

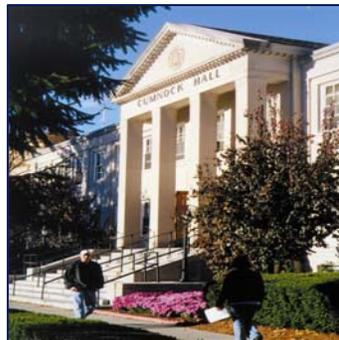
UNIVERSITY OF MASSACHUSETTS

Amherst • Boston • Dartmouth • Lowell • Worcester



2008 Report on Annual Indicators

University Performance Measurement System



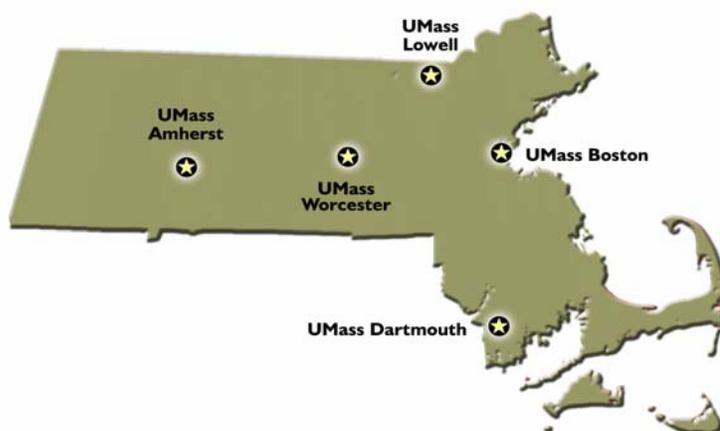
UNIVERSITY OF MASSACHUSETTS

Amherst • Boston • Dartmouth • Lowell • Worcester

2008 REPORT ON ANNUAL INDICATORS **University Performance Measurement System**

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THE 2008 REPORT ON ANNUAL INDICATORS

The 2008 Report on Annual Indicators is the eleventh annual report of the University of Massachusetts Performance Measurement System. This report provides Trustees, Legislators, and state-level policy makers with information by which they can assess the University as compared with similar institutions and its own 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; and*
- *Financial Health*

Encompassed within these 5 areas are 9 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 leadership role in public service;*
- *Increase endowment*
- *Improve administrative and IT services; and*
- *Develop first-rate infrastructure*

Many indicators are common to all campuses, but several are unique and reflect the distinct missions of each of the campuses.

The 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 Amherst campus, the peer group consists of the national universe of public and private research universities with at least \$20 million in federal research expenditures. For the Worcester campus, the peer group consists of the 76 public medical schools in the United States. For the Boston, Dartmouth, and Lowell 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) a small group of public university systems in other states.

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

- Headlines from the 2008 Annual Indicators
- 2008 Annual Indicators at a Glance
- Data Tables and Charts
- Definitions and Sources

LEGISLATIVE PRIORITIES	UMASS STRATEGIC PRIORITIES	2008 ANNUAL INDICATORS
ACADEMIC QUALITY	Improve student learning experience	HS GPA of Freshmen
		SAT Scores of Freshmen
		Average GPA of Transfer Students
		MCAT Scores of Entering Students
		Licensure and Certification Pass Rates
		Satisfaction with Major/Education
		Number of Students Enrolled in For-Credit Internships
		Doctorates Awarded
		Postdoctoral Appointees
		Strengthen research and development
	Federal Research Support	
	Rank in Total R&D (NSF)	
	Sponsored Instruction/Outreach per Faculty	
	Rank in NIH Funding Among Medical Schools	
	US News Ranking in Primary Care Medicine	
	Patent Applications	
	License Income	
	Renew faculty	New Tenured/Tenure-Track Faculty Hired
		Change in Tenured/Tenure-Track Faculty
		Change in Faculty FTE
		Faculty Awards
	Access and Affordability	National Academy Members
		Tuition & Fees as Percent of Statewide Family Income
		Percent Pell Grant Recipients
		Percent of Need Met for Students Awarded Need-Based Aid
		Tuition & Fees with Learning Contract
		Percent Undergraduates from Massachusetts
		Online Course Enrollments
	Enrollments in Continuing/Corporate Education	

LEGISLATIVE PRIORITIES	UMASS STRATEGIC PRIORITIES	2008 ANNUAL INDICATORS		
STUDENT SUCCESS AND SATISFACTION	Diversity and positive climate	Percent Undergraduates who are Students of Color		
		Percent Undergraduates who are First Generation in College		
		Percent Undergraduates who have English as Second Language		
		Freshman One-Year Retention Rate		
		Freshman Six-Year Graduation Rate		
		Transfer One-Year Retention Rate		
		Transfer Graduation Rate		
		Match Rate/Choice of Residency		
		SERVICE TO THE COMMONWEALTH	Develop a leadership role in public service	Percent Mass Residents Attending UMass
				In-State UG Enrollment by Region
UMass Percent of all Massachusetts Degrees				
Percent Graduates who Remain in MA				
Enrollment in Science, Technology, Engineering, and Mathematics (STEM) Programs				
Degrees Awarded in STEM Fields				
MTEL Science & Math Test-Takers				
Regional Impact				
Service to State Agencies (\$)				
FINANCIAL HEALTH	Endowment			Endowment and Endowment per Student
		Annual Growth in Endowment		
	Administrative and IT services	Private Funds Raised Annually		
		Return on Net Assets		
		Financial Cushion		
	Infra-structure	Campus Safety		
		Debt Service to Operations		
		Total Deferred Maintenance Cost		

HEADLINES FROM THE 2008 ANNUAL INDICATORS

ACADEMIC QUALITY

❖ *UMass continues to admit high quality students.*

UMass attracts highly qualified applicants. For Fall 2007, all the campuses received the highest number of undergraduate applications in the last 11 years. Like last year, the freshmen average SAT scores for some campuses dropped reflecting a national trend. However, average high school GPA rose or remained stable.

❖ *UMass students outperform state and national averages on professional exams.*

In most cases, the average UMass pass rates are better than the national or state averages for certification/licensure exams in fields such as education, medicine, and nursing.

❖ *UMass' research capacity continues to grow.*

In FY2007, the system generated \$397.5 million¹ in sponsored research, an increase of 7% over FY2006.

❖ *UMass Worcester is consistently ranked in the top 10% of medical schools with an emphasis in primary care.*

In the 2008 US News ranking, UMass Worcester ranked 13th among 144 medical schools with emphasis in primary care medicine.

❖ *Commercialization of UMass research continues to grow.*

In FY2007, license income for the system totaled \$41.4 million. UMass ranks in the top 20 of US universities in license income.

ACCESS AND AFFORDABILITY

❖ *UMass continues to be accessible and affordable.*

UMass tuition and fees average 12.4% of statewide median family income, a percent much lower than that for the state's private universities (45.4%) and other New England public universities (15.2%).

❖ *UMass serves citizens of the Commonwealth.*

Over four-fifths (84%) of UMass undergraduates are Massachusetts residents, compared with a quarter (26%) at private universities in the state.

❖ *UMassOnline expands programs to provide educational access.*

UMass Online reaches diverse and geographically dispersed learners. In AY 2006-07 course enrollments for

UMassOnline were 28,543, a 26% increase over those for AY 2005-06.

STUDENT SUCCESS AND SATISFACTION

❖ *UMass educates a diverse citizenry.*

The number of students of color enrolling at UMass has increased over the last five years. Currently, over one-fifth (one of five, or 23%) UMass undergraduates are Black, Asian, Hispanic or Native.) At UMass Boston, 44% of undergraduates are students of color, making it the most diverse public university with over 2,500 undergraduates in all of New England. As a point of comparison, approximately 27% of Massachusetts public high school graduates are students of color.

❖ *Medical school graduates get their choice of residency.*

Ninety-eight percent (98%) of UMass Worcester graduates were accepted to their choices of residency, a match rate that is consistently higher than the peer institutions.

SERVICE TO THE COMMONWEALTH

❖ *Majority of Massachusetts residents attend UMass.*

Almost 2 of 3 (62%) Massachusetts residents enrolling in universities in the state as first-time undergraduates attend UMass. The University's students come from every region of the state.

❖ *UMass' contribution to an educated citizenry and workforce remains high.*

UMass awarded over 11,700 degrees and certificates in 2006-07, which is 14% of all undergraduate and graduates degrees awarded in the Commonwealth. The University's impact is particularly high in the following fields: computer & information sciences and health (bachelor's level), natural sciences, computer science and engineering (master's level) and education and business (doctoral level).

❖ *Majority of UMass alumni reside and work in Massachusetts.*

Three of five (60%) graduates of the University remain in the Commonwealth after graduation.

FINANCIAL HEALTH

❖ *Endowment at more than \$350 million.*

The market value of the University's endowment grew 34.6% from FY2006 to FY2007.

❖ *Financial indicators compare favorably to peers.*

In FY2007, the University's return on net assets, financial cushion and debt service to operations were all within the range of peer systems.

¹ Comparisons with prior year data should be made with caution due to a revised methodology in the calculation of this figure by some campuses.

2008 ANNUAL INDICATORS AT A GLANCE

ACADEMIC QUALITY

- Research Expenditures \$397.5M
- License Income \$41.4M

ACCESS AND AFFORDABILITY

- Tuition & Fees as Percent of Family Income 12.4%
- Percent Undergraduates from Massachusetts 84%
- Online Course Enrollments 28,543
- Annual Growth in Online Course Enrollments 26%

STUDENT SUCCESS AND SATISFACTION

- Percent Undergrads who are Students of Color 22.9%

SERVICE TO THE COMMONWEALTH

- Proportion of Mass Residents Attending Universities in MA enrolled in UMass 62.2%
- Enrollment of In-State Undergraduates by Region:
 - Greater Boston 33.2%
 - Northeastern Mass 24.5%
 - Southeastern Mass 18.8%
 - Central Mass 9.8%
 - Western Mass 13.6%
- Degrees awarded 11,704
- UMass as Percent of all Massachusetts Degrees 13.5%
- Percent Graduates who Remain in MA 59.7%
- MTEL Science and Math Test-Takers 123

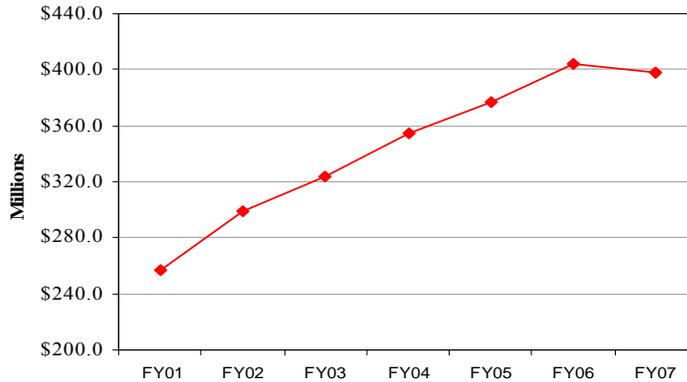
FINANCIAL HEALTH

- Endowment Assets \$350.2M
- Annual Growth in Endowment 34.6%
- Private Funds Raised Annually \$90.9M
- Return on Net Assets 16.0%
- Financial Cushion 20.4%
- Debt Service to Operations 3.7%
- Total Deferred Maintenance Cost \$2.6B
- Deferred Maintenance per GSF \$114.26

ACADEMIC QUALITY

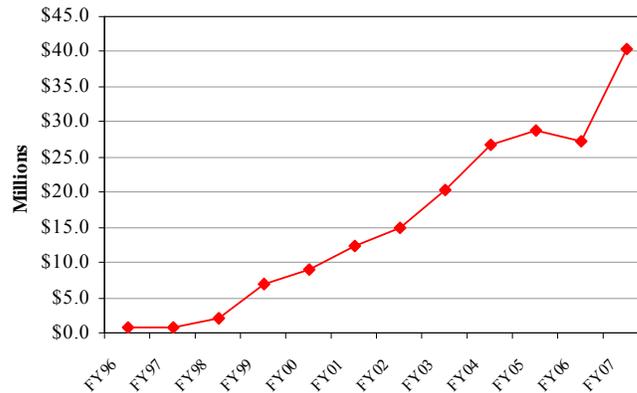
Research Expenditures

Research and development expenditures is an indicator of an institution's research capacity. At UMass, R&D expenditures continue to grow. For FY 2007, the amount was \$397.5 million. Most of the University's R&D expenditures are in the science and engineering fields. Between FY 2001 and FY 2007, R&D expenditures grew by 57%.



License Income

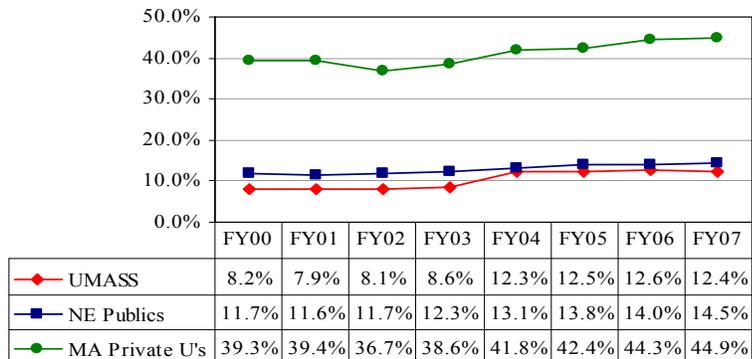
License income is a measure of the economic value of an institution's inventiveness and a contributor to the University's economic health. It is difficult to predict when or for what products or processes a license will begin to generate significant income. License income for UMass totaled \$40.4 million in FY2007, reflecting a 49% increase from FY2006. UMass ranks in the top 20 of US universities in terms of licensing income generated from its technology transfer operation.



ACCESS AND AFFORDABILITY

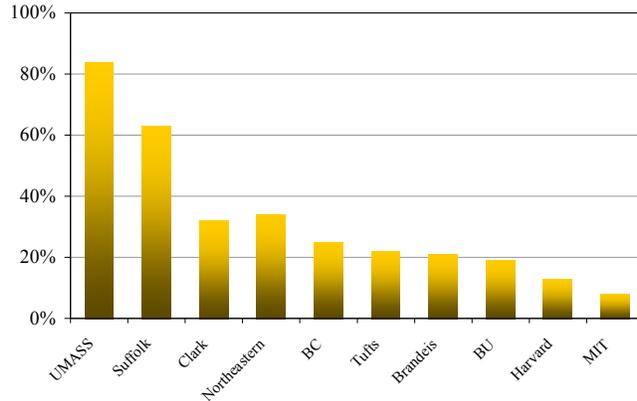
Tuition and Fees as a Percentage of Family Income

UMass average tuition and fees remain affordable relative to median family income. UMass tuition and fees average 12.4% of statewide median family income, compared with an average of 44.9% for the state's private universities and 14.5% for other New England public universities.



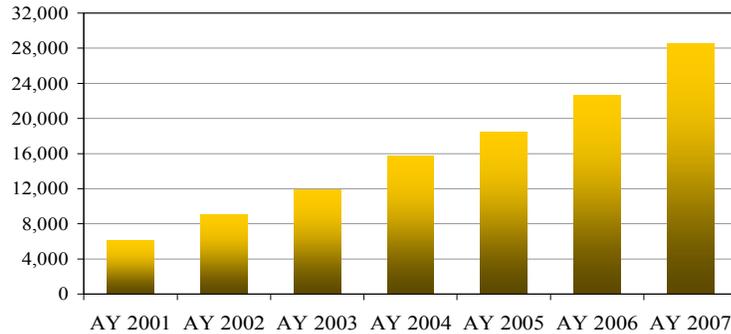
Percent Undergraduate Students from Massachusetts

The vast majority (84%) of UMass undergraduates are citizens of the Commonwealth. The percentages are highest at the more regional campuses - at Boston, Dartmouth, and Lowell, nine out of ten students are in-state - and lowest at UMass Amherst, where nearly eight of ten students are in-state. By contrast, only 26% of undergraduates enrolled in the state's private universities come from Massachusetts.



Rate of Growth in Online Course Enrollments

UMassOnline delivers 77 programs to diverse and geographically dispersed learners. Course enrollments in UMass Online continue to grow at a healthy rate. Academic year 2006-07 course enrollments were 26% higher than those for AY 2005-06.



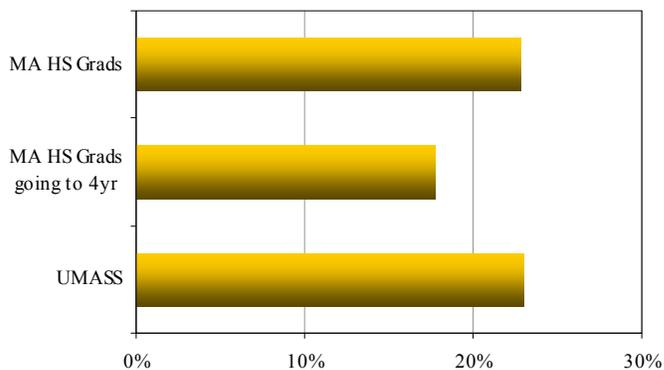
	AY 2001	AY 2002	AY 2003	AY 2004	AY 2005	AY 2006	AY 2007
Annual growth rate		47%	33%	31%	17%	23%	26%

STUDENT SUCCESS AND SATISFACTION

Percent Undergraduate Students of Color

Nearly one-fourth (22.9%) of the University's undergraduate students are Black, Asian, Hispanic, or Native American, compared with 22.8% of the state's population of public high school graduates and 17.7% of high school graduates who intend to enroll in a four-year college or university.

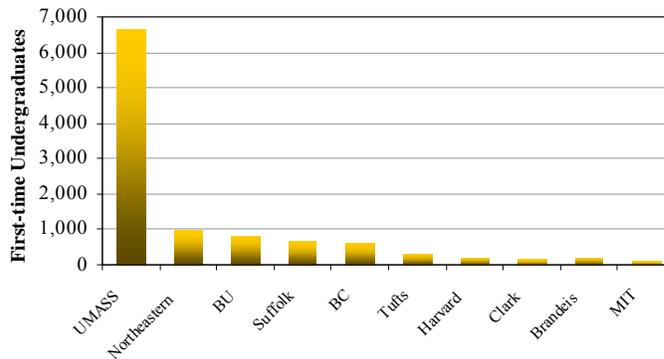
Note: Beginning with the high school class of 2006, students who identify as Multi-Race are included in the count of students of color. Comparisons with prior year data should be made with caution.



SERVICE TO THE COMMONWEALTH

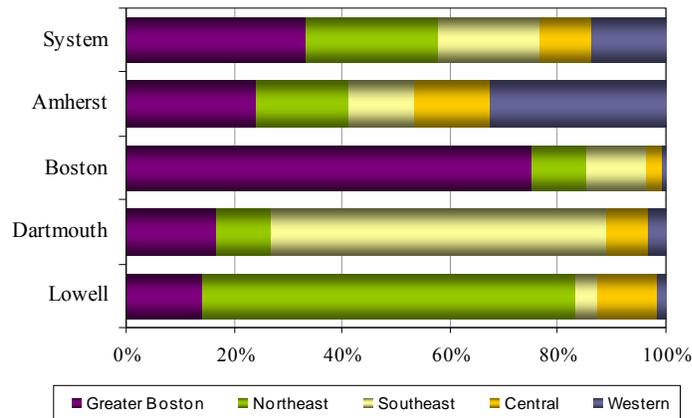
Enrollment of Massachusetts Residents

Almost two of three (62%) Massachusetts residents enrolling in universities within the state as first-time undergraduates attend the University of Massachusetts.



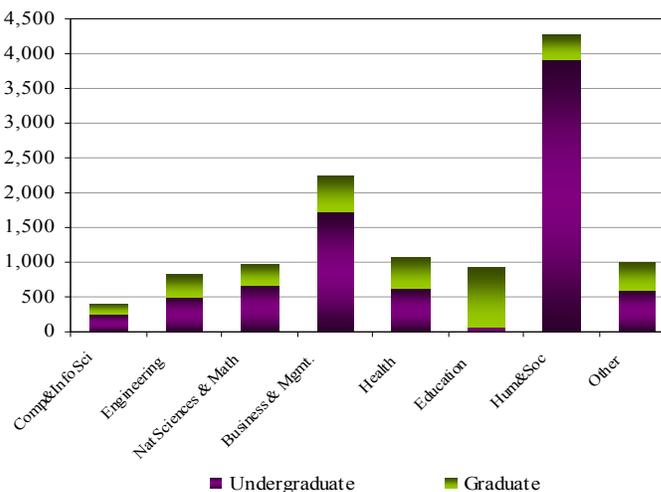
Enrollment by Region

UMass serves undergraduate students from all regions of the Commonwealth, with UMass Boston drawing 75% from the Greater Boston area, Dartmouth drawing 62% from Southeastern Massachusetts, and Lowell drawing 69% from the northeastern corner of the state. Thirty two percent (32%) of Amherst's undergraduate students are from Western Massachusetts, and another 24% are from the Greater Boston area.



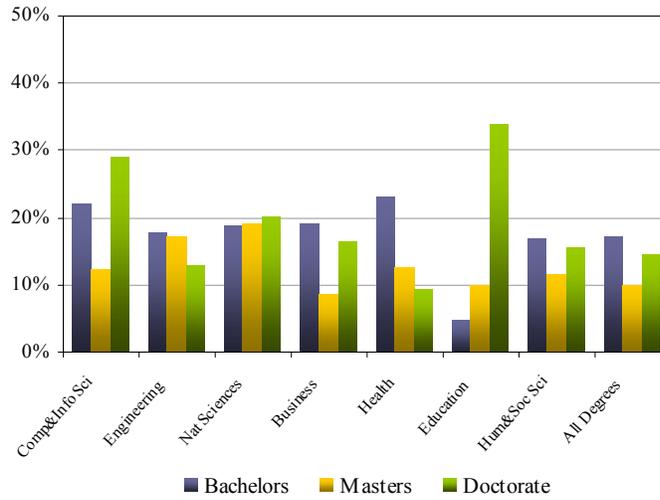
Degrees Conferred by Field

Of the 11,704 degrees and certificates conferred by the University in 2006-07, nearly three-fourths were at the undergraduate level and over one-fourth at the graduate level. Over one-third (37%) of all degrees were in the humanities and social sciences. Business/management also comprised nearly one-fifth (19%) of all degrees. The University awarded 391 degrees in computer and information sciences, 817 degrees in engineering and engineering-related technologies (an 8% increase from the previous year), and 964 degrees in math and natural sciences. Degrees in health sciences and professions were at 1,075, a 14% increase from the previous year. There was also a 5% increase in the number of Education degrees awarded (919 degrees) from the previous year.



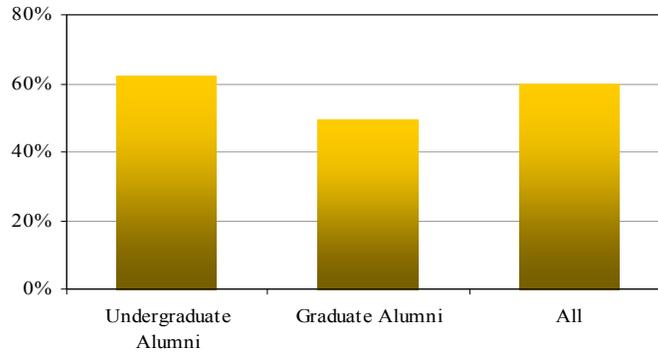
UMass Degrees as Percent of Massachusetts Degrees

The University of Massachusetts annually awards 14.5% of baccalaureate and graduate degrees (17.1% of bachelors, 10% of master's degrees and 14.4% of doctoral degrees) in the state. The University's impact at the doctoral level in business and education is particularly high, as is its impact at the master's level in natural sciences, computer and information sciences, and engineering, and the bachelor's level in computer and information sciences and health (which includes nursing).



Percentage of Graduates Who Live in Massachusetts

Almost two of three (62%) undergraduate alumni and half (50%) of the graduate alumni of the University live and work in the Commonwealth of Massachusetts.



MTEL Science and Math Test-Takers

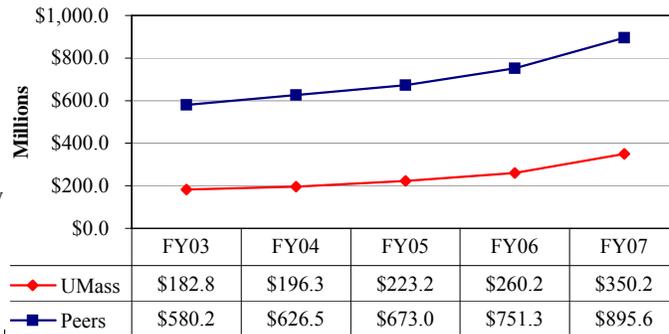
In 2006-07, 123 of the students completing the University's teacher preparation program took the Massachusetts Tests for Educator Licensure (MTEL) in Science and Math subjects. The fact that this figure has more than doubled from last year is a clear reflection of the recent successes achieved by campuses in their STEM initiatives

2003-04	2004-05	2005-06	2006-07
50	72	61	123

FINANCIAL HEALTH

Endowment Assets

Despite a relatively small overall endowment, the growth in the market value of the University's endowment has outpaced the average of the peer systems in most years. The rate of endowment growth for UMass more than doubled over the past two fiscal years, from nearly 17% (FY06) to over 34% (FY07).

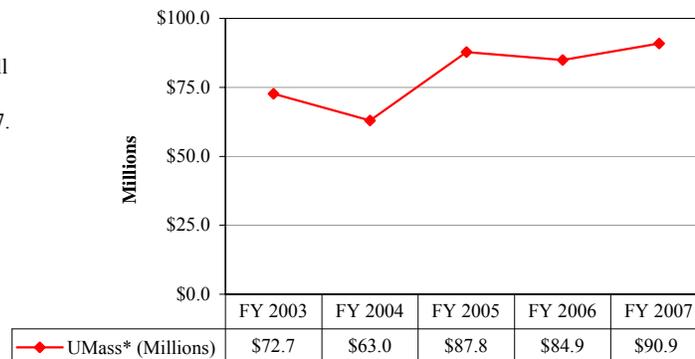


* Peers do not include University of California

Annual growth rate	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMass	0.3%	13.3%	7.4%	13.7%	16.6%	34.6%
Peers	-3.1%	10.7%	8.0%	7.4%	11.6%	19.2%

Private Funds Raised Annually

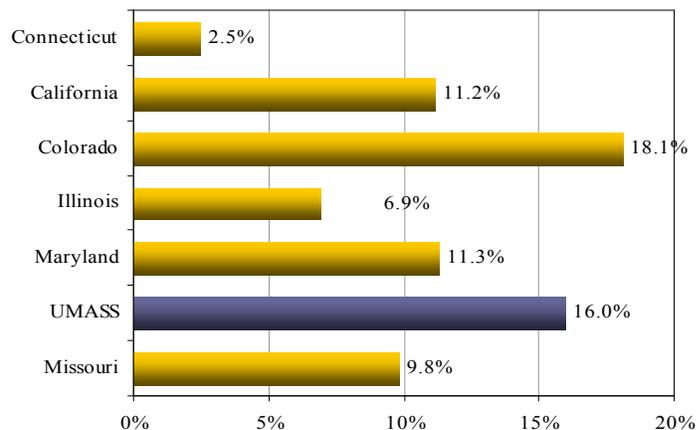
The trend in private giving has been very positive in recent years. Overall there was an 25% increase in annual giving between FY2003 and FY2007.



Return on Net Assets

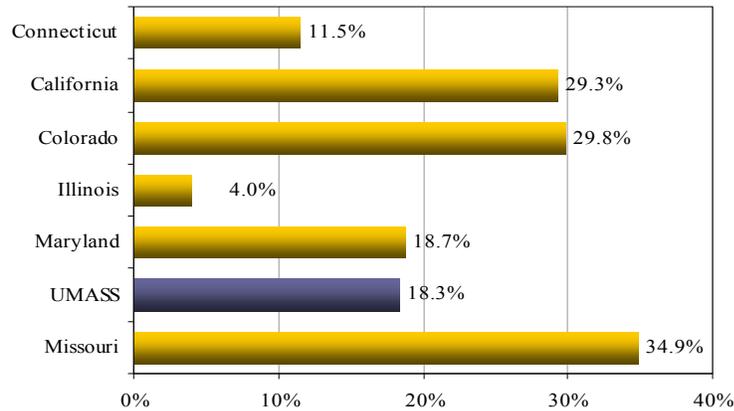
This measure provides a comprehensive measure of the growth or decline in total University wealth. This measure is best viewed over a longer period of time, however, it still helps to show if an institution is better off at the end of the fiscal year than at the beginning. A decline in this ratio may be appropriate if it reflects a strategy to fulfill mission such as investing in capital improvements.

In FY2007, the University's return on net assets compared favorably to that of the peer systems. The 16.0% growth was over twice that of FY 2006 (7.8%).



Financial Cushion

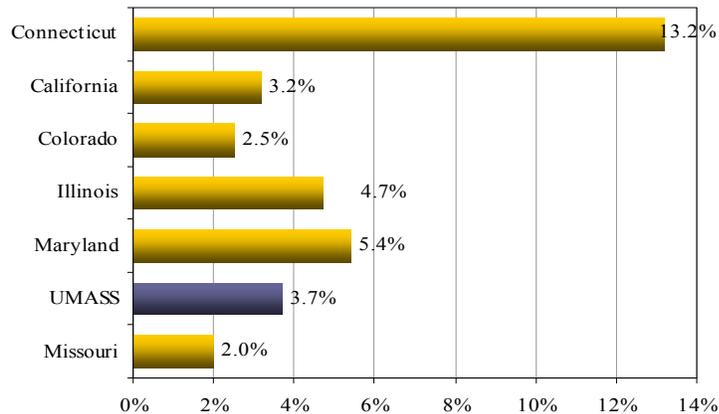
In FY2007, the University as a whole had a financial cushion of 20.4%, a two percent increase from FY 2006 (18.3%). This was within the range for the peer systems of 4.0% to 35.9%.



Debt Service to Operations

Debt service as a percent of expenditures is a reflection of the demand that long-term commitments make on operational funds.

Rating agencies generally consider that a debt service ratio of greater than 10% represents an institution that is highly leveraged.



Note: If state support of debt service was factored in, ratio for Connecticut would be 2.7%.

Total Deferred Maintenance Cost

These facilities indicators will be tracked annually. The total amount of deferred maintenance includes the amount needed to maintain the current functions of the campuses. This is the amount needed to address the deferred maintenance backlog plus the code work that would be mandated to allow campuses to continue to use space once repairs are complete.

The total deferred maintenance cost per square foot of space ratio quantifies the average dollar level of deferred maintenance work needed per square foot of space.

	FY 2007
Total Deferred Maintenance Cost	\$2,575,020,428
Deferred Maintenance per GSF	\$114.26

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Research Expenditures. Data as reported to the National Science Foundation (NSF) through its annual Survey of R&D Expenditures at Universities and Colleges.

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

ACCESS AND AFFORDABILITY INDICATORS

Tuition and fees as a percentage of family income. Tuition and mandatory fees for in-state undergraduates as a percentage of state-wide median family income as reported by US Census in 2007 inflation-adjusted dollars (latest available). Comparative data are from IPEDS and US Census.

Percentage of undergraduate students from Massachusetts. Percentage of Fall 2007 undergraduate state-supported students from in-state as determined by tuition residency classification. Data for Massachusetts private universities are from Fall 2006 IPEDS.

Rate of growth in distance education enrollments. Percentage rate of growth in annual course registrations. Does not represent headcount enrollments. Academic Year represents Fall, Winter, Spring and Summer enrollments.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Percentage of undergraduate students of color. Fall 2007 undergraduates who are Black, Hispanic/Latino, Asian and/or Native American, divided by total U.S. citizens and permanent residents who report race/ethnicity. Comparative data for 2007 public high school graduates are from the MA Department of Education.

SERVICE TO THE COMMONWEALTH INDICATORS

Enrollment of Massachusetts residents. Number of first-year undergraduates enrolling at each institution who are residents of Massachusetts. Data for Massachusetts private universities are from Fall 2006 IPEDS and the universities' institutional research offices.

Enrollment by region. In-state undergraduate enrollment by region for Fall 2007.

Degrees conferred by field. 2006-07 degrees conferred by UMass campuses by field.

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 in 2006-2007 based on IPEDS Completions Survey.

Percent of graduates who live in Massachusetts. Percentage of total undergraduate and graduate degree recipients who currently reside in Massachusetts based on alumni records as of Fall 2007.

MTEL Science & Math Test-Takers. Total number of students who took the Massachusetts Tests for Educator Licensure (MTEL) subject tests in science and math fields. Data compiled from the campuses' MTEL Annual Institution reports.

FINANCIAL HEALTH INDICATORS

Endowment assets. Market value of true and quasi-endowment assets. Comparative data are from IPEDS, financial statements and 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 (exception: Lowell's equipment gifts in-kind were not included). Comparable peer data are not available.

Return on net assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data from published financial statements.

Financial cushion. Unrestricted net assets as a percentage of operating expenditures and interest expense. Peer data are from published financial statements. Not comparable to prior years.

Debt service to operations. Debt service payments as a percentage of operating expenditures and interest expense. Peer data from published financial statements. Not comparable to prior years.

Total Deferred Maintenance (DM) Cost & Deferred Maintenance Cost (DM) per Square Foot of Space. These new indicators better reflect the condition of campus facilities and are based on work being done with the facilities asset advisory firm *Sightlines* utilizing their *The Return on Physical Assets (ROPA sm)* methodology.

Total Deferred Maintenance (DM) Cost: Includes deferred and other maintenance dollars needed to maintain the current function of the campus. This is the amount needed to address the deferred maintenance backlog plus the code work that would be mandated to allow the campus to continue to use the space once the repairs were complete.

DM Cost per square foot: The total deferred maintenance cost per square foot of space. This ratio quantifies the average dollar level of deferred maintenance work needed per square foot of space.

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

Massachusetts Private Universities

Boston College
Boston University
Brandeis University
Clark University
Harvard University
Massachusetts Institute of Technology
Northeastern University
Suffolk University
Tufts University

HEADLINES FROM THE 2008 ANNUAL INDICATORS

ACADEMIC QUALITY

The Top American Research Universities (TheCenter) identifies seven performance indicators which reflect academic quality for evaluating the comparative performance of research universities. These public and private doctoral institutions, which include UMass Amherst, generate over \$20 million in federal research annually. The Amherst campus is comparing its progress on these measures with the 152 institutions with undergraduate programs in this group.

Research. Total and federal research dollars in science and engineering (R&D) are key measures of an institution's commitment to and success in research. The Amherst campus faculty has been successful in competing for these dollars. Total R&D spending increased by 25% in the past five years. The campus has retained its relative position among research universities; however it has consistently been below the median on research spending. Growth in the tenure system faculty will allow for growth in R&D spending.

Faculty Quality. The number of academic honors and awards bestowed on its faculty is another indicator of an institution's quality. UMass Amherst's faculty has shown considerable strength in this area and has received a wide range of awards. The campus is at the upper 22nd percentile for faculty awards and at the 45th percentile for membership in the National Academies.

Advanced Training. The campus has also demonstrated strength in the education and training of pre- and post-doctoral researchers. Here, too, UMass Amherst ranked in the top half on the number of degrees awarded and for the number of post-doctorates receiving training.

Academic Quality. The academic profile of entering students has improved in recent years, evidenced by growth in high school GPA. SAT scores have remained about the same and somewhat below the median for research universities. The high school GPA of entering students rose from 3.28 in fall 2003 to 3.48 in fall 2007, and 94% of students entered UMA with a high school GPA of 3.0 and above. Additionally, graduating seniors report high satisfaction with their undergraduate experience. Results from the UMA Senior Survey show that over 90% of graduates report satisfaction with their overall experience in the major.

ACCESS AND AFFORDABILITY

Providing an affordable and accessible education of high quality is stated in the University's mission. The neediest students at UMA (23%) receive aid in the form of Pell grants, making their education more affordable. The campus will continue to increase institutional need-based aid.

STUDENT SUCCESS AND SATISFACTION

UMass Amherst students have a positive educational experience. Eighty-four percent of students return for their sophomore year, and two-thirds graduate within six years. The one-year retention rate is slightly lower than other Carnegie Very High Research institutions. However, the six-year rate is comparable to this group of institutions. The expectation is that expansion of mechanisms to assess and improve the first year experience, and the undergraduate education experience in general, will result in higher retention and graduation rates.

SERVICE TO THE COMMONWEALTH

The Amherst campus has invested in programs to promote the enrollment and graduation of undergraduate and graduate students in the sciences and mathematics. In fall 2007, 23% of baccalaureate students and 28% of graduate students were enrolled in STEM programs. These investments will continue.

FINANCIAL HEALTH

Two measures of an institution's financial strength also used in The Center's rankings are its endowment assets and private funds raised. The campus is well below other research universities on these measures. However, the endowment has doubled in value since FY 2003. Endowment assets and private funds are expected to grow once a new Chancellor is appointed, and the campus begins the quiet phase of a comprehensive capital campaign. Investment in capital improvements and restoration of faculty are necessary if the campus is to remain nationally competitive. Through these investments, the campus will enhance its academic mission and bolster its standing as a major public university. More information can be found in the FY2008 Financial Indicators Report.

2008 ANNUAL INDICATORS AT A GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	3.48
• SAT Scores of Freshmen	
<i>25th – 75th Percentile</i>	1050 – 1230
• Licensure/Certification Pass Rates	
<i>Massachusetts Teacher Test</i>	98%
<i>Registered Nurse</i>	85%
• Satisfaction With Major (UMA Senior Survey)	92%
• No. of Doctorates Awarded	293
• No. of Postdoctoral Appointees	195
• Total R&D Expenditures (\$000)	\$141,538
• Federal R&D Expenditures (\$000)	\$71,984
• Total R&D/Faculty	\$146,368
• Federal R&D/Faculty	\$74,441
• New Tenured/Tenure-Track Faculty Hired	68
• Change in Tenured/Tenure-Track Faculty	+11
• Change in Faculty FTE	+3
• Faculty Awards	19
• National Academy Members	7

ACCESS AND AFFORDABILITY

• Percent Pell Grant Recipients	23%
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STUDENT SUCCESS AND SATISFACTION

• Freshman One-Year Retention Rate	84%
• Freshman Six-Year Graduation Rate	67%

SERVICE TO THE COMMONWEALTH

• Enrollment in STEM Programs	
<i>Undergraduate</i>	4,455 (23%)
<i>Graduate</i>	1,413 (28%)
• Degrees Awarded in STEM Fields	
<i>Undergraduate</i>	919 (22%)
<i>Graduate</i>	419 (29%)

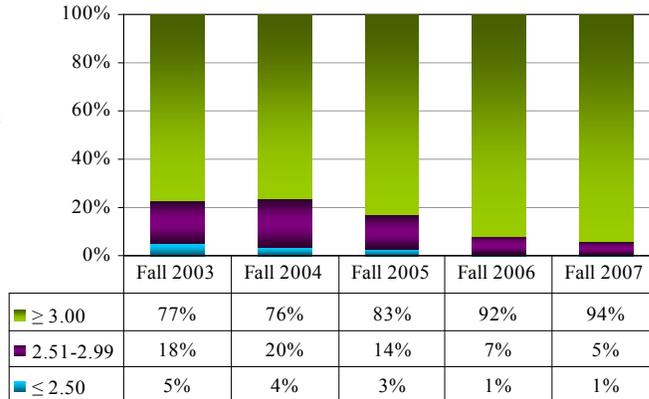
FINANCIAL HEALTH

• Endowment (\$000)	\$136,954
• Endowment Per Student	\$6,101
• Private Funds Raised Annually (\$000)	\$28,392
• Return on Net Assets	17.2%
• Financial Cushion	18.2%
• Debt Ratio	4.2%

ACADEMIC QUALITY

High School GPA of Freshmen

UMass Amherst entering first-year students are strong academically with high school GPAs approaching 3.5. The Fall 2007 entering class was the strongest in the five year period with nearly 95% of students earning a GPA of 3.0 and above in high school.



<i>Mean GPA</i>	2003	2004	2005	2006	2007
<i>UMA</i>	3.28	3.29	3.38	3.46	3.48

SAT Scores of Freshmen

The SAT profile of UMass Amherst students is somewhat below that of other research universities. UMA students perform slightly better at the 25th percentile than they do at the 75th percentile when compared with this group.

<i>SAT Score</i>	2003	2004	2005	2006	2007
<i>UMA</i>					
<i>25th %ile</i>	1050	1050	1050	1050	1050
<i>75th %ile</i>	1230	1220	1240	1240	1230
<i>Peer Median</i>					
<i>25th %ile</i>	1050	1070	1070	1070	1070
<i>75th %ile</i>	1260	1260	1260	1260	1270
<i>UMA Rank</i>					
<i>25th %ile</i>	50%	53%	53%	55%	56%
<i>75th %ile</i>	55%	61%	58%	58%	60%

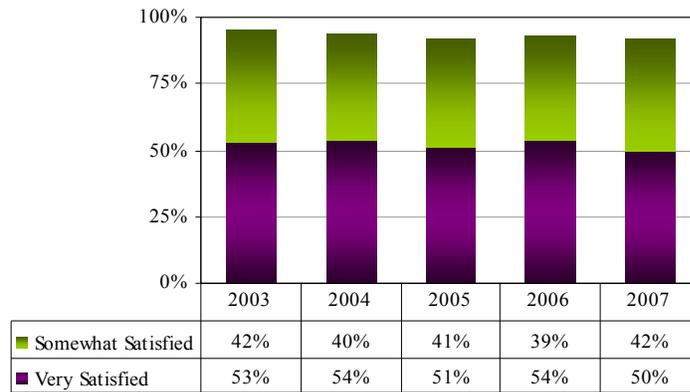
Licensure and Certification Test Pass Rates

Ninety-eight percent of program completers passed the Educator licensure exam in 2007. The rate has been consistently high for the campus and this year matches the state average. In 2007, the first-time pass rate for Nursing was the same as the national pass rate. The number of students taking these exams represent a small portion of the campus's graduates.

<i>Pass Rates</i>	<i>Educator Licensure</i>		<i>Registered Nurse</i>	
	2006	2007	2006	2007
<i>UMA Test Takers</i>	180	199	88	124
<i>UMA Pass Rate</i>	96%	98%	89%	85%
<i>State Pass Rate</i>	97%	98%	88%	88%
<i>National Pass Rate</i>	NA	NA	88%	85%

Student Satisfaction with Major

Results of the Amherst campus Senior Survey administered at the time of graduation are evidence of high student satisfaction. Satisfaction with the overall experience in the major has been consistently high. Half of graduates reported being very satisfied.



Number of Doctorates Awarded

The number of doctorates awarded at UMA has fluctuated in recent years, and is at its high for the five-year period. UMA has consistently scored well above the peer median on this measure.

<i>Doctorates</i>	2003	2004	2005	2006	2007
<i>UMA</i>	213	274	267	253	293
<i>Peer Median</i>	164	174	187	195	206
<i>Percentile Rank</i>	40%	32%	37%	41%	38%

Postdoctoral Appointees

UMass Amherst senior faculty mentor recent PhDs with science and engineering degrees who wish to receive advanced research training. The number of post-doctoral scholars is at a five-year high. UMass's rank is above the peer median, evidence of strong research programs.

<i>Post-Docs</i>	2003	2004	2005	2006	2007
<i>UMA</i>	161	173	166	182	195
<i>Peer Median</i>	127	133	140	NA	NA
<i>%ile Rank</i>	41%	43%	47%	NA	NA

Research Expenditures

Total R&D spending in FY07 was \$146 million, of which nearly \$142 million was in science and engineering (S&E). S&E expenditures increased by 25% in total dollars and 18% in federal dollars since FY2003. The total S&E dollars per faculty increased by 20% in that same period. The campus's relative position among those institutions with \$20 million or more in Federal R&D has been fairly stable with respect to total dollars but declined slightly for federal dollars.

Total S&E Research (\$000's)	2003	2004	2005	2006	2007
<i>UMA</i>	\$113,512	\$120,788	\$127,487	\$136,057	\$141,538
<i>Peer Median</i>	\$152,986	\$168,132	\$179,094	NA	NA
<i>%ile Rank</i>	59%	61%	59%	NA	NA

Federal S&E Research (\$000's)	2003	2004	2005	2006	2007
<i>UMA</i>	\$60,839	\$65,452	\$66,921	\$69,642	\$71,984
<i>Peer Median</i>	\$82,208	\$92,290	\$97,664	NA	NA
<i>%ile Rank</i>	61%	62%	63%	NA	NA

Per Tenure System Faculty FTE	2003	2004	2005	2006	2007
<i>Total</i>	\$122,317	\$135,064	\$138,049	\$142,468	\$146,368
<i>Federal</i>	\$66,900	\$73,188	\$72,386	\$72,847	\$74,441

New Tenured/Tenure-Track Faculty Hired

The campus is in the process of rebuilding the tenure-system faculty. Of the 129 new hires in the past two years, 53 were new positions, and the remaining were replacements for faculty who left. As of March 2008, 108 tenure-system faculty positions have been allocated as part of the Amherst 250 Plan.

	AY 2005-06	AY 2006-07	AY 2007-08
<i>UMA</i>	64	61	68

Change in Tenured/Tenure-Track Faculty

Fall 2007 saw a net gain of eleven in the tenure-system faculty. Investment in faculty is required to maintain the campus as a nationally competitive public research university. Continued growth is expected for 2008-09 with over 100 searches underway. Some of these positions will be replacements for faculty who left.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007	1-year Change
<i>UMA</i>	917	954	961	972	11

Change in Faculty FTE

Faculty full-time equivalent has grown by 62 since fall 2004, with most of the growth in the tenure system faculty.

	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>	<i>1-year Change</i>
<i>UMA</i>	1,180	1,221	1,239	1,242	3

Faculty Awards

UMass Amherst faculty members are recipients of many prominent awards in the arts, humanities, science, engineering and health fields. There was a spike in the number of faculty awards in 2006, raising the campus to the top quarter among other research universities.

<i>Awards</i>	2002	2003	2004	2005	2006
<i>UMA</i>	10	15	10	13	19
<i>Peer Median</i>	7	7	8	8	8
<i>Percentile Rank</i>	38%	25%	42%	34%	22%

National Academy Members

Several UMass faculty members have been elected to some of the most prestigious disciplinary organizations: the National Academy of Science, the National Academy of Engineering, or the Institute of Medicine. These are some of the highest honors academic faculty can receive. The campus ranks above its peers on this measure.

<i>Members</i>	2002	2003	2004	2005	2006
<i>UMA</i>	9	7	7	9	7
<i>Peer Median</i>	6	5	6	6	6
<i>Percentile Rank</i>	39%	45%	44%	41%	45%

ACCESS AND AFFORDABILITY

Percent Pell Grant Recipients

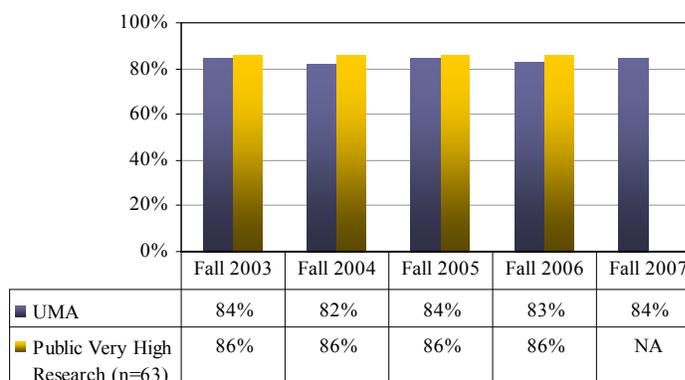
Nearly one-quarter of UMA undergraduate students receive support in the form of Pell grants. This number is quite favorable as compared with the other National Universities (as defined by US News & World Report) where the Amherst campus ranks 93 of 215 universities.

	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
<i>UMA</i>	23%	22%	23%

STUDENT SUCCESS AND SATISFACTION

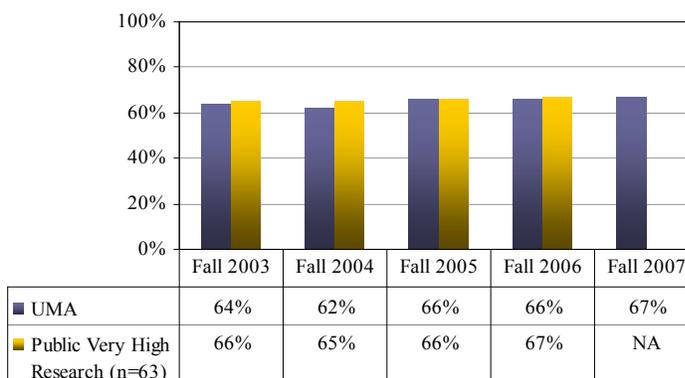
Freshman One-Year Retention Rate

The one-year retention rate is somewhat below the average for other public Carnegie Very High Research institutions. Improving student retention is a campus priority, and new strategies are being developed to enhance the first-year experience.



Freshman Six-Year Graduation Rate

Two-thirds of full-time Amherst campus students graduate within six years of entrance. The 2006 rate is comparable to that of other public institutions classified as Carnegie Very High Research. The six-year graduation rate is a lagging indicator in that it tends to reflect the academic profile of students entering six years earlier.



SERVICE TO THE COMMONWEALTH

Enrollment in STEM Programs

There are several initiatives on the Amherst campus to promote the enrollment and graduation of students in science, technology, engineering and mathematics (STEM) fields. Presently, 23% of baccalaureate students and 28% of graduate students are enrolled in such programs.

Undergraduate

UMA	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Total</i>	18,378	18,812	19,299	19,621
<i>STEM</i>	4,096	3,961	4,157	4,455
<i>Percent STEM</i>	22%	21%	22%	23%

Graduate

UMA	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Total</i>	4,898	4,890	5,067	5,077
<i>STEM</i>	1,522	1,474	1,453	1,413
<i>Percent STEM</i>	31%	30%	29%	28%

Degrees Awarded in STEM Fields

The proportion of undergraduate and graduate students receiving degrees in STEM disciplines tends to mirror the enrollment in these programs. In 2006-2007, 22% of undergraduate and 29% of graduate degrees awarded were in STEM fields.

Undergraduate

UMA	2003-04	2004-05	2005-06	2006-07
<i>Total Degrees</i>	3,919	4,262	4,038	4,235
<i>STEM</i>	876	952	953	919
<i>Percent STEM</i>	22%	22%	24%	22%

Graduate

UMA	2003-04	2004-05	2005-06	2006-07
<i>Total Degrees</i>	1,332	1,411	1,402	1,448
<i>STEM</i>	412	393	369	419
<i>% STEM</i>	31%	28%	26%	29%

FINANCIAL HEALTH

Endowment per Student

The campus endowment is one of the lowest in the country for a public flagship campus. The total endowment increased by 20% over the last year, and will continue to show improvement over the next several years.

<i>Endowment per FTE</i>	FY 2004	FY 2005	FY 2006	FY 2007
UMA	\$3,830	\$4,232	\$5,164	\$6,101
Peers	\$16,426	\$18,529	\$19,769	\$21,304

<i>Endowment (\$000's)</i>	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMA	\$65,951	\$81,880	\$91,193	\$113,724	\$136,954
<i>Annual % change</i>	10%	24%	11%	25%	20%

Private Funds Raised Annually

Issues surrounding campus leadership led to fewer commitments from major donors and a decline in private funds raised in FY07. Once a new Chancellor is appointed, the quiet phase of the campus's comprehensive fundraising campaign is expected to see renewed growth in major gifts and increases in private fundraising.

<i>Private Funds (\$000's)</i>	FY 2004	FY 2005	FY 2006	FY 2007
UMA	\$26,326	\$27,027	\$33,401	\$28,392

Return on Net Assets

Return on net assets for the campus is above the peer average. However, this ratio will decline sharply in future years as a result of higher depreciation and interest costs and more moderate investment income gains.

	FY 2005	FY 2006	FY 2007
UMA	5.42%	8.4%	17.2%
Peers	-	3.0%	7.8%

Financial Cushion

Financial cushion represents an institution's capacity to sustain itself during difficult financial times. Although lower than its peers, the ratio for the Amherst campus still compares favorably. The financial cushion will decline over the next five years as accumulated unrestricted funds which have been designated for capital improvements are spent on these projects.

	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMA</i>	16.8%	15.2%	16.7%	18.2%
<i>Peers</i>	21.5%	22.4%	22.5%	25.6%

Debt Service to Operations

The debt service ratio for the campus is slightly below its peers but will escalate over the next five years to over 6% of operations to cover the cost of new construction and major renovations to existing space.

	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMA</i>	3.2%	3.7%	4.8%	4.2%
<i>Peers</i>	6.2%	5.9%	4.9%	5.3%

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

High school GPA of first-year students. Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to BHE admissions policy, reported on all first-year students.

SAT scores of first-year students. The 25th and 75th percentile (middle range) of all first-year students. ACT scores are converted to SAT scores for those institutions using the ACT. Peer data are from IPEDS.

Licensure and certification test pass rates. Pass rates on Massachusetts Tests for Educator Licensure (undergraduate and graduate) and Registered Nurse Licensure Exam. Registered Nurse pass rates are reported for first-time test takers only.

Satisfaction with major. Percent of seniors who responded “somewhat satisfied” or “very satisfied” to the question, “Please rate your satisfaction with your overall experience in your major” on the Amherst campus’s annual Senior Survey administered at the time of graduation.

Doctorates awarded. The number of doctorates awarded as reported in the IPEDS Completions survey. Peer data are from *The Top American Research Universities* as reported to IPEDS.

Postdoctoral appointees. The number of postdoctoral appointees as reported to NSF. Peer data are from *The Top American Research Universities*.

Research expenditures. R&D expenditures in all sciences and engineering fields, from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF. Peer data are from *The Top American Research Universities* and adjusted for some institutions to exclude other campuses in a multi-campus system. **Total** and **Federal** dollars are reported.

Sponsored research per faculty. Total and Federal R&D expenditures in all science and engineering fields, divided by total tenure system faculty.

New Tenured/Tenure-Track Faculty Hired. The number of new tenured/tenure-track faculty members hired to start their new positions in the academic year.

Change in Tenured/Tenure-Track Faculty. The difference in the number of tenured/tenure-track faculty from one fall semester to the next. Includes faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative.

Change in Faculty FTE. The difference in the total FTE, from one fall semester to the next, for all full-time and part-time instructional faculty teaching state-supported courses. The FTE for part-time faculty is based on the FTE as recorded on the Human Resources system. Includes faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative.

Faculty awards. Number of faculty with awards from a list of 24 prominent grant and fellowship programs in the arts, humanities, science, engineering and health fields (e.g., Fulbright American Scholars, Guggenheim Fellows, MacArthur Foundation Fellow, National Endowment for the Humanities Fellows, NSF Career Awards, Sloan Research Fellows). Data reported in *The Top American Research Universities* and were obtained from directories or web-based listings.

National academy members. Number of faculty with active or emeritus status who have been elected to membership in the National Academy of Sciences, the National Academy of Engineering, or the Institute of Medicine. Data reported in *The Top American Research Universities*.

ACCESS AND AFFORDABILITY INDICATORS

Percent of undergraduates who receive Federal Pell Grants. 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 in the Financial Aid Template.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Freshman one-year retention rate. Percent of first-time, full-time freshmen who entered in the previous fall and were still enrolled as of the next fall. Peer data are from IPEDS and represent 63 universities classified as Carnegie Very High Research.

Freshman six-year graduation rate. Percent of first-time, full-time freshmen who entered in a given fall and had graduated within six years. Peer data are from IPEDS and represent 63 universities classified as Carnegie Very High Research.

SERVICE TO THE COMMONWEALTH INDICATORS

Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs. Total number of students enrolled in STEM programs. STEM programs are those fields of study defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Enrollment count includes degree-seeking undergraduate and graduate students.

Degrees 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.

FINANCIAL HEALTH INDICATORS

Endowment per student. True and quasi-endowment per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data from financial statements and IPEDS.

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 cash donations, pledges, and gifts in kind made in that year.

Return on net assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data are from published financial statements.

Financial cushion. Unrestricted net assets as a percentage of operating expenditures and interest expense. Peer data are from published financial statements.

Debt service to operations. Debt service payments as a percentage of operating expenditures and interest expense. Peer data are from published financial statements.

PEER INSTITUTIONS FOR UMass AMHERST**Academic Quality Indicators**

The peer group for the University of Massachusetts Amherst is comprised of the top American Research Universities, both public and private institutions, with at least \$20 million in federal research expenditures in fiscal year 2005. Excluded from this reference group of 152 universities are 43 institutions that do not have an undergraduate program (e.g., medical schools). These institutions are listed in *The Top American Research Universities, 2007 Annual Report from The Center for Measuring University Performance* at Arizona State University. The percentile rank of UMass is shown with respect to these institutions. The *percentile rank* shows the relative standing of the campus. Percentiles range from 1 (high) to 99 with a percentile rank of 50 representing the median.

The Top American Research Universities does not report retention and graduation rates. An alternate source, IPEDS, was used. Retention and graduation rates for UMass students are compared with those of 63 other universities with very high research activity that participated in the data exchange.

Financial Peers

Iowa State University
Rutgers University
University of California, Santa Barbara
University of Colorado, Boulder
University of Connecticut
University of Maryland College Park

ACADEMIC QUALITY**Improve student learning experience**

We continue to attract well-qualified freshmen and transfers to our entering classes in greater numbers. We place emphasis on the high school GPA for admissions decisions and have successfully increased the average over the last five years. The quality of our students' academic achievement is also demonstrated by the fact that, since 1999, we have had one Woodrow Wilson Foundation Thomas Pickering Foreign Affairs Fellowship awardee, five Fulbright awardees, one British Marshall scholar and two Rhodes semi-finalists. In 2007 two students applied for the Fulbright scholarship, one for the British Marshall and three applied for the Jack Kent Cooke award.

Strengthen research and development

Research dollars per faculty member grew again this year from \$42,916 in FY 03 to \$71,691 in FY 07, an increase of 70%. Since FY 03, R&D expenditures have increased 64%, to \$26 million. We are very pleased with this progress.

Sponsored Instruction and Outreach funding has been sustained, growing from \$41,495 per faculty member in FY 03 to \$42,181 in FY 07.

Renew faculty

We welcomed 29 new tenured and tenure-track faculty to UMass Boston in AY 2007-08, and with the retention of existing faculty have increased the total tenure stream faculty by 3% from Fall 06 to Fall 07. We have launched a new faculty orientation program to assist with the transition to a successful faculty career.

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. UMass Boston is the most diverse public university in all of New England with over 2,500 undergraduates. In Fall 2007, 44% of our undergraduate students were US students of color. The diversity of our student population has continued to increase along with steady increases in admissions standards and steady growth in enrollments.

ACCESS AND AFFORDABILITY

We continue to serve residents of Greater Boston communities by fulfilling our mission of access to diverse populations. UMass Boston serves large numbers of minority students, first-generation college students, transfers, and students with English as a Second Language. Our students are also diverse in age and national origin. Our graduates speak over 90 different languages in their homes, reflecting enrollments from regional

immigrant communities representing many different parts of the world.

The social and economic diversity of our students is illustrated by our Pell grant figures. Over 30% of our undergraduate students from Massachusetts receive Pell grants, which are federal funds targeted for those students most in financial need.

SERVICE TO THE COMMONWEALTH

UMass Boston's Division of Corporate, Continuing, and Distance Education continues to see an increase in online course registrations. Between Fall 2003 and Fall 2007, the registrations increased 254%. We currently offer two bachelor's degree programs and nine graduate programs online. We also offer 33 credit and non-credit certificate programs in a combination of on-ground and online formats to the corporate and professional community.

Over 90% of our students are from Massachusetts and almost 80% of our alumni reside in Massachusetts, where they contribute to the economy and civic life of the Commonwealth.

UMass Boston devotes a high proportion of research and public service activities to the cultural, social, and economic development of the Commonwealth and global community. In addition to applied research which addresses policy needs of the Boston area and the state, the campus is heavily engaged in a wide range of outreach activities, including our partnerships with the Dorchester Education Complex, the Dana Farber Harvard Cancer Consortium, and Children's Hospital. This was reflected in our designation this year by the Carnegie Foundation for the Advancement of Teaching as one of only 62 institutions recognized for outreach and partnerships, and for curricular community engagement.

FINANCIAL HEALTH

In recent years, UMass Boston's financial performance has reflected steady improvement resulting from rising enrollment and fee revenue, replenished state support, growing investment income and tighter expense management. In FY 07, the operating margin showed continued improvement and was positive (0.8%) for the first time since FY 04; the financial cushion ratio reached a six-year high of 9.8%, and the return on net assets ratio of 21.0% reflected more than \$24 million of capital support provided by the Commonwealth of Massachusetts. The campus remains in overall sound financial health. The campus is formulating its next budget around the goals of its Strategic Plan, *UMass Boston Renewal: Fidelity to Urban Mission*, and associated facilities Master Plan.

2008 ANNUAL INDICATORS AT A GLANCE

ACADEMIC QUALITY

• High School GPA of Freshmen	3.05
• SAT Scores of Freshmen (25 th -75 th)	960 - 1130
• Average GPA of Entering Transfers	3.06
• Licensure/Certification Pass Rates	
<i>Mass Teacher Certification Test</i>	99%
<i>NCLEX (Nursing)</i>	80%
• Percent Senior Rating Educational Experience “Good” or “Excellent”	87%
• Number of Students Enrolled in For-Credit Internships	1,453
• Research Per Faculty	\$71,691
• Sponsored Instruction and Outreach/Faculty	\$42,181
• New Tenure/Tenure-Track Faculty Hired	29
• Change in Tenured/Tenure-Track Faculty	12
• Change in Faculty FTE	34

ACCESS AND AFFORDABILITY

• Percent Pell Grant Recipients	32%
• Percent Undergraduate Students from MA	92%
• Registrations in Distance/Online Courses	5,768
• Rate of Growth in Distance Education Enrollments	23%

STUDENT SUCCESS AND SATISFACTION

• Percent Undergraduate ALANA Students	44%
• Percent First Generation College Students	53%
• Percent Undergraduates Who Speak English as a Second Language	37%
• Freshmen One-Year Retention Rate	75%
• Freshmen Six-Year Graduation Rate	33%
• Transfer One-Year Retention Rate	75%
• Transfer Four-Year Graduation Rate	58%

SERVICE TO THE COMMONWEALTH

• Percent of Graduates Who Live in Massachusetts	78%
• Enrollment in STEM Programs	1,789 (14%)
• Degrees Awarded in STEM Fields	184 (8%)

FINANCIAL HEALTH

• Endowment Per Student	\$3,012
• Annual Growth in Endowment	15%
• Private Funds Raised Annually	\$11.92M
• Return on Net Assets	21.00%
• Financial Cushion	9.81%
• Debt Service to Operations	5.11%

ACADEMIC QUALITY

High School GPA of Freshmen

The average GPA of entering first time freshmen at UMB has increased from 2.97 in Fall 2003 to 3.05 in Fall 2007. The number of entering freshmen has increased over this time period by 63%

GPA scores are closely linked to success in college.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
≥ 3.00	48%	54%	50%	45%	52%
2.50 - 2.99	45%	37%	36%	38%	37%
<2.50	7%	10%	14%	16%	11%
<i>Average</i>	2.97	3.03	3.02	2.97	3.05

SAT Scores of Freshmen

The quartile average SAT scores of entering freshmen have declined over the last five years during a period of rapid increase in the number of freshmen & changes in the SAT exams themselves. At the same time, GPA scores have risen.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Fall 2006 Peers
75th %ile	1110	1120	1160	1140	1130	1174
25th %ile	950	950	970	960	960	950

Average GPA of Entering Transfer Students

Two thirds of all new students entering in the Fall are transfer students. The average GPA of these students has risen from 3.03 in Fall 2003 to 3.06 in Fall 2007. There are no comparable peer data for this indicator.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>UMB</i>	3.03	3.05	3.03	3.01	3.06

Licensure and Certification Test Pass Rates

National Council Licensure Examination for Registered Nurses

Nursing continues to implement new strategies under the direction of the Dean and expect to observe a quantifiable improvement over the next year in the success of first time test takers.

	2003	2004	2005	2006	2007
<i>UMB First Time Taker Pass Rate</i>	91%	92%	90%	84%	80%
<i>National Pass Rate</i>	87%	85%	87%	88%	85%

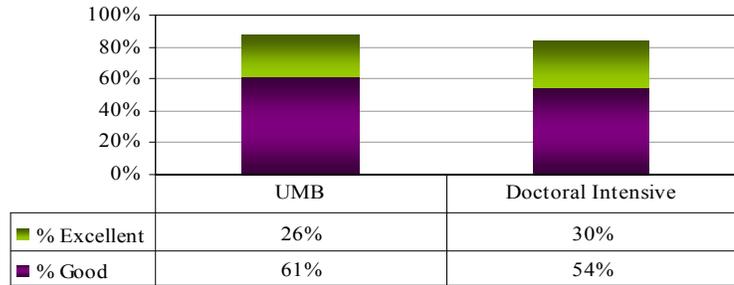
Mass Teacher Certification Pass Rate

Certification pass rates have increased from 88% to 99%. Since 2003/2004 the pass rate has been at or above the state average.

	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007
<i>UMB</i>	88%	96%	99%	97%	99%
<i>State average</i>	97%	95%	96%	97%	96%

Percent Seniors Rating Educational Experience "Good" or "Excellent"

Over 87% of seniors responding to the National Survey of Student Engagement rated their experience at UMass Boston as "good" or "excellent." This compares very favorably with the 84% of seniors at all responding Doctoral Intensive institutions who rated their experience similarly.



Number of Students Enrolled in For-Credit Internships

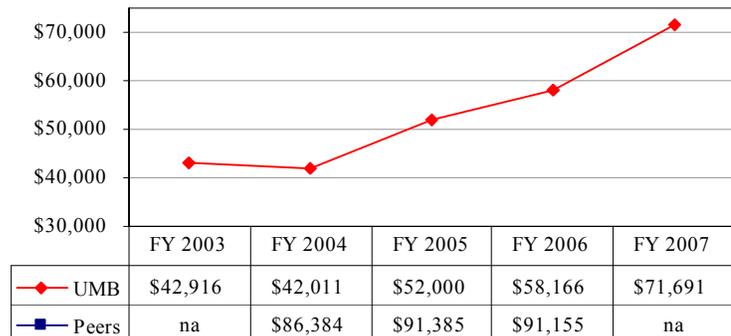
The number of internship participants reached 1,453 in Fall 2007. The 11% increase from Fall 2006 to Fall 2007 can be attributed to two major factors. First, employers are putting greater emphasis on internship experiences as a recruiting tool. Second, the assignment of career specialists to major colleges within the University has improved student participation in internship services.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
UMB	658	940	1,376	1,307	1,453

Research per Faculty

R&D per faculty member grew by 23.2% from FY 2006 to FY 2007 and by 67% between FY 2003 and FY 2007.

In calculating peer data, we excluded the University of Illinois Chicago and the University of Louisville which have Medical Schools. Our new Financial Peers have considerable research activity.

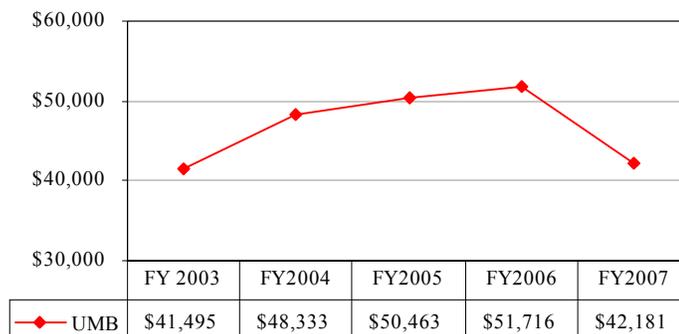


	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
Total R&D Expenditures as reported in NSF (\$000's)	\$15,793	\$15,460	\$18,148	\$21,056	\$25,952

Sponsored Instruction & Outreach per Faculty

Although overall Research increased, UMB's sponsored activity in Instruction and Public Service decreased in FY 2007 by 18%. The decline in the Instruction and Public Service component of Research is in the context of a per faculty research increase of 23% in FY 2007 (see above).

Financial information to calculate this measurement for our peers is not available because of the new GASB standards for financial reporting.



New Tenured/Tenure-Track Faculty Hired

In AY 2007 - 2008 UMass Boston was successful in recruiting 29 new tenured or tenure-track faculty. 21% of the new faculty were persons of color, and 35% were female.

	AY '05-'06	AY '06-'07	AY '07-'08
<i>UMB</i>	38	23	29

Change in Tenured/Tenure-Track Faculty

New faculty hiring and the retention of faculty resulted in an increase of tenure stream faculty of 3% from Fall 2006 to Fall 2007.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007	1-year Change
<i>UMB</i>	349	362	358	370	3%

Change in Faculty FTE

The 5% increase in FTE faculty from Fall 2006 to Fall 2007 is a reflection of our success in faculty recruitment as well as the sustained increase in enrollments between Fall 2004 and Fall 2007.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007	1-year Change
<i>UMB</i>	578	577	590	624	5%

ACCESS AND AFFORDABILITY

Percent Pell Grant Recipients

About one third of our in-state undergraduate applicants for financial aid are eligible for Pell Grants. Pell Grants are available only to those students with the lowest family incomes. The number Pell-eligible students is used as an indicator of diversity of the student population by socio-economic status.

	Fall 2005	Fall 2006	Fall 2007
<i>UMB</i>	32%	31%	32%

Percent Undergraduate Students from Massachusetts

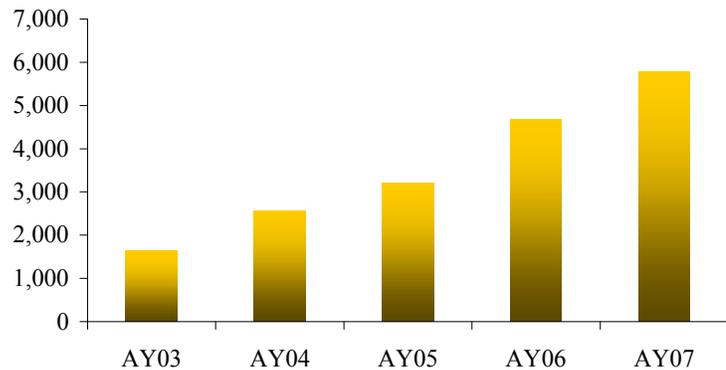
UMB serves primarily undergraduate students from Massachusetts. We also attract international and out-of-state students. In Fall 2007, 8% of our undergraduate students were international or out-of-state students.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Number</i>	7,975	7,397	7,437	7,706	8,266
<i>Percent</i>	91%	92%	92%	93%	92%

Enrollments in Distance/Online Courses

Annual online class registrations have grown significantly rapidly from AY 2003 to AY 2007, from 1,631 to 5,768

Academic Year (AY) enrollments includes Summer, Fall, Winter and Spring semesters.



Rate of Growth in Distance Education Enrollments

Annual online course registrations have grown very rapidly over the last five years.

Between AY 2003 and AY 2007, the course registrations have grown 254%.

	AY03	AY04	AY05	AY06	AY07
<i>UMB</i>	1,631	2,569	3,220	4,681	5,768
<i>Annual Rate of Growth</i>	78%	58%	25%	45%	23%

STUDENT SUCCESS AND SATISFACTION

Percent Undergraduate ALANA Students

The number and percentage of students of color continues to grow at UMass Boston, during a period of steady enrollment growth.

UMB continues to be the most diverse public university with over 2,500 undergraduates in New England.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Number</i>	2,608	2,525	2,733	3,200	3,603
<i>Percent</i>	40%	41%	41%	42%	44%

Percent First Generation College Students

Question: *Did either of your parents receive a Bachelor's degree?*

Alumni Survey: % reporting that neither of their parents had received a Bachelor's degree.

NSSE: % reporting that neither of their parents had received a Bachelor's degree.

CIRP: % reporting neither of their parents had received a Bachelor's degree.

	2002	2003	2004	2005	2006
<i>Alumni Survey</i>	64%			n/a	n/a
<i>NSSE</i>	56%		59%	n/a	n/a
<i>CIRP</i>		52%	57%	n/a	53%

(*NSSE is being administered in Spring 08 and CIRP Freshmen Survey in Fall 08 which will update these results*)

Percent Undergraduates who Speak English as a Second Language

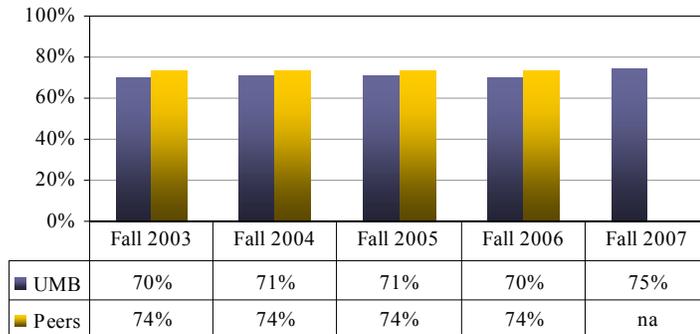
Four recent surveys contain data on the percentage of students who speak a language other than English at home:

	2002	2003	2004	2005	2006
<i>Retention Study 2002: Fall 00 First Time, Full-Time Freshmen</i>	42%			n/a	n/a
<i>Graduating Senior Survey: August 02, May 03, May 04&05</i>	39%	37%	36%	35%	n/a
<i>First Time, F-T Freshmen CIRP: Is English your native language? % responded 'No'.</i>		35%	38%	n/a	37%
<i>NSSE 2004: Combined Freshman and Seniors</i>			44%	n/a	n/a

(NSSE is being administered in Spring 08 and CIRP Freshmen Survey in Fall 08 which will update these results)

Freshmen One-Year Retention Rate

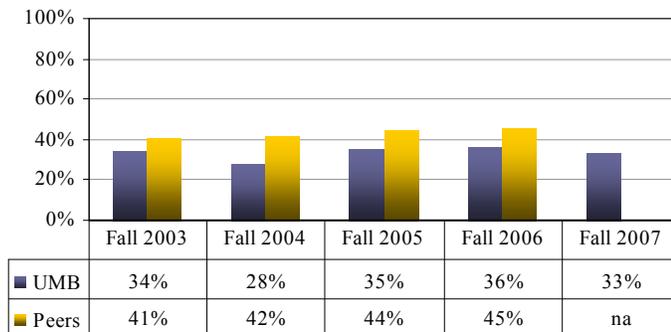
The one year retention rate for freshmen increased from 70% for those entering in Fall 2005 to 75% for those entering in Fall 2006. It remains slightly lower than our peer average. All of our peers institutions have residence life on campus.



Freshmen Six-Year Graduation Rate

The Fall 2001 entering cohort (reported as Fall 2007) graduation rate was 33%. This is a decrease over Fall 2006 but a substantial increase over Fall 2004 (those who entered in Fall 1998). The six year graduation rate of freshmen is lower than that of our peers.

Ongoing efforts to improve retention will also positively impact graduation rates over time. Graduation rates, of necessity, reflect cohort histories and not the future.



Note: Peer data are from previous year.

Transfer One-Year Retention Rate

The one year retention rate of all entering full-time transfer students has remained at 75% for students entering in Fall 2005 and Fall 2006.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Percent</i>	71%	70%	71%	75%	75%

Transfer Four-Year Graduation Rate

The four year transfer graduation rate decreased from 63% Fall 2006 to 58% in Fall 2007. There are no peer comparisons available for this indicator as these statistics are not collected nationally.

	<i>Fall 2003</i>	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
<i>Percent</i>	69%	65%	67%	63%	58%

SERVICE TO THE COMMONWEALTH

Percent Graduates Who Live in Massachusetts

The majority (78%) of undergraduate and graduate alumni of UMB stay, work, and pay taxes in Massachusetts.

The implementation of new software in Fall 2006 and a review of address data 'reduced' the percentage of graduates shown as living in MA in Fall 2006 & Fall 2007.

	<i>Fall 2003</i>	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
<i>Undergraduate</i>	80%	80%	81%	78%	78%
<i>Graduate</i>	80%	80%	81%	76%	76%
<i>All</i>	80%	80%	81%	78%	78%

Enrollment in STEM Programs

All the programs in Science, Technology, Engineering and Mathematics (STEM) are within the College of Science and Mathematics.

Enrollments continue to increase steadily in STEM programs.

	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
<i>Total Enrollment</i>	9,371	10,026	10,657	11,642
<i>STEM Enrollment</i>	1339	1416	1562	1789
<i>% STEM Enrollment</i>	11%	12%	13%	14%

Degrees Awarded in STEM Fields

The number of degrees and certificates awarded in STEM programs declined slightly between AY 2006 and AY 2007

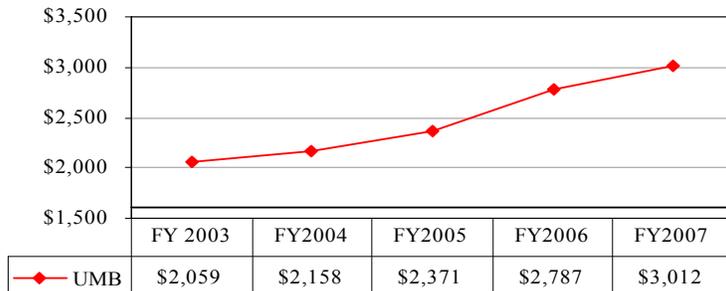
	<i>2003-04</i>	<i>2004-05</i>	<i>2005-06</i>	<i>2006-07</i>
<i>Total Degrees/Cert. Awarded</i>	2,315	2,376	2,453	2,295
<i>STEM Degrees/Cert.</i>	266	284	219	184
<i>% STEM Degrees/Cert.</i>	11%	12%	9%	8%

FINANCIAL HEALTH

Endowment per Student

The endowment per student continued to increase in FY 2007 in the context of increased student enrollment and continued increases in the market value of endowment holdings.

Peer data are not available for this measure.



	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
Total (\$000's)	\$20,491	\$21,244	\$22,634	\$24,995	\$28,672

Annual Growth in Endowment

The 15% rate of growth in the endowment in FY 2007 reflected an upturn in the financial markets and the endowment's holdings additions.

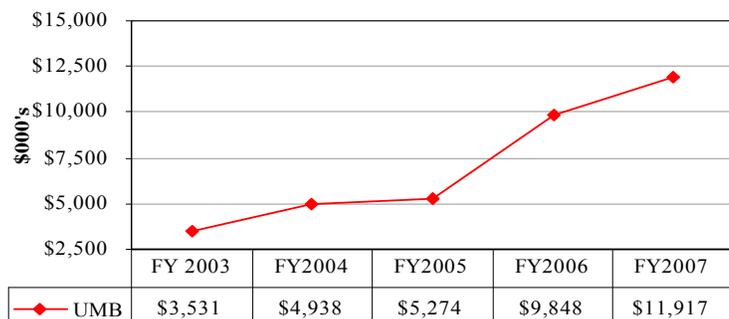
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
Growth	\$1,235,916	\$753,109	\$1,390,000	\$2,361,000	\$3,677,000
Percent	6%	4%	7%	10%	15%

Peer data are not available for this measure.

Private Funds Raised Annually

In FY 2007 private funds increased reflecting a continued upswing in pledges.

We are gratified that the re-vitalization of the University Advancement Office, with experienced staff and added resources is substantially increasing our private fundraising.



Return on Net Assets

In FY 2007 our asset base increased 21% from the level of the FY 2006 asset base. This was a very good year for net assets in which our increase was above the average increase of our peers.

	FY 2005	FY 2006	FY 2007
UMB	-1.27%	0.50%	21.00%
Peer Average	1.97%	3.13%	6.42%

Financial Cushion

In FY 2007, unrestricted and restricted-but-expendable net assets increased during the year.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMB</i>	3.68%	6.68%	6.30%	6.50%	9.81%
<i>Peer Average</i>	12.80%	12.50%	12.80%	14.00%	16.41%

Relative to our peers, UMB finds itself disadvantaged with regard to the financial cushion ratio, as all of our peer institutions are more mature than UMass Boston, and several are aspirant peers.

Debt Service to Operations

The debt service ratio shows a planned increase since FY 2003 due to UMB's aggressive capital plan and continuing investment in the infrastructure for science, technology, research, administrative processes, and our new campus improvements. In FY 2007, interest expense decreased by \$435,000 (8%) to \$4.529 million. We expect a continued increase in the Debt Service to Operations ratio as we undertake additional improvements to the University.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMB</i>	4.58%	5.03%	4.74%	5.33%	5.11%
<i>Peer Average</i>	6.44%	3.15%	2.66%	3.03%	4.09%

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

High school GPA of freshmen. Cumulative GPA for college prep courses with additional weight to honor and AP courses, according to BHE admissions policy, reported on all first-year students.

SAT scores of freshmen. 25th and 75th percentiles of all first-year students. Peer data are from US News.

Average GPA of entering transfer students. Cumulative GPA for college level courses transferred to UMB according to admissions policy.

Licensure and certification test pass rates. Pass rate on Massachusetts Teacher Certification Test. Pass rate on National Council Licensure Examination for Registered Nurses.

Percent seniors rating educational experience “good” or “excellent.” Percent of seniors who responded “good” or “excellent” to the question, “How would you evaluate your entire educational experience at this institution?” on the National Survey of Student Engagement administered in Spring 2004. Peer data are from NSSE.

Number of students enrolled in for-credit internships. Data from annual reports of the Cooperative Education Office at UMB, College of Public and Community Service, College of Management; Career and Alumni Programs, and the University Advising Center.

Research per 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 are from NSF.

Sponsored instruction & outreach per faculty. Restricted expenditures for instruction (e.g., training grants) and service per financial statements, divided by total tenure system faculty as reported to IPEDS.

Number of new tenured/tenured-track faculty. The number of new tenured/tenured-track faculty members hired to start their new positions in the academic year.

Change in number of tenured/tenure-track faculty. The difference in the number of tenured/tenure-track faculty from one fall semester to the next. Include faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative. For the 2008 PMS report, the difference will be between the figure for Fall 2006 and Fall 2007.

Change in faculty FTE. The difference in the total FTE, from one fall semester to the next, for all full-time and part-time instructional faculty teaching state-supported courses. Include faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative. For the 2008 PMS report, the difference will be between the figure for Fall 2006 and Fall 2007.

ACCESS AND AFFORDABILITY INDICATORS

Percent of undergraduates who receive Federal Pell Grants. 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 in the Financial Aid Template.

Percentage of undergraduate students from Massachusetts. Percentage of undergraduate students from in-state as determined by tuition residency classification.

Year to date enrollments in online courses. The Division of Corporate, Distance and Continuing Education began offering online Education courses in Fall 2000. Count represents course registrations, not headcount enrollments, during a given academic year (Fall-Summer).

Rate of growth in distance education enrollments. Percentage rate of growth in annual online course registrations between AY2001 and AY2005. Does not represent headcount enrollments.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Percentage of undergraduate ALANA students. Undergraduates who are African-American, Hispanic/Latino, Asian and/or Native American, divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity. Data from Census 2000 for the Massachusetts portion of the Boston-MA-NH PMSA are used for comparison.

Percent of first generation college students. Data are from the Spring 2002 & 2004 National Survey of Student Engagement, CIRP Freshmen Survey 2003 & 2004 and 2002 Alumni Survey.

Percent undergraduates who speak English as a second language. Data are from the Retention Study 2002; Graduating Senior Survey 2002, 2003 and 2004; CIRP Freshmen Survey 2003 and 2004.

Freshmen one-year retention rate. Percent of first-time, full-time freshmen who entered in previous fall and were still enrolled as of the next fall. Peer data are from U.S. News and represent 4-year averages.

Freshmen six-year graduation rate. Percent of first-time, full-time freshmen who entered in a given fall and had graduated within six years. Peer data are from US News and represent 4-year averages.

Transfer one-year retention rate. Percent of full-time transfer students at any level who entered in the prior fall and were still enrolled or graduated as of the next fall.

Transfer four-year graduation rate. Percent of full-time upper division transfers (60+ credits) who entered in a given fall and had graduated within four years.

SERVICE TO THE COMMONWEALTH INDICATORS

Percent of graduates who live in Massachusetts.

Percentage of total undergraduate and graduate degree recipients who currently reside in Massachusetts based on alumni records.

Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs. Total number of students enrolled in STEM programs. STEM programs are those fields of study defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Enrollment count includes degree-seeking undergraduate, graduate and certificate students.

Degrees 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.

FINANCIAL HEALTH INDICATORS

Endowment per student. Total UMass Boston endowments per annualized FTE student, where FTE of peer institutions is standardized to UMass formula.

Annual growth in endowment. Annual growth in total UMass Boston endowment balance.

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.

Return on net assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data from published financial statements.

Financial cushion. Unrestricted net assets as a percentage of total operating expenditures. Peer data are from published financial statements.

Debt service to operations. Debt service as a percentage of total operating expenditures. Peer data are from published financial statements.

PEER INSTITUTIONS FOR UMASS BOSTON

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

HEADLINES FROM THE 2008 ANNUAL INDICATORS

The UMass Dartmouth indicators show some continuing progress and some leveling in areas of recent strong growth. The campus has reached or exceeds the level of its peer institutions on many indicators. The indicators highlighted below are indicative of the campus's successes in the past few years as we progress in achieving strategic campus objectives. Also highlighted are areas of change. As UMass Dartmouth reaches towards the Carnegie classification level of the Boston and Lowell campuses, we acknowledge our achievements and look forward to new developments.

ADMISSIONS AND ACCESS

The Performance Measurement System's indicators for high school GPA and SAT scores help us gauge whether our admissions quality is matched to the academic experience that we deliver. UMass Dartmouth seeks students well prepared for college, and the campus works hard to recruit students across a relatively broad spectrum. We have significantly grown freshman enrollments while maintaining our standards for high school GPA and SATs of our entering freshman students. While bringing in the largest ever entering class, we have also achieved a strong increase over last year's SAT average. The new indicator for Pell grants is one measure of our on-going commitment to giving access to low-income students. We continue to realize our mission to serve the region and the Commonwealth by giving a wider range of capable students access to a high-quality education.

CONTINUED FACULTY STRENGTHS

Our faculty are both teachers and scholars who bring the excitement of their research and creative work into the classroom. We are encouraged to see federally-supported research increasing by 20% compared to last year, to \$11.5 million, indicating the Dartmouth campus' involvement in meeting national priorities through research and development. The Dartmouth indicator for Sponsored Research/Faculty has tripled in seven years, going from \$21,646 per faculty member in FY 2000 to \$62,484 in FY 2007. Submission of applications is up in an increasingly competitive environment. Our fund expenditures in the overall research and scholarship category can be explained by the conclusion of some major grants. Currently, because of many recent retirements, over a third of our faculty are untenured. Junior faculty show high potential in their striving to achieve funded research success. This indicator does not capture the many other kinds of scholarship at the university that are not funded by external sources, including artistic creation and much of the work in the humanities and social sciences.

STUDENT SUCCESS AND SATISFACTION

The one-year retention and six-year graduation rates for Dartmouth's freshmen compare satisfactorily with those of our peers and when seen in the light of research by such nationally-recognized experts as Alexander Astin. The indicators for transfer student retention and graduation fill in the picture that is left incomplete by the standard measure for freshman success.

DEGREES GRANTED

In 2007, UMass Dartmouth graduated 1,438 students, at all levels (as seen in the indicator on STEM degrees), an all-time high. Because eighty percent of our graduates remain in Massachusetts, the degrees we grant make a direct, important contribution to the Commonwealth. Although we are still small in doctoral education, we have now produced 28 PhDs at the UMass Dartmouth campus.

SERVICE TO THE COMMONWEALTH

These indicators help tell the story of UMass Dartmouth's successes in achieving our mission to "act as an intellectual catalyst for regional, economic, social, and cultural development." One aspect is our commitment to regional teacher education. Under the heading "Regional Impact" are assembled examples of UMass Dartmouth's transformational impact in the region. The campus strategic plan challenges the campus to become powerful stewards of our place by allowing regional needs to stimulate the creativity and energy that drive global impact.

FINANCIAL HEALTH

We have continued to address fiscal challenges. Strong progress continues on improving the unrestricted fund balance. A set of fiscal controls and processes are in place to ensure the achievement of full fiscal stability, and strategic planning has been linked to resources to better align academic goals and spending. We continue to make solid progress in reduction of accrued liability and building of fund balances. Funding sources have been diversified and planned enrollment growth and expenditure control have been adopted as a fiscal stabilizing strategy.

2008 ANNUAL INDICATORS AT A GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	3.04
• SAT Scores of Freshmen (average)	1058
• SAT Scores of Freshmen (25 th -75 th)	980 - 1140
• Licensure/Certification Pass Rates	
<i>Nursing</i>	84%
<i>Mass Teacher Test</i>	99%
• Sponsored Research/Faculty	\$62,484
• Sponsored Research	\$20.12M
• Federal Research Support	\$11.46M
• New Tenured/Tenure-Track Faculty Hired	12
• Change in Tenured/Tenure-Track Faculty	+ 3
• Change in Faculty FTE	+ 15

ACCESS AND AFFORDABILITY

• Percent Pell Grant Recipients	22%
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STUDENT SUCCESS AND SATISFACTION

• Freshman One-Year Retention Rate	76%
• Transfer One-Year Retention Rate	74%
• Freshman Six-Year Graduation Rate	47%
• Transfer Six-Year Graduation Rate	64%

SERVICE TO THE COMMONWEALTH

• Enrollment in STEM programs	1,784 (20%)
• Degrees Awarded in STEM fields	232 (16%)
• MTEL Science and Math Test-Takers	9
• Regional Impact (Narrative)	

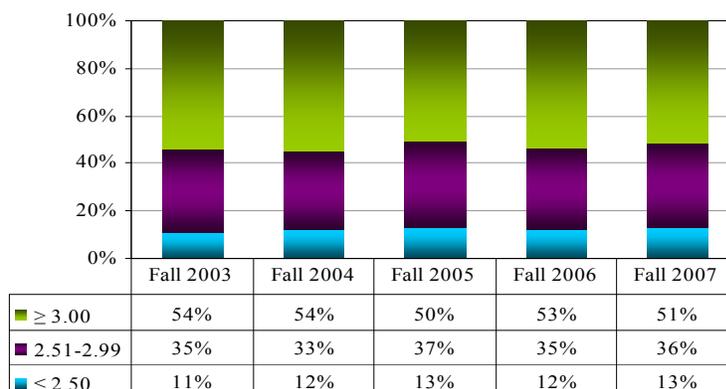
FINANCIAL HEALTH

• Endowment Per Student	\$3,028
• Endowment Assets	\$23.55M
• Private Funds Raised Annually	\$ 5.17M
• Return on Net Assets	3.4%
• Financial Cushion	-0.4%
• Debt Service to Operations	7.0%

ACADEMIC QUALITY

High School GPA of Freshmen

Since Fall 2003 our GPA quality levels have held steady at slightly over 3.0 during a period of rapid growth in freshman class size. At this level, UMass Dartmouth is succeeding in its goal of maintaining a strong student quality profile while also fostering access. High school GPA is the best predictor of success in college studies. These statistics include the 95 students who have entered by our long-standing and well recognized access program, *College Now*.



	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Average</i>	3.06	3.08	3.03	3.05	3.04

SAT Scores of Freshmen

From Fall 2003 through Fall 2005 our SAT quality levels improved steadily during a period of rapid growth in freshman class size. Fall 2006 scores declined, consistent with statewide and national trends; however, for Fall 2007 we have recovered much of the loss and are confident about the future strength of this measure. At this level, UMass Dartmouth is succeeding in its goal of maintaining a strong student quality profile while also fostering access. These statistics include the 95 students who have entered by our long-standing and well-recognized access program, *College Now*.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Peers
<i>75th percentile</i>	1130	1140	1150	1130	1140	1163
<i>25th percentile</i>	980	980	990	970	980	961
<i>Average</i>	1058	1058	1064	1046	1058	1062

Licensure and Certification Test Pass Rates

UMass Dartmouth Nursing students' performance on the licensure examination is acceptable, with an 84% pass rate. The 25% increase in the number of students reflects our efforts to increase the supply of new employees for this critical sector of our service economy. On the Massachusetts Tests for Educator Licensure, all but one student passed all three portions—Basic Skills Reading, Basic Skills Writing, and the Academic Content Area. Students may generally not enter the teacher preparation program before passing the skills and content tests. Our increasing emphasis on regional education is shown by the half-again larger number of students entering the teaching profession from UMass Dartmouth, compared to a year before.

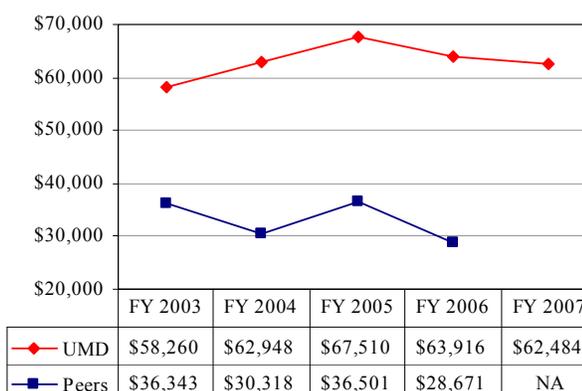
Nursing Licensure	2005	2006	2007
<i>Pass rate:</i>	91%	86%	84%
<i>National Average:</i>	87%	88%	85%
<i>Number Tested:</i>	55	77	97

Teacher Preparation	2005	2006	2007
<i>Pass rate:</i>	100%	98%	99%
<i>State Average:</i>	96%	97%	98%
<i>Number Tested:</i>	54	46	72

Sponsored Research per Faculty

Sponsored research per faculty has more than doubled between FY 2001 and FY 2005; but after a dramatic five year trend of increase in this indicator, UMass Dartmouth has seen a three-year leveling off period. Certain large grants have ended and our relatively new faculty are still moving towards their greatest productivity. From 2005 to 2007, the number of grant proposal submissions increased by 21% with an average of 227 annually. We are still considerably ahead of our peers in this indicator; FY 2006 is the latest year for which peer comparisons are available. Aspirant peers are included in the peer data.

Heightened research agendas in the colleges and the School for Marine Science and Technology are important to UMass Dartmouth's plans to expand its roles in graduate education and economic, technological, and intellectual development. New doctorate programs will strengthen this indicator.



Total R&D Value (in Millions)

FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
\$17.012	\$18.758	\$21.131	\$20.389	\$20.120

Federal Research Support

The federally funded portion of overall R&D activity reflects a growth of 20%, from \$9.5 million to \$11.5 million. We are considerably ahead of our peers in this indicator; FY 2006 is the latest year for which peer comparisons are available. The institution thus continues to expand its involvement in meeting national priorities through research and development, in an increasingly competitive grants environment.

(in Millions)	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMD	\$8.718	\$9.537	\$10.190	\$9.515	\$11.456
Peers	\$6.466	\$5.055	\$5.364	\$5.177	NA

New Tenured/Tenure-Track Faculty Hired

This indicator measures the number of new faculty hired to the tenure track or with tenure, starting with data from 2005-2006. In the longer run, this indicator will contribute to understanding the pipeline to tenure at UMass Dartmouth.

	AY 2005-06	AY 2006-07	AY 2007-08
UMD	25	13	12

Change in Tenured/Tenure-Track Faculty

This indicator measures the difference in the number of tenured and tenure track faculty from one fall semester to the next. The counts include faculty who are on paid leave but not those whose responsibilities are primarily administrative.

	Fall 2005	Fall 2006	Fall 2007	1-year Change
UMD	313	319	322	+ 3

Change in Faculty FTE

This indicator permits one to see the difference in the total FTE of instruction from one fall semester to the next. Three of the 15 additional FTE are the added tenure/track faculty, reported above; an additional three are full-time temporary faculty. The remaining 9 FTE are additional temporary part-time instructors. Not included are individuals whose primary responsibility is administrative, teaching assistants, and continuing education instructors.

	Fall 2005	Fall 2006	Fall 2007	1-year Change
UMD	427	434	449	+ 15

ACCESS AND AFFORDABILITY

Percent Pell Grant Recipients

This indicator represents the access that UMass Dartmouth offers to low-income undergraduate students. The results show a level proportion of these students among our growing frosh entering classes. The indicator reports on in-state undergraduates.

	Fall 2005	Fall 2006	Fall 2007
UMD	23%	21%	22%

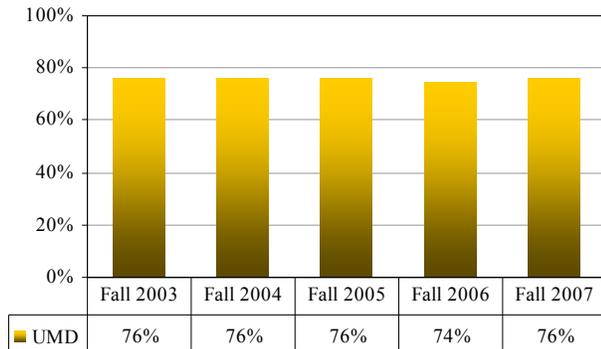
STUDENT SUCCESS AND SATISFACTION

Freshman One-Year Retention Rate

Over three quarters (76%) of last fall's first-time, full-time freshmen were enrolled as of the next fall. This is a recovery from last year's lower rate to our five-year-long trend level.

Research by higher-education scholars such as Alexander W. Astin shows that institutions with UMass Dartmouth's emerging profile of on-campus residency, admissions quality, and institutional type do well if they achieve first-year retention rates above 75% and quite well at 80% or above. Our comparative peers' average is 79% on this measure.

UMass Dartmouth has a long-range goal of reaching 80%—a goal designed to challenge the institution.



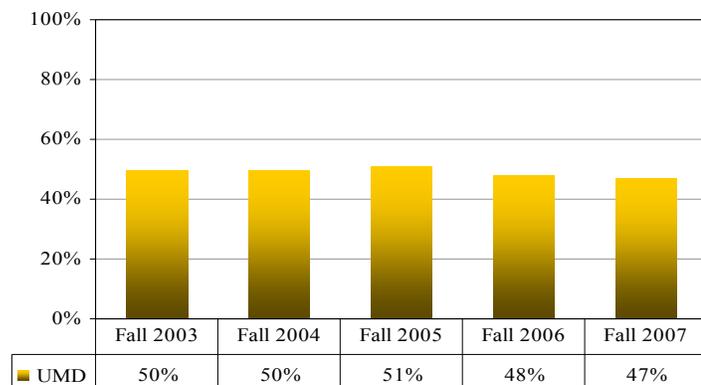
2-yr average from US News 2008 Edition (Fall 2006): Comparative Peers 79%.

Freshman Six-Year Graduation Rate

Nearly half (47%) of the first-time, full-time freshmen who entered in fall 2000 and remained UMass Dartmouth students had graduated by the end of the 2007 academic year.

Research by higher-education scholars such as Alexander W. Astin shows that institutions with UMass Dartmouth's profile of on-campus residency, admissions quality, and institutional type are doing well if they achieve graduation rates above 50%. We know that we will have some years before we can expect improvement in this measure, since this metric is governed strongly by the first-year retention rate. Our comparative peers' average is 55% on this measure.

UMass Dartmouth has a long-range goal of reaching 55%—a goal designed to challenge the institution.



3-year average from US News 2008 Edition (Fall 2006): Comparative Peers 55%.

Transfer One-Year Retention Rate

This indicator shows that 74% percent of last fall's entering transfer students were either still enrolled as of the next fall or had completed their programs. We are meeting the needs of the large proportion of these students. We also note that today's students have a wide range of reasons for transferring, and more and more do so readily. Transfer students are important in the university's enrollment and access goals.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007
Percent	76%	74%	77%	74%

Transfer Four-Year Graduation Rate

This indicator shows that 64% percent of the full-time upper division transfer students who entered in Fall 2003 had completed their program by Fall 2007; others had ceased to be students or transferred to another school. Upper division transfer students are those who entered with 60 or more credits. The decline in this indicator is a matter of concern and we are studying it.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007
Percent	77%	79%	71%	64%

SERVICE TO THE COMMONWEALTH

Enrollment in STEM Programs

This indicator demonstrates our commitment to educating students in Science, Technology, Engineering, and Mathematics (STEM) fields. STEM fields at UMass Dartmouth are biology, chemistry/biochemistry, mathematics, engineering (civil, computer, electrical, mechanical), computer science, physics, materials/textiles, biomedical engineering/biotechnology, and marine science/technology.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007
Total Enrollment	7,619	7,949	8,242	9,080
STEM Enrollment	1,630	1,609	1,676	1,784
Percent STEM Enrollment	21%	20%	20%	20%

1,784 students enrolled in STEM fields in 2007, 108 more than the previous year.

Degrees Awarded in STEM Fields

Science, Technology, Engineering, and Mathematics (STEM) graduates enter the workforce or pursue further education across the range of science, engineering, and mathematics fields. We are concerned at a declining completion rate in this measure; new leadership in our College of Engineering is addressing retention-in-major issues. Fuller examination is needed of this multi-faceted issue.

	2003-04	2004-05	2005-06	2006-07
Total Degrees/Certificates Awarded	1,273	1,302	1,406	1,438
STEM Degrees/Certificates	269	245	251	232
Percent STEM Degrees/Certificates	21%	19%	18%	16%

Test-Takers in MTEL Science and Math Subject Tests

This indicator counts total students who took and passed the Massachusetts Tests for Educator Licensure (MTEL) subject tests in science and mathematic fields. These students have completed our teacher preparation program and are entering the teaching profession. The campus considers STEM-related teacher training, professional development, research, and policy development as a major growth opportunity and a regional imperative. We are pleased to have the number of such students grow steadily. Our main growth in 2007 was in mathematics teachers.

	2003-04	2004-05	2005-06	2006-07
<i>UMD</i>	1	3	6	9

Regional Impact

UMass Dartmouth's engages our community through programs, centers, and community campus locations:

- The Advanced Technology Manufacturing Center in Fall River.
- The Star Store Arts campus in downtown New Bedford.
- The Center for University and School Partnerships to expand K-12 collaborations.
- The new Kaput Center for Innovation in Mathematics Education, which is changing the way math is being taught in southeastern Massachusetts and around the country.
- The expanding Changing Lives Through Literature Program, an alternative sentencing program that began in Bristol County but has now spread across the country and to Europe.
- The SouthCoast Economic Development Partnership with CEO's and municipal leaders, looked upon by state leaders as a model for other regions. Recent successes in advocating for Route 24 interchange, commuter rail, and other major economic development projects.
- Fostering and supporting a growing student community service ethic on our campus.

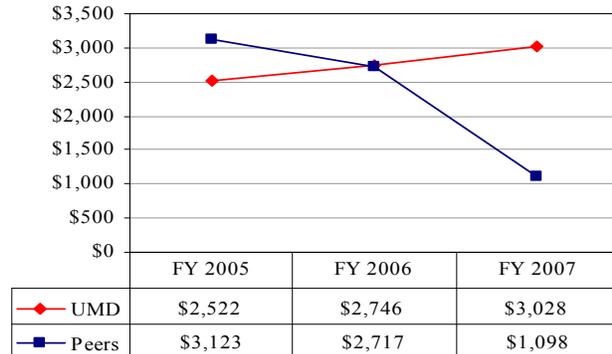
The campus impact is suggested by the following, and much more:

- A \$428 million economic impact on southeastern Massachusetts.
- 2,728 jobs created.
- 6,000 hours of reading tutoring for New Bedford children.
- 4,000 non-student visitors to Star Store art galleries and events.
- 6,000 students and program participants at downtown New Bedford and Fall River continuing education centers.
- 20,000 spectators to the annual July 3 Bank of America Freedom Festival, featuring fireworks and the New Bedford Symphony, on campus.

FINANCIAL HEALTH

Endowment per Student

The endowment per student ratio reflects a base from which earnings can contribute to current operations. In addition, unrestricted endowments contribute to the non-expendable fund balance, which greatly affects the financial cushion. In FY 2005 and FY 2006, the campus strategically allocated resources in hopes to generate additional revenues for the endowment. Although the absolute value of the endowment increased, growth in this indicator is lessened due to enrollment increases. The total endowment of \$23,550,000 in FY 2007 is projected to continue to grow. The total endowment has more than tripled since the FY 1998 figure of \$7,293,000.



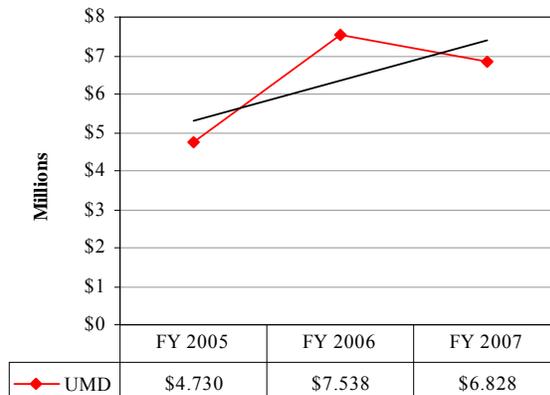
Endowment Assets

With additional funds allocated to fundraising, the campus anticipates continued endowment growth.

(in Millions)	FY 2005	FY 2006	FY 2007
<i>UMD</i>	\$18.267	\$20.815	\$23.550

Private Funds Raised Annually

The private funds indicator gauges UMass Dartmouth's success in raising funds from private sources (alumni and other individuals, foundations, corporations and other organizations) to support its mission. The campus expects revenues from this area to increase fairly consistently from FY07 to FY10. This can be attributed to the investment the campus has made and will continue to make around institutional advancement. In 2006, an unusual accounting adjustment was made for private support not counted in FY 2003, 2004, and 2005, but the trend of our performance is continuing upward steadily.



Return on Net Assets

The return on net assets ratio determines whether the institution is financially better off than in previous years by measuring total economic return. The institution's total wealth is determined by including the total change in net assets (Capital Assets net of Related Debt, Restricted, and Unrestricted) against the total net assets at the beginning of the year. The ratio provides a comprehensive measure of the growth or decline in the total wealth of an institution over a specific period of time.

	FY 2006	FY 2007
<i>UMD</i>	6.59%	3.42%
<i>Peers</i>	3.65%	6.60%

UMass Dartmouth's return on net assets has and will continue to grow over the next five years through strategic management of the Unrestricted Fund Balance.

Financial Cushion

The financial cushion reflects long-term financial health of the institution and its ability to weather, or "cushion" itself from short-term operational ups and downs. The current ratio is *much improved* over that of eight years ago, when this ratio was negative 7.2% and the campus had an "Unrestricted Net Asset" balance of negative \$9,055,000. The improved position represents a savings of approximately \$8.4 million. Positive operating results combined with the funding of liabilities will serve to diminish the negative financial cushion over time. The campus achieved cash equilibrium in FY 2002 and anticipates that the cash balance will increase each year. By FY 2008, the projected ratio is expected to reflect a positive cushion, with still more rapid improvement in FY 2009-2011.

	FY 2005	FY 2006	FY 2007
<i>UMD</i>	-2.7%	-1.2%	-0.4%
<i>Peers</i>	6.7%	6.2%	10.3%

Debt Service to Operations

Campus construction, primarily related to housing, has increased this ratio, but housing does have a dedicated revenue source. This increase is also offset by the campus's increased return on net assets ratio – a measure of the overall financial strength of an institution. This ratio remains below the 10% threshold.

	FY 2005	FY 2006	FY 2007
<i>UMD</i>	5.4%	7.3%	7.0%
<i>Peers</i>	3.2%	4.1%	5.8%

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

High School GPA of First-Year Students. Cumulative GPA for college preparatory courses with additional weight to honors and AP courses, according to BHE admissions policy, reported on all first-year students.

SAT Scores of First-Year Students. 25th, 75th percentiles and mean SAT scores of all first-year students. Peer data are from US News. Peer means are expressed as the average of 25th and 75th percentiles.

Licensure and Certification Test Pass Rates. Pass rate on Massachusetts Teacher Test and pass rate on Nursing Licensure Exam. Official data as reported annually to the testing organizations. Data are for test administrations in 2007.

Sponsored Research per 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 are from NSF/IPEDS.

Federal Research Support. R&D expenditures in all science and engineering fields, from all federal sources, as reported to NSF. Peer data are from NSF.

New Tenured/Tenure-Track Faculty Hired. The number of new tenured/tenure-track faculty members hired to start their new positions in the academic year.

Change in Tenured/Tenure-Track Faculty. The difference in the number of tenured and tenure track faculty from one fall semester to the next. Counts include faculty on paid leave but not those whose responsibilities are primarily administrative.

Change in Faculty FTE. The difference in the total FTE of instruction from one fall semester to the next. Not included are individuals whose primary responsibility is administrative, teaching assistants, and continuing education instructors. Faculty FTE is calculated as full-time faculty headcount and part-time faculty headcount divided by three.

ACCESS AND AFFORDABILITY INDICATORS

Percent of Undergraduates Who Receive Federal Pell Grants. Federal Pell Grants are awarded to low-income undergraduates based on their expected family contribution. Data are for in-state undergraduates as reported in the UMass President's Office's Financial Aid Update to the Board of Trustees Committee on Administration and Finance February 2008.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Freshman One-Year Retention Rate. Percent of first-time, full-time freshmen who entered in previous fall and were still enrolled as of the next fall. Peer data are from U.S. News and represent 2-year averages.

Freshman Six-Year Graduation Rate. Percent of first-time, full-time freshmen who entered in a given fall and had graduated within six years. Peer data are from US News and represent 3-year averages.

Transfer One-Year Retention Rate. Percent of full-time transfer students at any level who entered in the prior fall and were still enrolled or graduated as of the next fall.

Transfer Four-Year Graduation Rate. Percent of full-time upper division transfers (60+ credits) who entered in a given fall and had graduated within four years.

SERVICE TO THE COMMONWEALTH INDICATORS

Enrollment in Science, Technology, Engineering, and Mathematics (STEM) Programs. Total number of students enrolled in STEM programs. STEM programs are those fields of study defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Enrollment count includes degree-seeking undergraduate, graduate and certificate students.

Degrees 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.

Regional Impact. Presented is a narrative of significant activities and programs, with a number of facts and statistics cited. Sources include annual reports, newspaper clipping services, and alumni records.

FINANCIAL HEALTH INDICATORS

Endowment per Student. True and quasi-endowment per annualized FTE student, where FTE of peer institutions is standardized to UMass formula. Peer data are from financial statements and IPEDS.

Endowment Assets. Market value of true and quasi-endowment assets. Comparative data are from IPEDS, financial statements and 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.

Return on Net Assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data from published financial statements.

Financial Cushion. Unrestricted net assets as a percentage of operating expenditures and interest expense. Peer data are from published financial statements.

Debt Service to Operations. Debt service payments as a percentage of operating expenditures and interest expense. Peer data are from published financial statements.

PEER INSTITUTIONS FOR UMASS DARTMOUTH

Clarion University of Pennsylvania
 College of William and Mary (VA)*
 Michigan Technological University*
 Murray State University (KY)
 Slippery Rock University of Pennsylvania
 Sonoma State University (CA)
 South Dakota State University*
 The College of New Jersey
 University of Central Arkansas
 University of Minnesota, Duluth
 University of North Carolina at Greensboro*
 University of Wisconsin, Eau Claire

**Aspirant Peers*

HEADLINES FROM THE 2008 ANNUAL INDICATORS

ACADEMIC QUALITY

Every program in UMass Lowell's colleges/school, for which a national professional accreditation agency exists, is accredited by that agency. The average SAT score of incoming students remains high, with an average combined score of 1083.

Externally sponsored research per faculty is important to UMass Lowell both as one measure of faculty scholarship and as a measure of assisting innovation in the regional economy. Although we stand at \$68,235 of research expenditure per year per faculty, we need to continue our efforts to reach a goal of about \$90,000 per year per faculty.

STUDENT SUCCESS AND SATISFACTION

UMass Lowell's one-year retention rate has remained stable and above its peer mean. This is despite the fact that many of our students come from lower socio-economic backgrounds and are first-generation college-going. The graduation rate of our transfer students showed improvement from last year. UMass Lowell's transfer student success is reflected in the fact that almost half of the bachelors awarded annually are earned by our transfer students.

ACCESS AND AFFORDABILITY

The university works diligently with regional K-12 systems and the community colleges to make the transition from high school to community college to university as effective as possible. UMass Lowell recognizes the importance of strong K-12 systems and supports those in the region through, literally, scores of partnerships and programs.

The state is expected to experience only a slight drop in the number of high school graduates over the coming years. In order to maintain affordability and to entice high achieving students to the campus, UMass Lowell has instituted a program to offer 30 community college transfer students scholarships of \$2,500 annually. The campus has also increased the amount of Dean's Scholarships, awarded to 60 incoming freshmen each year, to \$4,000. Meanwhile, in 2007, the campus made offers to meet 93 percent of students' identified need.

SERVICE TO THE COMMONWEALTH

The portion of UMass Lowell's mission dealing with service and outreach is focused on four efforts: (1) to assist the region's enterprise to innovate, (2) to assist the region's K-12 system, (3) to assist the health of the region's environment and citizens, and (4) to assist in strengthening the vitality of the region's communities. A significant number of the university faculty from a wide variety of academic disciplines are engaged in these four areas and they have secured considerable funding from government agencies and private foundations.

Through its Division of Continuing Studies and Corporate Education, UMass Lowell provides high quality professional studies in innovative formats including campus based classes, online education, and customized corporate training. With over 25 degree and certificate programs at the undergraduate and graduate level, the Division serves numerous economic sectors including health, education, engineering, information technology, social services and criminal justice. The university promotes regional economic development by partnering with companies across the Commonwealth to deliver customized education and training programs for their employees, many of which are delivered on-site.

FINANCIAL HEALTH

The financial health of the Lowell campus has improved over the past year, and while not completely recovered, is moving closer towards a strong fiscal position. The primary fiscal goal is focused on reducing the operating deficit. This effort combined with significant gains on its financial investments, contributed to improving both the Return on Net Assets and Financial Cushion indicators.

Sustained growth in campus fund raising is reflected in both the Annual Growth in Endowment, and Private Funds Raised Annually indicators. The Lowell campus remains optimistic that through continued growth in enrollment and expenditure control measures, it will continue to improve our financial position.

2008 ANNUAL INDICATORS AT A GLANCE**ACADEMIC QUALITY**

• Average HS GPA of First-Time Freshmen	3.16
• Average SAT Score of First-Time Freshmen	1083
• Licensure And Certification Test Pass Rates	
<i>Massachusetts Teacher Test</i>	100%
<i>Physical Therapy</i>	100%
<i>Nursing/NYCLEX</i>	93%
• Number of Doctorates Awarded	112
• Total Research Expenditures	\$27.64M
• Research Expenditures Per Faculty	\$68,235
• Number of Patent Applications	17
• License Income	\$143,000
• New Tenure/Tenure-Track Faculty Hired	1
• Change in Tenured/Tenure-Track Faculty	+1
• Change in Total Faculty FTE	+11

ACCESS AND AFFORDABILITY

• Percent Pell Grant Recipients	17%
• Percent of Need Met for Students Awarded Need-Based Aid	93%
• Online Course Enrollments	9,618
• Rate of Growth in Online Course Enrollments	23%
• Annual Course Enrollments in Continuing Studies, Corporate and Distance Education	18,835

STUDENT SUCCESS AND SATISFACTION

• Percent ALANA Undergraduate Students	23%
• Freshman One-Year Retention Rate	75%
• Freshman Six-Year Graduation Rate	44%
• Transfer One-Year Retention Rate	74%
• Transfer Four-Year Graduation Rate	70%

SERVICE TO THE COMMONWEALTH

• Enrollment in STEM Programs	25%
• Degrees Awarded in STEM Fields	32%

FINANCIAL HEALTH

• Total Endowment	\$32.43M
• Endowment Per Student	\$3,726
• Annual Growth In Endowment	25%
• Private Funds Raised Annually	\$10.3M
• Return on Net Assets	1.6%
• Financial Cushion	5.0%
• Debt Service To Operations	4.2%

ACADEMIC QUALITY

High School GPA of First-Time Freshmen

For the sixth consecutive year, Lowell's average weighted high school GPA exceeded 3.0. The proportion of entering freshmen with high school GPAs above 3.0 continues to rise, while that below 2.5 GPA has become quite small.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
≥ 3.00	54%	54%	57%	57%	60%
2.51 - 2.99	37%	38%	37%	37%	35%
≤ 2.50	9%	8%	6%	6%	5%
<i>Average</i>	3.09	3.09	3.14	3.14	3.16

SAT Scores of First-Time Freshmen

After a year when Lowell saw a decrease in SAT scores, the campus saw an increase in the average SAT score. While not as high as previous years, there was a considerable increase over fall 2006. UML's percentile scores still compare favorably to our peers. Several peers and aspirants use ACT, and their SAT-equivalent scores were calculated using the ACT SAT conversion table.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Peers Fall 2006
75th Percentile	1170	1170	1170	1160	1160	1164
25th Percentile	1010	1010	1010	980	1000	928
<i>Average</i>	1093	1091	1094	1070	1083	1046

Licensure and Certification Test Pass Rates

Lowell's students continue to perform well in exams for careers that require special certification. Their success is linked to UML's commitment to preparing its graduates for the workforce.

	Pass Rate	Test Takers	Passed	National Average
<i>Physical Therapy (2007)</i>	100%	14	14	88%
<i>Nursing/NCLEX (2007)</i>	93%	59	55	85%
<i>Nurse Prac/ANCC (2007)</i>	100%	4	4	93%
<i>MTEL Basic Skills (2007)</i>	100%	38	38	99%*
<i>MTEL Reading (2007)</i>	100%	38	38	98%*
<i>MTEL Curriculum (2007)</i>	100%	55	55	99%*

*MA rate

Number of Doctorates Awarded

The number of doctoral degrees Lowell awards annually continues to compare very favorably with our peers and peer aspirants.

	2002-03	2003-04	2004-05	2005-06	2006-07
<i>UML</i>	69	96	72	93	112
<i>Peers</i>	44	44	48	50	56

Research Expenditures and Expenditures per Faculty

Total R&D expenditures as reported to National Science Foundation. Peer average includes peer aspirants and is skewed by western states' large agricultural expenditures. Faculty are total tenure-system instructional faculty in the fall semester of each fiscal year as reported to the National Center for Educational Statistics, IPEDS data collection.

Total Research and Development Expenditures (in thousands)

	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006
<i>UML</i>	\$22,827	\$22,783	\$22,163	\$23,852	\$27,635
<i>Peers</i>	\$45,065	\$51,931	\$54,919	\$59,220	\$68,801

Total Research and Development Expenditures per Faculty

	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006
<i>UML</i>	\$57,211	\$63,111	\$61,393	\$62,277	\$68,235
<i>Peers</i>	\$87,921	\$113,084	\$111,201	\$121,325	\$128,828

Number of Patent Applications

The number of patent applications filed is an indicator of an institution's inventiveness and the commercial potential of its academic work.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
<i>UML</i>	12	5	9	11	17

New Tenured/Tenure-Track Faculty Hired

The continued increase in number of full-time tenured/tenure track faculty through the fall of 2007 reflects progress in reaching Lowell's "target" faculty size, especially in the Fine Arts, Humanities, Social Sciences, and Mathematics, as well as additional hires in Nanotechnology and Health & Environment.

	AY 2006-2007	AY 2007-2008
<i>UML</i>	25	11

Change in Tenured/Tenure-Track Faculty

The slight increase in the number of full-time tenure track faculty reflects the continuing commitment to rebuilding the faculty after the waves of early retirements in the early 2000s.

	Fall 2005	Fall 2006	Fall 2007	1-year Change
<i>UML</i>	383	405	406	1

Change in Faculty FTE

State-supported faculty FTE reflects visiting faculty and lecturers as well as full-time tenured and tenure track faculty. The increase reflects the increase in part-time faculty.

	Fall 2005	Fall 2006	Fall 2007	1-year Change
<i>UML</i>	472	492	503	11

ACCESS AND AFFORDABILITY

Percent Pell Grant Recipients

Percentage of degree seeking undergraduates receiving federal Pell Grants (need based) is a new indicator. Lowell's peers' geographical distribution includes several states with lower average family income; therefore a greater proportion of peers' undergraduates appears Pell eligible.

	Fall 2005	Fall 2006	Fall 2007
<i>UML</i>	18%	17%	17%
<i>Peers</i>	28%	na	na

Percent Need Met for Students Awarded Need-Based Aid

This statistic is data element H2-i, for full-time undergraduates, from the Common Data Set which many institutions provide. UML has long striven to meet substantailly all demonstrated financial need of students awarded need-based financial aid.

	2003-04	2004-05	2005-06	2006-07	2007-08
<i>% need met</i>	97%	97%	93%	93%	93%
<i>Peers (6 of 8)</i>	69%	70%	63%	65%	n/a

Rate of Growth in Online Course Enrollments

Lowell's Continuing/Corporate Education online course registrations continue to increase, contributing to UMass Online's banner year. Many additional courses incorporate some elements of distance learning, such as e-mail, online syllabi and links, and chat rooms.

Online Courses	AY 2003	AY 2004	AY 2005	AY 2006	AY 2007
<i>Enrollment</i>	6,216	6,706	7,300	7,848	9,618
<i>% increase from prior year</i>	24%	8%	9%	8%	23%

Enrollments in Continuing Studies, Corporate & Distance Ed.

Continuing/Corporate Education runs courses twelve months a year in all formats--on-campus, off-campus, online--and regularly maintains one of the highest levels of course registrations in New England.

	AY 2003	AY 2004	AY 2005	AY 2006	AY 2007
<i>UML</i>	18,076	17,328	14,551	16,316	18,835

STUDENT SUCCESS AND SATISFACTION

Percent Undergraduate ALANA Students

UML's proportion of students of color, especially those of Asian and Hispanic origin, reflects the area's changing demographics and feeder high schools. According to Fall 2000 census figures, the ALANA percentage for Northern Middlesex Co. was 15%. Lowell's figures represent percent of students who are U.S. citizens of known race, and the number of all students reporting ethnicity has increased.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>Number</i>	1,023	1,012	1,309	1,438	1,520
<i>Percent</i>	20%	21%	21%	21%	23%

Freshman One-Year Retention Rate

Lowell's one-year retention rate has been relatively stable over the five-year period and has remained slightly higher than our peers. A number of coordinated efforts have been launched to promote the persistence of more first-time freshmen at UMass Lowell.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>UML</i>	75%	76%	74%	76%	75%
<i>Peers</i>	72%	72%	72%	72%	72%

Freshman Six-Year Graduation Rate

In Fall 2006, the freshman 6-year graduation rate of those freshmen entering in Fall 2001 was 44%.

	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
<i>UML</i>	42%	46%	46%	46%	44%
<i>Peers</i>	42%	43%	43%	43%	45%

One-Year Retention Rate for Full-time Transfers

Transfers make up a substantial proportion of Lowell's new student pool. Over a four-year span, the one-year retention rate is high, reflecting the fact that UMass Lowell is a particular school of choice for this applicant population.

<i>Transfer One-Year Retention Rate</i>	Fall 2003	Fall 2004	Fall 2005	Fall 2006	Fall 2007
	68%	72%	70%	74%	74%

**Peer data not available*

Four-Year Graduation Rate for Upper Level Transfers

Transfers constitute roughly half of all UML bachelors recipients and are therefore proportionally significant among our alumni. Over a four-year span, upper level transfers are seen to be more successful in their rate of graduation.

<i>Transfer Four-Year Graduation Rate</i>	<i>Fall 2003</i>	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
	70%	70%	73%	69%	70%

**Peer data not available*

SERVICE TO THE COMMONWEALTH

Enrollment in STEM Programs

In recognition of the importance of retaining students in undergraduate and graduate programs in science, technology, engineering, and mathematics (STEM) fields, the federal government recently established the National SMART Grant Program. One quarter of UML's degree students are in STEM designated programs.

	<i>Fall 2004</i>	<i>Fall 2005</i>	<i>Fall 2006</i>	<i>Fall 2007</i>
<i>Total Enrollment</i>	11,089	10,666	11,208	11,635
<i>STEM Enrollment</i>	2555	3032	3093	2927
<i>% STEM Enrollment</i>	23%	28%	28%	25%

Degrees Awarded in STEM Fields

Almost a third of Lowell's awards are in STEM fields. (Degree awards correlate with enrollment and transfer patterns from the prior 3--7 years). While not eligible for the SMART Grant Program which require 3 years' education, UML's wide variety of undergraduate and graduate certificate programs serve to lead students in STEM career paths.

	<i>2003-04</i>	<i>2004-05</i>	<i>2005-06</i>	<i>2006-07</i>
<i>Total Degrees/Cert. Awarded</i>	2,244	2,126	2,067	2,170
<i>STEM Degrees/Cert</i>	971	795	783	697
<i>% STEM Degrees/Cert.</i>	43%	37%	38%	32%

FINANCIAL HEALTH

Total Endowment and Endowment per Student

The FY07 total endowment increased \$6,482,000. The endowment per student increased as a result of the increase in the total endowment. The FTE students for FY07 were 8,704, an increase of 250 FTE students from FY06.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UML total (\$000's)</i>	\$16,596	\$19,289	\$23,268	\$25,949	\$32,431
<i>Per student</i>	\$1,869	\$2,180	\$2,719	\$3,071	\$3,726
<i>Peer average</i>				\$6,066	\$6,281

Annual Growth in Endowment

In FY07, the endowment grew 25%.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
<i>UML</i>	6%	16%	21%	12%	25%

Private Funds Raised Annually

In FY07, the private funds raised annually included \$7.3M of cash and grants, \$.5M for gifts in kind and \$2.5M for future pledges. For FY02 through FY06, gifts of cash and grants were \$6.2M, \$4.0M, \$5.8M, \$7.0M and \$6.2M respectively. The majority of the gifts in FY02 and FY03 were gifts in kind.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
<i>UML</i>	\$43.7 M	\$7.2 M	\$8.4 M	\$7.4 M	\$10.3 M

Return on Net Assets

The FY'07 Return on Net Assets is a positive 1.6% due to both the campus efforts to reduce its operating deficit and in large part to gains on investments. The campus will continue to make strides towards improved financial health through revenue enhancement and expenditure control. Operational revenue is specifically addressed in plans to increase fee revenue per student, combined with plans to grow enrollments by 2.5% per year. Student revenues become an even more critical factor in our formula to success when we do not foresee investment returns in FY'08 equivalent to those of FY'07. All factors considered, the Lowell campus anticipates long term growth when measuring its return on net assets.

	FY 2005	FY 2006	FY 2007
<i>UML</i>	-1.4%	-1.9%	1.60%
<i>Peers</i>	6.0%	6.7%	7.80%

Financial Cushion

The FY'07 Financial Cushion which measures available unrestricted resources, increased slightly to 5.0%. Efforts to grow revenue are reflected in the stabilization of this indicator. Even more aggressive efforts are being implemented each year to stimulate and maintain continued growth.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
<i>UML</i>	6.3%	8.2%	5.0%	4.8%	5.0%
<i>Peers</i>	12.7%	17.5%	15.7%	15.3%	17.5%

Debt Service to Operations

The FY'07 Debt Service to Operations ratio increased to 4.3% as a direct result of a \$10 million bond offering at the end of FY'06. As the Lowell campus continues to make improvements to existing buildings and strategic investments in new facilities, this ratio will increase. Capital improvements versus new debt is a balancing act that faces all of UMass. The bottom line rests with our ability to manage debt prudently so as not to exceed the ability of the operating budget to support. To date this campus has held this ratio under 5%.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
<i>UML</i>	3.8%	3.9%	3.6%	3.3%	4.2%
<i>Peers</i>	2.9%	3.2%	2.3%	2.6%	3.2%

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

High-school GPA of first-time freshmen. Cumulative GPA for college prep courses with additional weight to honor and AP courses, according to BHE admissions policy, reported on all first-year students.

SAT scores of first-time freshmen. 25th and 75th percentiles and mean SAT scores of all first-year students. ACT scores, used by most UML peers, have been converted to SAT using the ACT-SAT conversion table. Peer scores may not be comparable because percentage of freshmen represented is unknown.

Licensure and certification test pass rates. Pass rates on Massachusetts Teacher Test and on Nursing and Physical Therapy exams.

Doctorates awarded. Number of doctoral level degrees awarded annually as reported to National Center for Educational Statistics (IPEDS Degrees).

Research expenditures and expenditures per faculty. Research and development expenditures as reported to National Science Foundation. The “per faculty” figure is the total research and development expenditure figure divided by total tenure-system instructional faculty as reported to National Center for Educational Statistics (IPEDS Staff and Faculty). Faculty are total tenure-system instructional faculty in the fall semester of each fiscal year.

Number of patent applications. Number of U.S. Patent applications filed per year.

License income. Amount of annual income from license agreements.

Number of new tenured/tenure-track faculty hired. The number of new tenured/tenure-track faculty members hired to start their new positions in the academic year.

Change in number of tenured/tenure-track faculty. The difference in the number of tenured/tenure-track faculty from one fall semester to the next. Faculty members who are on paid leave are included. Individuals whose primary responsibility is administrative are not included. For the PMS 2008 report, the difference will be between the figure for Fall 2006 and Fall 2007.

Change in faculty FTE. The difference in the total FTE, from one fall semester to the next, for all full-time and part-time *instructional* faculty teaching state-supported courses. UMass Lowell’s fractional FTEs for part-time faculty were taken directly from UML’s PeopleSoft Human Resource System.

ACCESS AND AFFORDABILITY INDICATORS

Percent of undergraduates who receive Federal Pell Grants. 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 in the Financial Aid Template.

Percentage need met for students awarded need-based aid. Data element H2-i from the CDS, Common Data Set, gives the average percentage of demonstrated financial need that is met by the institution’s award of need-based financial aid to full-time students.

Rate of growth in online course enrollments. Percentage increase in total annual online (distance education) course registrations for the academic years 2003-2007.

Enrollments in corporate education and training. Total annual course registrations in the Division of Continuing/Corporate/Distance Education for the academic years 2003-2007.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Percentage of undergraduate students who are ALANA. Undergraduates who are African-American, Hispanic/Latino, Asian and/or Native American, divided by total U.S. citizens and permanent residents who report race/ethnicity.

Freshman one-year retention rate. Percent of first-time, full-time freshmen who entered in the previous fall and were still enrolled in the following fall. Peer data are from U.S. News and represent three-year averages.

Freshman six-year graduation rate. Percent of first-time, full-time freshmen who entered in a given fall and had graduated with six years. Peer data are from US News and represent three-year averages.

One-year retention rate for full-time transfers. Percent of full-time transfer students at any level who entered in the previous fall and were still enrolled or graduated as of the next fall.

Transfer graduation rate. Percent of full-time upper division transfers (60+ credits) who entered in a given fall and had graduated within four years.

SERVICE TO THE COMMONWEALTH INDICATORS

Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs. Total number of students enrolled in STEM programs. STEM programs are those fields of study defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Enrollment count includes degree-seeking undergraduate, graduate and certificate students.

Degrees 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.

FINANCIAL HEALTH INDICATORS

Total endowment and endowment per student. True and quasi-endowment. The per-student ratio is based on total annualized FTEs, including large numbers of non-degree seeking students in Continuing Education.

Annual growth in endowment. Trends in total endowment, partially reflective of the changing economy.

Private funds raised annually. Private funds include restricted and unrestricted income from individuals, foundations, corporations and other organizations. Include 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.

Return on net assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data from published financial statements.

Financial cushion. Expendable fund balance as a percentage of unrestricted expenditures and mandatory transfers. Peer data from audited financial statements.

Debt service to operations. Debt service as a percentage of unrestricted expenditures and mandatory transfers. Peer data from audited financial statements.

PEER INSTITUTIONS FOR UMASS LOWELL

Idaho State University
 Montana State University - Bozeman
 New Mexico State University – Main campus*
 Oakland University, Michigan
 University of Louisiana - Lafayette
 University of Maine – Orono*
 University of Rhode Island*
 Wichita State University, Kansas

* *aspirant peer*

HEADLINES FROM THE 2008 ANNUAL INDICATORS

The Worcester campus continues to build on the achievements of the last year, in terms of infrastructure, academic affairs, research activity and strategic planning. The appointment of Michael F. Collins, MD, as Senior Vice President for Health Sciences and Interim Chancellor has coincided with a bold new statewide initiative in the life sciences that may mean significant new investment for the University's health sciences campus – and significant challenges to manage resources and planning efforts efficiently. The campus has effectively used the worldwide prominence and attention as a result of the 2006 Nobel Prize as a springboard for highlighting broader accomplishments of the Worcester campus. The campus leadership remains committed to research growth in a number of key areas, especially clinical, and 'bench to bedside' arenas, while continuing the focus on core educational competencies and the campus service mission to the Commonwealth. Under the direction of Dr. Collins, the campus has embarked on an ambitious strategic planning initiative that will set a course for the campus in a number of key areas.

- **Academic quality:** The Worcester campus continues its trend of attracting highly capable students to the School of Medicine as judged by admission test scores, residency match rates and performance on licensing exams, even as the applicant pool shrinks slightly as a result of demographics; SOM graduates continues to rank the educational experience as highly satisfactory. The nursing educational experience and the vision for future direction in the Graduate School of Nursing is evolving, with the approval of the new Doctorate of Nursing Practice degree program; the Graduate School of Biomedical Sciences entering class is not only highly competitive, but continues to attract more applications than in previous years – in part attributable to the 'halo effect' of the Nobel Prize. A new Master's Degree program in Clinical Investigation will help create a new generation of clinical researchers.
- **Research growth, productivity and faculty recruitment:** Research productivity is at high levels across the basic science departments even as competition for federal dollars increases. The new Department of Quantitative Health Sciences has begun to take shape; senior faculty hires in several key areas, such as RNA biology, bioinformatics and gene therapy have attracted internationally known scientists. Growth in real research dollars and non-federal research dollars (an indicator of diversity of funding sources) remains impacted by the stagnant pool of federal research dollars; new faculty

recruitment will be depended upon to increase both productivity and total research support.

- Crucial to continued success of the Medical School is the ability to attract high quality students that will be able to meet the diverse cultural needs of underserved populations in the state. Student access and affordability can be measured and supported by the learning contract option, which in relation to tuition and fees, this measure continues to track favorably for the current year.
- Anecdotal evidence, such as rankings in the US News annual ratings of medical schools, continues to reinforce the identity of the SOM as a high quality, affordable institution. Comparative data on the performance of medical students on benchmark exams and in the residency program match are good supporting indicators of quality. An ambitious curriculum reform in the SOM has started to take shape.

Overall, the Worcester campus has handled the spotlight of an international accolade and senior leadership transitions without losing focus of its core missions and with increased dedication to diversifying funding, enhancing access and supporting Commonwealth initiatives. As Massachusetts charts a course of aggressive investment in the life sciences, the Worcester campus must be poised to respond, while keeping close eye on core competencies and key mission-based endeavors.

2008 ANNUAL INDICATORS AT A GLANCE

ACADEMIC QUALITY

• Average Biology MCAT Scores	10.62
• Licensure/Certification Pass Rates	
<i>USMLE Step 1</i>	98%
<i>USMLE Step 2 (2007)</i>	93%
<i>GSN State Certification</i>	99%
• Percent Students “Very Satisfied” With Quality of Their Medical Education	67%
• Sponsored Research Total Dollars	\$161.4M
• Sponsored Research Per Faculty	\$168,313
• Federal Research Support Per Faculty	\$127,923
• NIH Funding For Medical Schools	\$118.9M
• Rank in US News (Primary Care)	13
• Patent Application’s Per Year	58
• License Income Per Year	\$40.7M
• Licensing Income/AUTM Ranking	12
• New Tenured/Tenure-Track Faculty	15
• Change in Tenured/Tenure-Track Faculty	+6
• Change in Faculty FTE	+7

ACCESS AND AFFORDABILITY

• Tuition & Fees	\$14,087
Tuition & Fees (Including Adjust. for Learning Contract)	\$ 8,519

STUDENT SUCCESS AND SATISFACTION

• Match Rate/ Choice of Residency	98%
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SERVICE TO THE COMMONWEALTH

• Enrollment in STEM Programs	370
• Degrees Awarded in STEM Fields	38
• Service to State Agencies	\$363.5M

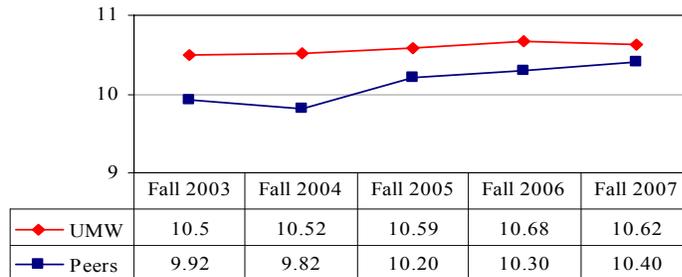
FINANCIAL HEALTH

• Total Endowment	\$94.4M
• Endowment Per Student	\$93,620
• Private Funds Raised Annually	\$7.9M
• Return on Net Assets	15.3%
• Financial Cushion	28.7%
• Debt Service to Operations	1.8%

ACADEMIC QUALITY

Mean Biology MCAT Score

The MCAT score provides a rough predictor of a student's success in medical school. It is widely used in the admissions process, but rarely as the principal indicator of a student's academic preparation. It is, however, the only indicator that is available to compare incoming students across institutions. MCAT scores range from 1 to 15, with 15 being the highest possible score. For the past five years, the mean MCAT score for 1st year medical students has been consistently higher than the peer average.

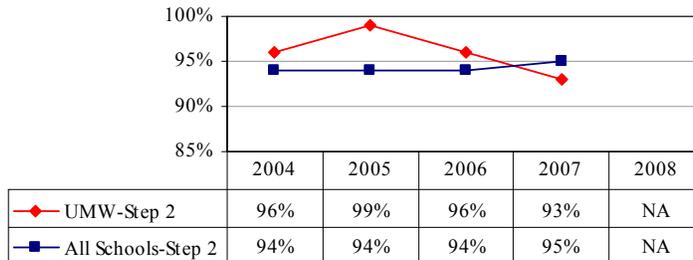
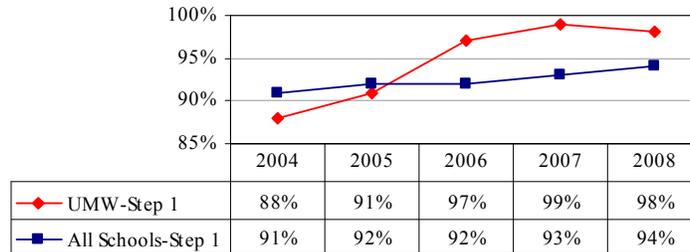


Pass Rates on USMLE Step 1 and Step 2

The USMLE (United States Medical Licensing Examination) is a national licensing examination for physicians and is the single path to medical licensure in the United States.

Step 1 exam covers basic science information and is taken in most medical schools at the end of the second year; Step 2 covers clinical science information and is usually taken during the fourth year.

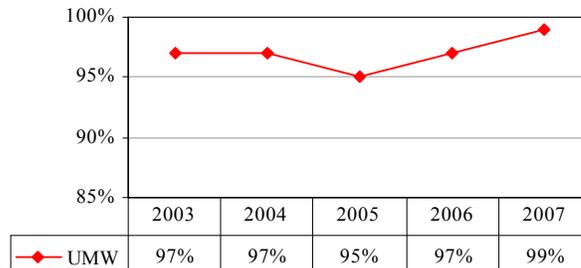
Rates reflect the level of knowledge of UMMS students in comparison to students from other medical schools.



Data by Class Year

Pass Rates on Nursing Board Certification

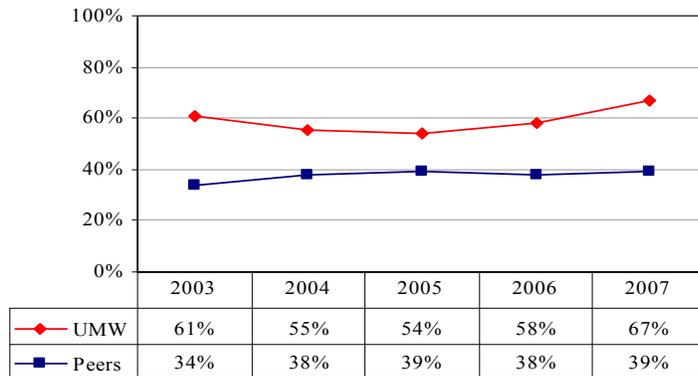
Board certification signifies advanced practice clinicians who have met requirements for clinical and functional practice in a specialized field, pursued education beyond basic preparation, and received the endorsement of their peers. After meeting these criteria, health care professionals take certification examinations based on nationally recognized standards of practice to demonstrate their knowledge, skills and abilities within the defined specialty. All nurse practitioners who wish to practice in Massachusetts must pass the certification examination. Several other states have a similar requirement. GSN has maintained very high pass rates compared to the national average, which ranges from 86%-93%.



Data by Class Year

Percent Graduates "Very Satisfied" with Medical Education

From the *AAMC Graduation Questionnaire*, the percentage of graduating students that responded very satisfied with the overall quality of their medical education. The level of satisfaction can be influenced by several factors, including time devoted to instruction and preparation for residency. Measures reported compare UMMS to responses of students graduating from all public medical schools. Results show UMMS students continue to be much more satisfied with the quality of their education than students from other public medical schools.

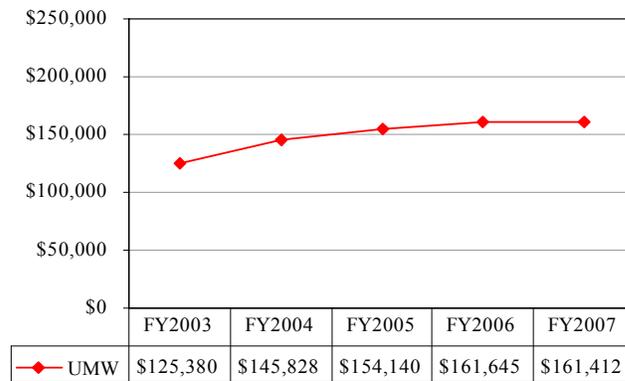


Data by Class Year

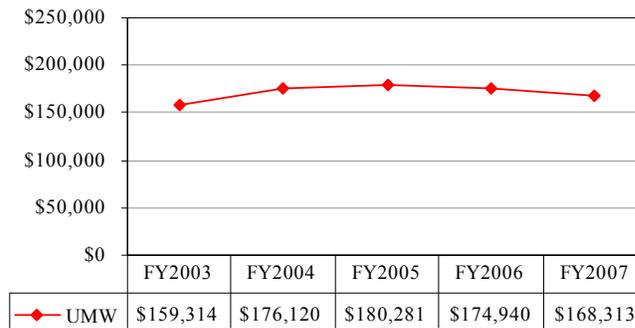
Sponsored Research

The Worcester Campus remains committed to research growth in a number of key areas, especially in the clinical and 'bench to bedside' arenas. Growth in real research dollars and non-federal research dollars remains impacted by the stagnant pool of federal research dollars. New faculty recruitment will be depended upon to increase both productivity and total research support. Peer comparison is not available due to size of peer group.

Sponsored Research Total Dollars (in \$000's)

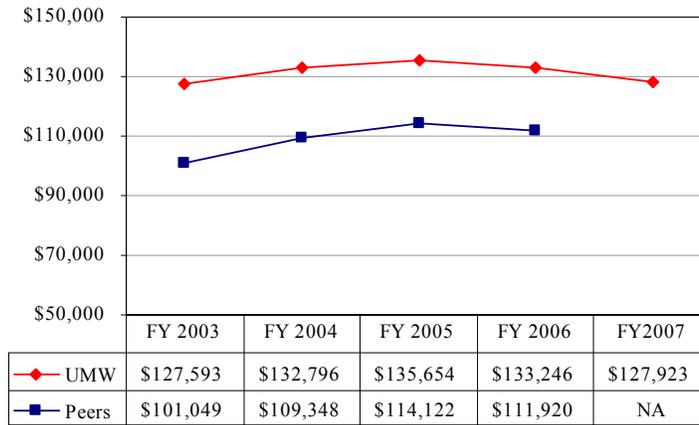


Sponsored Research Per Faculty



Federal Research Support per Faculty

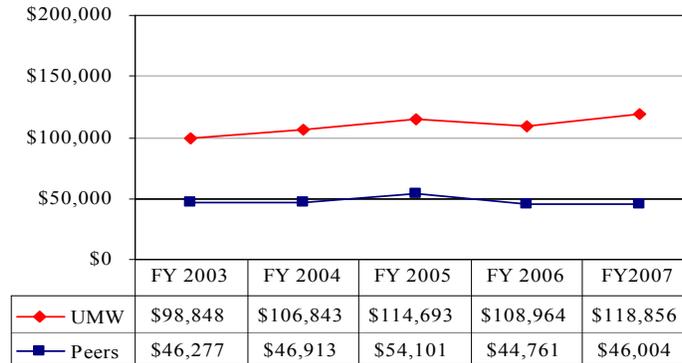
Federal Research Support per Faculty is a rough measure of faculty involvement in research. The amount of funding through federal research grants and contracts is a standard for measuring the success of a medical institution's faculty in achieving research goals. While the increased competition for limited federal dollars has impacted all institutions, research productivity at UMMS remains solidly ahead of peer institutions.



NIH Funding Among Medical Schools

The National Institutes of Health (NIH) awards funds on an annual basis to investigators throughout the U.S. and abroad. The NIH funded research provides a benchmark to compare the level of funding for research. As a result of the ongoing recruitment of faculty, UMass Medical School's funding continues to grow in real dollars as compared to the median for our peer institutions.

NIH Funding (in \$000's)



US News Ranking

The ranking by U.S. News & World Report is for 145 schools, comprised of 125 medical schools and 20 schools of osteopathic medicine, identifying those with a focus on primary care education. UMMS is consistently ranked in the top ten percent and has held a spot near the top of the category since the magazine began its rankings in 1994.

	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008
UMW Rank	3	4	4	11	13

Number of Patent Applications

The number of patent applications filed is an indicator of an institution's inventiveness and the commercial potential of its academic work. FY2004 was an unusual year in that the number of applications filed was significantly higher. These numbers are expected to increase in the future as our newly hired investigators begin to make their invention disclosures

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMW	92	151	93	66	58

License Income

License income is a measure of the economic value of an institution's inventiveness and a contributor to the University's economic health. It is difficult to predict when or for what products or processes a license will begin to generate significant income. At UMMS, there has been a significant steady increase in licensing revenues received from the sale of products invented.

(In \$000's)

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMW</i>	\$19,161	\$26,212	\$27,694	\$25,545	\$40,684

AUTM Ranking/Licensing Income

This indicator reports the ranking of licensing income/technology performance as reported on the Association of University Technology Managers (AUTM) Annual Survey. Total respondents include US & Canadian academic and non-profit institutions and Patent Management Firms. Measures reported reflect UMASS system ranking; however UMMS represents 98% of UMASS System total licensing revenue for FY07. FY2006 is the most recent data available.

	<i>FY 2002</i>	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>
<i>UMW</i>	21	21	17	n/a	12
<i>Total</i>	213	231	220	n/a	157

* data for 2005 not available

New Tenured/Tenure-Track Faculty Hired

In FY 2007, UMMS hired 15 new tenured/tenure-track faculty as the campus continues to recruit new faculty in support of the on-going plan to grow the research enterprise.

	<i>FY 2005</i>	<i>FY2006</i>	<i>FY 2007</i>
<i>UMW</i>	14	9	15

Change in Tenured/Tenure-Track Faculty

There were six more tenured/tenure-track faculty in Fall 2007 than in Fall 2006. UMMS continues to grow its faculty in support of the on-going plan to grow the research enterprise.

	<i>Fall 2006</i>	<i>Fall 2007</i>	<i>1-year Change</i>
<i>UMW</i>	194	200	6

Change in Faculty FTE

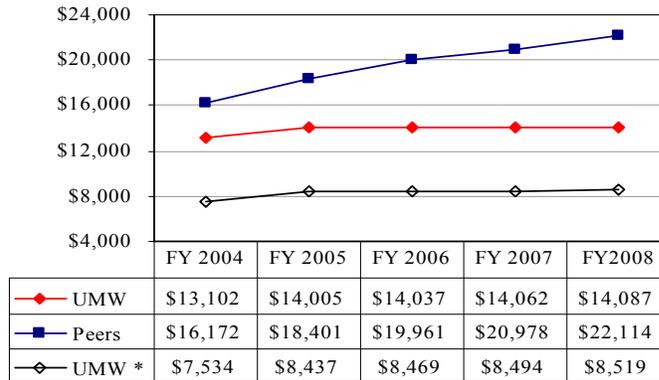
The total number of faculty, both tenured/tenure track and non-tenured, is increasing as the campus continues to recruit new faculty in support of the on-going plan to grow the research enterprise. There were seven more faculty FTE in Fall 2007 than in Fall 2006.

	<i>Fall 2006</i>	<i>Fall 2007</i>	<i>1-year Change</i>
<i>UMW</i>	1023	1030	7

ACCESS AND AFFORDABILITY

Tuition & Fees (includes adjustment for learning contract)

This indicator measures the annual medical school tuition and mandatory fees against peer institutions. UMMS's tuition and fees continue to be lower than the average for all public schools. In addition, at UMMS, 93% of our current medical students opt for the learning contract. Under the learning contract, students may defer two-thirds of their tuition. The deferral is to be paid upon completion of residency, internship or fellowship. The deferral can be repaid either by 4 years of service in the Commonwealth of Massachusetts in a primary care practice, other specialty practice in an underserved area of public or by repaying the deferred amount with interest over 8 years.

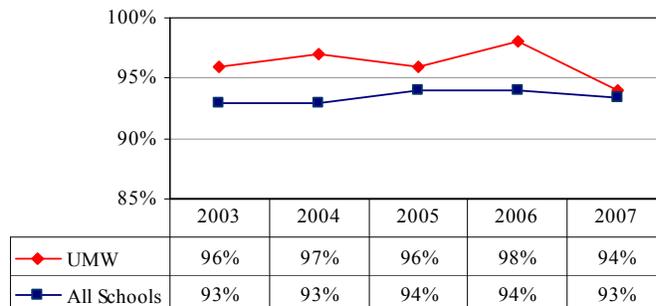


* UMW Tuition and Fees adjusted for learning contract

STUDENT SUCCESS AND SATISFACTION

Acceptance Rate to Choice of Residency

This indicator measures the percent of potential graduates who were matched to one of their choices of residency. Rates reflect the competitive strength of UMMS students in comparison to students graduating from all other medical schools. UMMS students have done very well in the match, consistently showing a higher percentage of graduates accepted to their residency choice. In 2007, of the students going through the NRMP, 94% were matched to their choice of residency.



Data by Class Year

SERVICE TO THE COMMONWEALTH

Enrollment in STEM Programs

Total number of Students enrolled in STEM (Science, Technology, Engineering and Mathematics) Programs at UMMS that contribute to the Commonwealth's workforce in the STEM areas.

	Fall 2004	Fall 2005	Fall 2006	Fall 2007
Total Enrollment	871	955	977	990
STEM Enrollment	325	368	354	370
Percent STEM Enrollment	37%	39%	36%	37%

Degrees Awarded in STEM Fields

Total number of Students enrolled in STEM (Science, Technology, Engineering and Mathematics) Programs at UMMS that have received degrees in the STEM fields.

	2003-04	2004-05	2005-06	2006-07
Total Degrees/Cert. Awarded	163	167	158	182
STEM Degrees/Cert	33	40	27	38
Percent STEM Degrees/Cert.	20%	24%	17%	21%

Service to State Agencies

This indicator measures the annual amount expended for state sponsored grants and contracts and the provision of public service activities to other Massachusetts state agencies. This number is significantly larger than that of peer institutions as a result of the contracts for policy analysis and programmatic development within Commonwealth Medicine. Commonwealth Medicine is a specialized organization within UMMS that focuses solely on providing health care consulting services to state agencies.

(In \$000's)

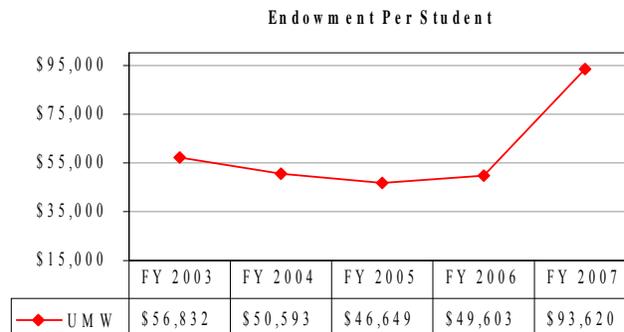
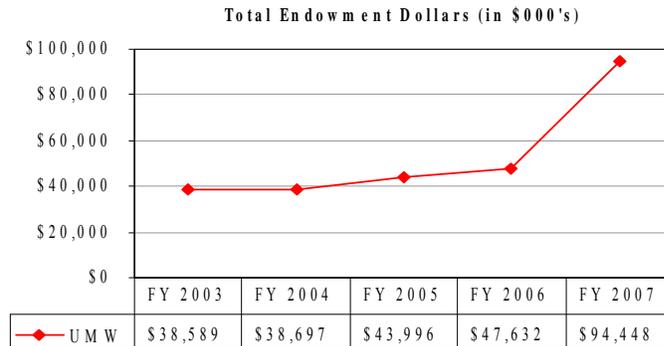
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMW	\$203,791	\$239,073	\$356,795	\$352,603	\$363,505
Peers	\$8,800	\$8,850	\$11,038	\$11,857	NA

* Peer 2007 number will be available in Spring 2008

FINANCIAL HEALTH

Endowment

The ratio provides a measure of the long term financial health of the institution, relative to the number of students. This indicator is not readily comparable to other UMass campuses. The size of the Medical School's research and public service programs in relation to its small student base skews the ratio.

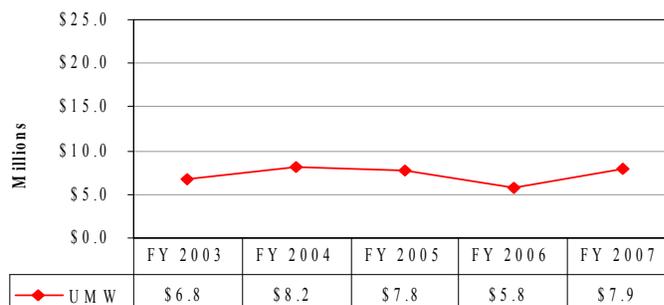


Annual Growth in Endowment

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007
UMW	28.66%	0.27%	13.69%	8.26%	97.80%

Private Funds Raised Annually

This indicator measures the success of the institution in raising support from private sources. Strong performance in this area provides the institution with funds to support new programs, investments in infrastructure and other activities for which funds may not otherwise be available from other funding sources.



Return on Net Assets

The return on net assets provides an indication whether the institution is financially better off than the previous year by measuring the overall economic return of the campus.

Return on net assets will fluctuate from year to year as the campus sets aside reserves for future use, or uses reserves for new investments in support of its mission, and should therefore be viewed over an extended period, and relative to the success in achieving the mission.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMW</i>	19.6%	18.4%	22.1%	2.4%	15.3%

Financial Cushion

The financial cushion reflects long-term financial health of the institution and its ability to weather or "cushion" itself from short-term operations ups and downs.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMW</i>	27.1%	31.4%	31.9%	27.8%	28.7%

Debt Service to Operations

The debt ratio measures the demand that annual commitments to creditors place on the institution's unrestricted operating funds.

	<i>FY 2003</i>	<i>FY 2004</i>	<i>FY 2005</i>	<i>FY 2006</i>	<i>FY 2007</i>
<i>UMW</i>	4.6%	4.2%	2.3%	2.0%	1.8%

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

MCAT scores. Mean Biology MCAT score for new medical students. Peer data provided by AAMC.

Pass rate on USMLE. The percentage of medical students passing Step 1 and Step 2 on the first attempt. Peer data represents national results from National Board of Examiners (NBE).

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 nurse practitioner graduates from all graduate nursing schools in the United States.

Percent of graduates indicating “Very Satisfied” with the quality of their medical education. Percent of graduating medical students who responded “Strongly Agree” to this statement, “Overall, I am satisfied with the quality of my medical education” found on the Graduation Questionnaire that is prepared by AAMC.

Sponsored research per faculty. R&D expenditures from all sources (federal, state, local governments, industry, private, and institutional) and in all academic fields, as reported to NSF, divided by all full-time faculty as reported by the AAMC. Peer data not accessible given the size of peer group.

Federal research support per faculty. Federal research direct plus federal research facilities and administration divided by all full-time faculty, as reported by the AAMC.

NIH funding among medical schools. The National Institute of Health annual funding of NIH dollars for Medical Schools.

US News ranking. US News annual ranking of medical schools with special emphasis in Primary Care.

Number of patent applications. Number of U.S. patent applications filed per year. Peer data are from the Association of University Technology Managers.

License income. Annual amount of income from license agreements. Peer data are from the Association of University Technology Managers.

AUTM ranking/licensing income. Ranking of licensing income as reported on the Association of University Technology Managers (AUTM) Annual Licensing Survey.

Number of new tenured/tenured-track faculty. The number of new tenured/tenured-track faculty members hired to start their new positions in the academic year.

Change in number of tenured/tenure-track faculty. The difference in the number of tenured/tenure-track faculty from one fall semester to the next. Include faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative.

Change in faculty FTE. The difference in the total FTE, from one fall semester to the next, for all full-time and part-time faculty. FTE is based upon standard hours per week (40). Include faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative.

ACCESS AND AFFORDABILITY INDICATORS

Tuition and fees as adjusted for learning contract. Annual tuition and mandatory fees for medical students. Also reported is UMW tuition and fees adjusted for learning contract. Peer data are from AAMC.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Acceptance Rate to Choice of Residency. Percent of potential graduates who were matched to one of their choices of residency. National results are provided by NRMP.

SERVICE TO THE COMMONWEALTH INDICATORS

Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs. Total number of students enrolled in STEM programs. STEM programs are those fields of study defined in the National Science & Mathematics Access to Retain Talent (SMART) Grant with the exclusion of foreign languages. Enrollment count includes undergraduate, graduate and certificate students.

Degrees 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.

Service to state agencies. Annual amount expended for state sponsored grants and contracts and the sale of public service activities to other Massachusetts state agencies. Peer data are from AAMC.

FINANCIAL HEALTH INDICATORS

Endowment per student. UMass endowments plus Foundation endowments plus quasi endowments divided by FY2007 annualized FTE students. Peer data is not available

Private funds raised annually. Includes restricted and unrestricted income from individuals, foundations, corporations, and other organizations. These amounts include private grant revenues but not private contract revenues. Total for each year include cash (not in-kind) and asset additions made in that year. Peer data is not available.

Return on net assets. Increase/decrease in net assets divided by total net assets at beginning of the year. Peer data is not available.

Financial cushion. Unrestricted net assets divided by total operating expenses (including interest expense). Peer data is not available.

Debt service to operations. Interest payments plus principal payments divided by total operating expenses (including interest expense). Peer data is not available.

PEER INSTITUTIONS FOR UMASS WORCESTER

East Carolina University School of Medicine
 East Tennessee State University
 Florida State (1 yr.)
 Indiana University School of Medicine
 Louisiana State U - School of Medicine in New Orleans
 Louisiana State U - School of Medicine in Shreveport
 M.C. of Ohio
 Marshall University
 Medical College of Georgia
 Medical University of South Carolina
 Michigan State University
 New Jersey Medical School
 Northeastern Ohio
 Ohio State
 Oregon Health Sciences University
 Robert Wood Johnson Medical School (Rutgers)
 Pennsylvania State
 Southern Illinois University
 SUNY Brooklyn
 SUNY Buffalo
 SUNY Stony Brook
 SUNY Syracuse
 Texas A&M University Health Science Center
 Texas Tech University Health Sciences Center
 Uniformed Services University of the Health Sciences
 University of Alabama School of Medicine
 University of Arizona
 University of Arkansas
 University of California - Davis School of Medicine
 University of California - Irvine
 University of California - Los Angeles
 University of California - San Diego
 University of California - San Francisco
 University of Cincinnati
 University of Colorado
 University of Connecticut School of Medicine
 University of Florida College of Medicine
 University of Hawaii
 University of Illinois
 University of Iowa
 University of Kansas
 University of Kentucky
 University of Louisville
 University of Maryland School of Medicine
 University of Massachusetts Medical School
 University of Michigan
 University of Minnesota - Duluth (2 yr.)
 University of Minnesota-Minneapolis
 University of Mississippi School of Medicine
 University of Missouri - Columbia School of Medicine
 University of Missouri - Kansas City
 University of Nebraska College of Medicine
 University of Nevada School of Medicine
 University of New Mexico School of Medicine
 University of North Carolina
 University of North Dakota
 University of Oklahoma College of Medicine
 University of Puerto Rico
 University of South Alabama
 University of South Carolina
 University of South Dakota School of Medicine
 University of South Florida
 University of Tennessee
 University of Texas Houston Medical School
 University of Texas Medical School at Galveston
 University of Texas Medical School at San Antonio
 University of Texas Southwestern Medical School
 University of Utah School of Medicine
 University of Vermont
 University of Virginia
 University of Washington
 University of Wisconsin -Madison Medical School
 Virginia Commonwealth University
 Wayne State
 West Virginia
 Wright State

**Clery Act Crime Statistics
UMass Amherst**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2006		Fall 2005		Fall 2004	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	19,823	11,566	19,394	11,376	18,966	11,013
GRADUATE STUDENTS	5,770	140	5,699	153	5,680	211
	Calendar Year					
OFFENSE	2006		2005		2004	
MURDER / NON-NEGLIGENT MANSLAUGHTER	0		0		0	
NEGLIGENT MANSLAUGHTER	0		0		0	
SEX OFFENSES, FORCIBLE*	12		13		14	
SEX OFFENSES, NON-FORCIBLE	0		0		1	
ROBBERY	2		3		3	
AGGRAVATED ASSAULT	13		14		11	
BURGLARY	102		100		77	
MOTOR VEHICLE THEFT	6		4		16	
ARSON	3		3		3	
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		1	
LIQUOR LAW ARRESTS**	204		271		266	
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	1009		836		770	
DRUG LAW ARRESTS**	175		104		98	
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	13		5		25	
ILLEGAL WEAPONS POSSESSION ARRESTS	1		3		4	
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	4		1		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.

**Clery Act Crime Statistics
UMass Boston**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2006		Fall 2005		Fall 2004	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	9,246	0	8,958	0	8,832	0
GRADUATE STUDENTS	3,116	0	2,904	0	2,850	0
	Calendar Year					
OFFENSE	2006		2005		2004	
MURDER / NON-NEGLIGENT MANSLAUGHTER	0		0		0	
NEGLIGENT MANSLAUGHTER	0		0		0	
SEX OFFENSES, FORCIBLE*	0		0		1	
SEX OFFENSES, NON-FORCIBLE	0		0		0	
ROBBERY	0		0		1	
AGGRAVATED ASSAULT	0		1		1	
BURGLARY	35		29		3	
MOTOR VEHICLE THEFT	0		0		0	
ARSON	0		0		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>	0		0		1	
LIQUOR LAW ARRESTS	0		1		1	
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0		0		0	
DRUG LAW ARRESTS	2		1		4	
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0		0		1	
ILLEGAL WEAPONS POSSESSION ARRESTS	0		0		1	
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	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.

**Clery Act Crime Statistics
UMass Dartmouth**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2006		Fall 2005		Fall 2004	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	7,626	4,115	7,519	3,893	7,290	3,224
GRADUATE STUDENTS	1,130	46	1,030	44	1,009	35
	Calendar Year					
OFFENSE	2006		2005		2004	
MURDER / NON-NEGLIGENT MANSLAUGHTER	0		0		0	
NEGLIGENT MANSLAUGHTER	0		0		0	
SEX OFFENSES, FORCIBLE	6		1		2	
SEX OFFENSES, NON-FORCIBLE	0		0		0	
ROBBERY	2		0		0	
AGGRAVATED ASSAULT	7		8		4	
BURGLARY	53		30		82	
MOTOR VEHICLE THEFT	5		2		2	
ARSON	0		1		0	
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	
LIQUOR LAW ARRESTS	8		18		8	
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	614		1171		793	
DRUG LAW ARRESTS	11		6		5	
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	133		116		150	
ILLEGAL WEAPONS POSSESSION ARRESTS	1		2		2	
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	6		51		42	

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.

**Clery Act Crime Statistics
UMass Lowell**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2006		Fall 2005		Fall 2004	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	8,649	2,136	8,309	2,252	8,662	2,080
GRADUATE STUDENTS	2,559	29	2,357	15	2,427	32
	Calendar Year					
OFFENSE	2006		2005		2004	
MURDER / NON-NEGLIGENT MANSLAUGHTER	0		0		0	
NEGLIGENT MANSLAUGHTER	0		0		0	
SEX OFFENSES, FORCIBLE	1		2		2 *2	
SEX OFFENSES, NON-FORCIBLE	0		0		0	
ROBBERY	1		0		2	
AGGRAVATED ASSAULT	14		1		5	
BURGLARY	32		25		35	
MOTOR VEHICLE THEFT	8		2		18	
ARSON	1		1		1	
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	
LIQUOR LAW ARRESTS	6		13		23	
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	217		226		113	
DRUG LAW ARRESTS	29		24		51	
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	51		35		18	
ILLEGAL WEAPONS POSSESSION ARRESTS	4		5		0	
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	7		8		0	

* = Reported to persons other than police.

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.

**Clery Act Crime Statistics
UMass Worcester**

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2006		Fall 2005		Fall 2004	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	0	0	0	0	0	0
GRADUATE STUDENTS	1,020	0	1,008	0	871	0
	Calendar Year					
OFFENSE	2006		2005		2004	
MURDER / NON-NEGLIGENT MANSLAUGHTER	0		0		0	
NEGLIGENT MANSLAUGHTER	0		0		0	
SEX OFFENSES, FORCIBLE	0		0		1	
SEX OFFENSES, NON-FORCIBLE	0		0		0	
ROBBERY	0		0		0	
AGGRAVATED ASSAULT	0		0		0	
BURGLARY	7		0		1	
MOTOR VEHICLE THEFT	0		4		10	
ARSON	0		0		0	
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	
LIQUOR LAW ARRESTS	0		0		0	
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0		0		0	
DRUG LAW ARRESTS	0		0		0	
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0		0		0	
ILLEGAL WEAPONS POSSESSION ARRESTS	0		0		0	
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	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.