



Faculty Council

https://www.umb.edu/faculty_staff/faculty_council

Monday, March 4, 2024, 1:00-3:00 PM

Chancellor's Conference Room

Third Floor, Quinn Administration Building

Agenda

I. Approval of the Agenda

II. Motion to Approve the 2/05/2024 Minutes

III. Motion from the General Education Committee and its Diversity Subcommittee (Neal Bruss, Associate Professor of English & the Chair of the General Education Committee)

Moved: That Political Science 439, Thinking Islamophobia and the War on Terror, be approved as satisfying the U.S. Diversity requirement.

WISER Course Description: Islamophobia is a longstanding part of American history and culture that takes specific forms in our current moment. This course will traverse the history of Islamophobia in the United States, paying particular attention to its 21st century incarnations via a critical and genealogical accounting of the "War on Terror," which will be considered as an extension of US empire and settler conquest as well as a project of racialization that constructs Islam and Muslims as innately "terrorist."

The two diversity dimensions of this course are race and culture (religion, nationality/ethnicity immigrant status, and language). Sex/gender/sexuality is a third dimension of diversity. The proposal may be found on Curriculog.

IV. Motion from the Graduate Studies Committee (Andre Maharaj, Director of the Graduate Certificate Program in Applied Behavior Analysis for Special Populations & the Chair of the Graduate Studies Committee)

Motion #1 (All materials available for review on Curriculog) **From: CM**

Request for program changes to the Business Analytics MS: 1) to change the name of the track "Big Data Analytics" to "AI and Data Analytics" 2) to add three elective courses to both tracks (AI and Data Analytics and Supply Chain Analytics): MBAMGT 698 Practicum, MSIS 697 Special Topics, and MSIS 690 Master's Thesis. These courses already exist. 3) to remove "Students may also choose MSIS 690/699 Master's Thesis Option, MSIS 697 Special Topics, or MBAMGT 698 Practicum (students must have relevant internship)" from the Capstone section of the program description and to correct the Capstone Note in program requirements which currently reads "capstone: completion of a written paper".

Rationale: 1) The MSIS department has updated the courses in the Big Data Analytics track to cover current AI and machine learning technologies; therefore, the new name of AI and Data Analytics is more appropriate. 2) The three additional courses will add flexibility to the program. 3) This is to correct a mistake. MSIS 690 Master's Thesis Option (there is no MSIS 699), MSIS 697 Special Topics, and MBAMGT 698 Practicum have been proposed to be added as electives to the two tracks in the Business Analytics MS. They cannot replace the Capstone course, MSIS 630. The capstone is the capstone course, MSIS 630 - it was never proposed to be a written paper.

Motion #2 (All materials available for review on Curriculog) **From: CLA**

Request for course changes: to change the title of ENGL 667 from Seminar for Tutors to Writing Center Pedagogy, Theory, and Research; change the description; and require department consent for enrollment.

Old description: This course teaches graduate students to tutor undergraduate students who are taking Freshman English 101 and 102 at UMass Boston. It features readings, writing, and discussion on the theoretical and practical issues one encounters in working as a composition tutor. Tutors learn to apply research about tutoring to the specific context of the undergraduate classroom, learning not only about tutoring goals and practices, but also about the UMass Boston Freshman English program's philosophy and the UMass Boston undergraduate experience. This knowledge provides a foundation for further teaching at UMass Boston. All elements of the course combine to provide an intellectual framework for articulation and synthesis of, as well as reflection on, what is learned in the work experience of the tutor.

New description: This course serves as an introduction to the work of writing centers and to writing center and composition pedagogies and theories. By reading and discussing writing center and writing studies scholarship, students will learn to engage in flexible practices to successfully work with writers from various backgrounds and identities. This course asks students to conduct writing center research, to compose written projects, and to make connections to teaching English courses. Students in this course may have the option of working directly with writers in the Writing Center.

Rationale: As one of the main avenues for training new writing center consultants, English 667 requires an updated title, description, and syllabus that more accurately reflect the work of the university-wide Writing Center and the field of writing center studies. The current course materials were originally written for the Writing Nook, which was an English Department based writing center. This revised course introduces students to the practice, methods, and theory of peer writing center consulting, providing a foundation for future teaching and giving students the tools to develop a number of skills that can serve them beyond their studies.

Motion #3 (All materials available for review on Curriculog) **From: MGS**

Request for a course change, to change GGHS 714 from a 2-credit course to a 3-credit course, to match both current practice in teaching the course and recent changes made (and approved through governance) to the program requirements for the PhD program in Global Governance and Human Security.

Rationale: This course requires the same amount of in-class time and written work as a standard 3-credit graduate course. There are no changes to the content of the course or its role in the program, just to the number of credits students get for it. The requirements for the degree have already been revised to reflect this change by decreasing the number of total credits for GGHS 899 Dissertation Research from 10 to 8; GGHS 714 is taken twice for a total of 6 credits instead of 4; the total number of credits for the degree remain the same.

Motion #4 (All materials available for review on Curriculog) **From: SGISD**

Request for a program change to the Vision Studies MEd - Teacher of Students with Visual Impairment Track: to replace one required course in the program, VISN 605 Clinical and Functional Assessment of Vision, with a new course (already approved through governance), VISN 615 Early Childhood and Visual Impairment,

to meet new licensure requirements from DESE. The credits remain the same and all standards are incorporated and enhanced.

Rationale: One of the Department of Elementary and Secondary Education’s recommendations to the program in 2022 was to strengthen the content for early childhood because our teachers are licensed from birth to age 22. The current program has content on early childhood, but not to the extent needed. The new course focuses solely on early childhood and visual impairments to meet the recommendations from DESE. Most of the content in VISN 605 was covered sufficiently in other courses (VISN 613 & VISN 614). A small amount of additional content covered in VISN 605 is being strengthened in the Assessment and Instructional Strategies courses I and II (VISN 613 & VISN 614).

Motion #5 (All materials available for review on Curriculog) **From: CEHD**

Request for a program change, to require COUNSL 661 Career Development Facilitation and Training instead of COUNSL 613 Vocational Development and Career Information as a requirement for the MED in Counseling (school counseling) program.

Rationale: Both courses are career focused, but COUNSL 661 allows for students to obtain the Career Development Facilitator certification while also meeting the career development content requirements needed to prepare the students to become school counselors and meet the Massachusetts Department of Elementary and Secondary Education licensure requirements.

Motion #6 (All materials available for review on Curriculog) **From: CLA (MGS)**

Request for 8 new courses proposed for the stand-alone, destination Master of Public Policy (MPP-2yr., currently in governance) curriculum.

1) PUBPOL 610 Policy and Program Evaluation

Description: How do you know if a program, policy, or practice is designed to remedy a social problem, and if it is in fact doing so? This course addresses this question through blending policy design, evaluation theory and research with “hands on” experience. It covers essential pieces of the policy and program design and evaluation process including tips for design of different types of programs, identifying values by which to determine goals, objectives, alternatives and outcome measures, working with community partners, ethics of research, articulating a theory of change through logic models, process evaluation, outcome/impact evaluation, measuring program success, and an introduction to cost-benefit analysis. Students will work collectively and individually, cultivating skills critical to the policy design and evaluation process including developing measures, learning principles of the design and analysis of different classes of programs, conducting interviews, observations and surveys, analyzing data, and presenting findings.

Rationale: Policies and the programs they generate are closely linked. This first-semester course is intended as an introduction to two essential skills of the MPP program: policy and program design and evaluation. These two fields are usually treated as distinct areas. The course emphasizes the importance of understanding policy design and program evaluation to develop effective, impactful, and ethical solutions to complex social topics. This will be a core, required course for the MPP-2yr. program.

2) PUBPOL 620 Analytic Methods for Public Policy

Description: This course is an introduction to data analytics, with a focus on data acquisition, management, and analysis in public-serving organizations. Successful public policy professionals should be able to deploy data analytics and data science tools and methods to make meaning from data, to identify, propose and evaluate relationships to build explanations about phenomena and organizations associated with the public interest. This course is designed to provide students the skills for assessing the need for data in public-serving organizations, for extracting knowledge and insight from data, and effectively communicating results for policy action and public engagement.

Rationale: Public-serving organizations are now expected to communicate data-rich messages with multiple stakeholders and engage in data-driven policy design, implementation, and evaluation using the most current analytic methods and tools. Policy professionals must now bring to their workplaces skills in data literacy, data management, data storytelling and visualization, and the means to achieve inference from data for policy insight. This will be a core, required course for the MPP-2yr. program.

This course differs from PUBADM 620 Analytic Methods I for the Master of Public Administration program because it requires a higher level of analytic and methodological mastery.

This course differs from PPOL-G 604L Statistical Methods in the Analysis of Social Problems I for the Public Policy PhD program because its focus is on use of multiple methods for data analysis to address real-world problems and to communicate these results to experts and non-experts alike. It is not intended to support training for academic research: theory-building and hypothesis testing.

3) PUBPOL 651 Social Enterprise and Innovation

Description: Social entrepreneurship and policy innovation is a new and fast-growing area of social policy and business scholarship and practice. The goal of social enterprise is to do well financially by creatively solving social issues. Innovation – in problem identification, stakeholder engagement, acquisition of funding, production, marketing, evaluation, and other areas – is essential to the success of social entrepreneurship. This course will introduce students to social enterprise and innovation through a mix of scholarly and practice reading, engagement with scholars and practitioners and teamwork. Working in a team and on a social issue they care about, students will learn system thinking skills, entrepreneurial mindset, skills, and tools to start up their own social venture or work in a social business.

Rationale: The course aims to prepare MPP students for diverse roles in addressing critical social challenges in both developed and developing economies. This will enable students to gain a broader perspective and become capable of establishing their own social businesses or making significant contributions to existing ones. Through a blend of academic articles, practical insights, and teamwork, students develop a robust foundation in entrepreneurial thinking. Students gain distinctive perspectives of the two-fold mission of social enterprise, that involves achieving financial success while addressing social issues. This course will be an elective and also is part of the concentration in Nonprofit Organization Policy and Management.

4) PUBPOL 671 Policy Simulation and Decision Modeling

Description: This elective course in the Master of Public Policy program provides an introduction to analytic methods for decision-making to improve planning and operations of public service organizations with a particular focus on mission-driven community-based organizations. A deeper understanding of relevant methods will help organizations better measure the impact of their services, and design new ways to provide these services to optimize efficiency, effectiveness and equity. The course will emphasize iterative, inductive, mixed-methods and critical approaches to empirical problem-solving using two broad classes of analytic methods: simulation and optimization.

Rationale: This elective provides an introduction to analytic methods for decision-making to improve planning and operations activities of public service organizations. The course concentrates on two types of policy-analytic approaches: I) simulation, to solve the complex problems that have interdependencies and feedback loops and is not easily amenable to standard analytic solutions, and ii) optimization in which a problem can be decomposed into decision alternatives, attributes and decision variables, and a most-preferred alternative may be selected via mathematical methods to optimize one or multiple objectives. This course will develop essential skills and ways of thinking to solve today's complex challenges facing our societies. It will be part of the Data Analytics and Policy Simulation concentration.

5) PUBPOL 673 Urban Analytics and Data Science

Description: This course addresses assembling, managing, visualizing and analyzing data on and about urban phenomena: people, communities, services, infrastructure in built environments. Using material from geographic information systems and geospatial technologies; urban analytics; and information systems policy, it enables students to become data explorers, data analysts, data stewards and data planners, all with the goal of making our urban communities as nurturing and sustainable as possible for the widest diversity of the city's residents.

Rationale: Urban planning and policies require urban data collection and analysis to better serve communities. This course will provide essential training in analyzing urban phenomena that has a rich and wide variety of data waiting to be used for making cities sustainable and livable for all. This course is unique in the sense that it combines data science and analytics with a specific focus on urban informatics, that will equip UMB MPP students with technical capacity with a clear orientation towards public service. It will be part of the Data Analytics and Policy Simulation concentration.

6) PUBPOL 687L Nonprofit Management

Description: Nonprofit organizations aim to improve society while facing similar management challenges to any organization as they provide valued goods and services. This large and growing sector includes colleges and universities, hospitals and social service entities, human rights. This course provides an opportunity to explore essential management issues in a nonprofit context as well as topics that are somewhat unique to the nonprofit sector, or that have particularly distinct considerations for nonprofit managers—such as distinctive funding methods, governance and staffing structures. This is an overview course and as such it is designed to provide you with breadth, rather than depth, of knowledge about the nonprofit sector. The final project is designed to let students “go deep” into one topic of their choosing however.

Rationale: The MPP program development committee has agreed that offering Nonprofit Management as a cross-listed course, jointly with the Management and Urban Planning and Community Development departments is the best way for use university resources to deliver a course of interest to students in multiple programs. The nonprofit sector is an essential component in the implementation of public policy, and nonprofit organizations play a crucial role in creating positive social change. Comprehending the dynamics and structures behind nonprofit management is vital for students to gain a deeper understanding of the fundamentals of this sector and its contribution to society. This course is a comprehensive introduction to the nonprofit sector for students from various backgrounds. Throughout the course, students delve into critical management issues particular to nonprofits and gain insights into current sector trends.

PUBPOL 687L, MGT 687L and UPCD 687L are the same course. They are intended to be offered in alternating years by the Management, Urban Planning and Community Development, and Public Policy and Public Affairs departments for their MBA, UPCD and MPP masters programs, respectively. Instructors in the various departments will adapt the course syllabus template to reflect their own teaching styles and areas of expertise. The current course syllabus makes reference to an "alternative assignment approach" that would enable students to pursue a capstone project within the course. This is an option for MGT 687L and UPCD 687L only. The MPP offering of this cross-listed course will be modified to suit the needs of our program's instructor and degree requirements, in particular that our program's capstone requirement is distinct from any other coursework.

7) PUBPOL 698 Capstone

Description: PUBPOL 698 Capstone is a 6-credit course designed to facilitate completion of the capstone project, the final requirement for the Master of Public Policy degree. Students will develop a research question, create a literature review, develop a research design and data collection instruments, collect relevant data, write a full report with findings, implications and conclusion/recommendations; and present their capstone study during the final presentations at the end of the semester. Depending on student interests and availability of topics and client organizations, students may pursue their capstone projects as solo or small-group endeavors.

Rationale: The MPP program provides training in many different analytic methods and application areas, with an emphasis on quantitative and mixed-method approaches to public and government policy design, implementation, and evaluation. It is essential that our program's graduates demonstrate skill in applying their learning to real-world problems and organizations. Capstone is intended to provide students with meaningful experience in problem identification, formulation, and solution, along with insights regarding potential for solution implementation and evaluation.

8) PUBPOL 699 Internship

Description: The internship provides an invaluable opportunity to gain substantive experience in the field of public policy, to apply material acquired in the classroom to professional work situations as well as to develop one's leadership capacities. These internships are intended to provide training for assessing needs for

government and nonprofit interventions in the private and public sector, providing support for design of new programs or redesign of existing programs, and rigorous evaluation of existing interventions.

Rationale: Practical experience plays a crucial role in shaping a professional career in public policy. The internship course is designed to merge academic and professional development goals, serving as a vital opportunity for individuals to gain experience in public policy and translate theoretical knowledge into practical skills and vice versa. Students will work with the instructor during the spring of their first year of classes to identify a suitable internship site for the summer after their first year.

Motion #7 (All materials available for review in Curriculog) **From: CEHD**

Request for a new track intended for students who want to pursue their MEd Leading to Successive Licensure in Moderate Disabilities PreK-8 or 5-12 beginning in their undergraduate program. This new option will enable undergraduate students to obtain a bachelor's degree and the MEd leading to Successive Licensures in Moderate Disabilities (PreK-8 or Grades 5-12) in as little as five years.

Rationale: The addition of an AMP pathway into the program will help in increasing and diversifying enrollment, in addition to addressing special educator teacher shortage issues in our state in terms of both quantity and diversity of candidates entering the field. This program contains no new courses or modifications of existing courses. Undergraduate students will replace some electives with graduate coursework and then matriculate as graduate students to complete their master's degrees.

V. Money Matters: An Open Conversation

UMass Boston was born in 1964 out of a crisis, when about 8,000 applications from the first wave of baby boomers, most of whom could not afford a private college education, and about 1,400 of those from metropolitan Boston, were rejected by UMass Amherst, the only public university in Massachusetts at that time. Our courageous, visionary and effective founders reached a decision within just a few months to establish UMass Boston for pursuing a noble mission and a highly inspirational vision: equal access to excellence in advanced learning, knowledge creation, technological innovations, well-paid career opportunities, and economic and social upward mobility. *“The philosophy is to provide a quality institution which eventually, like UCLA, may grow to 20,000 or 25,000 students”* (In the minutes of the meeting of the UMass Board of Trustees held on July 2, 1964). It was clearly stated by John F. Ryan on the occasion of his inauguration as the first chancellor of UMass Boston on December 10, 1966, that *“In providing young people equality of opportunity, we have an obligation to see that the opportunities we offer them are indeed equal to the best that private schools have to offer. Otherwise equality of opportunity means only that young people of limited means have equal access to something less than the best, and we perpetuate a class system of education.”*

However, UMass Boston has never been adequately supported financially. In 1967, Clark Kerr, an American economist and one of the most prominent academic administrators (the first Chancellor of the University of California, Berkeley, and the twelfth President of the University of California system), proposed the concept of "Urban Grant Universities", analogous to the earlier government support of land-grant colleges and universities. In 1974, the Chancellor of UMass Boston and the leaders of five other urban universities met in Chicago to discuss the possibility of reactivating the notion of federal support of "Urban Grant Universities", which eventually evolved into Urban 13, Urban 21, the Coalition of Urban Serving Universities, and the Coalition of Urban and Metropolitan Universities. Unfortunately, the funding model of "Urban Grant Universities" has never materialized. In addition, the state support of public colleges and universities has steadily and radically decreased in Massachusetts and most other states over the last four decades.

Thus, confronting the tough financial challenges, pursuing new sources of revenue, properly balancing many of the competing needs, and achieving the highest efficiency or doing more with less in our efforts to insure equal access to excellence in higher education have been and will continue to be a central focus for us. It

will take the best collective wisdom, strong discipline, great team work, and exceptionally effective shared governance in order to accomplish our mission and to transform UMass Boston into a distinguished public urban research university.

Some of the critical issues, the historical facts, the relevant data, and the global, national, and regional contexts are provided below to facilitate an open and continuing conversation among all of us, councilors, faculty, administrators, staff, students, alumni, community partners, and others.

1. UMass Boston is no longer affordable for the kinds of students that it was established to serve.

Financially affordable and accessible was a vital and desirable condition in our distant past. *“As a state institution of higher learning, the University charges a modest rate of tuition (\$200 per year) to all students who are bona fide residents of Massachusetts”* (University of Massachusetts Boston Bulletin, 1965-1966, Publication date 1965).

The State appropriations to UMass Boston peaked at 74.72% of our “total current funds revenues” in FY 1987. Then, the state support gradually and continuously decreased and dropped below our revenues from Tuition & Fees (net of scholarship allowances) in FY 2009. It has been brought back to a level higher than the revenues from Net Tuition & Fees in FY 2023 and possibly for FY 2024 as well, largely as a result of Federal Stimulus Funds (received through Coronavirus Aid, Relief and Economic Security: CARES; Higher Education Emergency Relief Fund: HEERF I, & HEERF II) and State Stimulus Funds (received through supplemental appropriations). Like many of its peers, UMass Boston has been mostly a privately funded and publicly assisted urban research university.

The national rankings of our average tuition and required fees for our full-time students in AY 2022 among 93 public Doctoral Universities with High research activity are among the highest, as shown below:

Institution Name	In-state average tuition for full-time undergraduates (IC2022_AY)	In-state required fees for full-time undergraduates (IC2022_AY)	Total In-state Tuition & Required Fees for Full-Time Undergraduates (IC2022_AY)
William & Mary	17,434	6,536	23,970
Michigan Technological University	18,592	318	18,910
University of Vermont	16,280	2,610	18,890
Miami University-Oxford	13,678	2,988	16,666
Eastern Michigan University	14,500	1,910	16,410
University of Massachusetts-Lowell	15,462	720	16,182
Rutgers University-Camden	12,900	3,212	16,112
University of Rhode Island	13,586	2,294	15,880
Oakland University	15,723	0	15,723
Rutgers University-Newark	12,900	2,748	15,648
Southern Illinois University-Carbondale	9,638	5,778	15,416
University of Massachusetts-Boston (Rank = 12)	14,542	590	15,132

Institution Name	Out-of-state average tuition for full-time undergraduates (IC2022_AY)	Out-of-state required fees for full-time undergraduates (IC2022_AY)	Total Out of State Tuition & Required Fees for Full-Time Undergraduates (IC2022_AY)
William & Mary	40,089	7,107	47,196
University of Vermont	41,280	2,610	43,890
University of California-Merced	41,636	2,227	43,863
Michigan Technological University	40,929	318	41,247
Miami University-Oxford	34,171	2,988	37,159

Institution Name	In-state average tuition full-time graduates (IC2022_AY)	In-state required fees for full-time graduates (IC2022_AY)	Total Instate Tuition & Required Fees for Full-Time Graduates (IC2022_AY)
University of Massachusetts-Boston (Rank = 6)	35,515	590	36,105
Michigan Technological University	23,607	260	23,867
Rutgers University-Camden	18,696	2,552	21,248
Rutgers University-Newark	18,696	2,364	21,060
Oakland University	20,016	0	20,016
University of Massachusetts-Boston (Rank = 5)	18,894	605	19,499

Institution Name	Out-of-state average tuition full-time graduates (IC2022_AY)	Out-of-state required fees for full-time graduates (IC2022_AY)	Total Out-of-State Tuition & Required Fees for Full-Time Graduates (IC2022_AY)
University of Massachusetts-Boston (Rank = 1)	36,879	605	37,484
William & Mary	28,305	6,831	35,136
Miami University-Oxford	32,698	2,242	34,940
Rutgers University-Newark	31,800	2,364	34,164
Rutgers University-Camden	30,816	2,552	33,368

The Tuition and Mandatory Charges for UMass Boston and other UMass campuses have been increased again during each of the last two years (AY 2023 & AY 2024) to the following levels:

Tuition & Mandatory Fees	Amherst	Boston	Dartmouth	Lowell
Undergraduate (in-state)	\$17,357	\$15,535	\$15,208	\$16,570
Undergraduate (regional)	\$32,356	\$26,711	\$20,616	\$29,010
Undergraduate (out-of-state)	\$39,293	\$37,211	\$31,750	\$35,396
Graduate (in-state)	\$17,809	\$19,971	\$17,065	\$16,050
Graduate (regional)	\$32,543	\$34,496	\$21,560	\$24,458
Graduate (out-of-state)	\$37,860	\$38,406	\$30,253	\$28,426

The continuing increase of tuition in AY/FY 2025 has already been included in our latest financial forecast.

FY25-29 Financial Forecast

Board of Trustees: Committee of the Whole
December 11, 2023

Revenue Assumptions

FY25-29

Tuition Increase:

In State	2.5% annually
Out of State UG	Campus Specific
Graduate	Campus Specific
CE	Campus Specific

Adopt Fall 2024 tuition & fees in April

2. A much higher percentage of our undergraduate students now depend on grant aid and/or student loans.

Institution	Percent of undergraduate students awarded federal state local institutional or other sources of grant aid (SFA2122)	Percent of undergraduate students awarded federal state local institutional or other sources of grant aid (SFA1112_RV)	Percent of undergraduate students awarded Pell grants (SFA2122)	Percent of undergraduate students awarded Pell grants (SFA1112_RV)	Percent of undergraduate students awarded federal student loans (SFA2122)	Percent of undergraduate students awarded federal student loans (SFA1112_RV)
UMass Boston	98% (Rank=5)	53% (Rank=67)	42% (Rank=25)	38% (Rank=51)	52% (Rank=13)	57% (Rank=42)

3. The awards of scholarships and fellowships by UMass Boston have been relatively more modest than most other public Doctoral Universities with High research activity.

	Rank of % of Total Expenses
Scholarships and fellowships expenses -- Current year total (F2122_F1A)	52 of 91 (7.44%)
Scholarships and fellowships expenses -- Current year total (F2021_F1A)	48 of 91 (6.72%)
Scholarships and fellowships expenses -- Current year total (F1920_F1A)	62 of 91 (4.72%)
Scholarships and fellowships expenses -- Current year total (F1819_F1A)	56 of 91 (4.17%)
Scholarships and fellowships expenses -- Current year total (F1718_F1A)	57 of 91 (3.99%)
Scholarships and fellowships expenses -- Current year total (F1617_F1A)	60 of 91 (3.80%)
Scholarships and fellowships expenses -- Current year total (F1516_F1A)	60 of 91 (3.84%)

4. As many of our new doctoral programs grow and reach their steady state, we need to systematically and carefully look at our current support for graduate students and to strategize on how we could provide much better support. There are two key indicators for measuring and planning the financial support for our graduate students: the number of graduate stipends and the level of graduate stipends.

The table below shows the numbers and types of graduate assistantships awarded by UMass Boston in the last ten years (data for AY 2023 is not yet available in the IPEDS [Integrated Postsecondary Education Data System]).

Academic Year	Total GAs (Graduate Assistants)	TAs (Teaching Assistants)	RAs (Research Assistants)	Other GAs	Total # of Graduate Students	# of Full-Time Graduate Students	# of Part-Time Graduate Students
2022	680	411	269	0	3,365	1,498	1,867
2021	699	425	274	0	3,368	1,311	2,057
2020	702	444	258	0	3,388	1,304	2,084
2019	698	444	244	10	3,394	1,297	2,097
2018	727	416	292	19	3,450	1,251	2,199
2017	736	415	297	24	3,755	1,352	2,403
2016	774	436	338	0	4,000	1,435	2,565
2015	794	549	245		4,081	1,405	2,676
2014	770	411	359		4,056	1,365	2,691
2013	705	346	359		3,911	1,240	2,671

As you can see, the total number of graduate stipends has decreased from 794 in AY 2015 to 680 in AY 2022 (a reduction of 114 graduate students – mostly by eliminating quarter stipends). On the other hand, the number of doctoral students has increased significantly during the same period.

	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022
Doctoral Research & Scholarship	425	442	456	520	571	623	677	740	771	794	794	794	798
Doctoral Professional	0	0	35	40	43	39	39	36	35	40	53	44	29
Total # of Doctoral Students	425	442	491	560	614	662	716	776	806	834	847	838	827

Nevertheless, the national ranks for UMass Boston in terms of the percentage of all graduate students and the percentage of all full-time graduate students with graduate assistantships in AY 2013 - AY 2022 are actually still within the top one third of the Doctoral Universities with High research activity, as shown below:

National Rank for	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
% of All Graduate Students with Graduate Assistantships	33	30	30	33	35	30	29	23	22	24 of 91
% of All Full-Time Graduate Students with Graduate Assistantships	18	15	16	23	19	17	20	19	18	21 of 91

The other key indicator for measuring and planning the financial support for our graduate students is the level of graduate stipends. The current GEO Contract (July 1, 2021 through June 30, 2024) shows the following rates:

Effective July 1, 2023, the minimum annual stipend of each member of the bargaining unit in the position of Teaching Assistant, Research Assistant, or Academic Assistant shall be as follows:

- Full-time \$20,352*
- Three quarter \$15,264*
- Half \$10,176*

Effective July 1, 2023, the minimum annual stipend of each member of the bargaining unit in the position of Teaching Fellow shall be as follows:

- Full-time \$22,073*
- Half \$11,037*

The levels of graduate stipends vary widely across the country. The University of California appears to offer the most competitive graduate stipends, as shown below:

<https://www.ucop.edu/academic-personnel-programs/files/2022-23/april-2023-ase-gsr-postoc-salary-scales/t18.pdf>

TABLE 18 STUDENT TITLES TEACHING ASSISTANT AND EQUIVALENT, OTHER SALARY SCALE

<u>Job Description</u>	<u>4/1/2023 Hourly</u>	<u>10/1/2023 Hourly</u>	<u>Salary Plan, Grade</u>
Reader With Baccalaureate	\$19.28	\$20.28	T18H, Grade I

Reader Without Baccalaureate \$18.40 \$19.40 T18H, Grade II

GROUP 1 (Davis, Irvine, Merced, Riverside, San Diego, Santa Barbara, and Santa Cruz)

<u>Job Description</u>	<u>4/1/2023 Annual</u>	<u>4/1/2023 1/9 Monthly</u>	<u>4/1/2023 Quarterly</u>	<u>Increment</u>	<u>10/1/2023 Annual</u>	<u>10/1/2023 1/9 Monthly</u>	<u>10/1/2023 Quarterly</u>	<u>Salary Plan, Grade</u>
Teaching Assistant	\$50,000	\$5,555.56	\$16,666.67	1	\$58,250	\$6,472.22	\$19,416.67	T18B, Grade 1
				2	\$59,998	\$6,666.44	\$19,999.33	T18B, Grade 1
				3	\$61,798	\$6,866.44	\$20,599.33	T18B, Grade 1
Teaching Fellow	\$59,346	\$6,594.00	\$19,782.00	1	\$69,139	\$7,682.11	\$23,046.33	T18B, Grade 2

GROUP 2 (Berkeley, Los Angeles, and San Francisco)

<u>Job Description</u>	<u>4/1/2023 Annual</u>	<u>4/1/2023 1/9 Monthly</u>	<u>4/1/2023 Quarterly</u>	<u>Increment</u>	<u>10/1/2023 Annual</u>	<u>10/1/2023 1/9 Monthly</u>	<u>10/1/2023 Quarterly</u>	<u>Salary Plan, Grade</u>
Teaching Assistant	\$50,000	\$5,555.56	\$16,666.67	1	\$62,531	\$6,947.89	\$20,843.67	T18C, Grade 1
				2	\$64,407	\$7,156.33	\$21,469.00	T18C, Grade 1
				3	\$66,339	\$7,371.00	\$22,113.00	T18C, Grade 1
Teaching Fellow	\$59,346	\$6,594.00	\$19,782.00	1	\$74,220	\$8,246.67	\$24,740.00	T18C, Grade 2

NOTES:

- 1) Salary Plan, Grade is for use in UCPath only.
- 2) For employees in any of the above-referenced titles who are exclusively represented, the application of the Salary Scale is subject to the requirements of the Higher Education Employer-Employee Relations Act (HEERA). As such, for employees covered by a Memorandum of Understanding (MOU), the Salary Scale applies to the extent provided for in the MOU.

<https://www.ucop.edu/academic-personnel-programs/files/2022-23/april-2023-ase-gsr-postoc-salary-scales/t22.pdf>

**TABLE 22 STUDENT TITLES: GRADUATE STUDENT RESEARCHER
FISCAL YEAR SALARY SCALE**

<u>Job Description</u>	<u>Increment</u>	<u>4/1/2023 Annual</u>	<u>4/1/2023 Monthly</u>	<u>4/1/2023 Hourly</u>	<u>10/1/2023 Annual</u>	<u>10/1/2023 Monthly</u>	<u>10/1/2023 Hourly</u>	<u>Salary Plan, Grade</u>
Graduate Student Researcher	1	\$61,080	\$5,090.00	\$29.25	\$64,990	\$5,415.83	\$31.13	T022, Grade 1
	2	\$65,814	\$5,484.50	\$31.52	\$70,027	\$5,835.58	\$33.54	T022, Grade 1
	3	\$70,915	\$5,909.58	\$33.96	\$75,454	\$6,287.83	\$36.14	T022, Grade 1
	4	\$76,411	\$6,367.58	\$36.60	\$81,302	\$6,775.17	\$38.94	T022, Grade 1
	5	\$82,333	\$6,861.08	\$39.43	\$87,603	\$7,300.25	\$41.96	T022, Grade 1
	6	\$88,714	\$7,392.83	\$42.49	\$94,392	\$7,866.00	\$45.21	T022, Grade 1

NOTES:

Salary Plan, Grade is for use in UCPath only.
 For employees in any of the above-referenced titles who are exclusively represented, the application of the Salary Scale is subject to the requirements of the Higher Education Employer-Employee Relations Act (HEERA). As such, for employees covered by a Memorandum of Understanding (MOU), the Salary Scale applies to the extent provided for in the MOU.

The report on the results of a fairly comprehensive survey on stipends for PhD candidates in English by Professor Eric Weiskott at Boston College (<https://profession.mla.org/english-phd-stipends-in-the-united-states-statistical-report/>) provides a much more detailed and complicated national landscape and offers some more practical benchmarks for most of the doctoral research universities.

The data tables on the financial support and education-related debt of research doctorate recipients collected by the Survey of Earned Doctorates of the National Science Foundation (<https://nces.nsf.gov/pubs/nsf24300/data-tables>) are also quite useful for identifying the changing trends, establishing some reasonable standards, and developing some meaningful and effective strategies for improving the learning and creative environments and living conditions of our graduate students and aspiring/emerging research scholars.

5. The significant one-time federal and state stimulus aid funds have ended, which will most likely have important implications to our revenues, expenses, budget priorities, and long-term financial planning.

**Board of Trustees Administration & Finance Committee
June 9, 2021**

- Federal stimulus funds are critical and allow the University to avoid deficits**
- Absent federal stimulus the University has a structural gap**
- Long term financial planning is required**

The UMass system received \$260 million from CARES: Coronavirus Aid, Relief, and Economic Security Act (Higher Education Emergency Relief Fund: HEERF I), CRRSAA: Coronavirus Response and Relief Supplemental Appropriations Act (HEERF II), ARP: American Rescue Plan (HEERF III), and GEER: Governor's Emergency Education Relief Fund.

TOTAL STIMULUS (by legislation)			
	Student	Institutional	
<i>(\$ in Thousands)</i>	Aid	Allocation	Total
CARES & GEER	23,009	26,047	49,056
HEERF II	23,009	52,916	75,925
HEERF III	67,530	66,060	133,590
Total	113,548	145,023	258,571

Student Aid:

- \$113.5M across multiple rounds
- Emergency grants to students
- Prioritize “exceptional need”; includes but not restricted to students receiving Pell grants
- Not conditioned on continued enrollment
- Can satisfy outstanding balances with consent
- Not considered financial aid or taxable income

Institutional Allocation:

- \$145M across multiple rounds

- Recovers a portion of lost revenue due to the pandemic
- Bridge to a post-COVID environment including but not limited to:
 - One-time operating and/or infrastructure investments
 - Strategic investments that grow revenue (enrollment and retention; programmatic and research)

TOTAL STUDENT AID				
<i>(\$ in Thousands)</i>				
Campus	FY20 Actual	FY21 Projection	FY22 Budget	Student Total
Amherst	8,882	9,454	25,256	43,592
Boston	2,527	9,657	18,561	30,745
Dartmouth	460	5,065	9,995	15,520
Lowell	2,690	5,323	14,970	22,983
Medical School	122	586	-	708
Total	14,681	30,085	68,782	113,548

**Based on best estimates included in FY22 plan; actuals may vary*

INSTITUTIONAL AID				
<i>(\$ in Thousands)</i>				
Campus	FY20 Actual	FY21 Projection	FY22 Budget	Institutional Total
Amherst	8,882	20,318	24,940	54,140
Boston	1,734	20,537	18,330	40,601
Dartmouth	558	8,632	10,702	19,892
Lowell	2,726	11,165	15,667	29,558
Medical School	-	833	-	833
Total	13,899	61,485	69,640	145,023

**Based on best estimates included in FY22 plan; actuals may vary*

6. The projected growth, the enhancement of our academic programs, and the overall vitality of our institution require continuous renewal of our faculty and academic programs.

The headcount of our tenured and tenure-track faculty remains below Non-Tenure Track and part-time faculty. The number of full professors reached 143, the highest level in our history. The number of Associate Professors in Fall 2023 is down by 17 from the peak of 241 in Fall 2019. The number of Assistant Professors in Fall 2023 went up to 107 from the lowest point of 99 in Fall 2022, but remains significantly below the highest level of 172 in Fall 2016. On the other hand, the number of doctoral students has increased from 425 in Fall 2010 to the highest point of 847 (almost doubled) in Fall 2020 and has dropped to 827 in Fall 2022.

UMass Boston Enrollment by Student Level from Fall 2008 to Fall 2023

	Fall2008	Fall2009	Fall2010	Fall2011	Fall2012	Fall2013	Fall2014	Fall2015	Fall2016	Fall2017	Fall2018	Fall2019	Fall2020	Fall2021	Fall2022	Fall2023
UMB HC	UG2008	UG2009	UG2010	UG2011	UG2012	UG2013	UG2014	UG2015	UG2016	UG2017	UG2018	UG2019	UG2020	UG2021	UG2022	UG2023
UMB FTE	7,965	8,488	8,845	9,201	9,410	9,688	10,079	10,371	10,280	10,416	10,857	10,803	11,078	10,545	10,372	10,470
	GR2008	GR2009	GR2010	GR2011	GR2012	GR2013	GR2014	GR2015	GR2016	GR2017	GR2018	GR2019	GR2020	GR2021	GR2022	GR2023
UMB HC	3,639	3,871	3,886	3,875	3,750	3,911	4,056	4,081	4,000	3,755	3,450	3,394	3,388	3,368	3,365	3,437
UMB FTE	2,477	2,668	2,597	2,590	2,591	2,645	2,755	2,824	2,821	2,620	2,362	2,438	2,493	2,413	2,502.7	2,618.1
% of Total	25.78	25.96	25.15	24.62	23.62	24.03	24.21	23.96	23.74	22.88	21.34	21.23	20.84	21.54	21.59	21.93
Doctoral_RS*			425	442	456	520	571	623	677	740	771	794	794	794	798	
Doctoral_PR*			0	0	35	40	43	39	39	36	35	40	53	44	29	
Total08	Total09	Total10	Total11	Total12	Total13	Total14	Total15	Total16	Total17	Total18	Total19	Total20	Total21	Total22	Total23	
Total HC	14,117	14,912	15,454	15,741	15,874	16,277	16,756	17,030	16,847	16,415	16,164	15,989	16,259	15,637	15,586	15,671
Total FTE	10,442	11,156	11,442	11,791	12,001	12,333	12,834	13,195	13,101	13,036	13,219	13,241	13,571	12,959	12,874.70	13,088

*Doctoral_RS: Doctoral - Research and Scholarship

*Doctoral_PR: Doctoral - Professional

UMass Boston Faculty by Rank and Tenure Status from 2014 to Fall 2023

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023						
	HC	HC	HC	HC	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE
Professor	122	117	111	120	126	122	129	126	125	123	125	123	136	132	143	142
Associate Professor	199	220	229	237	238	237	241	234	233	230	233	230	229	224	225	222
Assistant Professor	170	168	172	159	148	147	127	126	119	119	119	119	99	99	107	107
Instructor	3	7	1				Duplicate of 2021 (Data Errors)									
Lecturer	725	759	725	623	602	354	526	351	529	359	529	359	530	359	536	353
Not Faculty				3	5											
Unknown					49	48	112	53	139	67	139	67	140	62	138	58
Grand Total	1,219	1,271	1,241	1,144	1,163	908	1,135	890	1,091	868	1,145	898	1,134	876	1,149	883
Tenured	302	317	324	338	349	349	349	349	353	353	345	345	344	344	360	
Tenure-Track/Non-Tenured	179	179	182	167	148	148	125	125	122	122	119	119	100	100	107	
Non-Tenure Track	169	208	210	201	224	223	312	253	209	209	235	235	230	230	242	
Part-Time	563	562	521	429	427	179	327	152	398	179	433	191	440	191	432	
Part-Time Tenured	5	5	4	10	13	7	19	9	8	4	13	8	20	10	8	
Part-Time Tenure-Track	1		2	1	2	1	3	2	1	1						
	1,219	1,271	1,243	1,146	1,163	907	1,135	890	1,091	868	1,145	898	1,134	876	1,149	

(Data Source: Faculty and Staff Dashboards, The Office of Institutional Research, Assessment, and Planning, UMass Boston)

Faculty in Fall 2023 = 860 (FTEs) + 12 (Restricted)

(Data Source: Board of Trustees, December 11, 2023, FY25-29 Financial Forecast)

657 Lecturers [Service End Date: 2023-12-16 = Date of the Last Paycheck in CY 2023] (Headcount of Unique Individuals: 335 Associate Lecturers, 136 Lecturers, 101 Senior Lecturers, 48 Senior Lecturers II, 37 Senior Lecturers III)

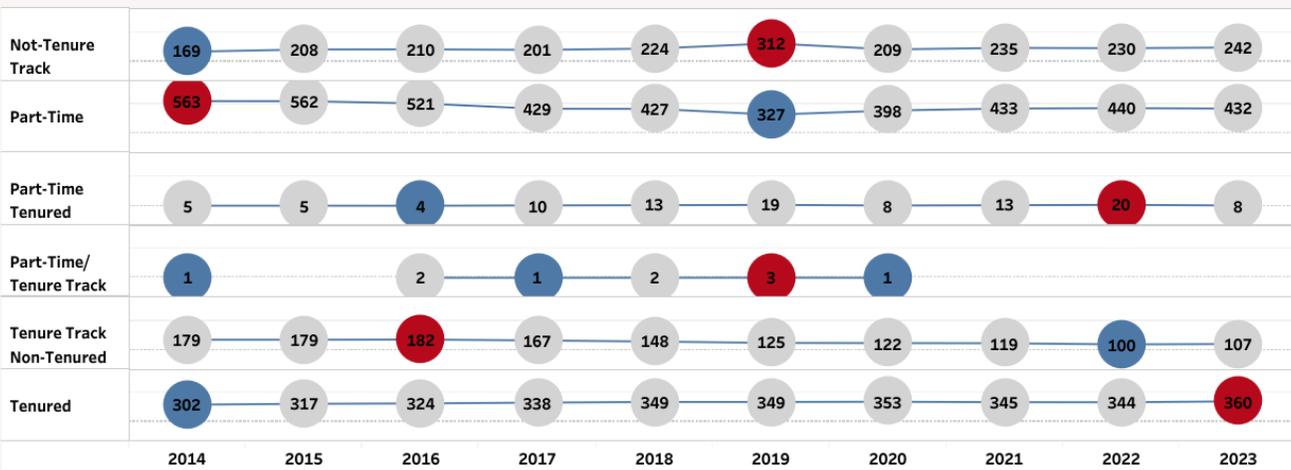
(Data Source: Statewide Payroll of the Office of the Comptroller, The Commonwealth of Massachusetts)


Full Part Time
All

Department Name
All

10 Years Faculty Headcount by Rank excluding Unknown Rank (Highest Headcounts are in Red Circle, Lowest are in Blue)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Professor	122	117	111	120	126	129	125	125	136	143
Associate Professor	199	220	229	237	238	241	237	233	229	225
Assistant Professor	170	168	172	159	148	127	122	119	99	107
Instructor	3	7	1							
Lecturer	725	759	725	623	646	634	602	529	531	536
Not Faculty			3	5	4	3	3			

10 Years Faculty Headcount by Tensure (Highest Headcounts are in Red, Lowest are in Blue)


7. The faculty at UMass Boston has literally become the worst supported faculty in the UMass system in terms of staff/faculty ratio since AY/FY 2021.

UMass Amherst

	September* FY20	August FY21	Variance
Employee FTEs			
Restricted			
Faculty	42	41	(1)
Staff	382	400	18
Total Restricted	424	441	17
Unrestricted General University Ops			
Faculty	1,620	1,640	20
Staff	2,762	2,808	46
Staff/Faculty Ratio		1.7122	
Total General University Ops	4,382	4,448	66

Faculty Paid by Restricted & General Funds

$$41+1640=1681$$

Staff Paid by Restricted & General Funds

$$400+2808=3208$$

Staff/Faculty Ratio

$$1.9084$$

Unrestricted Aux./Independent Business

Faculty	-	-	0
Staff	1,517	1,448	(69)
Total Aux./Independent Business	1,517	1,448	(69)
Total Faculty & Staff	6,323	6,337	14

*September used due to budgeted staffing changes that occurred Jul-Sept of FY20

UMass Boston

		August					
Employee FTEs	FY20	FY20	FY21	FY21	Variance	FY22	FY23
Restricted		6/1/2022	6/1/2022				
Faculty	11	10	8	7	(3)	6	9
Staff	129	132	122	126	(7)	116	156
Total Restricted	140	142	131	133	(10)	122	165
Unrestricted General University Ops							
Faculty	821	864	808	843	(12)	861	853
Staff	950	941	903	869	(47)	898	847
Staff/Faculty Ratio			1.1176				
Total General University Ops	1,771	1,805	1,711	1,712	(60)	1,759	1,700

	FY20	FY20	FY21	FY21	Variance	FY22	FY23
Faculty Paid by Restricted & General Funds							
	8+808=816	7+843=850				6+861=867	9+853=862
Staff Paid by Restricted & General Funds							
	122+903=1025	126+869=995				116+898=1,014	156+847=1,003
Staff/Faculty Ratio	1.2561	1.1706				1.1696	1.1636

Unrestricted Aux./Independent Business

Faculty	-	-	-	-	-	-	-
Staff	27	27	29	2	19	29	28
Total Aux./Independent Business	27	27	29	2	19	29	28
Total Faculty & Staff	1,938	1,974	1,871	(67)	1,863	1,910	1,892

UMass Dartmouth

		August		
Employee FTEs	FY20	FY21	Variance	
Restricted				
Faculty	3	2	(1)	
Staff	32	33	2	
Total Restricted	35	35		
Unrestricted General University Ops				
Faculty	408	400	(7)	
Staff	574	533	(41)	
Staff/Faculty Ratio		1.3325		
Total General University Ops	981	933	(48)	

Faculty Paid by Restricted & General Funds	2+400=402
Staff Paid by Restricted & General Funds	33+533=566
Staff/Faculty Ratio	1.4080

Unrestricted Aux./Independent Business			
Faculty	-	-	-
Staff	93	78	(15)
Total Aux./Independent Business	93	78	(15)
Total Faculty & Staff	1,109	1,046	(63)

UMass Lowell

Employee FTEs	FY20	August FY21	Variance
Restricted			
Faculty	10	14	3
Staff	91	91	0
Total Restricted	101	105	4

Unrestricted General University Ops

Faculty	638	665	27
Staff	977	928	(50)

Staff/Faculty Ratio

Total General University Ops	1,616	1,593	(23)
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Faculty Paid by Restricted & General Funds

14+665=679

Staff Paid by Restricted & General Funds

91+928=1019

Staff/Faculty Ratio

1.5007

Unrestricted Aux./Independent Business

Faculty			
Staff	74	63	(11)
Total Aux./Independent Business	74	63	(11)
Total Faculty & Staff	1,791	1,761	(30)

Data Source: UMass Board of Trustees Administration & Finance Committee
Senior Vice President's Report (April 7, 2021)

FY23-27 Financial Forecast

Board of Trustees: Administration & Finance Committee

December 13, 2021

			Actual	Forecast
Page 78 UMass Amherst	Staff - Faculty (All)	Staff-Faculty Ratio	2.7 in FY 2022	2.8 in FY 2023
	Staff - Faculty (E&G)	Staff-Faculty Ratio (E&G)	1.7 in FY 2022	1.8 in FY 2023
Page 90 UMass Boston	Staff - Faculty (All)	Staff-Faculty Ratio	1.2 in FY 2022	1.3 in FY 2023
	Staff - Faculty (E&G)	Staff-Faculty Ratio (E&G)	1.0 in FY 2022	1.1 in FY 2023
Page 102 UMass Dartmouth	Staff - Faculty (All)	Staff-Faculty Ratio	1.4 in FY 2022	1.5 in FY 2023
	Staff - Faculty (E&G)	Staff-Faculty Ratio (E&G)	1.2 in FY 2022	1.3 in FY 2023
Page 114 UMass Lowell	Staff - Faculty (All)	Staff-Faculty Ratio	1.3 in FY 2022	1.3 in FY 2023
	Staff - Faculty (E&G)	Staff-Faculty Ratio (E&G)	1.1 in FY 2022	1.2 in FY 2023

UMass Amherst

	Actual					Budget	Actual	Forecast				
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Student - Faculty												
Student (FTE)	28,339	28,711	29,051	29,808	29,693	29,723	29,802	30,164	30,173	30,699	31,361	31,700
Faculty (FTE)	1,550	1,556	1,611	1,663	1,647	1,629	1,649	1,659	1,664	1,669	1,674	1,685
Student-Faculty Ratio	18.3	18.4	18.0	17.9	18.0	18.2	18.1	18.2	18.1	18.4	18.7	18.8
Staff - Faculty (All)												
Staff (FTE)	3,944	4,072	4,301	4,660	3,926	4,533	4,445	4,593	4,596	4,599	4,614	4,635
Faculty (FTE)	1,550	1,556	1,611	1,663	1,647	1,629	1,649	1,659	1,664	1,669	1,674	1,685
Staff-Faculty Ratio	2.5	2.6	2.7	2.8	2.4	2.8	2.7	2.8	2.8	2.8	2.8	2.8
Staff - Faculty (E&G)												
Staff (FTE)	2,611	2,676	2,712	2,762	2,678	2,787	2,695	2,836	2,829	2,822	2,827	2,838
Faculty (FTE)	1,486	1,508	1,569	1,620	1,605	1,588	1,604	1,618	1,623	1,628	1,633	1,644
Staff-Faculty Ratio (E&G)	1.8	1.8	1.7	1.7	1.7	1.8	1.7	1.8	1.7	1.7	1.7	1.7

UMass Boston

	Actual				Budget	Actual	Forecast				
	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Student - Faculty											
Student (FTE)	13,036	13,213	13,241	13,571	13,486	12,943	13,308	13,434	13,518	13,598	13,647
Faculty (FTE)	875	885	874	850	840	867	836	836	836	836	836
Student-Faculty Ratio	14.9	14.9	15.2	16.0	16.1	14.9	15.9	16.1	16.2	16.3	16.3
Staff - Faculty (All)											
Staff (FTE)	1,192	1,106	1,100	1,013	1,060	1,043	1,048	1,048	1,026	1,026	1,026
Faculty (FTE)	875	885	874	850	840	867	836	836	836	836	836
Staff-Faculty Ratio	1.4	1.2	1.3	1.2	1.3	1.2	1.3	1.3	1.2	1.2	1.2
Staff - Faculty (E&G)											
Staff (FTE)	983	931	941	869	892	898	883	883	861	861	861
Faculty (FTE)	862	873	864	843	828	861	830	830	830	830	830
Staff-Faculty Ratio (E&G)	1.1	1.1	1.1	1.0	1.1	1.0	1.1	1.1	1.0	1.0	1.0

UMass Dartmouth

	Actual				Budget	Actual	Forecast				
	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Student - Faculty											
Student (FTE)	7,286	7,330	6,971	6,709	6,353	6,459	6,408	6,465	6,631	6,894	7,070
Faculty (FTE)	470	471	462	443	408	439	432	432	432	436	444
Student-Faculty Ratio	15.5	15.6	15.1	15.2	15.6	14.7	14.8	15.0	15.4	15.8	15.9
Staff - Faculty (All)											
Staff (FTE)	733	733	699	639	695	622	656	656	656	662	678
Faculty (FTE)	470	471	462	443	408	439	432	432	432	436	444
Staff-Faculty Ratio	1.6	1.6	1.5	1.4	1.7	1.4	1.5	1.5	1.5	1.5	1.5
Staff - Faculty (E&G)											
Staff (FTE)	597	595	577	530	585	513	545	545	545	549	558
Faculty (FTE)	464	466	457	437	405	434	429	429	429	433	441
Staff-Faculty Ratio (E&G)	1.3	1.3	1.3	1.2	1.4	1.2	1.3	1.3	1.3	1.3	1.3

UMass Lowell

	Actual				Budget	Actual	Forecast				
	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Student - Faculty											
Student (FTE)	14,423	14,601	14,790	14,855	14,795	14,795	14,483	14,704	14,928	15,102	15,279
Faculty (FTE)	832	845	853	783	817	810	833	833	834	835	836
Student-Faculty Ratio	17.3	17.3	17.3	19.0	18.1	18.3	17.4	17.6	17.9	18.1	18.3
Staff - Faculty (All)											
Staff (FTE)	1,093	1,131	1,146	999	1,143	1,054	1,117	1,121	1,126	1,131	1,136
Faculty (FTE)	832	845	853	783	817	810	833	833	834	835	836
Staff-Faculty Ratio	1.3	1.3	1.3	1.3	1.4	1.3	1.3	1.3	1.3	1.4	1.4
Staff - Faculty (E&G)											
Staff (FTE)	979	974	988	841	975	887	942	942	942	942	942
Faculty (FTE)	825	837	839	767	801	793	815	815	815	815	815
Staff-Faculty Ratio (E&G)	1.2	1.2	1.2	1.1	1.2	1.1	1.2	1.2	1.2	1.2	1.2

Education and General (E&G): The Education and General revenue budget consist of Public University Fund state allocation, tuition and student course fees, internal sales and miscellaneous revenue. The expense/transfer budget supports activities and services that are intrinsic to the university, including instruction, research, student services, libraries, administration, and maintenance of the campus facilities.

https://www.eou.edu/budplan/files/2020/11/11.12.20-BP-Orientation_Major-Fund-Types.pdf

8. The competitive landscape for student recruitment, enrollment and retention has become much more challenging.

Massachusetts now has a new state scholarship program, MassReconnect, which covers community college costs for residents over 25 who have not previously earned an associate’s degree or certificate (<https://www.mass.edu/osfa/programs/massreconnect.asp>).

“After nine years of undergraduate enrollment declines, first brought on by anticipated population and demographic changes in the state and then exacerbated by the coronavirus pandemic in 2020, the Massachusetts public higher education system is seeing its first enrollment increase this fall, with most of the growth attributed to the community colleges and, across segments, to first-time students.”

“Most of the system’s growth this fall comes from a substantial enrollment increase at the community colleges, who gained over 5,000 students, or +8.0%, in fall 2023. Among new community college students, categorized as either new first-time or new transfer students, the increase was even higher at +12.2%. Also notable is that every one of the 15 community colleges showed some degree of enrollment growth” (<https://www.mass.edu/datacenter/2023enrollmentestimates.asp>).

How will the free community colleges in Massachusetts impact our recruitment and enrollment remains to be seen.

The recruitment of international students has also become more complicated as a result of changing political environments in the United States as well as international geopolitics and is certainly facing additional uncertainty. UMass Boston has been traditionally more local and regional than other institutions of its Carnegie category in terms of the geographic origins of its students. The leading sources of international students for UMass Boston have been China and India. Recruitment of students from these countries through external partners such as Shorelight has created some unusual challenges. While the overall graduate enrollment

decreased slightly, the enrollment for two of our large graduate programs was more than doubled from Fall 2021 to Fall 2022 as shown in the table below:

Graduate Program Enrollment - Fall 2017 - Fall 2022

	2017	2018	2019	2020	2021	2022
Computer Science M.S.	104	71	64	57	73	168
Business Analytics (M.S.)	8	36	61	70	84	199
TOTAL DOCTORALS	776	806	834	847	838	827
TOTAL MASTERS	2,266	2,076	2,049	2,025	2,073	2,194
TOTAL CERTIFICATES**	288	253	225	262	273	194
CAGS	42	36	21	23	25	23
Non-Degree	383	279	265	231	159	127
Total	3,755	3,450	3,394	3,388	3,368	3,365

Although enrollment growth is highly desirable and most welcome, this was not well-planned growth and required the Graduate Program Director for one of these programs to review about 2,500 graduate applications within a very tight timeframe. These graduate programs and departments obviously also had to make significant adjustments in order to accommodate such radical and unexpected increases.

9. UMass Boston is among the most diverse academic institutions in the country. However, the makeup of our student population does not mirror the population of our city and region.

Undergraduate	Fall 2023	Fall 2022	Fall 2021	Fall 2017	Fall 2015	Fall 2012	Fall 2010	Fall 2007	Fall 2006	Fall 2005	Fall 2003
American Indian/Alaska Native		0.0	0.1	0.2	0.2	0.3	0.4	0.5	0.6	0.6	0.10
Asian	15.82	17.66	17	15.9	15.1	13.4	14.1	15.1	14.3	14	14.00
Black/African American*	17.47	19.82	19.7	20.3	19.5	18.1	18.4	17	16.9	16.6	16.00
Hispanic/Latino	19.26	21.45	20.8	18.9	16.6	13.2	10.5	9.4	9	8.2	7.00
Native Hawaiian/Pacific Island						0.1	0				
Cape Verdean								1.5	1.6	1.4	1.00
Two or more races	3.98	4.24	4.2	3.7	3.3	2.9	0.7				
International (Non-Resident Alien)	6.90	6.42									
White	30.21	36.7	38.1	41	45.3	52.00	55.9	56.4	57.6	59.1	60.00
Race and Ethnicity Unknown	6.22	6.08									

	City of Boston	12 Cities/Towns (Connected by the T)
Total:	675,647	1,425,513
Hispanic or Latino	126,113 (18.67%)	223,847 (15.70%)
Not Hispanic or Latino:	549,534	
Population of one race:	516,813	
White alone	301,464 (44.62%)	728,774 (51.12%)
Black or African American alone	129,264 (19.13%)	180,158 (12.64%)
American Indian and Alaska Native alone	989 (0.1464%)	1,755 (0.1231%)
Asian alone	75,588 (11.19%)	201,944 (14.17%)
Native Hawaiian and Other Pacific Islander alone	251 (0.0372%)	438 (0.0307%)
Some Other Race alone	9,257 (1.791%)	19,595 (1.3746%)
Population of two or more races:	32,721 (4.84%)	69,002 (4.8405%)

12 Cities/Towns (connected by the T): Boston, Braintree, Brookline, Cambridge, Chelsea, Malden, Medford, Milton, Newton, Quincy, Revere, Somerville

Community	Population 2000	Population 2010	% change	White	% in 2010	Black	%	Asian	%	Hispanic	%
Boston	589,141	617,594	+4.83%	333,033	53.92%	150,437	24.36%	55,235	8.94%	107,917	17.47%

Community	Population 2010	Population 2020	% change	White	% in 2020	Black	%	Asian	%	Hispanic	%
Boston	617,594	675,647	+9.40%	318,101	47.08%	138,870	20.55%	76,021	11.25%	126,113	18.67%

Community	Population 2010	Population 2020	% change	White	% in 2020	Black	%	Asian	%	Hispanic	%
Massachusetts	6,547,629	7,029,917	+7.37%	4,896,037	69.65%	494,029	7.03%	507,934	7.23%	887,685	12.63%

The questions are:

- (1) is this by intentional design or proactive and purposeful choice to become a minority-serving institution?
- (2) what are the implications for student recruitment and enrollment growth as we move forward?

10. UMass Boston spends a much higher percentage of our annual budget on instructional activities and institutional support.

Below are the national rankings of UMass Boston for undergraduate, graduate and total enrollment, the total operating revenues, the expenses for all the functional categories in AY/FY 2022 (the latest year with data available in IPEDS), and for Instruction and Institutional Support in recent years (FY 2016 – FY 2022).

Carnegie 2021 Public Doctoral Universities with High Research Activity (91 out of 93 with data)

University of Massachusetts-Boston		Rank
Total enrollment (DRVEF2022)	15,586	39 of 91
Undergraduate enrollment (DRVEF2022)	12,221	37 of 91
Graduate enrollment (DRVEF2022)	3,365	33 of 91
Total operating revenues (F2122_F1A)	\$249,199,000	38 of 91
Total nonoperating revenues (F2122_F1A)	\$220,090,000	35 of 91
Total operating and nonoperating revenues (F2122_F1A)	\$469,289,000	43 of 91
Total other revenues and additions (F2122_F1A)	\$9,208,000	35 of 91
Total all revenues and other additions (F2122_F1A)	\$478,497,000	43 of 91
Total expenses and deductions (F2122_F1A)	\$ 482,613,000	41 of 91
		% Rank
Instruction - Current year total (F2122_F1A)		8 of 91
Research - Current year total (F2122_F1A)		31 of 91

Public service - Current year total (F2122_F1A)	48 of 91
Academic support - Current year total (F2122_F1A)	53 of 91
Student services - Current year total (F2122_F1A)	27 of 91
Institutional support - Current year total (F2122_F1A)	10 of 91
Scholarships and fellowships expenses -- Current year total (F2122_F1A)	52 of 91
Auxiliary enterprises -- Current year total (F2122_F1A)	83 of 91
Hospital services - Current year total (F2122_F1A)	N/A
Independent operations - Current year total (F2122_F1A)	86 of 91
Other expenses & deductions - Current year total (F2122_F1A)	61 of 91
Total expenses and deductions - Current year total (F2122_F1A)	41 of 91

% Rank

Instruction - Current year total (F2122_F1A)	8 of 91
Instruction - Current year total (F2021_F1A)	5 of 91
Instruction - Current year total (F1920_F1A)	6 of 91
Instruction - Current year total (F1819_F1A)	5 of 91
Instruction - Current year total (F1718_F1A)	10 of 91
Instruction - Current year total (F1617_F1A)	12 of 91
Instruction - Current year total (F1516_F1A)	14 of 91

Institutional support - Current year total (F2122_F1A)	10 of 91
Institutional support - Current year total (F2021_F1A)	20 of 91
Institutional support - Current year total (F1920_F1A)	9 of 91
Institutional support - Current year total (F1819_F1A)	9 of 91
Institutional support - Current year total (F1718_F1A)	6 of 91
Institutional support - Current year total (F1617_F1A)	5 of 91
Institutional support - Current year total (F1516_F1A)	8 of 91

NACUBO (National Association of College and University Business Officers) Function Code Definitions

Instruction: Expenses for instructional programs, including credit and non-credit courses; academic, vocational, and technical instruction; remedial and tutorial instruction; and regular, special, and extension sessions. Expenses for departmental research and public service that are not separately budgeted are included in this classification. Examples: Academic Department E&G Salary and M&O Budgets

Institutional Support: Management and long-range planning for the entire university. Includes executive management, planning and programming operations, legal services, fiscal operations, administrative information technology (when information technology resources are not separately accounted for, the costs associated with the three primary missions is classified as academic support and the remainder is institutional support), space management, employee personnel and records, logistical activities that provide procurement, storerooms, printing, activities concerned with community and alumni relations, including development and fund raising and other activities that provide university-wide support. Examples: President's Office, HR, Financial Affairs, Budget Office, Purchasing, Payroll, Legal Affairs, Auditing, Equal Opportunity Services, Government Relations, etc.

Higher expenses for our instructional programs are expected because of the kinds of students that we serve, who have been historically under-served, often lack adequate financial resources and family support systems, and most are working half or full time while pursuing their college education.

In addition, the Student-to-Faculty Ratio of UMass Boston is also relatively lower than its peers.

National Rank

UMass Boston Student-to-faculty (S2F) ratio (2022) [Arizona State University=25/1] 50-63 of 91

Institution Name	S2F ratio (F2022)	S2F ratio (F2021)	S2F ratio (F2020)	S2F ratio (F2019)	S2F ratio (F2018)	S2F ratio (F2017)	S2F ratio (F2016)	S2F ratio (F2015)	S2F ratio (F2014)	S2F ratio (F2013)	S2F ratio (F2012)	S2F ratio (F2011)	S2F ratio (F2010)	S2F ratio (F2009)	S2F ratio (F2008)
UMB	16	15	17	16	16	16	16	16	16	15	15	16	16	18	18

Another important factor is the relatively high number of course load reductions. The policies, standards and procedures or historical practice for course load reduction have been incrementally accumulated over many decades. The primary reasons for course load reductions include (1) heavy administrative responsibilities such as serving as the Department Chairs, Program or Center Directors, (2) extraordinary graduate and undergraduate advising responsibilities, (3) unusual burden of externally sponsored research programs/projects and exceptionally intensive and productive research efforts, (4) course buyouts for sponsored research, (5) course reductions as part of the faculty recruitment and startup package negotiated at the time of hiring, (6) significant professional services such as serving as editors of prestigious peered reviewed journals, and (7) other special considerations (health, family, ...). Such policies, standards and procedures are not clearly documented and widely communicated. The implementation of these policies, standards and procedures have been inconsistent across the campus. There is also a lack of adequate accountability in some cases.

In addition, the extremely low enrollment of some graduate programs makes it very challenging or impossible to offer custom-designed courses for their graduate students and often leads to under-enrolled graduate or cross-listed course sections.

Part of the unusually high percentage of our expenses in “Institutional Support” is the relatively high number of senior administrators at UMass Boston. We are about to launch our search for the tenth vice chancellor for a relatively small institution.

- Chancellor
- Deputy Chancellor
- Vice Chancellor for Student Affairs
- Vice Chancellor for Enrollment Management
- Vice Chancellor for Administration & Finance
- Provost and Vice Chancellor for Academic Affairs
- Vice Chancellor for Human Resources
- Vice Chancellor for Information Technology & CIO
- Vice Chancellor & Director for Athletics & Recreation
- Vice Chancellor for Marketing & Engagement
- Vice Chancellor for University Advancement
- Vice Chancellor for Diversity, Equity and Inclusion

UMass Amherst is a R1 institution (Doctoral University with Very High research activity), has a student population of 32,229 (24,311 undergraduate) in Fall 2022, and an operating budget of over \$1.7 billion in FY 2024. Their Chancellor’s cabinet only has ten members (<https://www.umass.edu/chancellor/campus-leaders>). The Chancellor's Executive Cabinet of UMass Lowell (with a student population of 17,335 [12,391

undergraduate] in Fall 2022 and an operating budget of \$578 million in FY 2024) only has six members and five Vice Chancellors (<https://www.uml.edu/about/leadership/>).

Below is a copy of the last slide of a presentation given to the Chancellor's Budgeting Committee on July 12, 2016. It was a response to the proposed ideas for budget cuts at that particular time.

PRESENTATION TO THE CHANCELLOR'S BUDGETING COMMITTEE

Zong-Guo Xia

Vice Provost for Research & Strategic Initiatives and Dean of Graduate Studies

July 12, 2016

ISC Conference Room 1400

I have been a senior administrators at three different academic institutions (a cabinet member at CUNY). UMass Boston is by far the most top heavy, most complex and least efficient institution that I have personally observed and experienced.

Yes, every institution needs a President/Chancellor, a Provost, a Vice President/Chancellor for Administration & Finance, ...

However, I hope that you would be as shocked as I was to find out that we had around 100 "executive" staff in Spring 2016 (>\$15 million for salaries and ~\$5 million for fringe benefits: another important factor towards our structural deficit), with

37 of them with the word "Dean" in their job titles,

25 with the word "Chancellor" in their job titles, and

18 with the word "Provost" in their job titles.

I am aware that some of these people were to a certain degree forced into these titles because of our peculiar HR policies, standards and procedures.

Similarly, there are perfect reasons for engaging consultants, such as providing expertise not available on campus and responding to emergencies and short-term critical and urgent needs.

\$3,188,992 [Office of Budget and Financial Planning: "10 Reduce use of external consultants (50%) 1,594,496"]

These numbers have actually got much higher in the last a few years:

37 (52 in 2022) of them with the word "Dean" in their job titles,

25 (46-3 in 2022) with the word "Chancellor" in their job titles, and

18 (16+4 in 2022: 4 changed titles because of Vice Provost for IT Upgrade to Vice Chancellor for IT) with the word "Provost" in their job titles.

FY25-29 Financial Forecast

Board of Trustees: Committee of the Whole

December 11, 2023

shows that the number of our faculty in AY/FY2024 (860) is still 4 below the level in FY 2020 (864), but the number of Executive/Admin/Managerial staff has actually increased from 83 in FY 2020 to 91 in FY 2024, a net gain of 8 FTEs.

Boston: Staffing

Employee FTEs	Actual					Budget	Actual
	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	
Restricted							
Faculty	12	10	7	6	7	10	12
Staff	135	132	126	116	163	171	170
Total Restricted	147	142	133	123	170	180	182
<i># Change</i>	<i>(19)</i>	<i>(5)</i>	<i>(9)</i>	<i>(10)</i>	<i>47</i>	<i>15</i>	<i>12</i>
<i>% Change</i>	<i>-11.3%</i>	<i>-3.4%</i>	<i>-6.5%</i>	<i>-7.8%</i>	<i>38.7%</i>	<i>9.3%</i>	<i>7.0%</i>
Unrestricted General University Ops							
Faculty	873	864	843	861	851	850	860
Staff	931	941	869	898	868	895	927
<i>Executive/Admin/Managerial</i>	89	83	85	85	86		91



VI. Reports – maximum of 10 minutes

- a. Chancellor – Marcelo Suárez-Orozco
- b. Provost and Vice Chancellor for Academic Affairs – Joseph Berger
- c. Vice Chancellor for Administration & Finance – Kathleen Kirleis
- d. Faculty Representative to the Board of Trustees – Sana Haroon
- e. Representative from the Faculty Staff Union – Caroline Coscia
- f. Representative from the Professional Staff Union –
- g. Representative from the Classified Staff Union –
- h. Representatives from the Graduate Employee Organization – Chidimma Ozor Commer and/or Jonathan Vega-Martinez (GEO Organizing Committee Members)
- i. Representatives from the Undergraduate Student Government – Kaushar Barejiya (President) and/or Kaley Whipkey (Vice President)
- j. Representatives from the Graduate Student Government – Delaney Bowen (President) and/or Chirag Nemani (Vice President)

VII. New Business

VIII. Motion to Adjourn