21)

▼ **1**  
Five-year % point change (vs. 2016-17)



## UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

**\$31.5k**  
Average Debt Load in 2021

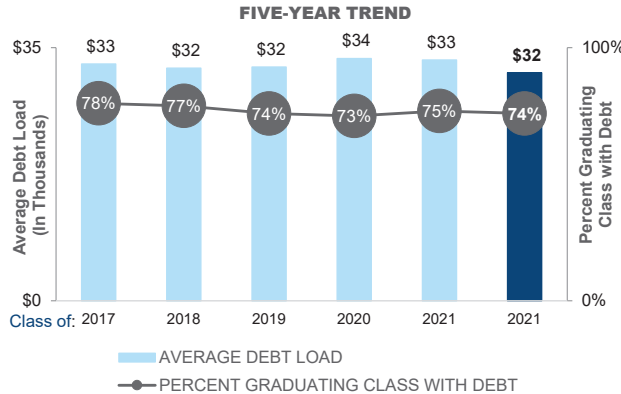
▼ **5%**  
One-year % change (vs. 2021)

▼ **4%**  
Five-year % change (vs. 2017)

**74%**  
Percent Graduating Class with Debt in 2021

▼ **1**  
One-year % point change (vs. 2021)

▼ **4**  
Five-year % point change (vs. 2017)



# ACCESS AND AFFORDABILITY

## TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

**237**

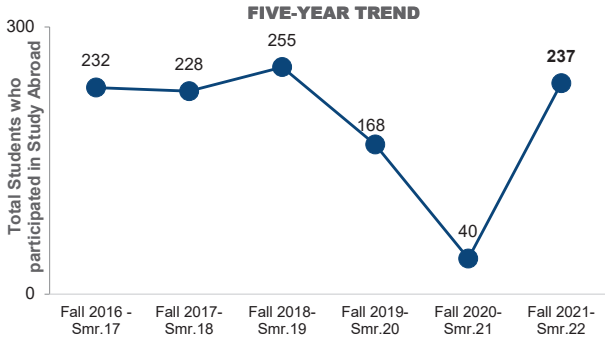
Students who participated in Study Abroad in Fall 2021-Smr.22

▲ **197**

One-year nominal change vs. Fall 2020-Smr.21

▲ **5**

Five-year nominal change vs Fall 2016 -Smr.17



## TOTAL ONLINE COURSE REGISTRATIONS

**40,730**

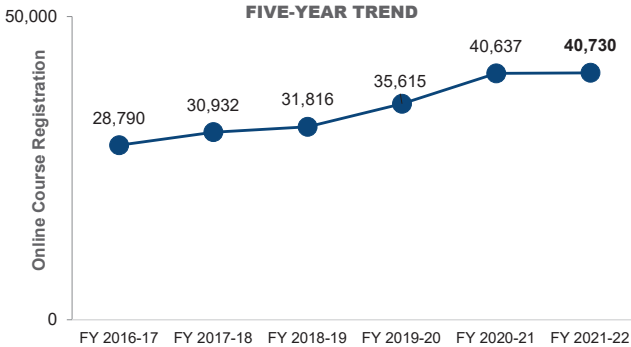
Online Course Registrations in FY 2021-22

▲ **0%**

One-year % change (vs. FY 2020-21)

▲ **41%**

Five-year % change (vs. FY 2016-17)

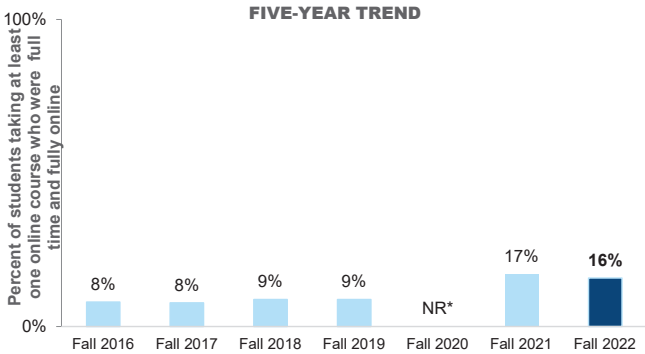


## PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

**16%**

Students taking at least one online course who were full time and fully online in Fall 2022

\*Data not reported, as all students shifted to online learning during the pandemic



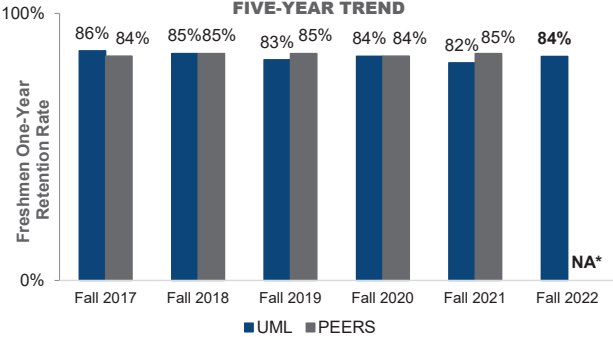
# STUDENT SUCCESS AND SATISFACTION

## FRESHMEN ONE-YEAR RETENTION RATE

**84%**  
Freshmen One-Year Retention Rate in Fall 2022

▲ **2**  
One-year % point change (vs. Fall 2021)

▼ **2**  
Five-year point (vs. Fall 2017)



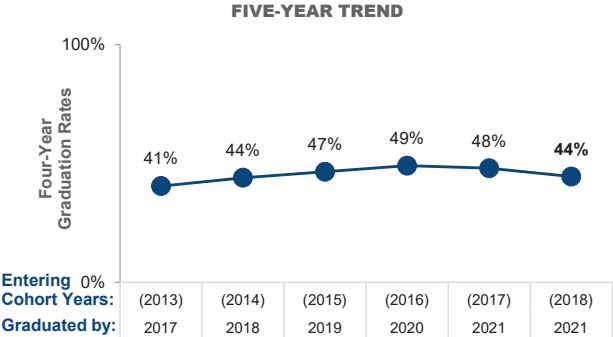
\* Peer data for Fall 2022 not available for reporting purposes.

## FRESHMEN FOUR-YEAR GRADUATION RATES

**44%**  
Freshmen Four-Year Graduation Rates in 2021

▼ **4**  
One-year % point change (vs. 2021)

▲ **3**  
Five-year % point change (vs. 2017)

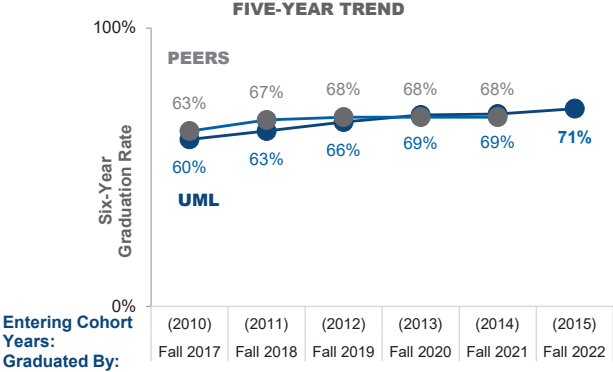


## FRESHMEN SIX-YEAR GRADUATION RATE

**71%**  
UML Freshmen Six-Year Graduation Rates in Fall 2022

▲ **2**  
One-year % point change (vs. Fall 2021)

▲ **11**  
Five-year % point change (vs. Fall 2017)



Peer data for Fall 2022 not currently available.

# STUDENT SUCCESS AND SATISFACTION

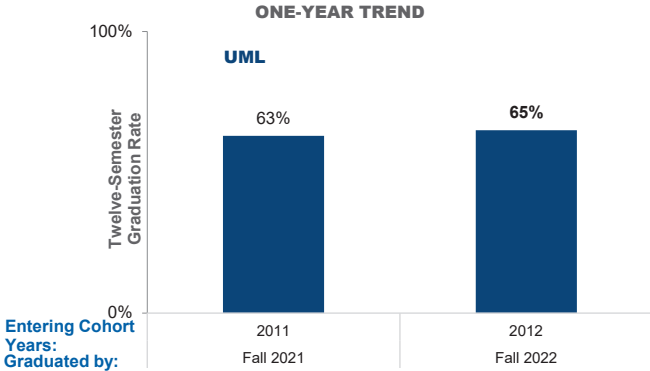
## FRESHMEN TWELVE-SEMESTER GRADUATION RATE

**65%**

UML Freshmen  
Twelve-semester  
Graduation Rates  
in Fall 2022

**▲ 2**

One-year  
% point change  
(vs. Fall 2021)



## TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

**80%**

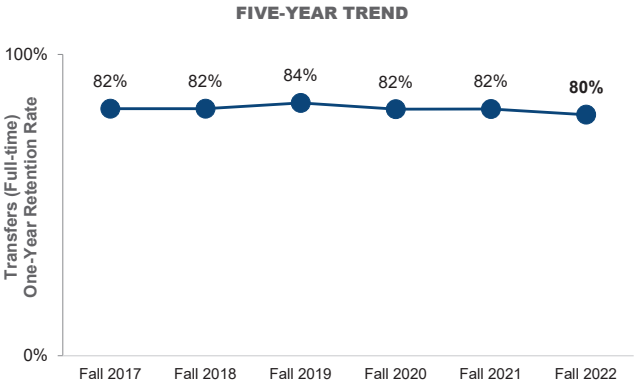
Transfers (Full-time)  
One-Year  
Retention Rate  
in Fall 2022

**▼ 2**

One-year  
% point change  
(vs. Fall 2021)

**▼ 2**

Five-year  
% point change  
(vs. Fall 2017)



## TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

**82%**

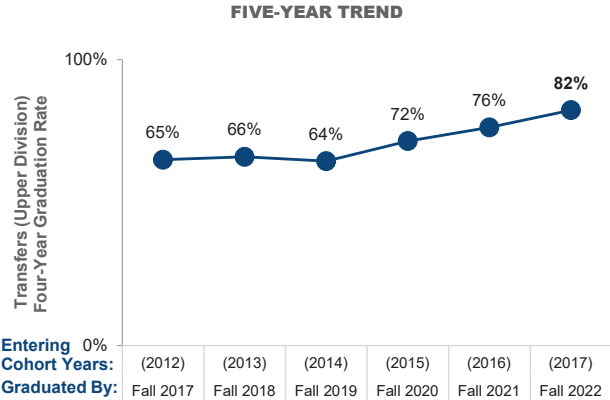
Transfers (Upper  
Division) Four-Year  
Graduation Rates  
in Fall 2022

**▲ 6**

One-year  
% point change  
(vs. Fall 2021)

**▲ 17**

Five-year  
% point change  
(vs. Fall 2017)



# STUDENT SUCCESS AND SATISFACTION

## STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2016-17

**54%**

Bachelor's Degree  
Within 4 Yrs. from  
any institution

**75%**

Bachelor's Degree  
Within 5 Yrs. From  
any institution

**81%**

Bachelor's Degree  
Within 6 Yrs. From  
any institution

**49%**

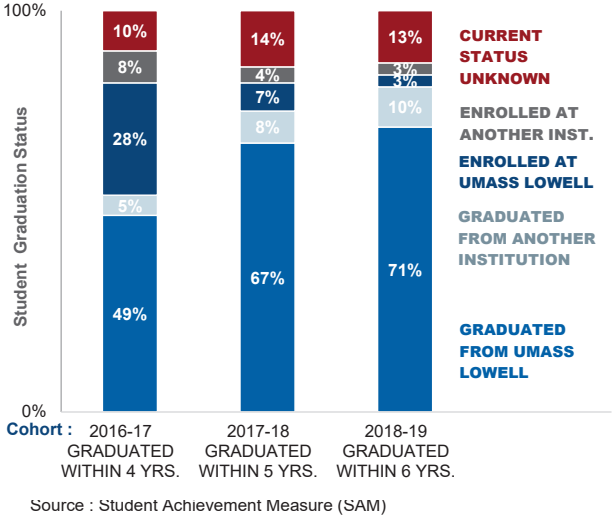
Bachelor's Degree  
Within 4 Yrs. from  
UMass Lowell

**67%**

Bachelor's Degree  
Within 5 Yrs. From  
UMass Lowell

**71%**

Bachelor's Degree  
Within 6 Yrs. From  
UMass Lowell



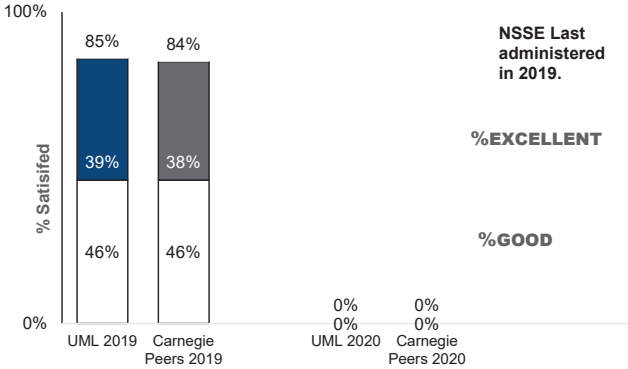
## STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

**0%**

Student Satisfaction  
as Good or Excellent  
in UML 2021

**.0**

Three-year  
% point change  
(vs. UML 2020)



## ALUMNI PARTICIPATION RATE

**5%**

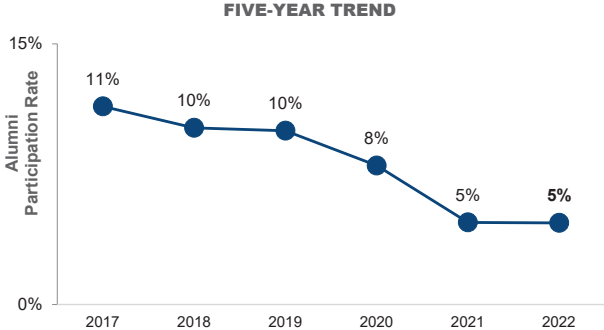
Alumni Participation  
Rate  
in 2022

**.0**

One-year  
% point change  
(vs. 2021)

**▼ 6**

Five-year  
% point change  
(vs. 2017)





# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS

**4,370**

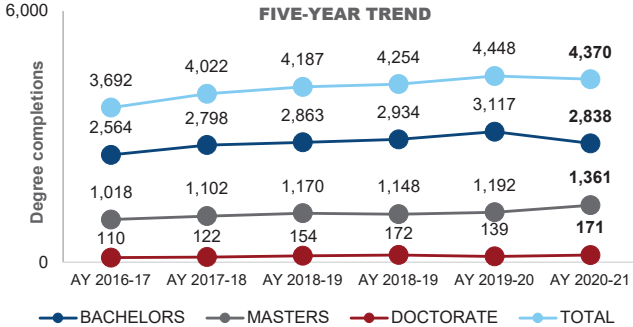
Total degree completions  
AY 2020-21

▼ **2%**

One-year % change in total degree completions (vs. AY 2019-20)

▲ **18%**

Five-year % change in total degree completions (vs. AY 2016-17)



## NUMBER OF PATENT APPLICATIONS

**50**

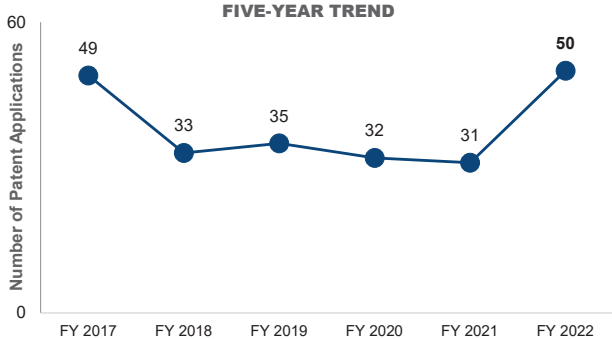
Patent Applications in FY 2022

▲ **19**

One-year nominal change (vs. FY 2021)

▲ **1**

Five-year nominal change (vs. FY 2017)



## TOTAL R&D EXPENDITURES

**\$111.1**

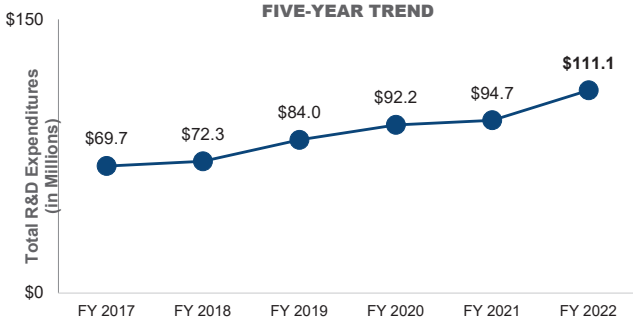
Million in FY 2022

▲ **17%**

One-year % change (vs. FY 2021)

▲ **60%**

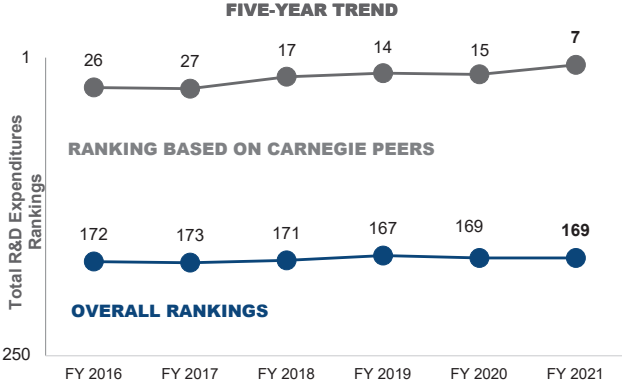
Five-year % change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## TOTAL R&D EXPENDITURES RANKINGS

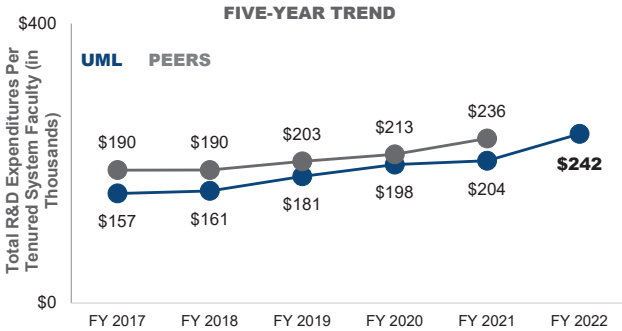
<b>169</b> Total R&D Expenditures Overall Rankings in FY 2021	<b>0</b> One-year nominal change (vs. FY 2020)	<b>3</b> Five-year nominal change (vs. FY 2016)
<b>7</b> Rankings based on Carnegie Peers in FY 2021	<b>8</b> One-year nominal change (vs. FY 2020)	<b>19</b> Five-year nominal change (vs. FY 2016)



Overall Ranking Source: National Science Foundation Ranking by Total R&D Expenditures.  
Ranking based on Carnegie Peers is further standardized by US Publics and Non-Medical Schools.

## TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

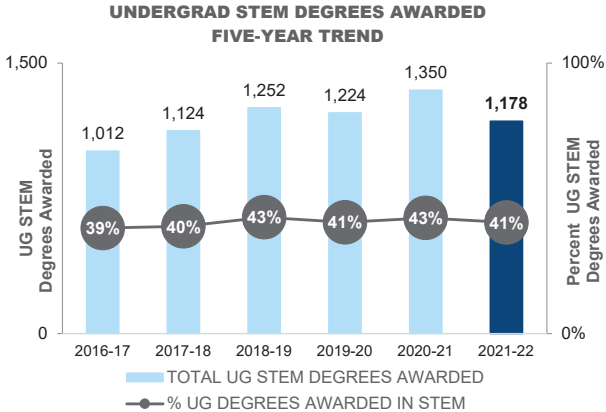
<b>\$242k</b> Total R&D Expenditure Per Tenured System Faculty in FY 2022	<b>19%</b> One-year % change (vs. FY 2021)	<b>54%</b> Five-year % change (vs. FY 2017)
---	---	--



\* Peer data is currently not available for most recent year.

## DEGREES AWARDED IN STEM FIELDS

<b>1,178</b> UG degrees awarded in STEM fields in 2021-22	<b>13%</b> One-year % change (vs. 2020-21)	<b>16%</b> Five-year % change (vs. 2016-17)
<b>41%</b> Percent of total UG degrees awarded in STEM fields in 2021-22	<b>2</b> One-year % point change (vs. 2020-21)	<b>2</b> Five-year % point change (vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## GRAD STEM DEGREES AWARDED FIVE-YEAR TREND

**540**  
Grad degrees awarded in STEM fields in 2021-22

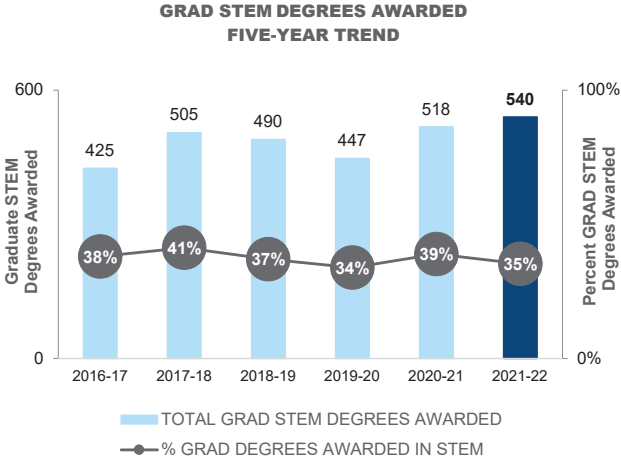
**▲ 4%**  
One-year % change (vs. 2020-21)

**▲ 27%**  
Five-year % change (vs. 2016-17)

**35%**  
Percent of total Grad degrees awarded in STEM fields in 2021-22

**▼ 4**  
One-year % point change (vs. 2020-21)

**▼ 3**  
Five-year % point change (vs. 2016-17)



## TOTAL STEM DEGREES AWARDED

**1,718**  
Total degrees awarded in STEM fields in 2021-22

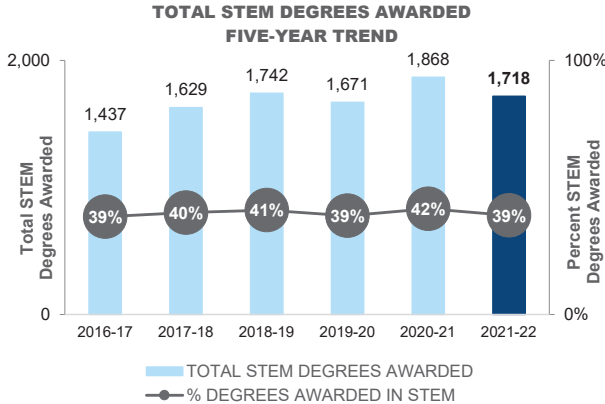
**▼ 8%**  
One-year % change (vs. 2020-21)

**▲ 20%**  
Five-year % change (vs. 2016-17)

**39%**  
Percent of Total degrees awarded in STEM fields in 2021-22

**▼ 3**  
One-year % point change (vs. 2020-21)

**▲ 1**  
Five-year % point change (vs. 2016-17)



## CERTIFICATES AWARDED IN STEM FIELDS

**114**  
Total Certificates awarded in STEM fields in 2021-22

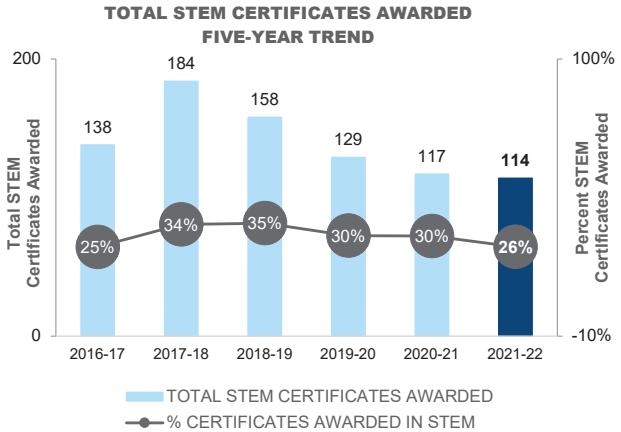
**▼ 3**  
One-year nominal change (vs. 2020-21)

**▼ 24**  
Five-year nominal change (vs. 2016-17)

**26%**  
Percent of Total Certificates awarded in STEM fields in 2021-22

**▼ 4**  
One-year % point change (vs. 2020-21)

**▲ 1**  
Five-year % point change (vs. 2016-17)



# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS IN HEALTHCARE FIELDS

**458**

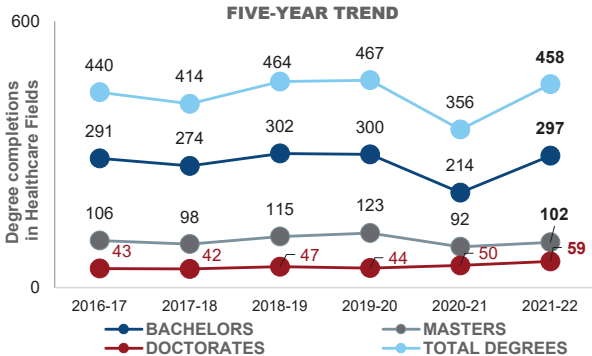
Total degrees awarded in HealthCare fields in 2021-22

**▲ 29%**

One-year % point change (vs. 2020-21)

**▲ 4%**

Five-year % point change (vs. 2016-17)



## CERTIFICATES AWARDED IN HEALTHCARE FIELDS

**47**

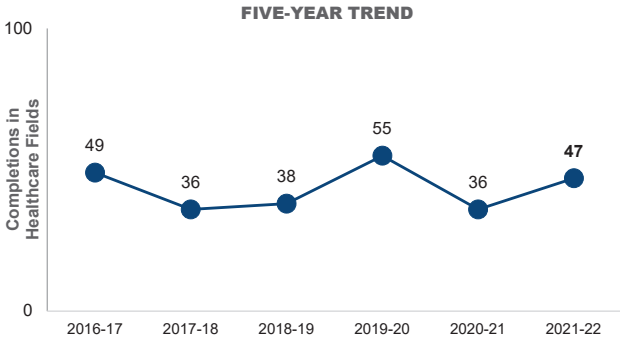
Total Certificates awarded in HealthCare fields in 2021-22

**▲ 31%**

One-year % point change (vs. 2020-21)

**▼ 4%**

Five-year % point change (vs. 2016-17)



## LICENSE INCOME

**\$177k**

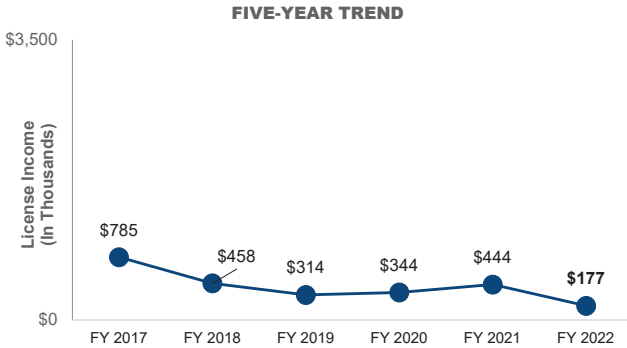
License Income in FY 2022

**▼ 60%**

One-year % change (vs. FY 2021)

**▼ 77%**

Five-year % change (vs. FY 2017)



# FINANCIAL HEALTH

## PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**58%**

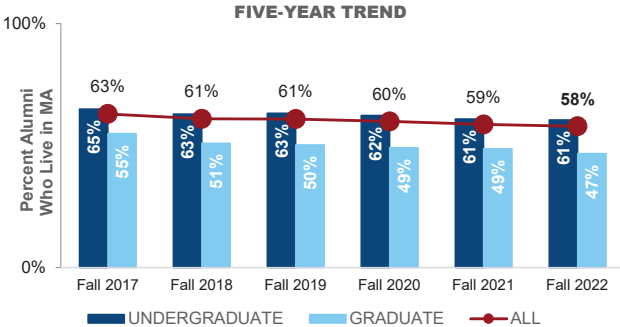
Of all UMass Alumni live in the Commonwealth in Fall 2022

**▼ 1**

One-year % point change (vs. Fall 2021)

**▼ 5**

Five-year % point change (vs. Fall 2017)



## ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**\$130M**

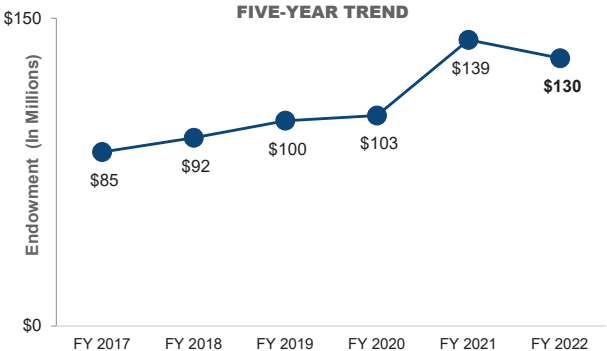
Endowment Assets in FY 2022

**▼ 6%**

One-year % change (vs. FY 2021)

**▲ 54%**

Five-year % change (vs. FY 2017)



## ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

**-6%**

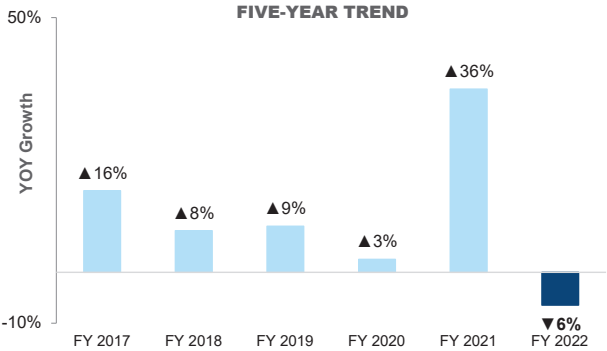
Annual Growth in FY 2022

**▼ 42**

One-year % point change (vs. FY 2021)

**▼ 22**

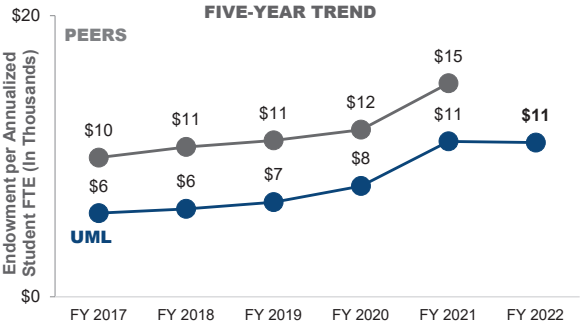
Five-year % point change (vs. FY 2017)



# FINANCIAL HEALTH

## ENDOWMENT PER ANNUALIZED STUDENT FTE

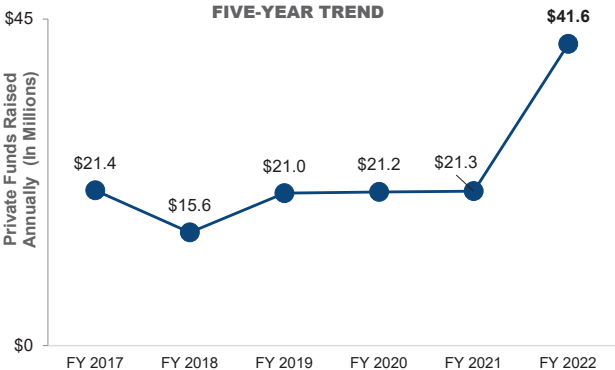
**\$11.0k** ▼ **1%** ▲ **84%**  
 Endowment per Annualized Student FTE in FY 2022 One-year % change (vs. FY 2021) Five-year % change (vs. FY 2017)



\* Peer data not available for most recent year.

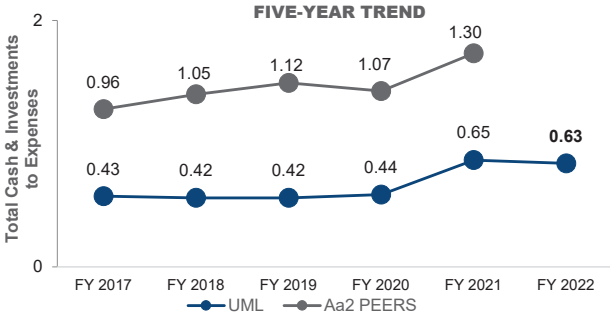
## PRIVATE FUNDS RAISED ANNUALLY

**\$41.6M** ▲ **95%** ▲ **94%**  
 Private Funds Raised Annually in FY 2022 One-year % change (vs. FY 2021) Five-year % change (vs. FY 2017)



## TOTAL CASH & INVESTMENTS TO EXPENSES

**0.63**  
 Total Cash & Investments to Expenses in FY 2022



# FINANCIAL HEALTH

## DEBT SERVICE BURDEN

**6.6%**

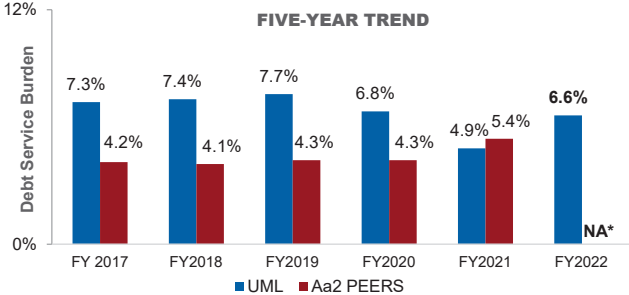
Debt Service Burden in FY2022

**▲ 1.7**

One-year % Point change (vs. FY2021)

**▼ 0.7**

Five-year % Point change (vs. FY 2017)



## OPERATING MARGIN (%)

**0.9%**

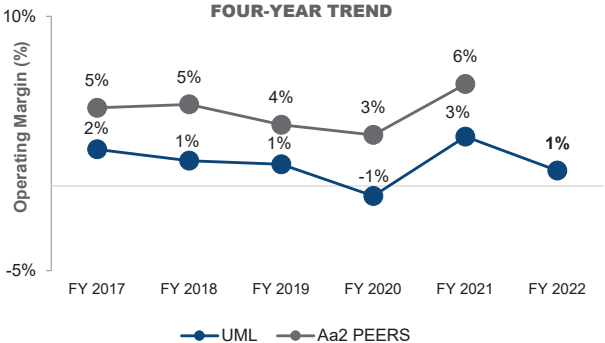
Operating Margin (%) in FY 2022

**▼ 2.0**

One-year % Point change (vs. FY 2021)

**▼ 1.3**

Five-year % Point change (vs. FY 2018)



## DEFINITIONS AND SOURCES

### ACADEMIC QUALITY INDICATORS

#### **Average High School GPA of First-Time**

**Freshmen.** Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

**SAT Scores of Freshmen.** SAT scores of Freshmen. All reported SAT scores are based on the sum of the SAT MSS and the ERWS for entering freshmen. A redesigned SAT was used for Fall 2017 admissions; therefore, scores for Fall 2016 and before cannot be compared to scores for Fall 2017 and later. The average is the arithmetic mean of these SAT scores. Peer data are from IPEDS.

#### **Average GPA of Entering Transfer Students.**

Average Cumulative GPA of entering transfer students according to DHE admissions policy.

**Student-Faculty Ratio.** The ratio of FTE students to FTE instructional faculty. Faculty and students in stand-alone graduate or professional programs such as medicine, law, veterinary, dentistry, social work, business, and public health in which faculty teach virtually only graduate-level students are excluded. Teaching assistants are not counted as faculty. Data and definition are from CDS.

#### **Technology-Enhanced Classrooms.**

Classification of the campus's total classroom capacity in terms of the level of technology-support.

#### **Percent Tenured/Tenure-Track Faculty (FTE).**

Percent based on the ratio of Tenured/Tenure-Track Faculty FTE to Total Faculty FTE.

**Faculty FTE.** Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

**Faculty-of-Color.** The proportion of full-time instructional faculty who are U.S. citizens or permanent residents and report their race/ethnicity to be one or more of the following: Hispanic/Latino, American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Other Pacific Islander, or Two or More Races. Race/ethnicity definition is based on IPEDS.

**Women Faculty.** The proportion of full-time instructional faculty who identify themselves as female.

### ACCESS AND AFFORDABILITY INDICATORS

#### **Percentage Undergraduates from**

**Massachusetts.** Percentage of total undergraduate students who are "In State" or residents of Massachusetts based on tuition residency. For state-supported (day) students, tuition classification is used, whereas for CPE students, the actual residency at time of matriculation is used.

#### **Percent Undergraduates who are Students**

**of Color.** Undergraduates who self-identify as either African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean

students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

#### **Percent Undergraduates who are**

**International.** Percentage of all undergraduates who are non-resident aliens, studying at the university on an eligible visa types, and enrolled in credit courses. Does not include permanent residents, refugees, or US citizens.



## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

**Percent Undergraduates who are First Generation in College.** Percent of first-time, full-time undergraduates where neither parent has earned a bachelor's degree. The source of this data field is the Common Application.

**Percent first-time, full-time Undergraduates with English as a Second Language.** Percent of first-time, full-time undergraduates who speak another language at home. The source of this data field will be from the Common Application.

**Percent Undergraduates Who Are of Transfer Origin.** Percent of all currently enrolled bachelor's degree-seeking undergraduate students who were admitted as transfer students at the institution.

**Number of First-degree Bachelor-seeking Students Aged 25+.** Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of Sept 1 of the Fall semester. Includes undergraduate, bachelor's-seeking students who came in as freshmen or transfers; excludes second degree transfers.

**Dual Enrollment Students (Headcount).** Headcount of current non-Degree dual-enrolled students on campus.

**Percent (In-State) Pell Grant Recipients.** Federal Pell Grants are awarded to low-income undergraduates based on their expected family contribution. Data as reported by campuses to the UMass President's Office of in-state, full-time students with Pell Grants in the Financial Aid Template.

**Percent of Need Met for In-State Students Awarded Need-Based Aid.** The average percentage of demonstrated financial need that is met by the institution's award of need-based financial aid to in-state undergraduate students. Data as reported to the UMass President's Office in the Financial Aid Template.

**Average Student Debt Load of Graduating Class (UG).** Average debt load is based on the total debt borrowed by an Institution's graduating

class (bachelor's, first-time only) divided by the number of students of that cohort that carried any amount of debt. It does not include those students with no debt load. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Percent Graduating Class with Debt (UG).** The total number of students in the graduating class (bachelor's, first-time only) that carried a debt load at the institution divided by the total number of graduating (bachelor's, first-time only) students in that institution. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

**Number of Students who Participated in a Study Abroad Program.** Number of students who participated in a credit-bearing study abroad program outside of the U.S. over the most recent academic year, either at UMass or elsewhere.

**Online Course Registrations.** Course registrations for the academic year for online credit courses. Academic year includes Summer, Fall, intersession, and Spring. These do not include hybrid courses, but fully online courses only offered via UMassOnline.

**Percentage of degree-seeking students taking at least one online course who were full time and fully online.** Metric calculated using the formula below. Data from fall student headcount of degree-seeking students, split by full-time and part-time status, who fall into the following categories: Enrolled exclusively in online courses; Enrolled in at least one, but not all, online courses; and Not enrolled in any online courses. (As per IPEDS definition).  

$$\frac{(\text{Full time Enrolled exclusively in online courses})}{(\text{Full time Enrolled in at least one, but not all, online courses} + \text{Full time Enrolled exclusively in online courses} + \text{part-time Enrolled in at least one, but not all, online courses} + \text{part-time Enrolled exclusively in online courses})}$$

## DEFINITIONS AND SOURCES

### STUDENT SUCCESS AND SATISFACTION INDICATORS

**Freshmen One-Year Retention Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall and were still enrolled at the institution in the following Fall. Peer data as reported to IPEDS.

**Freshmen Four-Year Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution by the end of their fourth year. Associates degree and CPE students are excluded.

**Freshmen Six-Year Graduation Rate.** Percent of first-time, full-time freshmen who entered UMass in a given Fall term and had graduated from the institution within six years. Peer data are based on median as reported to IPEDS. Associates degree and CPE students are excluded.

**Freshmen Twelve-semester Graduation Rate.** Percent of first-time, full-time, degree-seeking freshmen who entered UMass in a given Fall term and graduated from the institution within twelve active semesters (Fall and Spring semesters) within 10 years of their initial attendance. Associates degree and CPE students are excluded.

**Transfer (Full-Time) One-Year Retention Rate.** Percent of full-time transfer students at any level who entered UMass in a given Fall and were still enrolled at, or graduated from the institution as of the following Fall.

**Transfer (Upper-Division) Four-Year Graduation Rate.** Percent of full-time upper division transfers (60+ credits) who entered UMass in a given Fall term and had graduated from the institution within four years.

**Student Achievement Measure.** SAM tracks student movement across postsecondary institutions to provide a more complete picture of undergraduate student progress and completion within the higher education system. SAM is an alternative to the federal graduation rate, which is limited to tracking the completion of first-time, full-time students at one institution.

**Student Satisfaction with Educational Experience.** Percent of seniors who responded “good” or “excellent” to the question, “How would you evaluate your entire educational experience at this institution?” on the most recently conducted National Survey of Student Engagement (NSSE).

**Alumni Participation Rate.** The percentage of undergraduate alumni of record who donated money to the college or university. Alumni of record are former full- or part-time students who received an undergraduate degree and for whom the college or university has a current address. The alumni giving rate is calculated by dividing the number of alumni donors during a given academic year by the number of alumni of record for that same year. Graduates who earned only a graduate degree are excluded.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The number of degrees (not including certificates) awarded in the previous academic year, by degree level. As reported to IPEDS.

**Patent Applications.** Number of U.S. Patent applications filed per year. Data reported by campuses to UMass President’s Office, Office of OTCV.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local

governments, industry, private and institutional) as reported to NSF.

**Total R&D Expenditures Ranking.** Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. UMass Lowell’s rank in the annual NSF ranking of Total R&D expenditures among public institutions of higher education with a Carnegie classification of “Highest Research” and with no medical school. Data source NCES WebCaspar/NSF HERD data tables.

## DEFINITIONS AND SOURCES

### SERVICE TO THE COMMONWEALTH INDICATORS

#### **Total Research Expenditures per Tenure**

**System Faculty.** R&D expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF, divided by total tenure system faculty as reported to IPEDS. Peer data reported by NSF and IPEDS.

#### **Degrees and Certificates Awarded in**

**STEM Fields.** Number of undergraduate and graduate degrees awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Certificates data also included separately.

#### **Degrees and Certificates Awarded in**

**Healthcare Fields.** Number of undergraduate and graduate degrees awarded in Health Care fields. Healthcare designation as defined by Campus IR, and based on CIP classification. All of CIP 51, and specific 6-digit CIPs unique to each campus. Certificates data also included separately.

**License Income.** Amount of annual income from license agreements. Data Source: Data reported by campuses to UMass President's Office, Office of OTCV.

#### **Percent Alumni who Live in**

**Massachusetts.** Percentage of total alumni who currently reside in Massachusetts based on alumni records.

### FINANCIAL HEALTH INDICATORS

#### **Endowment Assets and Annual Growth in**

**Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual BOT report, and the percent change from previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

#### **Endowment per Annualized Student FTE.**

Total UMass Lowell endowments per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data are for the comparative peers from financial statements (current year) and IPEDS (prior years).

**Private Funds Raised Annually.** Private funds raised includes restricted and unrestricted revenues from individuals, foundations, corporations and other organizations. Includes private grant revenues but

not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions.

#### **Total Cash & Investments to Expenses.**

Indicates the university's financial flexibility and resilience, and its ability to generate investment income. (Cash & Investments – debt service reserve funds) / Total expenses

**Debt Service to Operations.** Debt service as a percentage of total operating expenditures (operating expenditures plus interest expense). Peer data are from published financial statements.

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses)

## DEFINITIONS AND SOURCES

### PEER INSTITUTIONS FOR UMASS LOWELL

Georgia State University	University of Rhode Island*
San Diego State University	University of Wisconsin – Milwaukee
University of Maine (Orono)	Virginia Commonwealth University
University of Maryland -- Baltimore County	* <i>Aspirant peer</i>
University of New Hampshire*	

#### Moody's Aa2 Peers

Alamo Community College District, TX	University of Alabama at Birmingham, AL
Arizona State University, AZ	University of Alabama, AL
Auburn University, AL	University of Arizona, AZ
Board of Regents of The University System of Georgia, GA	University of Arkansas, AR
California State University, CA	University of California, CA
City University of New York, NY	University of Florida, FL
Clemson University, SC	University of Georgia, GA
Cuyahoga Community College District, OH	University of Hawaii, HI
Florida State University, FL	University of Houston System, TX
Houston Community College System, TX	University of Kansas, KS
Iowa State University of Science & Technology, IA	University of Kentucky, KY
Michigan State University, MI	University of Massachusetts, MA
Mississippi Institutions of Higher Learning, MS	University of North Texas System,
Nevada System of Higher Education, NV	TX University of Oregon, OR
State University of New York, NY	University of South Carolina, SC
State University System of Florida, FL	University of Wyoming, WY
Texas State University System, TX	

*Please Note: Unless otherwise specified, all data are from the UMass Lowell Office of Institutional Research.*



# CHAN MEDICAL SCHOOL

## HEADLINES

The Medical School currently enjoys a position of stability and promise as it executes to its strategic vision, buoyed in no small measure by the transformational \$175 Million philanthropic commitment made by The Morningside Foundation in 2021. This unrestricted endowment gift, to be paid over five years, is a significant validation of the approach taken to investments in research programs, the educational mission and importantly, faculty and student recruitment and retention. The campus – now UMass Chan Medical School – continues to make significant advances in all its mission areas.

UMass Chan has continued to achieve in research, academic, and fundraising initiatives, including significant increases in research support, approval by the Liaison Committee on Medical Education accrediting body to launch its second regional campus for the T.H. Chan School of Medicine. UMass Chan-Lahey, in partnership with Lahey Hospital & Medical Center, part of Beth Israel Lahey Health, will enroll its first cohort in August 2023. Students enrolled in this new track will follow the core curriculum of the Chan School of Medicine with an added focus on health system science, team training, leadership and communication skills. The UMass Chan-Lahey campus will also include a new research collaboration with the goal of fostering innovation in digital medicine, population health and health care delivery.

The Morningside Foundation commitment will impact a number of initiatives already contemplated in the campus strategic plan, especially investments in the educational program, the research enterprise, workforce development, information technology, and organizational development. In early 2023, the campus completed and shared with its campus community the annual progress report for its IMPACT 2025 strategic plan, which can be [read here](#).

Goals for IMPACT 2025 position UMass Chan Medical School to build upon its first 50 years by looking forward to the next 50 as an opportunity to further demonstrate our contributions as a leading-edge medical school known for propagating an enhanced social mission. Specifically, we will:

- Design innovative and inter-professional learning modalities for diverse learners and evolving workforce needs.

- Enable the engine of discovery to generate groundbreaking scientific knowledge, while expanding our ability to invest in emerging opportunities such as human genetics and areas of world-class strength such as gene therapy and RNAi, neuroscience, digital medicine, health equity, inflammation and immunity.
- Launch a Collaborative in Health Equity to harness and improve the health and welfare of the residents of Massachusetts and the citizens of the world as part of the Medical School's enhanced social mission that engages community partners, advances health equity research and promotes public health interventions for the benefit of those greatest in need;
- Enhance innovation and increase impact by advancing the science of translation and channeling more discoveries into development and practice;
- Establish models for outstanding support services, vibrant working environments, and highly efficient infrastructure to propel UMass Chan to new heights.
- Create inclusive, equitable environments across the campus so that UMass Chan can better attract, support and advance diverse staff, faculty and learners.

The campus is well positioned for this new vision, as research and faculty achievement and intense efforts in resource maximization and operational efficiencies continue, coupled with full accreditation approval from the New England Commission of Higher Education for a period of 10 years, through 2032. Extramurally funded research surpasses \$300 million annually and in 2024 the Medical School looks forward to bringing its new education and research building online. In addition, the Medical School was proud to be the only institution of higher education in Massachusetts to be named to *The Boston Globe's* 2022 Top Places to Work in December 2022 – a distinction that is particularly noteworthy and satisfying because it was based upon survey data and feedback from Medical School employees. In addition, UMass Chan was named by Newsweek as one of America's Greatest Workplaces for Diversity 2023.

## HEADLINES

Ongoing and active efforts to prioritize educational and research initiatives continue, but an unyielding commitment to education, research, service, innovation, and training remains the hallmark of the commonwealth’s great public medical school.

Licensing of the medical school’s intellectual property reflects keen national and international interest in the work of the faculty, including ongoing clinical trials for a growing number of rare diseases, neurodegenerative diseases once thought intractable to treatment and an expansion of a clinical trial for an antibody prophylaxis for Lyme disease that may usher in a new approach to preventive therapeutics. UMass Chan researchers continue to compete at an exceptionally high level for federal funding, even in a shrinking federal research pool and attract investment from a wide range of new and long-established biotechnology research and manufacturing entities.

- **Academic quality:** UMass Chan continues to attract outstanding students to the newly named T.H. Chan School of Medicine, as judged by admission test scores, residency match results, and performance on licensing exams, even in a time of unusual upheaval and uncertainty; the quality of the incoming class remains on a par with previous years. The increase in class size has been successful, increasing the number of physicians in training with no negative impact on student quality, performance, or satisfaction. The applicant pool for the limited number of spaces for highly qualified out-of-state students is robust; the “Population-based Urban and Rural Community Health” (PURCH) track students are distinguished by their passion for this targeted curricular offering, and a similar response to the new UMass Chan-Lahey regional medical campus is anticipated. Medical School graduates continue to rank their educational experience as highly satisfactory - literally in the 100<sup>th</sup> percentile in some categories. Agreements with Lahey, Baystate Health and Cape Cod Healthcare not only create superb clinical opportunities for medical students but increase the school’s profile in new regions. The newly named Tan Chingfen Graduate School of Nursing is capably managing its curriculum, course offerings, and cross-disciplinary involvement in a changing academic and practice environment. Graduates from the Masters of Science in Nursing, Doctorate of Nursing Practice degree program, the Graduate Entry Pathway, and the doctoral program are meeting important needs in areas of practice,

research, and education for the campus and the region.

The newly named Morningside Graduate School of Biomedical Sciences continues to track favorably to peer institutions and the school is recognized for its efforts to prepare students for multidisciplinary careers, whether in academia, industry or any number of compelling settings.

- **Research growth, productivity, and faculty recruitment:** Research productivity is significant across the departments, in part because of continued recruitment and investment in the clinical and translational sciences. Multidisciplinary programs in RNA therapeutics, systems biology, rare diseases, and neurosciences are creating exciting opportunities for research growth and faculty recruitment. Faculty recruitment is also aided by the stellar reputation of the graduate school of biomedical sciences. A new Translational Institute for Molecular Therapeutics is the first of its kind. Licensing and sponsored research agreements in gene therapy, vaccine development, RNA biology, and drug development support research activity across all basic science disciplines. Faculty recruitment is aided by the reputation of our graduate school of biomedical sciences.

- **Crucial to the continued success of UMass Chan** is the ability to attract high-quality students who will be able to meet the diverse cultural needs of underserved populations in the state. For the T.H. Chan School of Medicine, applicants are incredibly competitive and match or exceed class profiles of previous years. Student access and affordability can be measured and supported by the learning contract option, which in relation to tuition and fees, continues to track favorably for the current year. Out-of-state students compare favorably to historical student profiles.

- **Anecdotal evidence, such as rankings in the *US News & World Report* “Best Graduate Schools”** continues to reinforce the reputation of the Medical School as a high quality, affordable institution: the 2023 *US News* ranking places the T.H. Chan School of Medicine 13<sup>th</sup> in the nation for primary care; and 44<sup>th</sup> among research institutions. UMass Chan Medical School also ranked 37<sup>th</sup> among all US medical schools – yet #2 in New England - in NIH funding, according to the Blue Ridge Institute for Medical Research in 2022. Performance of medical students on benchmark

## **HEADLINES**

exams and nursing students on board certification, along with residency program match results, are good supporting indicators of quality. Morningside Graduate School of Biomedical Sciences students are highly competitive for fellowship awards. Job placement data exceeds national rates. The Morningside Foundation gift, in addition to creating a foundation for campus success far into the future, is also a clear and tangible vote of confidence in the campus direction, leadership, strategic plan and ability to impact human health. As achievements and discoveries in the life sciences portend an exciting future - one where the fruits of research positively impact human lives and at a time when the need for highly talented physicians, scientists and advanced practice nurses is projected to grow dramatically - the campus remains exceptionally well-positioned to respond.



**AT-A-GLANCE**

**ACADEMIC QUALITY**

• Mean MCAT Score	<b>514.8</b>	• Faculty FTE	<b>1,241</b>
• USMLE Step 1 Pass Rate	<b>97%</b>	• Full-Time Instructional Faculty	
• <i>USMLE Step 2 (CK) Pass Rate</i>	<b>100%</b>	• Percent Faculty-of-Color	<b>33%</b>
• USMLE Step 2 (CS) Pass Rate	<b>N/A*</b>	• Percent Women Faculty	<b>44%</b>
• Nursing Board Certification Pass Rate	<b>93%</b>	• NIH Funding among Medical Schools	<b>\$179,947</b>
• Technology-Enhanced Classrooms	<b>84</b>	• US News & World Report Ranking	<b>13</b>
• Percent Tenured/Tenure-Track Faculty FTE	<b>18%</b>		

**ACCESS AND AFFORDABILITY**

• Graduates From Massachusetts	<b>888</b>	• Graduates Who Are International	<b>113</b>
• Graduate Students Of Color	<b>451</b>	• Tuition and Fees	<b>\$39,250</b>

**STUDENT SUCCESS AND SATISFACTION**

• Residency Choice Acceptance Rate	<b>96%</b>	• Alumni Participation Rate	<b>17%</b>
• Student Satisfaction with Medical Education Quality	<b>89%ile</b>		

**SERVICE TO THE COMMONWEALTH**

• Degree Completions	<b>297</b>	• Patent Applications	<b>159</b>
<i>Master's</i>	<b>44</b>	• License Income	<b>\$32M</b>
<i>Doctorates</i>	<b>253</b>	• Percent Alumni who Remain in MA	<b>58%</b>
• Total R&D Expenditures	<b>\$358M</b>	• Degrees Awarded in STEM Fields	<b>52</b>
• Total R&D Expenditures Ranking	<b>80</b>	• Degrees Awarded in Healthcare Fields	<b>245</b>

## AT-A-GLANCE

### FINANCIAL HEALTH

• Total Endowment	<b>\$443.3M</b>	• Debt Service Burden	<b>5.1%</b>
• Annual Growth in Endowment	<b>-9.5%</b>	• Operating Margin (%)	<b>2.1%</b>
• Endowment per Annualized Student FTE (Includes three graduate schools)	<b>\$356,330</b>	• Total Cash & Investments to Expenses	<b>0.68</b>
• Private Funds Raised Annually	<b>\$222.6M</b>		

# ACADEMIC QUALITY

## MEAN MCAT SCORE

**515**

Average Score for MCATs in Fall 2022

Peer Source: AAMC Medical Schools.

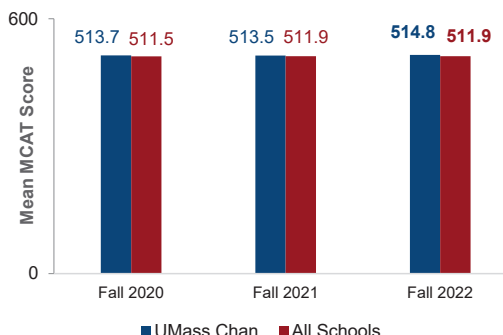
**0.0%**

One-year % change (vs. Fall 2021)

**0.0%**

Two-year % change (vs. Fall 2020)

### TWO-YEAR TREND



## PASS RATES ON USMLE STEP 1 AND STEP 2 (CK)

**97%**

Pass Rate for USMLE Step 1 in 2022

2022 All Med. Schools data is not available

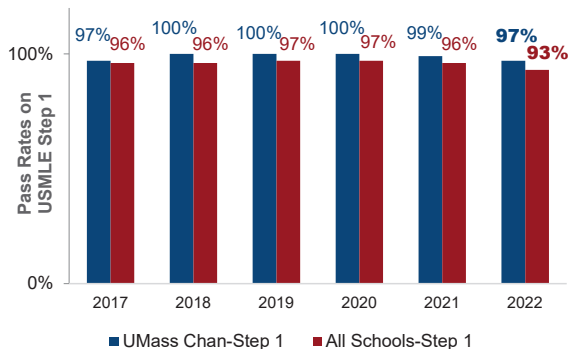
**▼ 2**

One-year % Point change (vs. 2021)

**• 0**

Five-year % Point change (vs. 2017)

### FIVE-YEAR TREND



Source - National Board of Medical Examiners: Performance of Examinees.

**100%**

Pass Rate for USMLE Step 2 (CK) in AY 2021-22

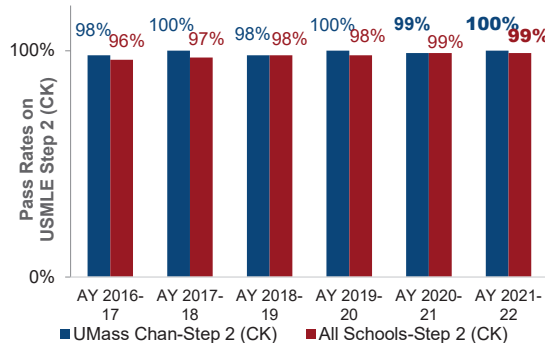
**▲ 1**

One-year % Point change (vs. AY 2020-21)

**▲ 2**

Five-year % Point change (vs. AY 2016-17)

### FIVE-YEAR TREND



Source - National Board of Medical Examiners: Performance of Examinees.

# ACADEMIC QUALITY

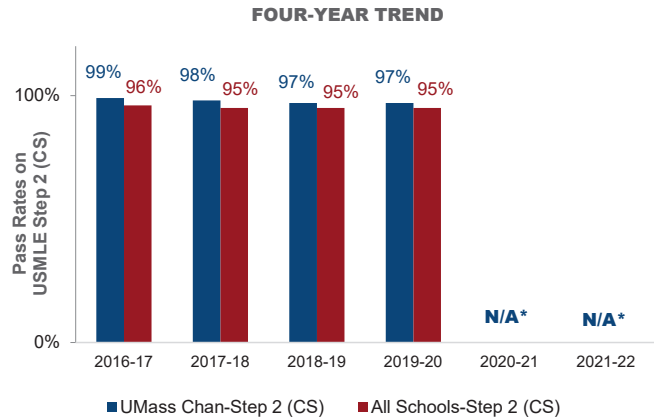
## PASS RATES ON USMLE STEP 2 (CS)

**N/A\***

Pass Rate for USMLE Step 2 (CS) in AY 2021-22

Peer Comparison - All U.S. and Canadian Medical Schools, Data by Academic Year.

\*Step 2 (CS) has been eliminated beginning AY 2020-21.



## PASS RATES ON NURSING BOARD CERTIFICATION

**93%**

Pass Rate for Nursing Board Cert. in 2022

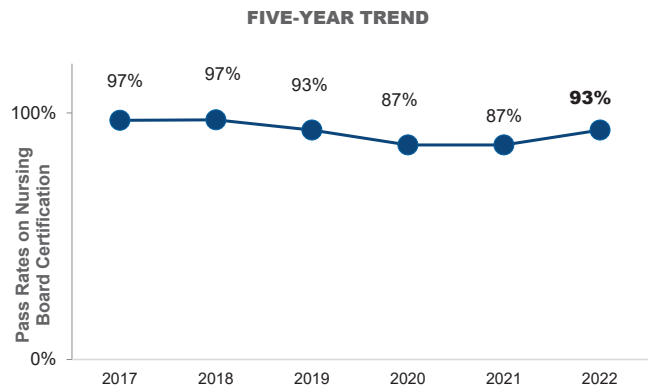
Peer Comparison - All U.S. and Canadian Medical Schools, Data by Calendar Year.

**▲ 6%**

One-year % change (vs. 2021)

**▼ 4%**

Five-year % change (vs. 2017)



## TECHNOLOGY-ENHANCED CLASSROOMS

**84**

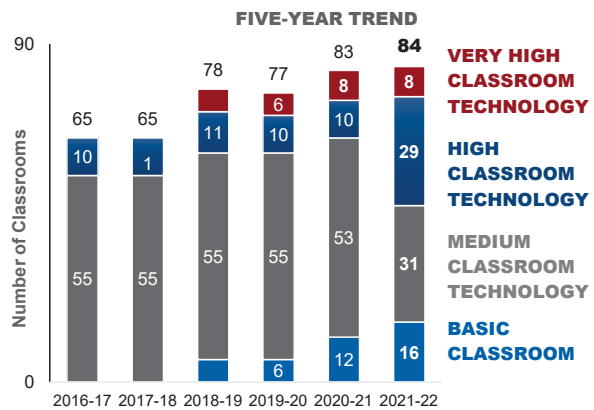
Total Technology Enhanced Classrooms in 2021-22

**▲ 1%**

One-year % change (vs. 2020-21)

**▲ 29%**

Four-year % change (vs. 2017-18)



# ACADEMIC QUALITY

## PERCENT TENURED/TENURE-TRACK FACULTY FTE

**18%**

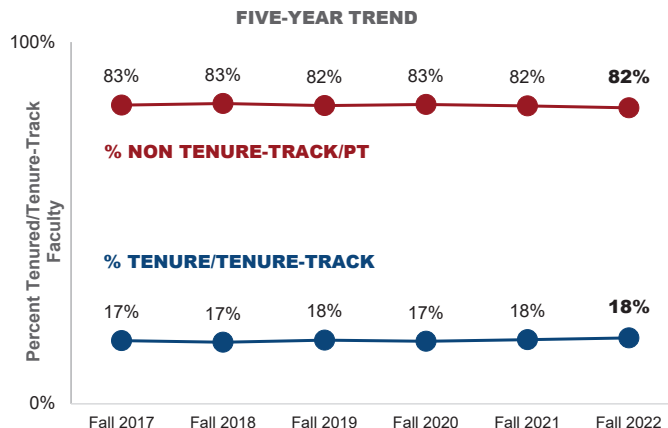
Percent Tenured/  
Tenure-track Faculty  
in Fall 2022

**0**

One-year  
% Point change  
(vs. Fall 2021)

**1**

Five-year  
% Point change  
(vs. Fall 2017)



## FACULTY FTE

**1,241**

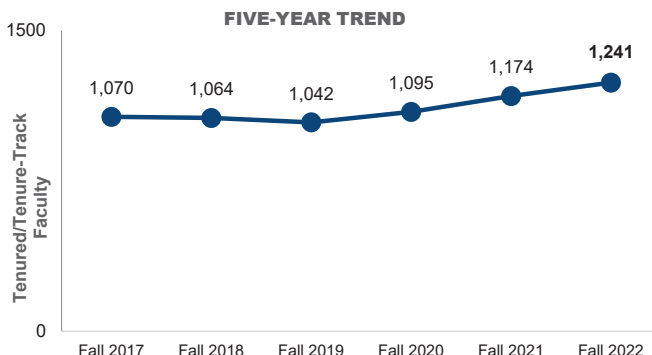
Total Tenured/  
Tenure-track Faculty  
in Fall 2022

**6%**

One-year  
% change  
(vs. Fall 2021)

**16%**

Five-year  
% change  
(vs. Fall 2017)



In 2016 "New Hires" were expanded to include any faculty hired from November 1 and October 31.

## FACULTY-OF-COLOR

**362**

Faculty Of Color  
in Fall 2022

**39**

One-year  
nominal change  
(vs. Fall 2021)

**110**

Five-year  
nominal change  
(vs. Fall 2017)

**33%**

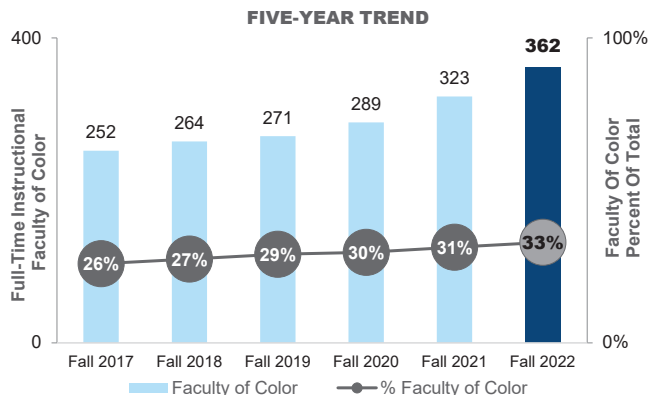
Percent of  
Faculty Of Color  
in Fall 2022

**2**

One-year  
% point  
(vs. Fall 2021)

**7**

Five-year  
% point  
(vs. Fall 2017)



Faculty of Color based on 2010 IPEDS definitions Race/Ethnicity. Does not include Unknowns and Non Resident Aliens.

# ACADEMIC QUALITY

## WOMEN FACULTY

**514**

Women Faculty in Fall 2022

**▲ 31**

One-year nominal change (vs. Fall 2021)

**▲ 111**

Five-year nominal change (vs. Fall 2017)

**44%**

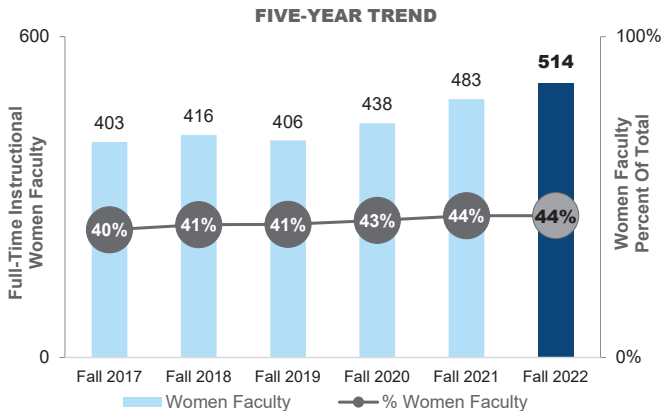
Percent of Women Faculty in Fall 2022

**• 0**

One-year % point (vs. Fall 2021)

**▲ 4**

Five-year % point (vs. Fall 2017)



## NIH FUNDING AMONG MEDICAL SCHOOLS

**\$180k**

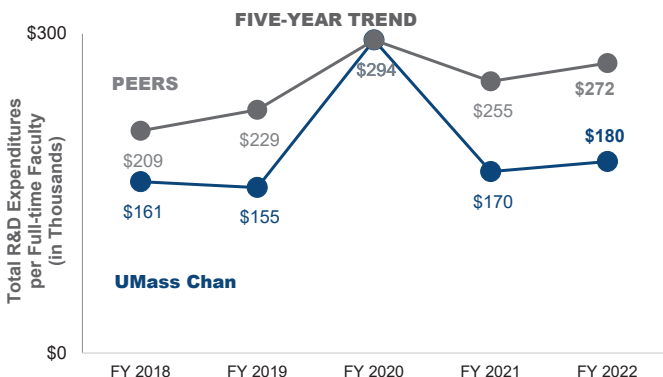
NIH Finding among Medical Schools in FY 2022

**▲ 6%**

One-year % change (vs. FY 2021)

**▲ 17%**

Five-year % change (vs. FY 2017)



## US NEWS RANKING

**13**

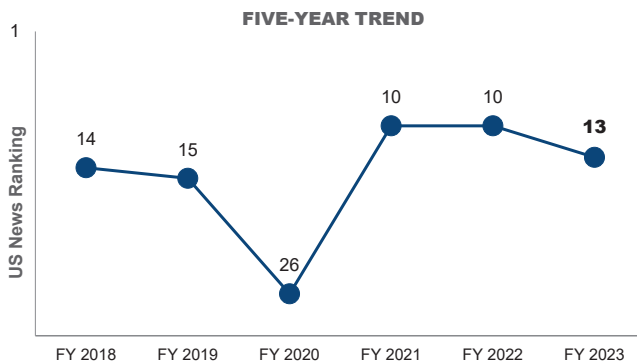
Medical Schools Ranking in FY 2023

**▼ 3**

One-year nominal change (vs. FY 2022)

**▲ 1**

Five-year nominal change (vs. FY 2018)



# ACCESS AND AFFORDABILITY

## GRADUATES FROM MASSACHUSETTS

**888**

Graduates from Massachusetts in Fall 2022

▲ **5%**

One-year % change (vs. Fall 2021)

▲ **14%**

Five-year % change (vs. Fall 2017)

**66%**

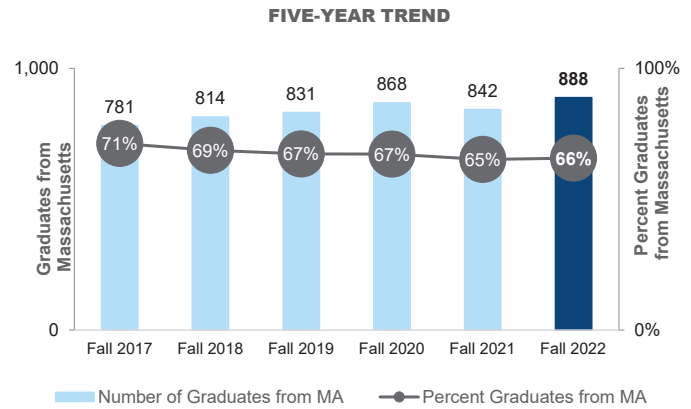
% Graduates from Massachusetts in Fall 2022

▲ **1**

One-year % point change (vs. Fall 2021)

▼ **6**

Five-year % point change (vs. Fall 2017)



## GRADUATE STUDENTS OF COLOR

**451**

Graduates Students of Color in Fall 2022

▲ **12%**

One-year % change (vs. Fall 2021)

▲ **62%**

Five-year % change (vs. Fall 2017)

**39%**

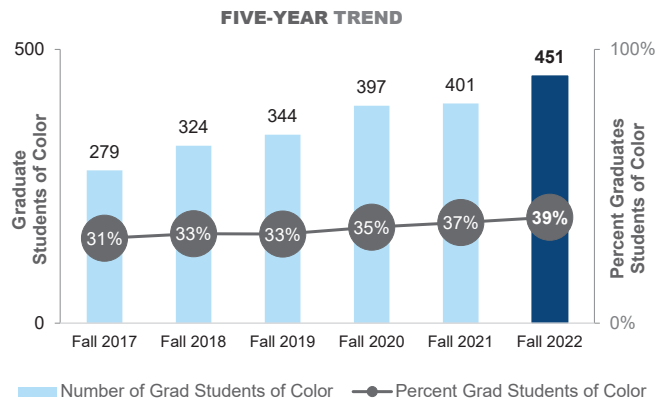
% Graduates Students of Color in Fall 2022

▲ **2**

One-year % point change (vs. Fall 2021)

▲ **8**

Five-year % point change (vs. Fall 2017)



## GRADUATES WHO ARE INTERNATIONAL

**113**

International Graduate Enrollment in Fall 2022

▼ **5%**

One-year % change (vs. Fall 2021)

▼ **19%**

Five-year % change (vs. Fall 2017)

**8%**

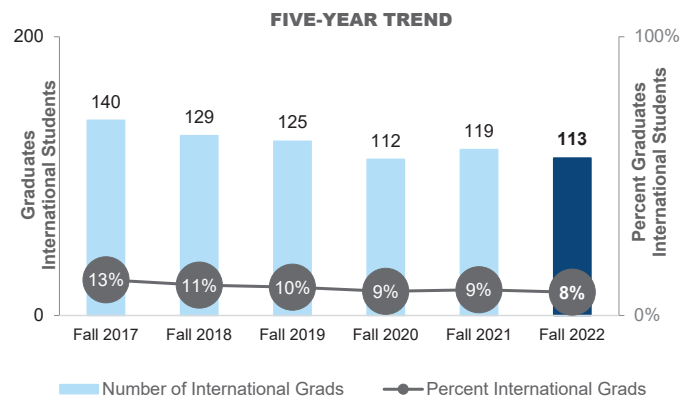
% International Graduate Enrollment in Fall 2022

▼ **1**

One-year % point change (vs. Fall 2021)

▼ **4**

Five-year % point change (vs. Fall 2017)



## ACCESS AND AFFORDABILITY

### TUITION AND FEES (INCLUDES ADJUSTMENT FOR LEARNING CONTRACT)

**\$39.3k**

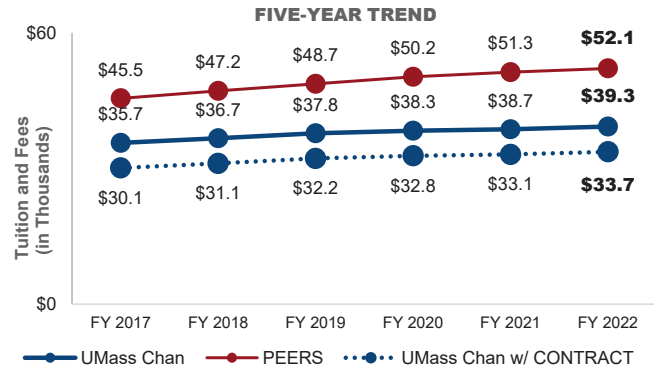
Tuition & Mandatory Fees in FY 2022

**▲ 2%**

One-year % change in Tuition & Mandatory Fees (vs. FY 2021)

**▲ 10%**

Five-year % change in Tuition & Mandatory Fees (vs. FY 2017)



## STUDENT SUCCESS AND SATISFACTION

### ACCEPTANCE RATE TO CHOICE OF RESIDENCY

**96%**

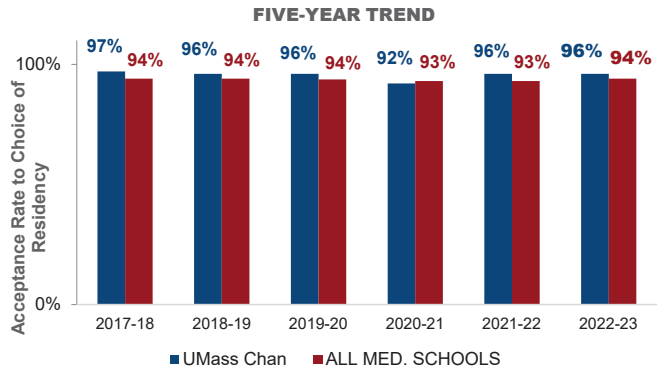
Residency Choice Acceptance Rate in 2022-23

**• 0**

One-year % point change (vs. 2021-22)

**▼ 1**

Five-year % point change (vs. 2017-18)



% Matched based on those going through NRMP match

### STUDENT SATISFACTION WITH QUALITY OF MEDICAL EDUCATION

**89%ile**

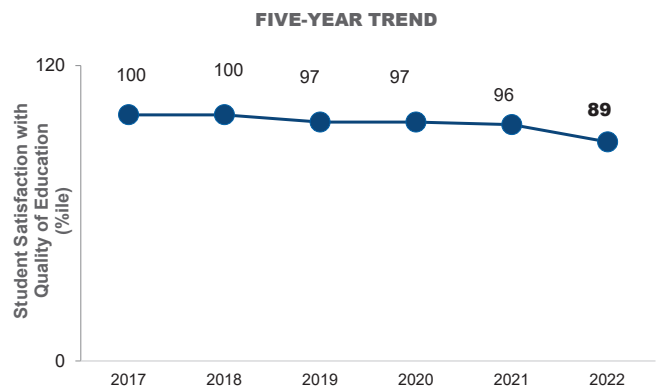
Student Satisfaction with Education Quality in 2022

**▼ 7**

One-year % Point change (vs. 2021)

**▼ 11**

Five-year % Point change (vs. 2017)



Source: AAMC MMT Report, Percentile reported annually



# STUDENT SUCCESS AND SATISFACTION

## ALUMNI PARTICIPATION RATE

**17%**

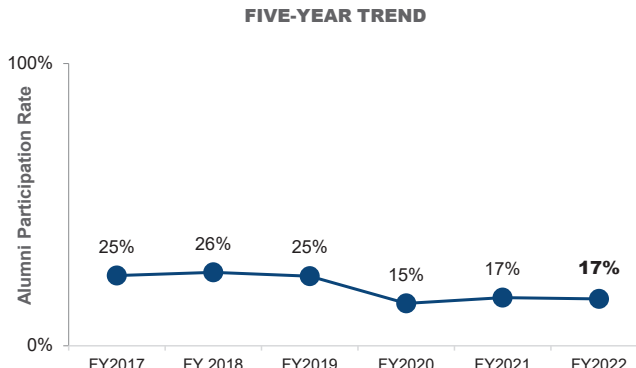
Alumni Participation Rate in FY2022

**0**

One-year % point change (vs. FY2021)

**▼ 8**

Five-year % point change (vs. FY2017)



# SERVICE TO THE COMMONWEALTH

## DEGREE COMPLETIONS

**297**

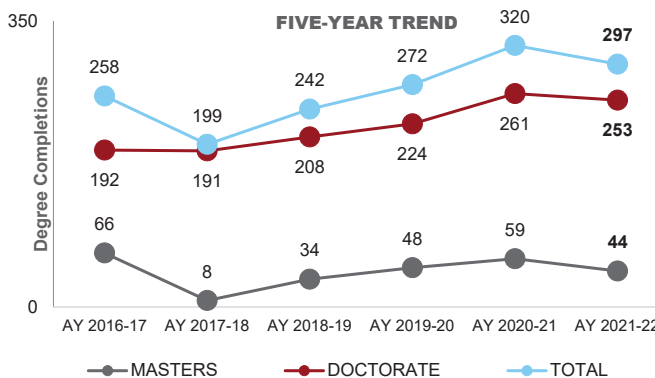
Total degree completions AY 2021-22

**▼ 7%**

One-year % change in total degree completions (vs. AY 2020-21)

**▲ 15%**

Five-year % change in total degree completions (vs. AY 2016-17)



## TOTAL R&D EXPENDITURES

**\$358**

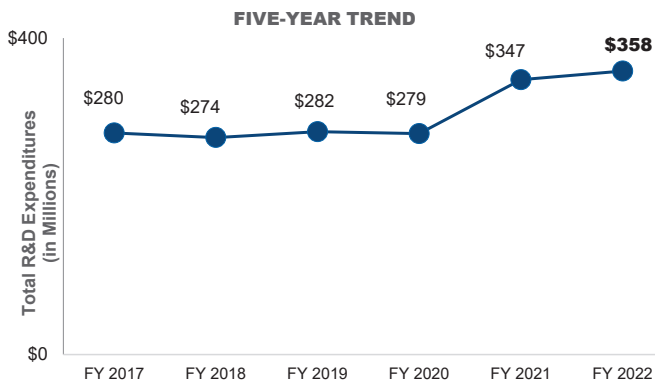
Million in R&D Expenditures in FY 2022

**▲ 3%**

One-year % change (vs. FY 2021)

**▲ 28%**

Five-year % change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## TOTAL R&D EXPENDITURES RANKINGS

**80**

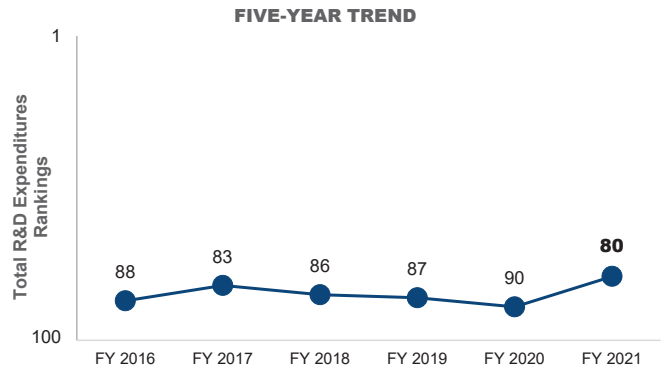
Total R&D Expenditure Ranking in FY 2021

▲ **10**

One-year nominal change (vs. FY 2020)

▲ **8**

Five-year nominal change (vs. FY 2016)



## PATENT APPLICATIONS

**159**

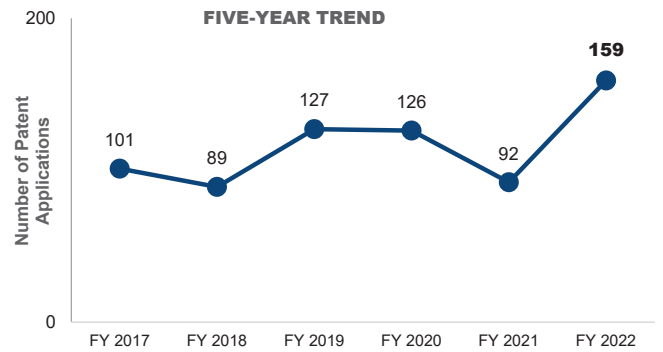
Patent Applications in FY 2022

▲ **67**

One-year nominal change (vs. FY 2021)

▲ **58**

Five-year nominal change (vs. FY 2017)



## LICENSE INCOME

**\$32M**

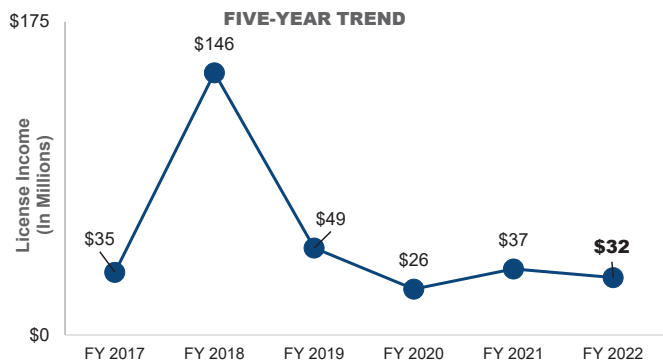
License Income in FY 2022

▼ **13%**

One-year % change (vs. FY 2021)

▼ **9%**

Five-year % change (vs. FY 2017)



# SERVICE TO THE COMMONWEALTH

## PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

**58%**

Alumni Who Live in Massachusetts in Fall 2022

**0**

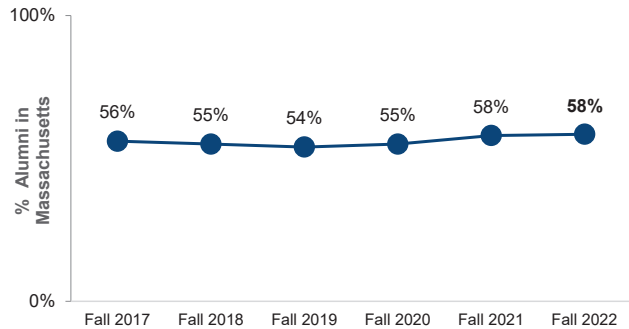
One-year % point change (vs. Fall 2021)

**2**

Five-year % point change (vs. Fall 2017)

Beginning in Fall 2020, this will be calculated using data from the Fall Data Template, Table 18

FIVE-YEAR TREND



## DEGREES AWARDED IN STEM FIELDS

**52**

STEM Degrees Awarded in 2021-22

**5%**

One-year % change (vs. 2020-21)

**9%**

Five-year % change (vs. 2016-17)

**18%**

Percent of degrees in STEM fields in 2021-22

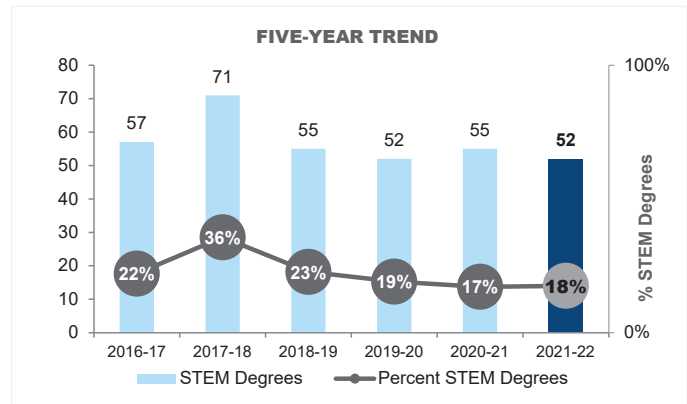
**1**

One-year % point change (vs. 2020-21)

**4**

Five-year % point change (vs. 2016-17)

FIVE-YEAR TREND



## DEGREES IN HEALTHCARE PROGRAMS

**245**

Healthcare Degrees Awarded in 2021-22

**8%**

One-year % change (vs. 2020-21)

**22%**

Five-year % change (vs. 2016-17)

**82%**

Percent of degrees in Healthcare fields in 2021-22

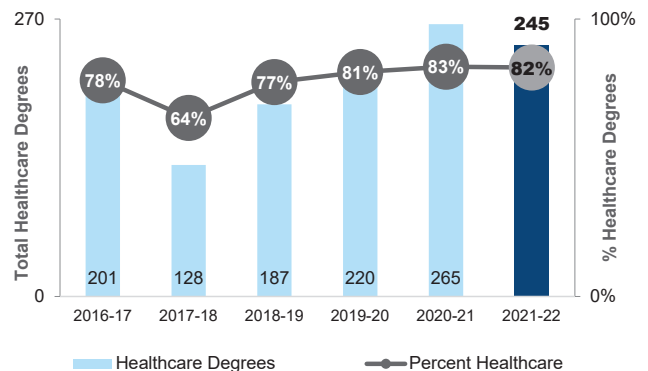
**1**

One-year % point change (vs. 2020-21)

**4**

Five-year % point change (vs. 2016-17)

FIVE-YEAR TREND



# FINANCIAL HEALTH

## ENDOWMENT ASSETS

**\$443M**

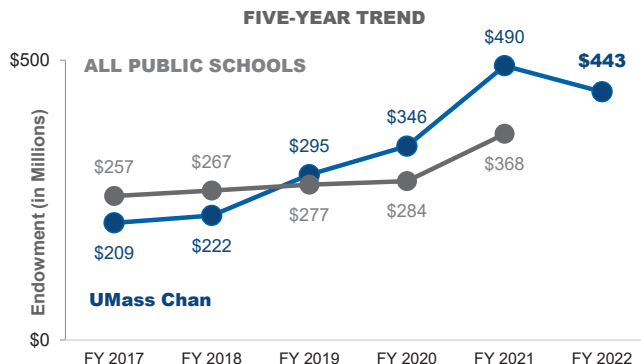
Endowment Assets  
in FY 2022

▼ **10%**

One-year  
% change  
(vs. FY 2021)

▲ **112%**

Five-year  
% change  
(vs. FY 2017)



FY 2022 All Public Schools\* data are not available.

## ENDOWMENT PER ANUALIZED STUDENT FTE

**\$356k**

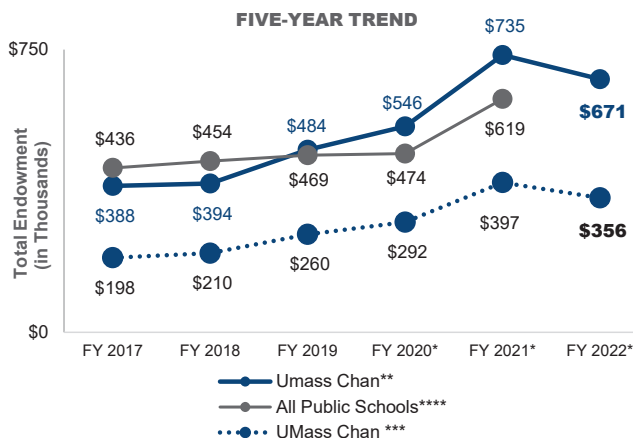
Endowment per FTE  
All Schools  
in FY 2022\*

▼ **10%**

One-year  
% change in  
Endowment per FTE  
All Schools  
(vs. FY 2021\*)

▲ **80%**

Five-year  
% change  
Endowment per FTE  
All Schools  
(vs. FY 2017)



FY 2022\*All Public Schools\*\*\*\* are currently not available

\*\* Total endowment per UMass Chan annualized student FTE -

T.H. Chan School of Medicine only

\*\*\* Total endowment UMass Chan annualized student FTE - All 3 Schools

\*\*\*\* Total endowment per student enrollment - All public medical schools

# FINANCIAL HEALTH

## PRIVATE FUNDS RAISED ANNUALLY\*

**222.6**

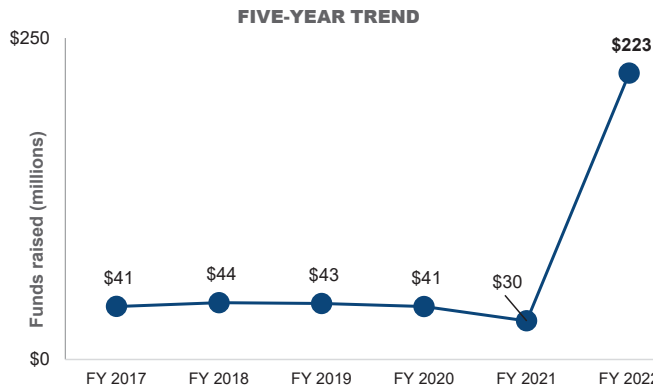
Million  
in FY 2022

▲ **642%**

One-year  
% change in  
(vs. FY 2021)

▲ **440%**

Five-year  
% change  
(vs. FY 2017)



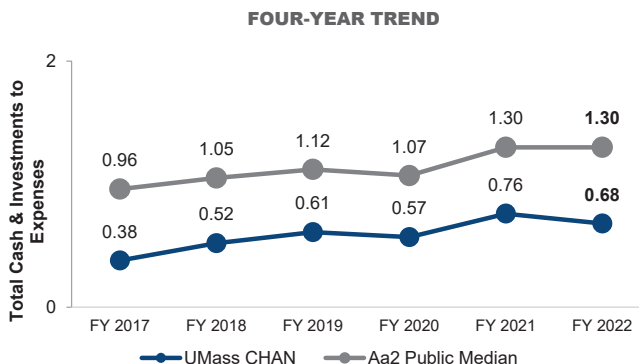
\* Includes cash, pledges and grants

# FINANCIAL HEALTH

## TOTAL CASH & INVESTMENTS TO EXPENSES

**0.68**

Total Cash & Investments to Expenses in FY 2022



## DEBT SERVICE BURDEN

**5.1%**

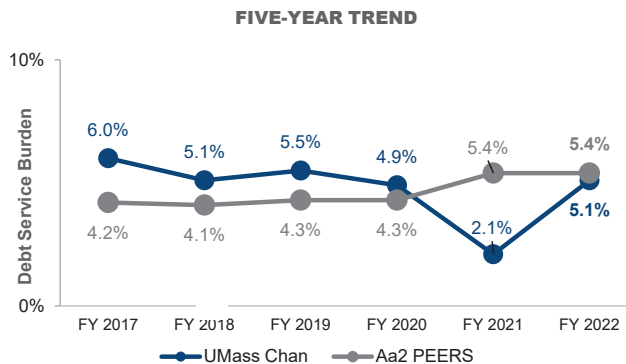
Debt Service Burden in FY 2022

**▲ 3.0**

One-year Point change (vs. FY 2021)

**▼ 0.9**

Five-year Point change (vs. FY 2017)



## OPERATING MARGIN (%)

**2.1%**

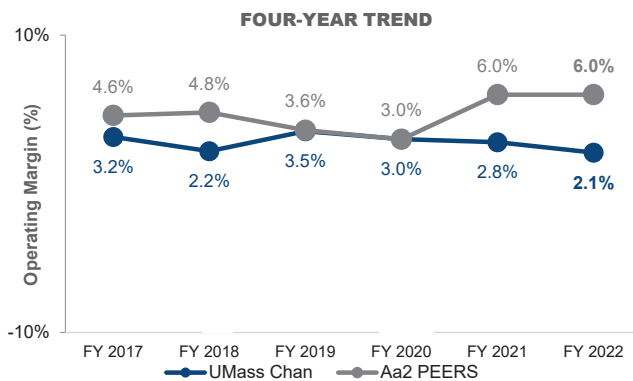
Operating Margin (%) in FY 2022

**▼ 0.7**

One-year Point change (vs. FY 2021)

**▼ 1.1**

Five-year Point change (vs. FY 2017)



## DEFINITIONS AND SOURCES

### ACADEMIC QUALITY INDICATORS

**Mean MCAT Score.** Mean biology MCAT score for new medical students. Peer data calculated from AAMC website.

**Pass Rates on USMLE Step 1 and Step 2 (CK, CS).** The percentage of medical students passing Step 1 and Step 2 on their first attempt. Peer data represents national results from National Board of Medical Examiners (NBME).

**Pass Rate on Nursing Board Certification.** The percentage of nursing graduates who passed the board certification examination on their first attempt. National results (provided by the American Nurses Association Credentialing Center) represent pass rates by registered nursing graduates from all graduate nursing schools in the United States. Peer data not available.

**Technology-Enhanced Classrooms.** Classification of the campus's total classroom capacity in terms of the level of technology-support.

**Percent Tenured/Tenure-Track Faculty FTE.** Percent based on the ratio of Tenured/Tenure-Track Faculty FTE to Total Faculty FTE.

**Faculty FTE.** The difference in the total FTE, from one Fall semester to the next, for all full-time and part-time instructional faculty. Includes faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative. Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

**Faculty-of-Color.** The proportion of full-time instructional staff who are U.S. citizens or permanent residents and report their race/ethnicity to be one or more of the following: Hispanic/Latino, American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Other Pacific Islander, or Two or More Races. Race/ethnicity definition is based on IPEDS.

**Women Faculty.** The proportion of full-time instructional staff who identify themselves as female.

**NIH Funding Among Medical Schools.** Annual amount of NIH Funding. UMass Chan Medical School and peer data are from NIH Ad Hoc Report, 20-school peer list.

**US News Ranking.** U.S. News annual ranking of medical schools with emphasis in Primary Care.

### ACCESS AND AFFORDABILITY INDICATORS

**Percentage Graduates from Massachusetts.** Percentage of total graduate students who are "In State" or residents of Massachusetts based on tuition residency. For state-supported (day) students, tuition classification is used, whereas for CPE students, the actual residency at time of matriculation is used.

**Percent Graduates who are Students of Color.** Graduates who self-identify as either

African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

## DEFINITIONS AND SOURCES

### ACCESS AND AFFORDABILITY INDICATORS

**Percent Graduates who are International.** Percentage of all Graduates who are non-resident aliens, studying at the university on an eligible visa types, and enrolled in credit courses. Does not include permanent residents, refugees, or US citizens.

**Tuition and Fees.** Annual tuition and mandatory fees for in-state students including adjustment for learning contracts. Peer data from AAMC.

### STUDENT SUCCESS AND SATISFACTION INDICATORS

**Acceptance Rate to Choice of Residency.** Percent of graduating students accepted to their choice of residency. National results provided by NRMP.

satisfied" with the quality of their medical education. UMass Chan Medical School percentile compares to national peer data from AAMC MMT Annual Report.

**Student Satisfaction With Quality of Medical Education.** The percentile of graduating medical students indicating "very

**Alumni Participation Rate.** The number of alumni donors divided by the number of alumni of record where alumni of record is defined as all living alumni.

### SERVICE TO THE COMMONWEALTH INDICATORS

**Degree Completions.** The number of degrees (not including certificates) awarded in the previous academic year, by degree level. As reported to IPEDS.

**Percent Alumni Who Live in Massachusetts.** The percentage of UMass Chan Medical School alumni who live in Massachusetts.

**Total R&D Expenditures.** Research and development (R&D) expenditures in all academic fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF.

**Degrees and Certificates Awarded in STEM Fields.** Number of undergraduate and graduate degrees awarded in STEM fields. STEM fields are those defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Certificates data also included separately.

**Total R&D Expenditures Ranking.** Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. Data source NCES WebCaspar/NSF HERD data tables.

**Degrees and Certificates Awarded in Healthcare Fields.** Number of undergraduate and graduate degrees and certificates awarded in Health Care fields. Healthcare designation as defined by Campus IR, and based on CIP classification. All of CIP 51, and specific 6-digit CIPs unique to each campus. Certificates data also included separately.

**Patent Applications.** Number of U.S. Patent applications filed per year. Data reported by campuses to UMass President's Office, OTCV.

**License Income.** Amount of annual income from license agreements. Data reported by each UMass campus to President's Office, OTCV.

### FINANCIAL HEALTH INDICATORS

**Endowment Assets and Annual Growth in Endowment.** The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual

BOT report, and the percent change from the previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

## DEFINITIONS AND SOURCES

### FINANCIAL HEALTH INDICATORS

**Endowment per Annualized Student**

**(FTE).** Total endowment (includes true and quasi-endowments) per annualized FTE student, where FTE of peer institutions is standardized to UMass formulae. Peer data are for comparative peers from financial statements (current year) and IPEDS (prior years).

**Private Funds Raised Annually.** Private funds raised include restricted and unrestricted revenues from individuals, foundations, corporations, and other organizations. Includes private grant revenues but not private contract revenues. Totals for each year include pledges made in that year as well as the value of in-kind contributions.

**Debt Service Burden.** Compares the relative cost of borrowing to overall expenditures. Debt service (P&I) / Total expenses

**Operating Margin (%).** Indicates the excess margin (or deficit) by which annual revenues cover annual expenses (excluding unrealized gains or losses). (Total revenues – total expenses)/Total revenues

**Spendable Cash & Investments to Operating Expenses.** Measures the extent to which the University can rely on wealth that can be accessed over time or for a specific purpose to operate.

Cash & investments – debt service reserve funds + permanently restricted pledges receivable – permanently restricted Net Assets)/Total expenses

### PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

ARIZONA	MU OHIO	PUERTO RICO
ARKANSAS	MU SOUTH CAROLINA	SUNY DOWNSTATE
BUFFALO	MARSHALL - EDWARDS	SUNY UPSTATE
CINCINNATI	MASSACHUSETTS	SOUTH ALABAMA
COLORADO	MICHIGAN STATE	SOUTH CAROLINA
EAST CAROLINA - BRODY	MINNESOTA TWIN CITIES	SOUTH DAKOTA
EAST TENNESSEE - QUILLEN	MISSISSIPPI	SOUTH FLORIDA
EASTERN VIRGINIA	MISSOURI COLUMBIA	SOUTHERN ILLINOIS
FLORIDA STATE	MISSOURI KANSAS CITY	STONY BROOK
GEORGIA	NEBRASKA	TENNESSEE
HAWAII - BURNS	NEVADA	TEXAS A & M
ILLINOIS	NEW MEXICO	TEXAS TECH
KANSAS	NORTH DAKOTA	U WASHINGTON
KENTUCKY	NORTHEASTERN OHIO	UC IRVINE
LSU NEW ORLEANS	OKLAHOMA	UC SAN DIEGO
LSU SHREVEPORT	OREGON	UC SAN FRANCISCO
LOUISVILLE	PENN STATE	UCLA - GEFFEN



## DEFINITIONS AND SOURCES

### PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

UMDNJ - RW JOHNSON	WRIGHT STATE - BOONSHOFT	NORTH CAROLINA
UMDNJ NEW JERSEY	WRIGHT STATE	OHIO STATE
UT GALVESTON	ALABAMA	UC DAVIS
UT HOUSTON	CONNECTICUT	UT SOUTHWESTERN
UT SAN ANTONIO	FLORIDA	VIRGINIA
UTAH	INDIANA	WAYNE STATE
VERMONT	IOWA - CARVER	WISCONSIN
VIRGINIA COMMONWEALTH	MARYLAND	
WEST VIRGINIA	MICHIGAN	

### SELECTED PEER INSTITUTIONS

#### Regional/Competitor:

Harvard University  
 Boston University  
 Tufts University  
 Dartmouth College  
 University of Vermont  
 Brown University  
 State University of New York, Stonybrook  
 University of Maryland - Baltimore

#### Private Aspirant:

Washington University in St. Louis  
 Johns Hopkins University  
 Yale University  
 University of Pennsylvania  
 University of Pittsburgh – Pittsburgh

#### Public Aspirant:

University of Texas, SW  
 University of Iowa  
 University of North Carolina at Chapel Hill  
 University of Alabama, Birmingham  
 University of Michigan - Ann Arbor  
 University of Washington - Seattle  
 University of California, San Francisco

## DEFINITIONS AND SOURCES

### PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

#### Moody's Aa2 Peers

Alamo Community College District, TX	Texas State University System, TX
Arizona State University, AZ	University of Alabama at Birmingham, AL
Auburn University, AL	University of Alabama, AL
Board of Regents of The University System of Georgia, GA	University of Arizona, AZ
California State University, CA	University of Arkansas, AR
City University of New York, NY	University of California, CA
Clemson University, SC	University of Florida, FL
Cuyahoga Community College District, OH	University of Georgia, GA
Florida State University, FL	University of Hawaii, HI
Houston Community College System, TX	University of Houston System, TX
Iowa State University of Science & Technology, IA	University of Kansas, KS
Michigan State University, MI	University of Kentucky, KY
Mississippi Institutions of Higher Learning, MS	University of Massachusetts, MA
Nevada System of Higher Education, NV	University of North Texas System, TX
State University of New York, NY	University of Oregon, OR
State University System of Florida, FL	University of South Carolina, SC
	University of Wyoming, WY

### UMass Amherst - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2021		Fall 2020		Fall 2019		Fall 2018		Fall 2017	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	24,231	13,378	24,233	1,161	24,209	14,107	23,515	13,551	23,388	13,181
GRADUATE STUDENTS	7,814	12	7,409	6	7,141	95	7,078	92	6,952	96

OFFENSE	Calendar Year				
	2021	2020	2019	2018	2017
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	19	3	23	23	18
FONDLING	16	4	11	9	3
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	2	0	2	3	0
AGGRAVATED ASSAULT	3	1	2	4	5
BURGLARY	2	6	8	12	14
MOTOR VEHICLE THEFT	1	0	0	2	4
ARSON	2	0	3	2	1
DOMESTIC VIOLENCE***	3	5	4	9	8
DATING VIOLENCE***	0	0	0	0	0
STALKING***	3	1	3	1	2
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	1	1	1	4	2
LIQUOR LAW ARRESTS**	106	31	180	137	143
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	226	57	208	211	196
DRUG LAW ARRESTS**	0	4	7	4	11
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	2	0	1	1	6
ILLEGAL WEAPONS POSSESSION ARRESTS	1	1	5	1	0
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0

Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.

\*Forcible Sex Offenses include those reported to UMPD and those reported to other Campus agencies.

\*\*UMPD arrests involving both drug law and liquor law violations are counted only as a drug law violation, which is the more serious offense.

### UMass Boston - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2021		Fall 2020		Fall 2019		Fall 2018		Fall 2017	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	12,269	1,079	12,871	292	12,595	1078	12714	1067	12,660	0
GRADUATE STUDENTS	3,368	N/A	3,388	N/A	3,394	N/A	3450	N/A	3,755	0

Calendar Year					
OFFENSE	2021	2020	2019	2018	2017
MURDER / NON NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	0	3	1	1	1
FONDLING	0	0	2	1	0
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	0	0	0
AGGRAVATED ASSAULT	0	0	0	0	2
BURGLARY	1	1	3	1	0
MOTOR VEHICLE THEFT	1	0	0	0	0
ARSON	0	0	0	0	0
DOMESTIC VIOLENCE*	0	0	0	0	0
DATING VIOLENCE*	1	1	1	1	0
STALKING*	3	2	8	8	8
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	1	0	0	0	0
LIQUOR LAW ARRESTS	0	0	3	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	36	12	85	40	0
DRUG LAW ARRESTS	4	0	8	3	3
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	1	0	0
ILLEGAL WEAPONS POSSESSION ARRESTS	2	1	0	2	0
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	1	0	0

*Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus. UMB campus does not have residence halls.*

**UMass Dartmouth - Clery Act Crime Statistics**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2021		Fall 2020		Fall 2019		Fall 2018		Fall 2017	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	5,833	2,541	6,027	669	6,405	3,136	6,841	3,535	6,763	3,538
GRADUATE STUDENTS	1,884	70	1,842	20	1,749	77	1,672	72	1,643	76

Calendar Year					
OFFENSE	2021	2020	2019	2018	2017
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	6	2	3	7	1
FONDLING	0	0	2	0	4
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	2	0	5
AGGRAVATED ASSAULT	2	0	3	7	10
BURGLARY	2	3	12	11	11
MOTOR VEHICLE THEFT	0	1	1	0	0
ARSON	0	0	0	1	0
DOMESTIC VIOLENCE*	2	1	9	0	15
DATING VIOLENCE*	1	0	1	11	0
STALKING*	1	3	2	1	6
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	0	0	0	0	0
LIQUOR LAW ARRESTS	0	0	0	0	4
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	90	11	194	126	161
DRUG LAW ARRESTS	0	0	0	1	1
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	1	4	1
ILLEGAL WEAPONS POSSESSION ARRESTS	0	0	1	2	1
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	3	0	0

*Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.*

### UMass Lowell - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2021		Fall 2020		Fall 2019		Fall 2018		Fall 2017	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	12,885	3,709	13,815	710	14,155	4,494	14,005	4,379	14,013	3,632
GRADUATE STUDENTS	4,978	41	4,554	23	4,183	35	4,239	65	4,303	37

Calendar Year					
OFFENSE	2021	2020	2019	2018	2017
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	1	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	9	0	9	12	4
FONDLING	2	2	6	1	4
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	1	2	1	5
AGGRAVATED ASSAULT	4	3	3	2	2
BURGLARY	3	0	1	1	2
MOTOR VEHICLE THEFT	0	0	2	1	3
ARSON	0	1	0	0	0
DOMESTIC VIOLENCE*	2	3	7	6	3
DATING VIOLENCE*	1	0	0	0	0
STALKING*	2	1	1	1	7
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	0	0	0	0	0
LIQUOR LAW ARRESTS	2	1	0	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	97	32	78	150	217
DRUG LAW ARRESTS	1	1	0	8	5
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	2	0	1
ILLEGAL WEAPONS POSSESSION ARRESTS	2	5	1	0	1
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	1	0	5	0	1

*Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.*

### UMass Chan Medical School - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2021		Fall 2020		Fall 2019		Fall 2018		Fall 2017	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	0	0	0	0	0	0	0	0	0	0
GRADUATE STUDENTS	1,292	0	1,292	0	1,234	0	1,185	0	1,095	0

Calendar Year					
OFFENSE	2021	2020	2019	2018	2017
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	0	0	0	0	1
FONDLING	0	1	0	2	1
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	1	0	0	0
AGGRAVATED ASSAULT	1	5	9	3	3
BURGLARY	0	1	0	1	2
MOTOR VEHICLE THEFT	7	6	6	5	1
ARSON	0	0	0	0	0
DOMESTIC VIOLENCE*	5	3	4	7	3
DATING VIOLENCE*	0	0	0	0	0
STALKING*	0	0	0	4	4
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	0	0	0	0	0
LIQUOR LAW ARRESTS	2	0	0	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0
DRUG LAW ARRESTS	3	2	4	11	16
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0
ILLEGAL WEAPONS POSSESSION ARRESTS	0	0	2	1	1
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0

*Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately accessible from the campus. UMW campus does not have residence halls.*