



# UMASS LOWELL 2020 REPORT CARD 2014



Learning with Purpose

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When UMass Lowell embarked on its ambitious strategic plan—UMass Lowell 2020—we committed to benchmarking our progress toward targeted goals. To that end, we created the UMass Lowell Report Card to track and evaluate indicators that we believe are vital to our success. This report identifies 25 strategic indicators organized around five pillars of excellence that measure progress toward our goals.

Systematic analysis of the Report Card will be used to guide multi-year financial and academic program development by the Strategic Planning Commission working closely with senior administrators, faculty, staff and students of the University.

## MISSION AND PILLARS OF EXCELLENCE FOR UMASS LOWELL 2020

### MISSION:

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

### UMASS LOWELL 2020 — PILLARS AND COMMITTEES:

Strategic Planning Commission:  
Jacqueline Moloney & Ahmed Abdelal,  
Co-chairs  
NEASC Committee:  
Charlotte Mandell & Susan Houde,  
Co-chairs

#### I. TRANSFORMATIONAL EDUCATION

Experiential and trans-disciplinary learning prepare UMass Lowell students for fulfillment and making a difference in the world.  
Committee on Transformational Education: Charlotte Mandell, Anita Greenwood, Co-chairs  
Subcommittee on Advising  
Subcommittee on Course Redesign  
Subcommittee on General Education  
Subcommittee on Enhancing and Fostering Support for Trans- and Inter-disciplinary Learning  
Committee on Athletics Visioning:  
Don Pierson, Chair

#### II. GLOBAL ENGAGEMENT & INCLUSIVE CULTURE

Dynamic, global collaborations around the world support student and faculty exchanges, research and other entrepreneurial enterprises. These initiatives will contribute to the development of an inclusive campus culture.  
Committee on Global Engagement and Inclusive Community: Luis Falcon, Lauren Turner, Co-chairs

#### III. INNOVATIVE RESEARCH & ENTREPRENEURSHIP

UMass Lowell fosters innovative and creative research and scholarship that seeks sustainable solutions to the major challenges in today's world.  
Committee on Innovative Research: Julie Chen, Andrew Harris, Co-chairs  
Subcommittee on Centers & Institute  
Subcommittee on Policies & Guidelines  
Subcommittee on Faculty Mentoring  
Subcommittee on Communication & Networking  
Riverhawk Advisory Board:  
Don Latorre, Chair

#### IV. LEVERAGE OUR LEGACY AND OUR PLACE

UMass Lowell is a public enterprise committed to building on our legacy by creating partnerships, locally, regional, nationally and internationally that enrich and sustain the human experience.  
Committee on Economic Development, Entrepreneurship and Corporate Relations: Sanjeev Manohar, Steve Tello, Jack Wilson, Co-chairs  
Web Advisory Committee:  
Patti McCafferty, Mark Hines, Co-chairs  
Deans' Alumni Advisory Councils

#### V. ENTREPRENEURIAL STEWARDSHIP

An entrepreneurial approach to stewardship of human, physical and financial resources will be the hallmark of UMass Lowell's approach to building a healthy and sustainable future.  
Committee on Budget Planning:  
Michael Carter, Steve O'Riordan, Co-chairs  
Master Planning Committee:  
Joanne Yestranski, John Ting, Co-chairs  
Climate Action Plan Committee:  
Tom Dreyer, Mark Hines, Co-chairs

# UMASS LOWELL 2020 REPORT CARD FOR 2014

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

## EXTERNAL NATIONAL RANKINGS AND CLASSIFICATIONS

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
<b>U.S. News &amp; World Report</b> , "National Universities," Publics	101	97	94	<b>85</b>	60
<b>U.S. News &amp; World Report</b> , "National Universities," Overall	183	177	170	<b>158</b>	120
Tier/ # National Universities Ranked	Tier 1/260	Tier 1/268	Tier 1/270	<b>Tier 1 /270</b>	Tier 1
<b>Payscale.com</b> "30-yr Return on Investment Rank," Publics				<b>10</b>	
<b>Payscale.com</b> "30-yr Return on Investment Rank," Overall				<b>50</b>	
<b>Forbes</b> , "Best Value Colleges," Overall				<b>10</b>	

### Carnegie Foundation for the Advancement of Teaching:

*Basic Classification:* Research University—High Research (RU/H) since 2010

*Community Engagement Classification:* "Curricular Engagement" & "Outreach and Partnerships" since 2008

### President's Higher Education Community Service Honor Roll:

UMass Lowell has been on every Honor Roll since 2009, "with Distinction" in 2010 and 2012.

## I. TRANSFORMATIONAL EDUCATION

### A. Overall Admissions & Enrollment

#### SAT Scores of First-time Freshmen

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	018 Goal
75th Percentile	1160	1160	1160	1170	1190	1210	<b>1210</b>	1275
Average	1083	1071	1083	1089	1113	1125	<b>1134</b>	1175
25th Percentile	1000	970	1000	1000	1020	1030	<b>1040</b>	1075

Source: OIR, "Enrollment at a Glance," various years

#### Student Enrollment—Headcount

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	018 Goal
Undergraduate	6,659	7,316	8,031	8,675	9,026	9,401	<b>9,804</b>	12,000
Graduate	2,745	2,765	3,054	3,426	3,702	4,007	<b>4,198</b>	5,000
Total DAY	9,404	10,081	11,085	12,101	12,728	13,408	<b>14,002</b>	17,000
Online & Continuing Ed	2,231	2,396	2,517	2,585	2,711	2,886	<b>2,930</b>	3,000
GRAND TOTAL	11,635	12,477	13,602	14,686	15,439	16,294	<b>16,932</b>	20,000

Source: OIR, "Enrollment at a Glance," various years

#### Online Course Registrations

	AY 2007	AY 2008	AY 2009	AY 2010	AY 2011	AY 2012	AY 2013	018 Goal
Number of Registrations	10,476	12,367	14,427	16,698	18,567	20,322	<b>22,522</b>	30,000
Year-on-Year Increase	21%	17%	16%	15%	11%	9.5%	<b>10.8%</b>	6%

Source: Division of Online and Continuing Education, various years; 2018 goal based on 6% growth/yr

## B. Undergraduate Education

### Bachelor's Degrees Awarded

	AY 2007	AY 2008	AY 2009	AY 2010	AY 2011	AY 2012	AY 2013	2018 Goal
UMass Lowell	1,381	1,362	1,337	1,475	1,653	1,836	<b>2,031</b>	2,450
Peers (Median)	2,855	2,961	3,105	3,198	3,186	3,414	<b>n/a</b>	

### Full-Time Freshman One-Year Retention Rate

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
UMass Lowell	75%	79%	81%	78%	79%	81%	<b>84%</b>	90%
Peers (Median)	82%	82%	83%	84%	84%	84%	<b>n/a</b>	

### Full-Time Freshman Six-Year Graduation Rate

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
UMass Lowell	44%	51%	53%	51%	50%	54%	<b>54%</b>	60%
Peers (Median)	57%	59%	59%	57%	59%	n/a	<b>n/a</b>	n/a

### Four-Year Graduation Rate of Upper-Level Transfer Students

	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
UMass Lowell	65%	77%	65%	70%	<b>64%</b>	80%
Number in Cohort	33	140	88	152	<b>242</b>	n/a

### Undergraduate Day Class Size

	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
Percent below 20	39%	37%	<b>50%</b>	<b>55%</b>	<b>51%</b>	<b>50%</b>	50%
Peers (Median)			38%	36%	37%	<b>n/a</b>	n/a

Source: OIR, Common Data Set, various years

### Number of Faculty

	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
FT Faculty	425	444 <sup>†</sup>	484 <sup>†</sup>	535 <sup>†</sup>	<b>546</b>	715
PT FTE Equivalent *	156	190	180	153	<b>155<sup>†</sup></b>	153
Total Faculty FTE	581	634	664	688	<b>701</b>	868
Percent Instruction by Adjuncts	27%	30%	27%	22%	<b>22%</b>	18%

<sup>†</sup> Includes Research Faculty. \*Calculated according to IPEDS methodology: FT + [(1/3)PT]

### National Survey of Student Engagement Results: Overall Student Satisfaction\*

	Fall 2008	Fall 2011	Fall 2012	Fall 2013	2018 Goal
UMass Lowell Freshmen	3.02	3.11	3.10	<b>3.00</b>	3.20
N.E.** Publics Freshmen	3.06	3.13	3.12	<b>3.10</b>	
UMass Lowell Seniors	3.06	3.14	3.14	<b>3.10</b>	3.20
N. E.** Publics Seniors	3.17	3.13	3.17	<b>3.20</b>	

\* On a scale of 1 = "Poor" and 4 = "Excellent." \*\* N.E. = New England

**Note:** Two NSSE questions in earlier Report Cards are no longer part of the 2013 NSSE Survey, so have been dropped.

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

	2013	2018 Goal
UMass Lowell Freshmen	<b>65%</b>	70%
New England Publics Freshmen	<b>56%</b>	
Carnegie Class Peers	<b>57%</b>	
UMass Lowell Seniors	<b>83%</b>	85%
New England Publics Seniors	<b>86%</b>	
Carnegie Class Peers	<b>85%</b>	

\* For Freshmen, these High-Impact Practices include Learning Community, Service-Learning, Research with faculty; For Seniors, these include Internship, Study abroad & Culminating senior experience in addition to those for Freshmen.  
**Note:** New item added to Report Card.

## C. Graduate Education

### Master's/Doctoral Degrees Awarded

	AY 2007	AY 2008	AY 2009	AY 2010	AY 2011	AY 2012	AY 2013	2018 Goal
Master's*	465	509	602	612	654	739	<b>745</b>	1,100
Peers (Median)	999	1,025	1,108	1,070	1,116	1,102	<b>n/a</b>	
Doctoral*	69	67	80	67	83	93	<b>102</b>	135
Peers (Median)	91	104	106	115	121	128	<b>n/a</b>	

\*Master's include Education CAGS/Ed.S. degrees; Doctorates include research and professional practice degrees

## II. GLOBAL ENGAGEMENT AND FOSTERING INCLUSION

### International Undergraduate/Graduate Students

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
Undergraduate DAY + CE	82	69	57	64	129	123	<b>181</b>	500
Percent of Total	0.9%	0.9%	0.7%	0.6%	1.1%	1.0%	<b>1.4%</b>	4%
Pathways Students*	n/a	n/a	n/a	n/a	63	153	<b>218</b>	
TOTAL UG + Pathways					192	276	<b>399</b>	
Graduate	422	463	403	390	405	<b>525</b>	<b>678</b>	1,000
Percent of Total	15.3%	16.7%	13.2%	11.4%	11.0%	13.1%	<b>16.2%</b>	20%

\* Includes Navitas students

### Underrepresented Populations—Faculty and Staff

	Spring 2007	Spring 2008	Spring 2009	Spring 2010	Spring 2011	Spring 2012	Spring 2013	2018 Goal
Faculty† Number	82	82	89	86	93	108	<b>115</b>	165
Percent of Total	19.4%	19.4%	21.3%	21.0%	22.3%	21.3%	<b>21.5%</b>	23%
Staff Number	86	96	91	101	111	117	<b>122</b>	128
Percent of Total	11.2%	12.5%	12.0%	13.1%	13.6%	13.7%	<b>13.4%</b>	15%

† Includes instructional and research faculty

### Underrepresented Populations—Students

	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	2018 Goal
Undergraduate Number	1,266	1,460	1,741	2,122	2,442	2,529	<b>2,601</b>	3,600
Percent of Total	21%	22%	23%	26%	29%	29%	<b>29%</b>	35%
Graduate Number	327	360	404	510	664	746	<b>692</b>	1,150
Percent of Total	17%	18%	18%	19%	21%	23%	<b>21%</b>	30%



### III. INNOVATIVE RESEARCH

#### Research Expenditures (Millions)

	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
Total Research and Development Expenditures	\$36,000	\$41,000	\$57,000	\$59,000	\$60,000	\$60,600	<b>\$63,136</b>	\$98,000 <sup>†</sup>
Total Research and Development Expenditures per TT* Faculty Member	\$89,000	\$102,000	\$131,000	\$149,000	\$153,000	\$153,000	<b>\$154,000</b>	\$180,000

† Based on assumed annual growth 10%. \*TT = Tenure Track

#### License Income

	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
UMass Lowell		\$480,000	\$340,000	\$350,000	\$1.13 M	\$261,000	<b>\$386,000</b>	\$450,000 <sup>†</sup>

† Assumed annual growth 5% from 2010

### IV. LEVERAGE OUR LEGACY AND PLACE

#### Alumni Giving (Number of Donors)

	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
Alumni Giving		5,222	4,683	4,909	6,898	7,513	<b>8,106</b>	10,000
% Giving		8.4%	7.4%	7.6%	10.3%	11.5%	<b>11.7%</b>	13%
Peers Average % Giving		6%	5%	6%	5% <sup>†</sup>	5% <sup>†</sup>	<b>n/a</b>	

† Without UNH, URI



## V. ENTREPRENEURIAL STEWARDSHIP

Courses Using Web-Based Technology								
	FY 2007	AY 2008	AY 2009	AY 2010	AY 2011	AY 2012	AY 2013	2018 Goal
Courses Using <i>Blackboard</i>		1,215	1,422	1,567	1,771	2,059	2,365	2,750
Private Funds Raised Annually (Millions)								
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
UMass Lowell		\$12.9	\$9.4	\$10.8	\$15.2	\$17.6	\$19.3	\$25.0
Total Endowment and Annual Growth in Endowment (Millions)								
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
UMass Lowell Total	\$33.7	\$35.8	\$31.1	\$41.1	\$49.5	\$54.9	\$66.1	\$100
Annual Growth	16%	6%	-13%	32%	20%	11%	20%	n/a
Endowment Per Student								
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
Per FTE	\$3,726	\$3,915	\$3,085	\$3,711	\$4,185	\$4,388	\$5,027	\$5,300
Peers (Median)	\$6,962	\$5,286	4,692	\$6,151	\$7,346	\$7,922	n/a	n/a
Financial Health (Millions)								
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	2018 Goal
Total Operating Revenues	\$116.1	\$129.4	\$149.3	\$170.5	\$189.3	\$203.8	\$220.8	\$338.5
Annual Growth		11%	15%	14%	11%	8%	8%	n/a
Operating Margin		3.2%	2.9%	9.8%	5.9%	break even	2.1%	1.0%
Debt Service Ratio		3.9%	4.1%	4.0%	4.2%	4.7%	5.8%	7.5%

**Current Peers:** Georgia State U., U. Maine, U. Maryland–Baltimore County, U. New Hampshire, U. Rhode Island, San Diego State U., Virginia Commonwealth U., U. Wisconsin–Milwaukee



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