

2024 Report on Annual Indicators

University Performance Measurement System

July 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law



University of Massachusetts

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2024 REPORT ON ANNUAL INDICATORS
University Performance Measurement System



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Message from the President

August 2024

I am pleased to share the University of Massachusetts 2024 Annual Indicators Report, which details our performance, highlights our areas of excellence, and explores the immense impact of our campuses and the university.

We conduct this thorough self-analysis annually to evaluate our progress in furtherance of our mission of education, research, and service and to determine areas in which we would like to prioritize to better serve the Commonwealth.

This report on UMass impact and excellence reflects an updated collection of key metrics and data that compares the university's performance with peer institutions nationwide. Readers will find that the university has made historic progress in achieving the strategic priorities set and approved by the UMass Board of Trustees, effectively fulfilling our vital role as the Commonwealth's public research institution.

These achievements would not be possible without our dedicated, thoughtful, and hardworking faculty and staff, who help advance our enduring mission to improve lives by making a world-class education accessible and affordable. It would also not be possible without the exceptional leadership provided by the chancellors on each campus.

This year, I'm proud of the many achievements and milestones reached by this university. Some highlights include:

Academic Quality

- UMass continues to attract highly qualified students: the average high school GPA of first-time first-year students at UMass Amherst was 4.07 for Fall 2023.
- UMass Boston employed 39 more Faculty of Color than in Fall 2022. (206 to 245).
- UMass Dartmouth became the third highest-ranked public university in Massachusetts according to US News & World Report rankings.
- 87% of UMass Lowell undergraduates are from Massachusetts.
- UMass Chan Medical School's pass rates on nursing board certification reached 100% in 2023.

Access and Affordability

- UMass remains the most affordable institution compared to other public and private universities in New England relative to median family income by state, with stable tuition prices despite rising median family income in Massachusetts.
- Dual-enrollment student numbers nearly doubled over the previous year.
- Study abroad programs have exceeded pre-COVID levels, with 1,800 students across the university.

Service to the Commonwealth

- UMass remains the single-largest educator of Massachusetts residents, with more than 19,000 degree completions in FY23, or 16 % of all degrees awarded in the state.
- Research expenditures continue their rise as UMass continues attracting state, federal, and private research funding. Over the last five years, the university has expanded its research and development spending by 23%, increasing from \$651 million in FY18 to \$826 million in FY23.
- Graduate STEM degrees awarded indicate an upward trend in both success and interest in STEM-focused career paths. This year, UMass awarded 29% more stem degrees than in the previous academic year.

Financial Health

- The university's endowment assets have increased by \$200 million since FY2022. UMass's endowment now stands at \$1.37 billion, rising 23% in one year alone, and increasing 58% since FY18.
- The university's bond ratings remain strong and stable. Our credit opinions from Moody's, Fitch and S&P Global reflect continuing confidence in the strength of the university's operations, as well as our disciplined financial oversight and accountability framework.

While the university will be grappling with many challenges in the years ahead as we confront a more difficult demographic environment, increasing costs, and a citizenry that is questioning the value of higher education, we know that by holding ourselves accountable and remaining focused on our mission, the University of Massachusetts will come through this period stronger than ever before.

This disciplined approach will ensure that we continue to innovate, experiment, and implement best practices to ensure that UMass is as strong as it can be. Our students, faculty, staff, and the hundreds of thousands of Massachusetts families who rely on us deserve nothing less.

Sincerely,



Marty Meehan
President

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UMASS LOWELL

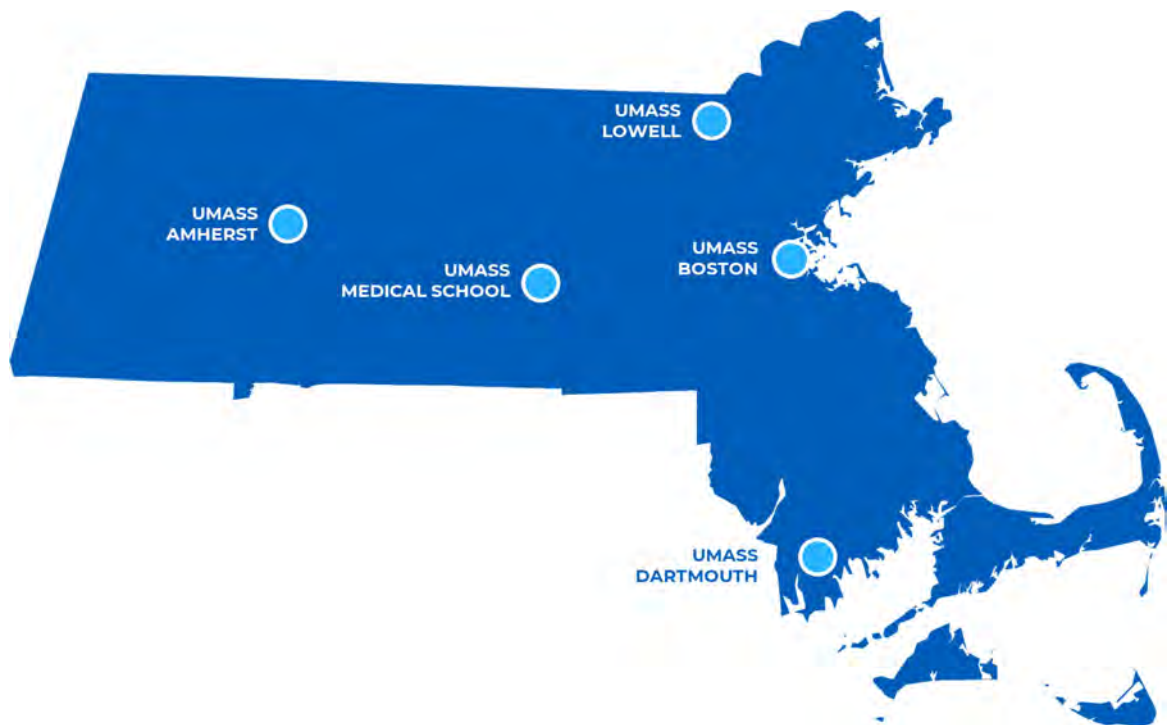
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THE 2024 REPORT ON ANNUAL INDICATORS

The University of Massachusetts Annual Indicators Report measures progress toward achieving the strategic priorities approved by the Trustees and embedded in its mission - 'to provide an affordable and accessible education of high quality and to conduct programs of research and public service that advance knowledge and improve the lives of the people of the Commonwealth, the nation, and the world.' The 2024 Report on Annual Indicators is the 25th annual report of the University of Massachusetts Performance Measurement System.

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

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

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

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

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

To ensure that the University's self-evaluation process is current and in alignment with emerging issues of salience, the Report on Annual Indicators undergoes a system-wide review process every five years. The 2024 Report on Annual Indicators reflects an updated list of the metrics that we collect.

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

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

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

- Headlines from the 2024 Annual Indicators
- 2024 Annual Indicators at a Glance
- Infographics and Charts
- Definitions and Sources
- List of Institutional Peers

Legislative Priorities	UMass Strategic Priorities	2024 ANNUAL INDICATORS	
ACADEMIC QUALITY	Improve student learning experience	Average High-School GPA of Freshmen	
		SAT Scores of Freshmen	
		25 th – 75 th Percentile	
		Average	
		Average GPA of Entering Transfer Students	
		Mean MCAT Scores of Entering Students (UMMS Only)	
		Student Satisfaction with Educational Experience	
		Student-Faculty Ratio	
		Technology-Enhanced Classrooms	
	Strengthen research and development	Total R&D Expenditures	
		Total R&D Expenditures Rankings	
		Total R&D Expenditures Rankings among Carnegie Peers, US Publics, Non-Medical	
		Federal R&D Expenditures (Optional)	
		Total R&D Expenditures per Tenured/Tenure-track Faculty	
		Total R&D Expenditures per FT Faculty	
		Federal R&D Expenditures per FT Faculty	
		Sponsored Instruction/Outreach per Faculty	
		NIH Funding Among Medical Schools (UMMS Only)	
		US News Ranking in Primary Care Medicine (UMMS Only)	
		Patent Applications	
		License Income	
		Utilization of Shared High-Performance Computing Research Resources*	
	Renew faculty	Percent Tenured/Tenure-Track Faculty FTE	
		New Tenured/Tenure-Track Faculty Hired	
		New Tenured/Tenure-Track Faculty Hired as Percent of All Tenured/Tenure-Track Faculty	
		Tenured/Tenure-Track Faculty	
		Faculty FTE	
		Faculty-of-Color	
		Women Faculty	
		National Academy Members*	
ACCESS AND AFFORDABILITY	Access and Affordability/ Diversity & Positive Climate	Percent UGs from Massachusetts	
		Percent UGs who are Students of Color	
		Percent UGs who are International	
		Percent First-Time UGs who are First Generation in College	
		Percent First-Time UGs who have English as Second Language	
		Percent of Students of Transfer Origin**	
		Dual Enrollment Students**	

Legislative Priorities	UMass Strategic Priorities	2024 ANNUAL INDICATORS	
ACCESS AND AFFORDABILITY	Access and Affordability		Percent (In-State) Pell Grant Recipients
			Percent of Need Met for In-State Students Awarded Need-Based Aid
			Average Debt of Students for Graduating Class
			Percent Graduating Class with Debt
			Total Students who participated in the Study Abroad program
			Total Online Course Registrations
			Annual Growth in Online Course Enrollments*
			Percent of Online Enrollment that is Full-Time**
STUDENT SUCCESS AND SATISFACTION	Diversity and positive climate		Freshmen One-Year Retention Rate
			Freshmen Four-Year Graduation Rate
			Freshmen Six-Year Graduation Rate
			Transfer One-Year Retention Rate
			Transfer Four-Year Graduation Rate
			Student Achievement Measure
			Student Satisfaction with Educational Experience
			Alumni Participation Rate
			Match Rate/Choice of Residency (UMMS Only)
SERVICE TO THE COMMONWEALTH	Develop a leadership role in public service		Degree Completions
			Percent Mass Residents Attending UMass
			In-State UG Enrollment by Region*
			Total Degrees Awarded
			UMass as Percent of all Massachusetts Degrees
			Total R&D Expenditures, Rankings, and Expenditures per Faculty Member
			Number of Patent Applications
			License Income
			Percent Alumni who live in MA
			Enrollment in Science, Technology, Engineering, and Mathematics (STEM) programs (Graduate/Undergraduate) *
			Degrees and Certificates Awarded in STEM fields
			Degrees and Certificates Awarded in Healthcare fields
			Test Takers in MTEL Science and Math subject tests*
FINANCIAL HEALTH	Endowment		Endowment Assets and Annual Growth in Endowment
			Total Endowment per Annualized Student FTE
			Private Funds Raised Annually
	Administration and IT Services/ Infrastructure		Operating Margin (%)
			Total Cash & Investments to Expenses.
			Debt Service to Operations
			Bond Ratings (Moody's, S&P, Fitch)
			Campus Safety

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

HEADLINES

ACCESS AND AFFORDABILITY

UMass enrolls more than 10 times the amount of First-year resident undergraduates than peers.

UMass attracts new aspiring residential students at 10 times (up from 8 times in the previous year) the rate of competing peer universities. Among all 4 UMass campuses 8,393 new first-year undergrads were admitted, with the next highest peer being Suffolk at 711 students.

Dual-enrollment student numbers nearly double previous year.

In FY 2022, the system showed a head count of 361 dual-enrolled students. This number has been on an upward trajectory since Fall 2020 and has persisted upwards through the pandemic; now sitting at 590 students in Fall 2023.

UMass continues to be the most affordable institution compared to NE Publics and Privates.

For FY 2022 UMass schools continue to be the most affordable to families when looking at median family income (MFI) by state. Massachusetts MFI has been rising steadily over time while tuition prices at UMass remain largely unchanged over the last several years, resulting in increased affordability for students across the state.

Study abroad programs return to pre-COVID numbers.

In Fall 2020 to Summer 2021 due to the pandemic the amount of study abroad students dipped to only 156 throughout the system. This number has increased steadily since then and is now even higher than pre-COVID numbers at 1,900 students.

SERVICE TO COMMONWEALTH

UMass continues serving as a major contributor to post-secondary education in the state.

More than 15% of all degrees awarded in the state of Massachusetts were awarded by UMass in FY 2022. Furthermore, 20% of all engineering degree completions were also awarded by a UMass campus.

R&D expenditures on the rise as UMass continues funding state research. UMass research and development funding continues its

growing trajectory that has been on the rise since 2018. Over the last 5 years the university has expanded its R&D spending by 23%, going from 651 million in FY2018 to nearly 826 million in FY 2023.

Graduate STEM degrees awarded show upward trend. This year UMass awarded 29% more stem degrees than in its previous year, showing a growing interest in both the success and interest in STEM focused career paths.

FINANCIAL HEALTH

Endowment assets go up 200 million compared to FY 2022. From FY 2022 to FY 2023 UMass's endowment assets rose a staggering 23%, up 58% from FY2018.

Long-term bond credit ratings remain high. The UMass system continues its trend of strong bond ratings that it has maintained for the last 12 years (Moody's; AA- rating by S&P; AA rating by Fitch).

This reflects the institutions continued overall financial health. These scores last changed in F2012.

Operating margins trend upward with peers.

UMass for FY2023 operated at a 4.4% operating margin that trended upward from 3.8% in the previous year. Peer institutions also trended upward, from 6.0% in FY2022 and later 6.9% in FY 2023.

AT-A-GLANCE

ACCESS AND AFFORDABILITY

• Percent of First-year Undergraduates from Massachusetts	74%	• Dual Enrollment Headcount	590
• Percent of Undergraduates from Massachusetts	80%	• Tuition and Fees as a Percentage of Median HH Family Income	13%
• Percent Undergraduates who are Students of Color	45%	• Total Students who Participated in a Study Abroad Program	1,900
• Number of First-degree Bachelor-seeking Students Aged 25+	4,468	• Online Course Registrations	110,801

SERVICE TO THE COMMONWEALTH

• Degree Completions	19,192	• License Income	\$31M
<i>Bachelor's</i>	13,306	• Percent Alumni who Remain in MA	59%
<i>Master's</i>	4,903	• Degrees Awarded in STEM Fields	6,503 (34%)
<i>Doctorates</i>	983	<i>Undergraduate</i>	4,593 (35%)
• UMass Degrees as Percent of Massachusetts Degrees	16%	<i>Graduate</i>	1,910 (32%)
• Total R&D Expenditures	\$826M	• Certificates Awarded in STEM Fields	229 (18%)
• Patent Applications	131	• Degrees Awarded in Healthcare Fields	2,342

FINANCIAL HEALTH

• Total Endowment	\$1378M	• Debt Service to Operations	6.2%
• Annual Growth in Endowment	23.2%	• Operating Margin (%)	4.4%
• Private Funds Raised Annually	\$198M	• Total Cash & Investments to Expenses	0.81
• Agency Bond Ratings			
<i>Moody's</i>	Aa2		
<i>S&P</i>	AA-		
<i>Fitch</i>	AA		

ACCESS AND AFFORDABILITY

ENROLLMENT OF MASSACHUSETTS RESIDENTS

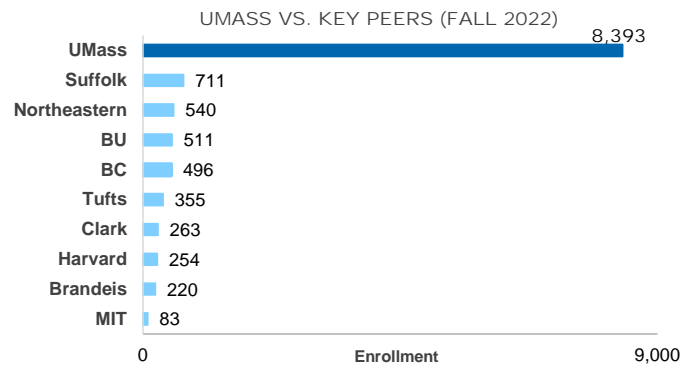
71%

Of all MA FY* UGs
enrolled at UMass or
key private peers
are enrolled at UMass
(Fall 2022)

*Undergraduate first-year (FY) students
*Data for FY23 unavailable for reporting reasons.

44%

Of all MA FY* UGs
enrolled at a MA
4 year college/university
are enrolled at UMass
(Fall 2022)

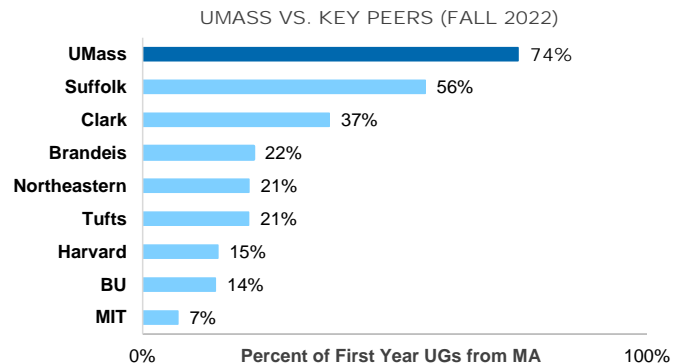


PERCENT OF FIRST YEAR UNDERGRADUATE STUDENTS

74%

UMass first-year
UGs from MA
in Fall 2022

*Data for FY23 unavailable for reporting reasons.



UMASS UNDERGRADUATES: ALL STUDENTS

43.1k

UMass UGs
from MA
in Fall 2023

80%

UMass % UGs
from MA
in Fall 2023

▼ 2%

One-year
% change
(vs. Fall 2022)

▼ 1

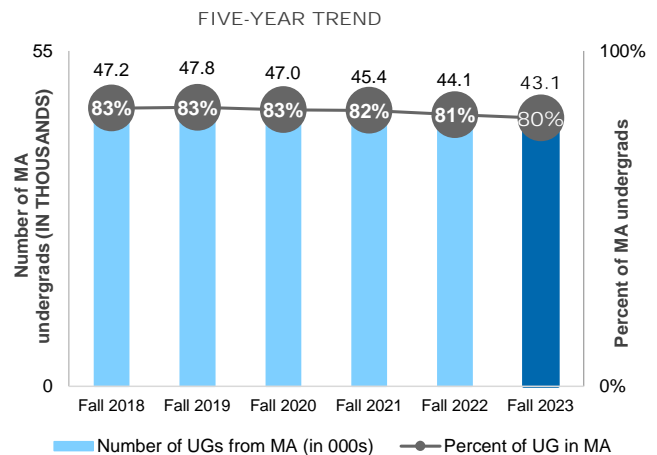
One-year
% point change
(vs. Fall 2022)

▼ 9%

Five-year
% change
(vs. Fall 2018)

▼ 3

Five-year
% point change
(vs. Fall 2018)



ACCESS AND AFFORDABILITY

UNDERGRADUATE STUDENTS OF COLOR

45%

UMass UG
Student of Color
in Fall 2023

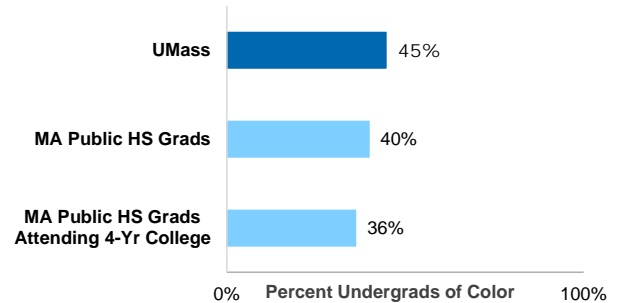
▲ 5

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

▲ 9

Pct point comparison vs.
MA Public HS
Graduates
Attending 4-Yr
College Class of 2022

UMASS Fall 2023 VS. MA PUBLIC HS CLASS OF 2022



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

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

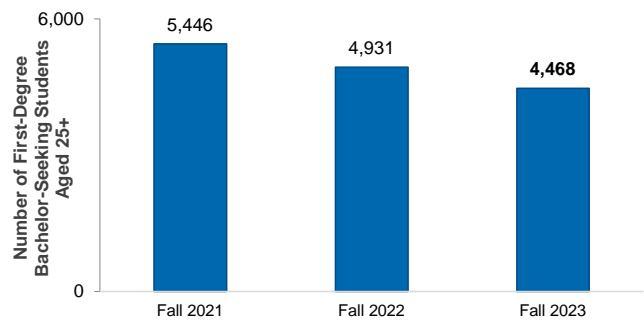
4,468

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

▼ 9

One-year
% change
at UMass
(vs. Fall 2022)

TWO-YEAR TREND



DUAL ENROLLMENT STUDENTS (HEADCOUNT)

590

Dual Enrolled
Students
in Fall 2023

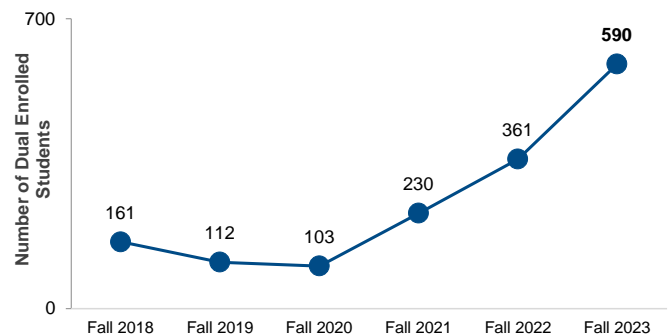
▲ 63%

One-year
% change
(vs. Fall 2022)

▲ 266%

Five-year
% change
(vs. Fall 2018)

FIVE-YEAR TREND



ACCESS AND AFFORDABILITY

TUITION AND FEES AS A PERCENTAGE OF FAMILY INCOME*

13%

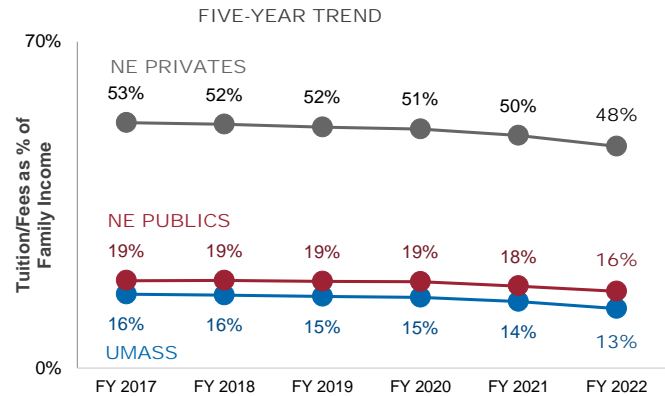
Tuition & Fees
as % of family
income at UMass
in FY 2022

▼ 1

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

▼ 3

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



*Percentage of MA statewide median family income.

TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

1,900

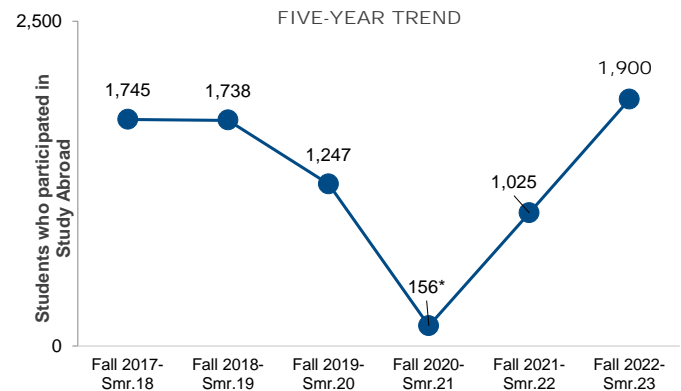
UMass UG
participation in
study abroad
in
Fall 2022-Smr.23

▲ 85%

One-year
% change
vs.
Fall 2021-Smr.22

▲ 9%

Five-year
% change
vs.
Fall 2017-Smr.18



*Decrease due to COVID.

ONLINE COURSE REGISTRATIONS

110,801

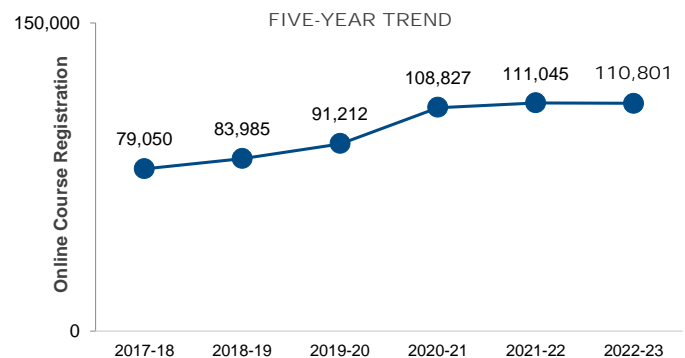
UMass total Online
course registrations
in 2022-23

● 0%

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

▲ 40%

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



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

19k

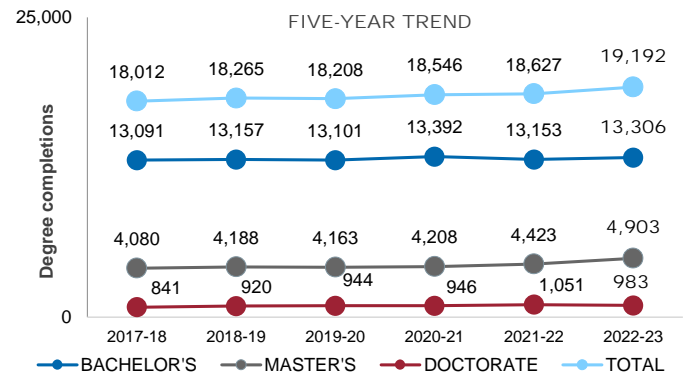
Total degree completions in 2022-23

▲ 3%

One-year % change in total degree completions (vs. 2021-22)

▲ 7%

Five-year % change in total degree completions (vs. 2017-18)



UMASS DEGREES AS PERCENTAGE OF ALL MASSACHUSETTS DEGREES

16%

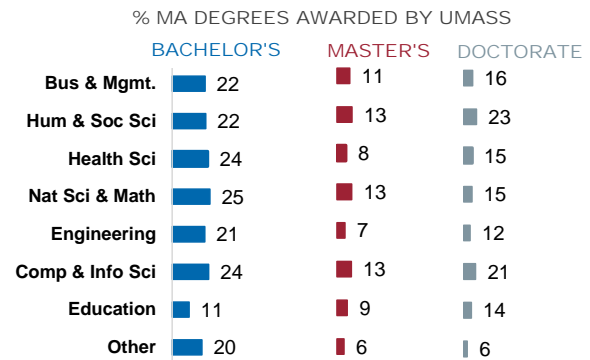
Of all MA degree completions awarded by UMass in 2022-23

15%

Of all MA business degree completions awarded by UMass in 2022-23

20%

Of all MA engineering degree completions awarded by UMass in 2022-23



TOTAL R&D EXPENDITURES

\$826M

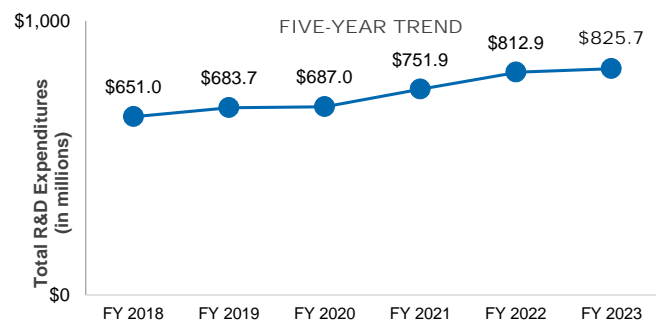
Total R&D Expenditures in FY 2023

▲ 2%

One-year % change (vs. FY 2022)

▲ 27%

Five-year % change (vs. FY 2018)



SERVICE TO THE COMMONWEALTH

PATENT APPLICATIONS

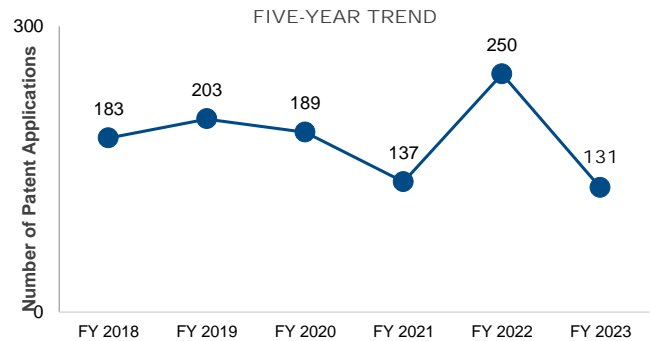
131

Patent
Applications
in FY 2023

▼ 48%

One-year
% change
(vs. FY 2022)

▼ 28%

Five-year
% change
(vs. FY 2018)

LICENSE INCOME

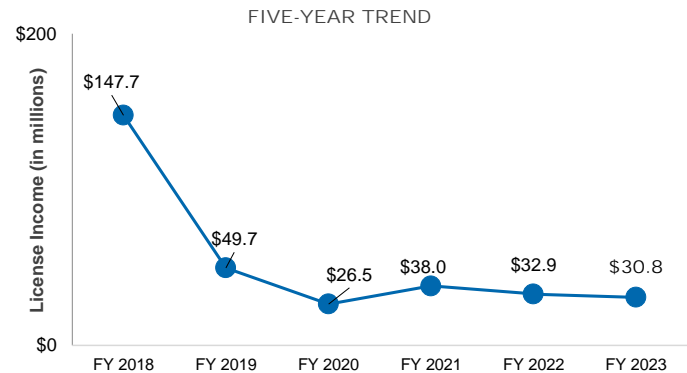
\$31

Million
in FY 2023

▼ 7%

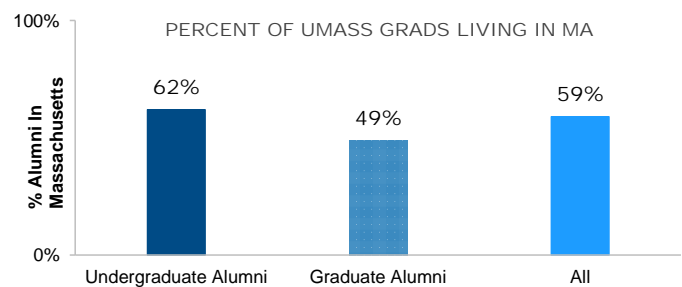
One-year
% change
(vs. FY 2022)

▼ 79%

Five-year
% change
(vs. FY 2018)

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

59%

Of all UMass Alumni
live in the Commonwealth

SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN STEM FIELDS

4.6k

UG degrees awarded
in STEM fields
in 2022-23

▲ 5%

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

▲ 14%

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

35%

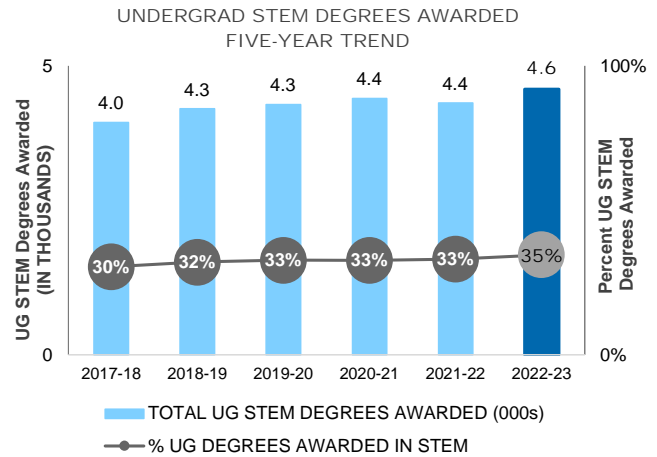
Percent of Total UG
degrees awarded in
STEM fields
in 2022-23

▲ 2

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

▲ 5

Five-year
% point change
(vs. 2017-18)



1.9k

GR degrees awarded
in STEM fields
in 2022-23

▲ 29%

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

▲ 33%

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

32%

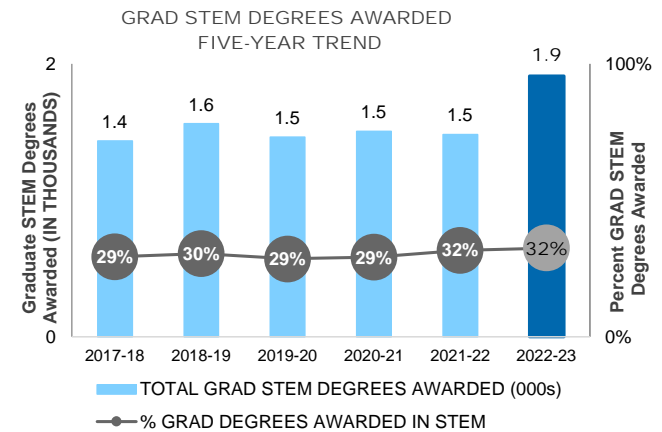
Percent of Total Grad
degrees awarded in
STEM fields
in 2022-23

● 0

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

▲ 3

Five-year
% point change
(vs. 2017-18)



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

6.5k

Total degrees awarded
in STEM fields
in 2022-23

▲ 10%

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

▲ 19%

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

34%

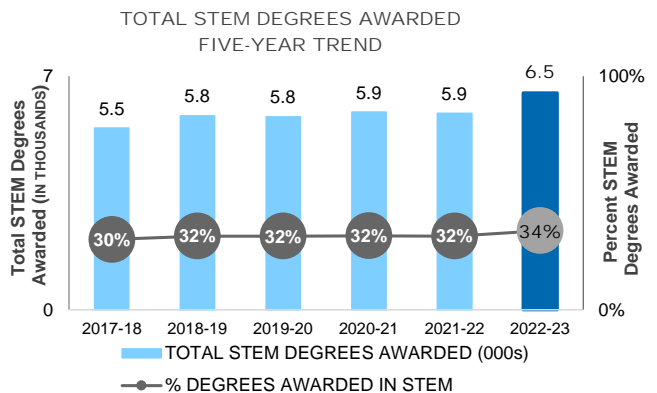
Percent of Total
degrees awarded in
STEM fields
in 2022-23

▲ 2

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

▲ 4

Five-year
% point change
(vs. 2017-18)



SERVICE TO THE COMMONWEALTH

CERTIFICATES AWARDED IN STEM FIELDS

229

Total certificates awarded
in STEM fields
in 2022-23

▲ 5%

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

▼ 8%

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

18%

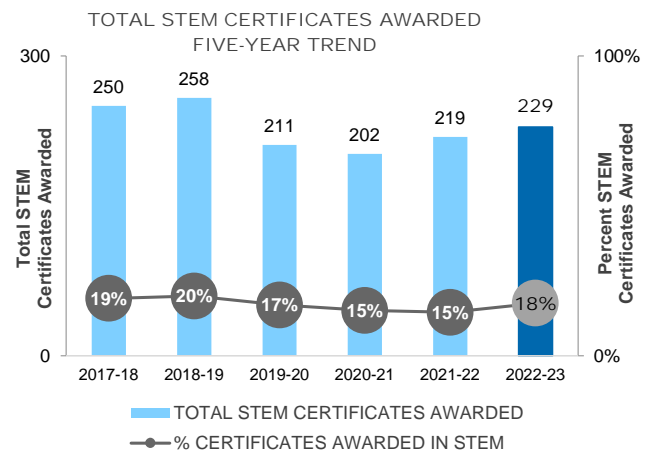
Percent of Total
certificates awarded in
STEM fields
in 2022-23

▲ 3

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

▼ 1

Five-year
% point change
(vs. 2017-18)



DEGREES AWARDED IN HEALTHCARE FIELDS

2.3k

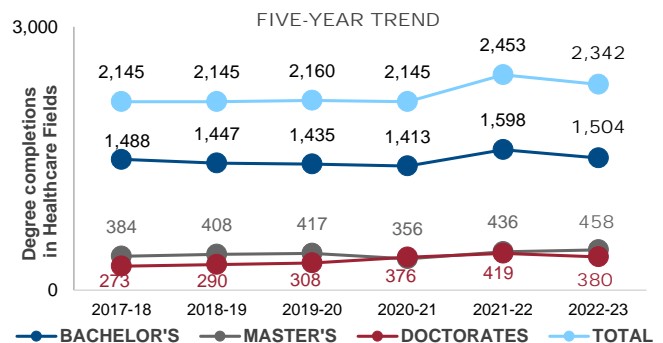
Total degrees awarded
in Healthcare fields
in 2022-23

▼ 5%

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

▲ 9%

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



CERTIFICATES AWARDED IN HEALTHCARE FIELDS

138

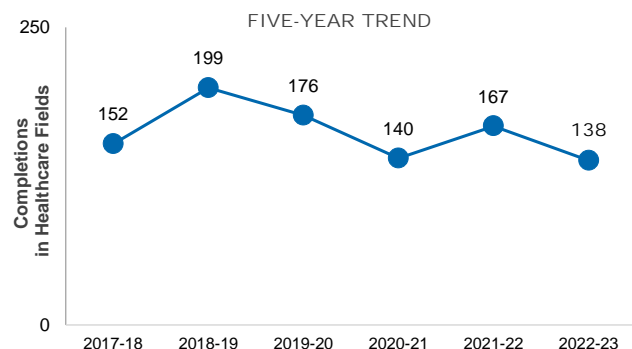
Total Certificates awarded
in Healthcare fields
in 2022-23

▼ 29

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

▼ 14

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



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

FINANCIAL HEALTH

ENDOWMENT ASSETS

\$1,378

Million
in FY 2023

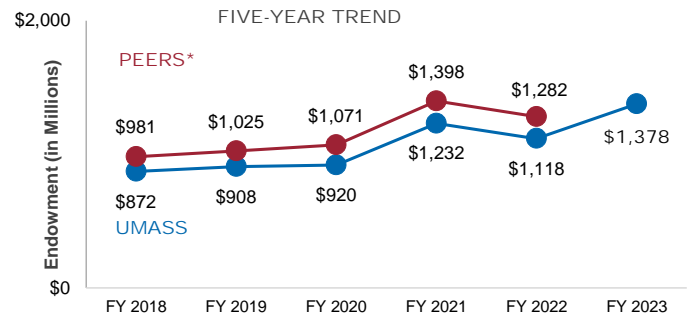
▲ 23%

One-year
% change
(vs. FY 2022)

▲ 58%

Five-year
% change
(vs. FY 2018)

*Peer data for FY 2023 unavailable for reporting reasons.
 *Peers include U Colorado, U Connecticut, U Illinois, U Maine,
 U Maryland, U Missouri, and U New Hampshire. Peer
 endowment changed in FY15.



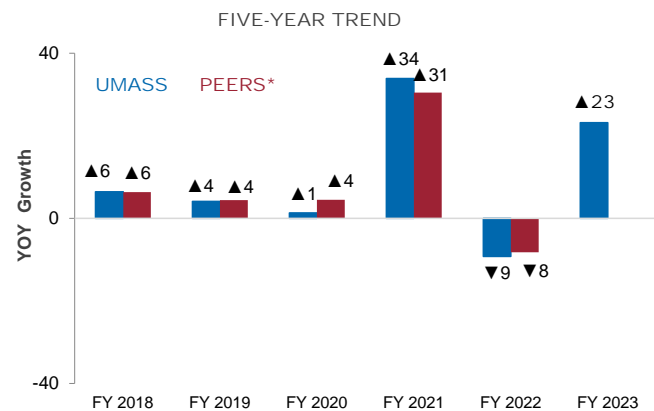
23%

Annual Growth
in FY 2023

▲ 32

One-year
% point change
(vs. FY 2022)

▲ 17

Five-year
% point change
(vs. FY 2018)

PRIVATE FUNDS RAISED ANNUALLY*

\$197.6

Million
in FY 2023

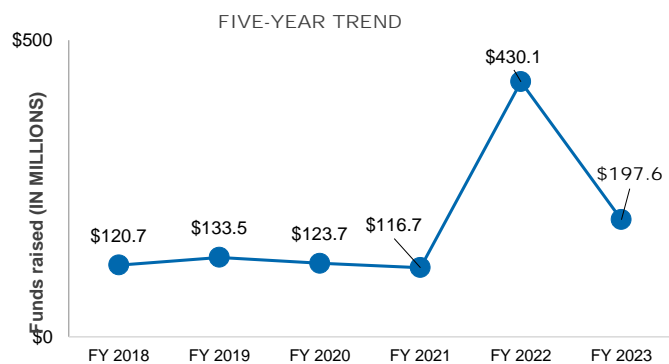
▼ 54%

One-year
% change
(vs. FY 2022)

▲ 64%

Five-year
% change
(vs. FY 2018)

*Includes cash, pledges and grants



FINANCIAL HEALTH

LONG-TERM BOND CREDIT RATINGS

Aa2

Moody's Rating
FY 2023

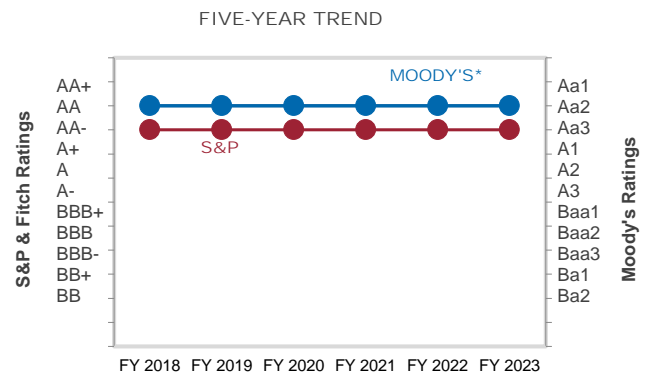
AA-

S&P Rating
FY 2023

AA

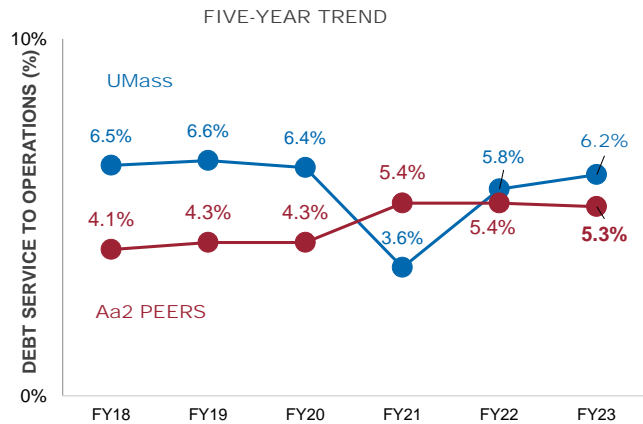
Fitch Rating
FY 2023

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



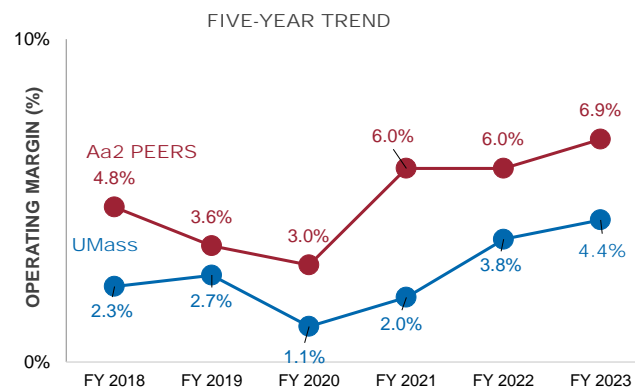
DEBT SERVICE TO OPERATIONS

6%

UMass Debt Service
to Operations
in FY23

OPERATING MARGIN (%)

4%

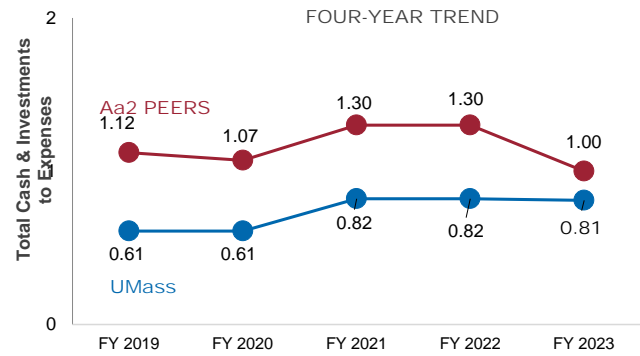
UMass Operating
Margin
in FY 2023

FINANCIAL HEALTH

TOTAL CASH & INVESTMENTS TO EXPENSES

0.81

Total Cash &
Investments to Expenses
in FY 2023



DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

Enrollment of Massachusetts

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

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

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

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

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

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

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

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

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

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

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

DEFINITIONS AND SOURCES

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

FINANCIAL HEALTH INDICATORS

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

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

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

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

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

Debt service (P&I) / Total expenses

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

(Total revenues – Total expenses)/Total revenues

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

PEER INSTITUTIONS FOR UMASS SYSTEM

Peer University Systems

University of Connecticut

University of California

University of Colorado

University of Illinois

University of Maryland

University of Missouri

New England Public Universities

University of Connecticut

University of Maine

University of New Hampshire

University of Rhode Island

University of Vermont

DEFINITIONS AND SOURCES

PEER INSTITUTIONS FOR UMASS SYSTEM

Massachusetts Private Universities

Boston College

Boston University

Brandeis University

Clark University

Harvard University

Massachusetts Institute of Technology

Northeastern University

Suffolk University

Tufts University

University of Alabama at Birmingham, AL

University of Alabama, AL

University of Arizona, AZ

University of Arkansas, AR

University of California, CA

University of Florida, FL

University of Georgia, GA

University of Hawaii, HI

University of Houston System, TX

University of Kansas, KS

University of Kentucky, KY

University of Massachusetts, MA

University of North Texas System, TX

University of Oregon, OR

University of South Carolina, SC

University of Wyoming, WY

Moody's Aa2 Peers

Alamo Community College District, TX

Arizona State University, AZ

Auburn University, AL

Board of Regents of The University System of Georgia, GA

California State University, CA

City University of New York, NY

Clemson University, SC

Cuyahoga Community College District, OH

Florida State University, FL

Houston Community College System, TX

Iowa State University of Science & Technology, IA

Michigan State University, MI

Mississippi Institutions of Higher Learning, MS

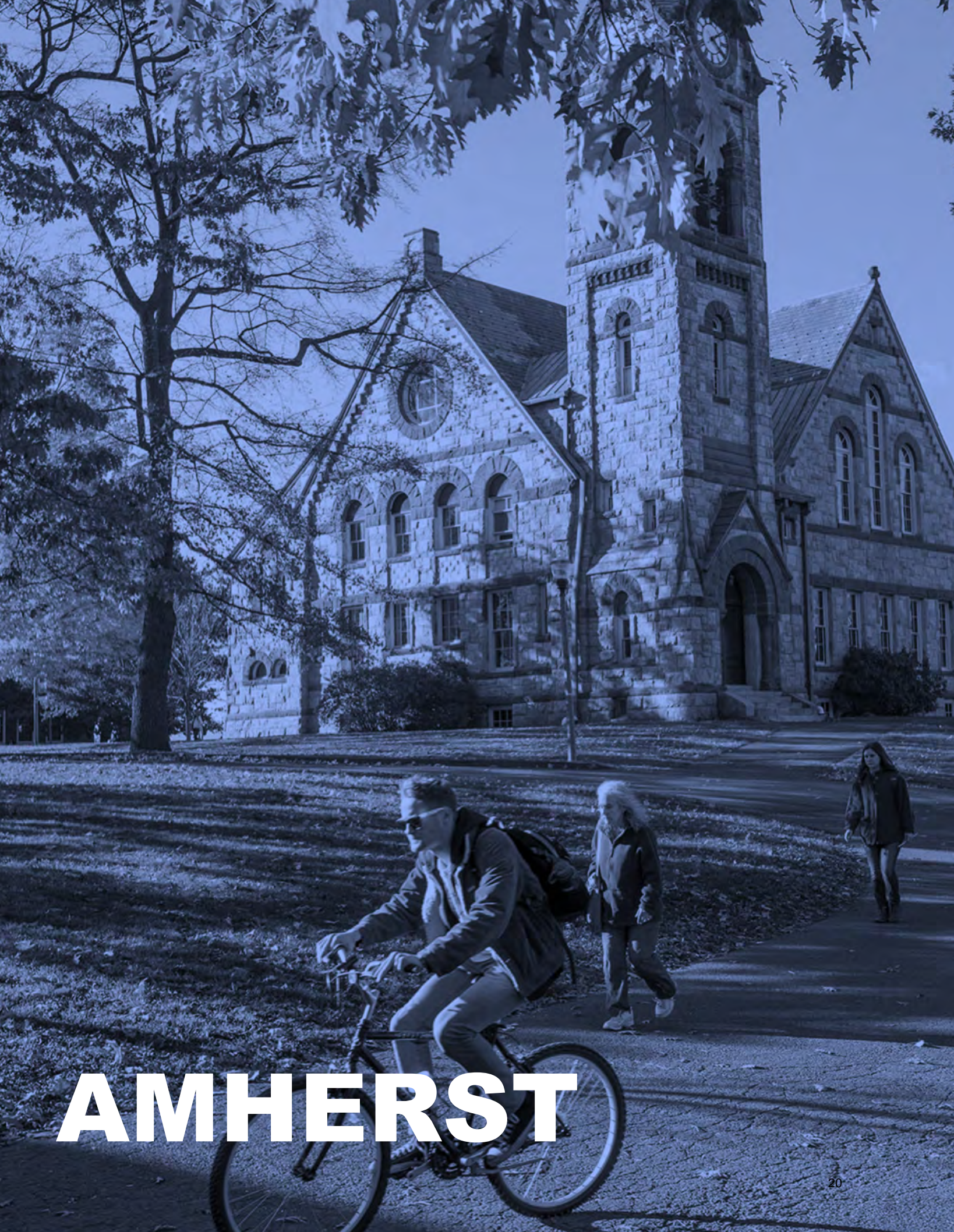
Nevada System of Higher Education, NV

State University of New York, NY

State University System of Florida, FL

Texas State University System, TX

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



AMHERST

HEADLINES

ACADEMIC QUALITY

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

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

Student Academic Quality. The academic profile of entering students has made impressive gains in recent years, evidenced by the growth in high school GPA and test scores. The high school GPA of entering students increased from 3.78 in 2014 to 4.07 in 2023. Virtually all (over 99%) students entered UMass Amherst with a high school GPA of 3.0 and above. Like most peers, standardized tests are optional for entering applicants. Further, seniors report high satisfaction with their undergraduate experience. Results from the 2023 National Survey of Student Engagement (NSSE) show that 83% of seniors rated their UMass Amherst educational experience positively.

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

Research and Creative Activity. Total research dollars (R&D) are key measures of an institution's commitment to and success in research. UMass Amherst faculty have been successful in competing for these dollars. Total R&D spending increased to over \$268 million. Per faculty, expenditures increased by 27% in the past five years.

The number of academic honors and awards earned by the faculty is another indicator of an institution's quality. The number of National Academy members has remained stable. A more comprehensive view of awards from Academic Analytics shows that UMass Amherst faculty have received over 1,400 nationally or internationally competitive awards.

The campus continues to invest in tenure-system faculty and their numbers remain steady over the last five years. In that same time frame, the total faculty has grown by 3%. Maintaining the size of the tenure-system faculty body will be required for the campus to make significant progress in improving academic quality and research productivity and advance in the research university rankings.

ACCESS AND AFFORDABILITY

Providing an affordable and accessible education of high quality is central to the University's mission. The campus continues to recognize its commitment to students with financial needs and has increased institutional need-based aid accordingly. In Fall 2023, 23% of full-time, in-state students qualified for Pell grants. Eighty-five percent of financial need was met for in-state students who applied for aid. The proportion of students graduating with debt continues to decrease, as does the average debt of graduating students.

Most UMass Amherst students have a positive educational experience. Ninety-one percent of students return for their sophomore year, and 83% graduate within six years from UMass Amherst. The campus has seen improvement in the four-year graduation rate, which has increased from 67% for the Fall 2010 cohort to 73% for the Fall 2019 cohort. Retention and graduation rate improvements have closed the gap with peer institutions, with the graduation rate now exceeding the median peer rate.

HEADLINES

STUDENT SUCCESS AND SATISFACTION

The Undergraduate Student Success unit coordinated programs, resources, and cross-disciplinary teams that prioritized student persistence and success, with particular attention to students historically marginalized in higher education. We partnered with a range of units on campus to provide high-impact learning opportunities, trainings and programs for staff and faculty, and individualized interventions that support students facing retention risks.

In our support for the many dozens of academic advisors on campus, we continue to benefit from the EAB Navigate360 platform which organizes student outreach and provides data analytics and best practices research. While graduation rates at UMass continue to be strong overall, we know that any student who is struggling to persist and complete their degree on time can be facing not only academic challenges, but a complex collection of financial, personal, and health or mental health needs. New functionality in the EAB Navigate360 platform, Cases, allows us to initiate and coordinate wrap-around care for these students, integrating academic teams with the Student Affairs & Campus Life CARE team. We also used this functionality to support the Academic Success Coaching pilot in the Learning Resource Center, an individualized and more intensive level of academic support available beyond tutoring and supplemental instruction. From this first year of the program, we have developed a productive understanding of the study skills and executive skills support we can provide via coaching to undergraduates at risk of withdrawing from or failing a course. We also initiated new sharing of Navigate360 data so that Learning Specialists in Disability Services have a more integrated picture of students' academic progress. In the coming year, we will host a Student Success Leadership Fellow in our unit to conduct a deeper dive into our Academic Alert data and clarify how instructors can best initiate automated referrals via the EAB platform.

Actively supporting students with financial insecurity helps foster a more equitable university experience. In its third year, the Provost's Office directed the cross-unit Partnerships for Advancing Completion Equity (PACE), aimed at reducing the achievement gap in retention and completion for students historically on the margins of higher education by rooting out inequitable campus

practices and addressing financial barriers for students. Financial insecurity and low credit accumulation can multiply for some students from one semester to the next. In conjunction with our Senior Completion Committee and the Dean of Students Office microgrant program, PACE offers grants to students struggling to meet their final financial obligations to complete their degree on time. Related, Student Success's financial literacy program, Smart About Money (SAM), educates students about the new financial independence they encounter in college. Through SAM, students can meet with a peer financial coach, attend workshops, and use online resources to learn about on-campus employment, budgeting, educational loans, credit, and preparing financially for life after UMass.

The UMass campus-wide focus on student belonging is foundational to our shared success work and calls us to center inclusivity as we decrease barriers to academic progress. Student Success's "I Am First Gen" outreach campaign regularly celebrates the identity of first-generation college students, fosters social connections, and demystifies college for all students. This past year we again offered Transfer Success seminars for new transfer students and will offer a Transfer Student Residential Academic Program (living-learning community) again in the fall of 2024. We partnered actively with New Student Orientation & Transitions to help students cultivate academic preparedness as they onboard to the university and establish relationships with academic advisors and other personnel in the schools and colleges.

As we look ahead we are excited that this year UMass joined two new national success partnerships: Excelencia and the University Innovation Alliance, both networks of universities committed to equity and broader degree attainment. Excelencia is focused specifically on Latino student success and UIA on scalable efforts to expand degree attainment in public institutions. We join our colleagues who participate in the American Talent Initiative and form a UMass trio of national success partnerships, aligning our mutually reinforcing efforts toward more equitable and effective practices driving inclusive success.

The campus has seen an increase in the diversity of the student body. The Fall 2023 entering first-year class contains 36.6% ALANA students; overall, over three in ten undergraduates were

HEADLINES

STUDENT SUCCESS AND SATISFACTION

students of color. Also, over one-fifth are the first in their families to pursue a bachelor's degree. The campus will continue to attract a diverse student body and encourage greater appreciation for diverse populations.

While the economy rebounded from the pandemic in 2022 with a hiring boom, we saw strong but more moderate hiring for the class of 2023 with overall placement of 85% (response rate 82%). Jobs in the Health Sciences, STEM, Business, and Education remained strong, while we saw a slight decline in jobs in Information Technology, Marketing and Sales and an increase in jobs in Architecture, Construction, Natural

Resources, and the Defense Industry. The National Association of Colleges and Employers is predicting a return to more "normal" hiring with a projected decrease of 5.8% in new college graduate hiring for the Class of 2024. As hiring slowed during the fall, many employers delayed recruitment until the spring semester, and we hosted a late-season career fair to accommodate these employers. Staying flexible and adapting to the changing environment, UMass Amherst continues to provide a range of recruitment opportunities to students through job and internship postings, campus-wide and boutique career fairs, and other types of on-campus and virtual recruitment activities.

SERVICE TO THE COMMONWEALTH

UMass Amherst has invested in programs to promote the enrollment and graduation of undergraduate and graduate students in the sciences and mathematics. In Academic Year 2022-2023, 37% of degrees awarded at the undergraduate level and 38% awarded at the graduate level were in Science, Technology, Engineering, and Mathematics (STEM) programs.

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

being longer, and correlates to improved outcomes for all students, including historically minoritized students.

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

HEADLINES

FINANCIAL HEALTH

The financial indicators of the Amherst campus demonstrate a commitment to the prudent use and investment of state appropriation, student tuition and fees, and other income streams. The campus continues to support campus priorities by investing in student success, research support, diversity, equity and inclusion initiatives and deferred maintenance. The campus is in the process of developing a new 10-year strategic plan, imagining 2034 and hope to have the plan firmly established in the fall. The new plan will continue to focus on establishing the campus as a top public research university by investing in capital infrastructure, strategic faculty growth, inclusivity and wellness and student success initiatives.

In Fall 2024, the UMass Amherst foundation will launch the public phase of *Accelerate: The Campaign for UMass Amherst*, which seeks to secure private support for students, faculty, programs, and facilities. The foundation has been partnering with stakeholders across campus and volunteer leadership to secure lead gifts for the campaign. A \$5 million gift from the Manning Family Foundation to support the Institute for Applied Life Sciences (IALS) helped the campus secure more than \$69 million in new gifts and pledges in FY 24

In addition to these extraordinary philanthropic investments increases in the numbers of major gifts (\$25,000 - \$999,999) and principal gifts (\$1 million+) in recent years have helped keep the campaign ahead of pace. With \$455 million raised during the quiet phase of the campaign, the public phase will launch with more than two-thirds of its \$600 million goal, paving the way for success over the next three years. We are finalizing campaign

marketing materials; building infrastructure to support fundraising; and strengthening giving programs, all of which will help grow philanthropic support for UMass Amherst.

Key contributors to our success in fundraising include the Commonwealth's Public Higher Education Endowment Incentive Program, which helped the foundation secure more than \$19 million in new endowment commitments this year, and the maturation of a Gift Planning program that helped donors maximize both their philanthropic potential and tax advantages while committing more than \$26 million in cash, life income, realized and revocable bequests, and qualified charitable distributions in 2022-2023. In April 2024, UMassGives—a 48-hour online annual giving campaign—inspired record giving, receiving more than 10,000 gifts totaling \$2.3 million to 310 areas of campus. UMassGives is a highly collaborative effort, encompassing annual and major gifts, marketing and communications, and connections with alumni networks that enable alumni, students, faculty, staff, parents, and friends to make gifts to the places that matter most to them at UMass Amherst.

Over the past year, our work to engage UMass Amherst constituents included developing and implementing more than 100 programs in FY24, including new and enhanced regional, affinity, industry, and life-stage alumni programs, a year-long celebration of the 150th anniversary of the UMass Amherst Alumni Association, and a series of events around the Commonwealth, the nation, and abroad that introduced Chancellor Reyes to the UMass family.

AT-A-GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	4.07	• Technology-Enhanced Classrooms	380
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	67%
<i>Arithmetic Mean</i>	1376	• Faculty FTE	1566
<i>25th – 75th Percentile</i>	1300-1485	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	3.41	<i>Percent Faculty-of-Color</i>	28%
• Student-Faculty Ratio	18:1	<i>Percent Women Faculty</i>	47%

ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	73%	• Percent In-State Pell Grant Recipients	24%
• Percent Undergraduates who are Students of Color	35%	• Percent of Need Met for In-State Students Awarded Need-Based Aid	85%
• Percent Undergraduates who are International	8%	• Average Debt of Students (UG Graduating Class)	\$29,764
• Percent First-Time Undergraduates who are First Generation in College	21%	• Percent Graduating Class with Debt (UG)	58%
• Percent First-Time Undergraduates with English as a Second Language	15%	• Total Students who Participated in a Study Abroad Program	1,391
• Percent Undergraduates Who Are Of Transfer Origin	18%	• Online Course Registrations	35,974
• Number of First-degree Bachelor-seeking Students Aged 25+	915	Percentage of degree-seeking students taking at least one online course who were full time and fully online.	6%
• Dual Enrollment Students (Headcount)	10		

STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	91%	• Transfer (Full-time) One-Year Retention Rate	89%
• Freshmen Four-Year Graduation Rate	73%	• Transfer (Upper Division) Four-Year Graduation Rate	85%
• Freshmen Six-Year Graduation Rate	83%	• Student Satisfaction With Educational Experience	83%
• Freshmen Twelve-Semester Graduation Rate	83%	• Alumni Participation Rate	5%

AT-A-GLANCE

SERVICE TO THE COMMONWEALTH

• Degree Completions	9,251	• Degrees Awarded in STEM Fields	3,478
<i>Bachelor's</i>	6,838	<i>Undergraduate</i>	2,557
<i>Master's</i>	2,094	<i>Graduate</i>	921
<i>Doctorates</i>	319	• Certificates Awarded in STEM Fields	117
• Patent Applications	26	• Degrees Awarded in Healthcare Fields	650
• Total R&D Expenditures	\$269M	<i>Undergraduate</i>	472
• Total R&D Expenditures Ranking	111	<i>Graduate</i>	178
Total R&D Expenditures Ranking among		• Certificates Awarded in Healthcare	
• Carnegie Peers, US Publics, Non-Medical	12	Fields	46
• Total R&D Expenditures per Tenure		• License Income	\$633,307
• System Faculty	\$241,164	• Percent Alumni who Remain in MA	53%

FINANCIAL HEALTH

• Total Endowment	\$506.9M	• Total Cash & Investments to Expenses	0.82
• Annual Growth in Endowment	14.5%	• Debt Service Burden	5.4%
• Endowment per Annualized Student FTE	\$15,820	• Operating Margin (%)	6.9%
• Private Funds Raised Annually	\$69.5M		

ACADEMIC QUALITY

AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

4.07

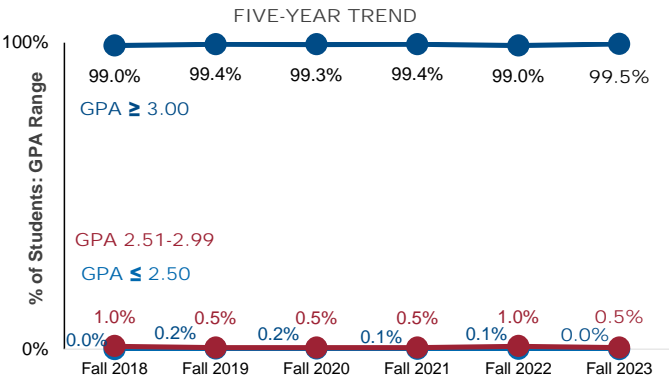
Average HS GPA in Fall 2023

▲ 0.05

One-year nominal change (vs. Fall 2022)

▲ 0.17

Five-year nominal change (vs. Fall 2018)



SAT SCORES OF FRESHMEN

1485

SAT Scores of Freshmen 75th Percentile in Fall 2023

▲ 5

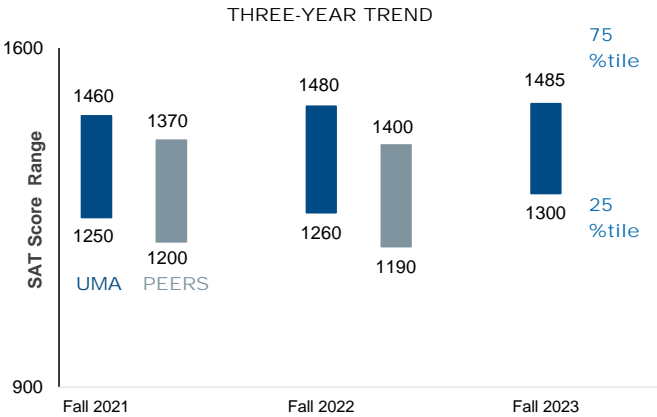
One-year nominal change (vs. Fall 2022)

1300

SAT Scores of Freshmen 25th Percentile in Fall 2023

▲ 40

One-year nominal change (vs. Fall 2022)



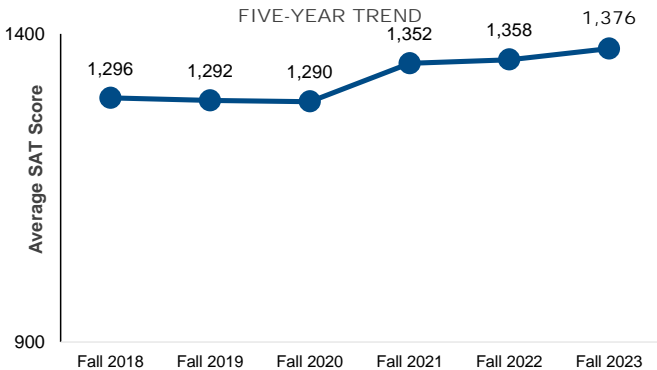
*Test scores became optional in Fall 2021.

1376

Average SAT Scores of Freshmen in Fall 2023

▲ 18

One-year nominal change (vs. Fall 2022)



*Test scores became optional in Fall 2021.

ACADEMIC QUALITY

AVERAGE GPA OF ENTERING TRANSFER STUDENTS

3.41

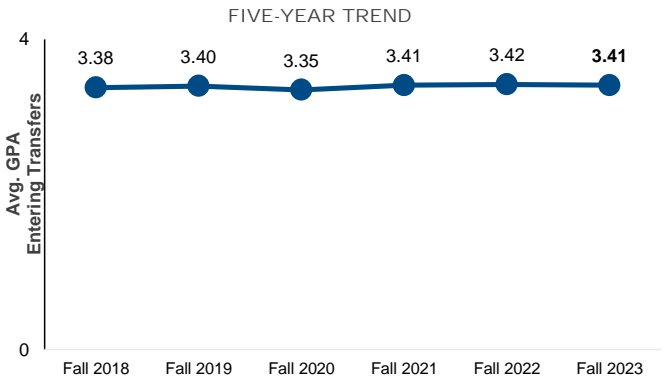
Average transfer GPA in Fall 2023

▼ 0.01

One-year nominal change (vs. Fall 2022)

▲ 0.03

Five-year nominal change (vs. Fall 2018)



STUDENT-FACULTY RATIO

18:1

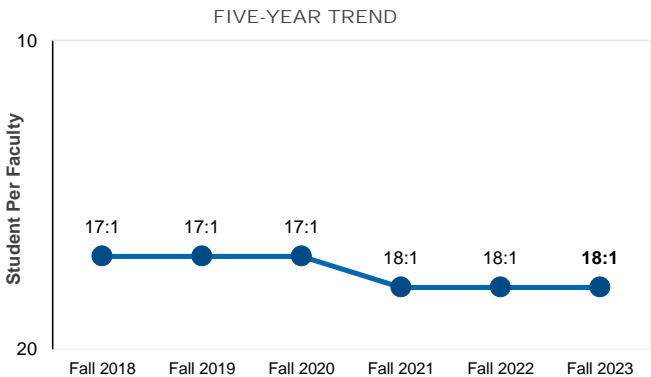
Student-Faculty Ratio in Fall 2023

• 0

One-year nominal change (vs. Fall 2022)

▼ 1

Five-year nominal change (vs. Fall 2018)



TECHNOLOGY-ENHANCED CLASSROOMS

380

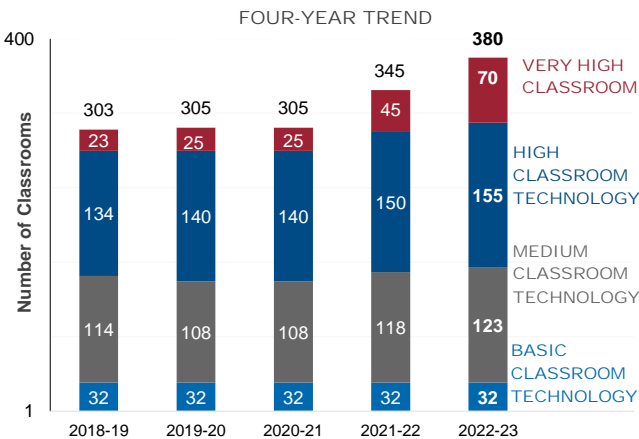
Total Technology Enhanced Classrooms in 2022-23

▲ 10%

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

▲ 25%

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



ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

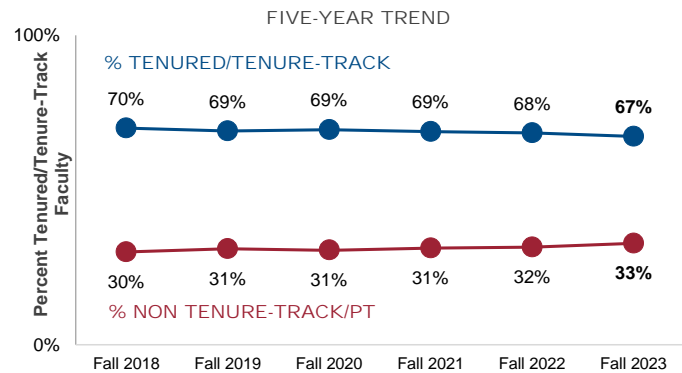
67%

Percent Tenured/
Tenure-track Faculty
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

▼ 3

Five-year
% point change
(vs. Fall 2018)

FACULTY FTE

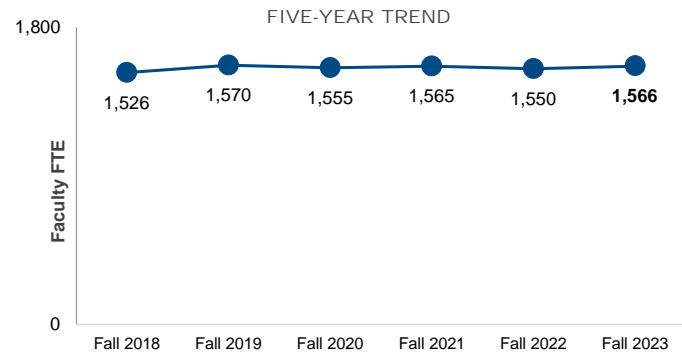
1566

Faculty FTE
in Fall 2023

▲ 1%

One-year
% change
(vs. Fall 2022)

▲ 3%

Five-year
% change
(vs. Fall 2018)

FACULTY-OF-COLOR

381

Faculty Of Color
in Fall 2023

▲ 24

One-year
nominal change
(vs. Fall 2022)

▲ 64

Five-year
nominal change
(vs. Fall 2018)

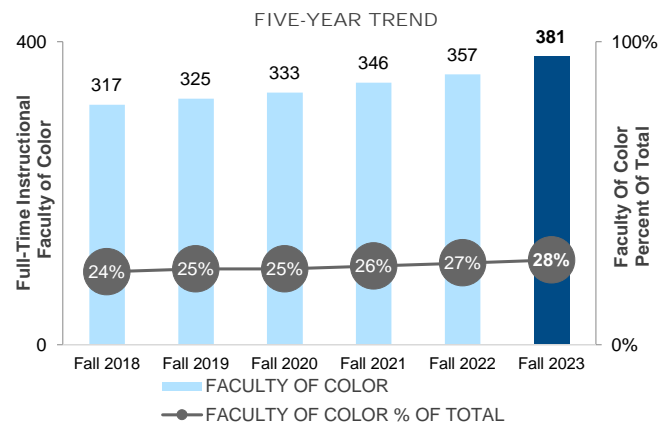
28%

Percent of
Faculty Of Color
in Fall 2023

▲ 1

One-year
% point
(vs. Fall 2022)

▲ 4

Five-year
% point
(vs. Fall 2018)

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

ACADEMIC QUALITY

WOMEN FACULTY

688

Women Faculty
in Fall 2023

▲ 10

One-year
nominal change
(vs. Fall 2022)

▲ 43

Five-year
nominal change
(vs. Fall 2018)

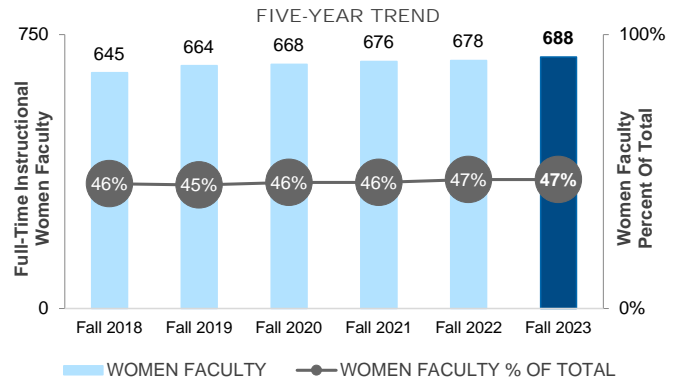
47%

Percent of
Women Faculty
in Fall 2023

● 0

One-year
% point
(vs. Fall 2022)

▲ 1

Five-year
% point
(vs. Fall 2018)

ACCESS AND AFFORDABILITY

UNDERGRADUATES FROM MASSACHUSETTS

17,416

Undergraduates from
Massachusetts
in Fall 2023

▼ 4%

One-year
% change
(vs. Fall 2022)

▼ 3%

Five-year
% change
(vs. Fall 2018)

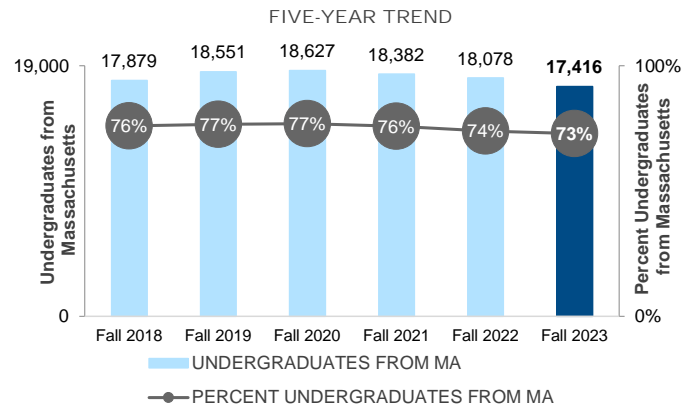
73%

% Undergraduates
from Massachusetts
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

▼ 3

Five-year
% point change
(vs. Fall 2018)

UNDERGRADUATE STUDENTS OF COLOR

7,405

Undergraduate
Students of Color
in Fall 2023

▲ 2%

One-year
% change
(vs. Fall 2022)

▲ 27%

Five-year
% change
(vs. Fall 2018)

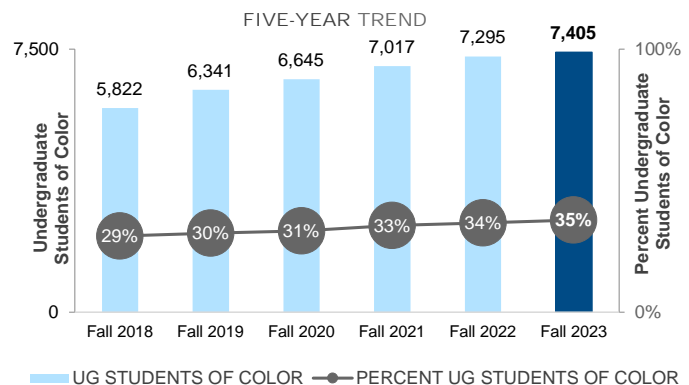
35%

% Undergraduate
Students of Color
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▲ 6

Five-year
% point change
(vs. Fall 2018)

ACCESS AND AFFORDABILITY

UNDERGRADUATES WHO ARE INTERNATIONAL

1,837

International UG
Enrollment
in Fall 2023

▲ 1%

One-year
% change
(vs. Fall 2022)

▲ 9%

Five-year
% change
(vs. Fall 2018)

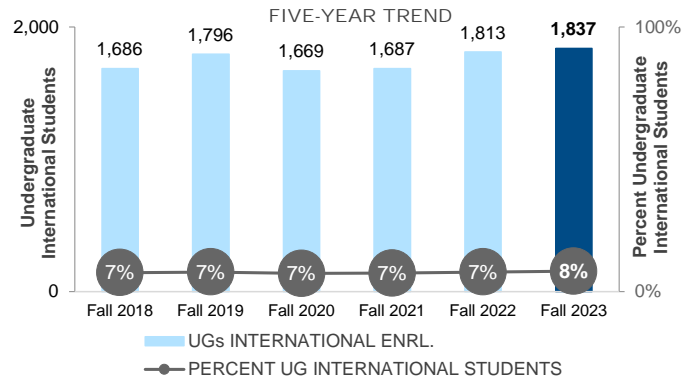
8%

% International UG
Enrollment
in Fall 2023

▲ 1

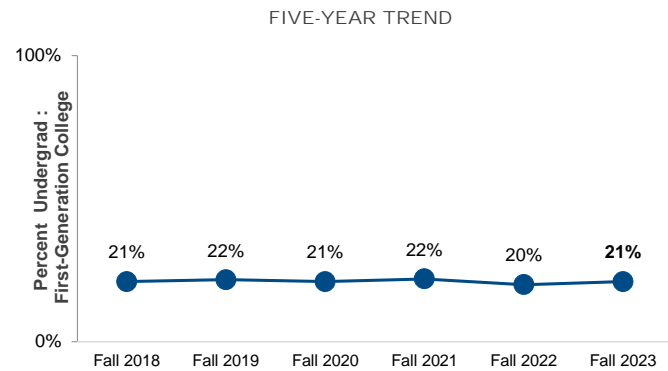
One-year
% point change
(vs. Fall 2022)

▲ 1

Five-year
% point change
(vs. Fall 2018)

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

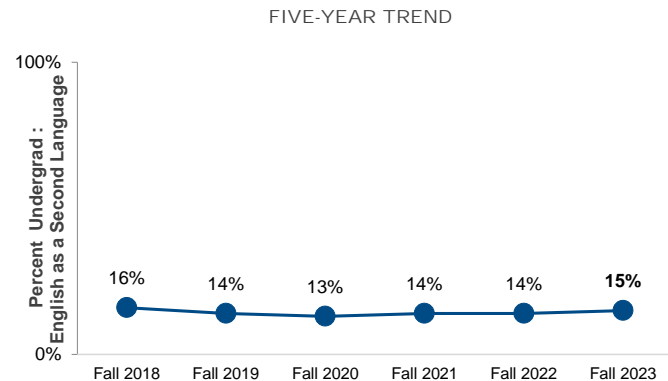
21%

Percent first-time
Undergraduates
who are First-Generation
College in Fall 2023

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

PERCENT FIRST-TIME UNDERGRADUATES WITH ENGLISH AS A SECOND LANGUAGE

15%

Percent Undergraduates
Speak English as a
Second Language
in Fall 2023

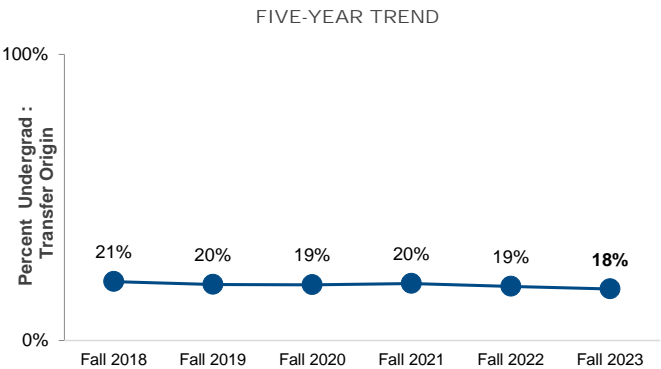
*The data source prior to 2018 is based on survey responses, 2018 to present is based on Common Application responses.

ACCESS AND AFFORDABILITY

PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

18%

Percent Undergraduates
who are of Transfer-Origin
in Fall 2023



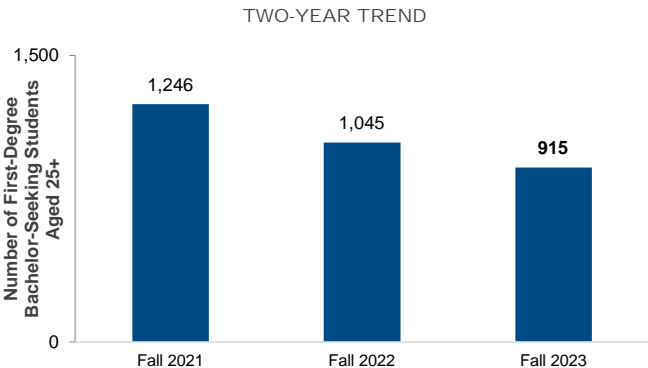
NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

915

Number of First-Degree
Bachelor-Seeking
Students Aged 25+
in Fall 2023

▼ 130

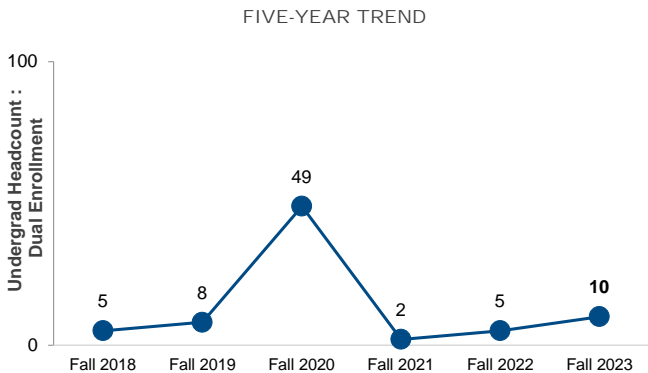
One-year
nominal change
vs. Fall 2023



DUAL ENROLLMENT STUDENTS (HEADCOUNT)

10

Dual Enrolled
Students
in Fall 2023



ACCESS AND AFFORDABILITY

PERCENT IN-STATE PELL GRANT RECIPIENTS

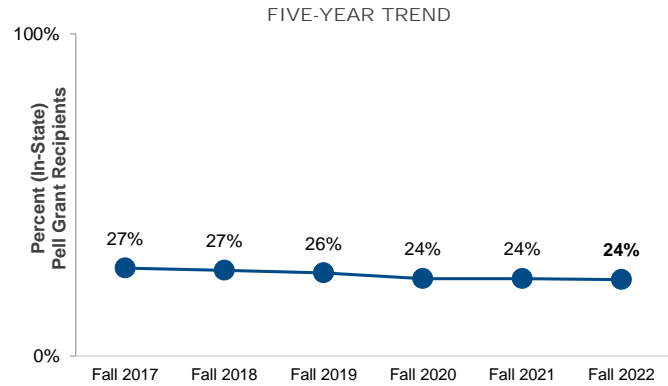
24%

Percent (In-State)
Pell Grant Recipients
in Fall 2022

.0

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

▼ 3

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

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

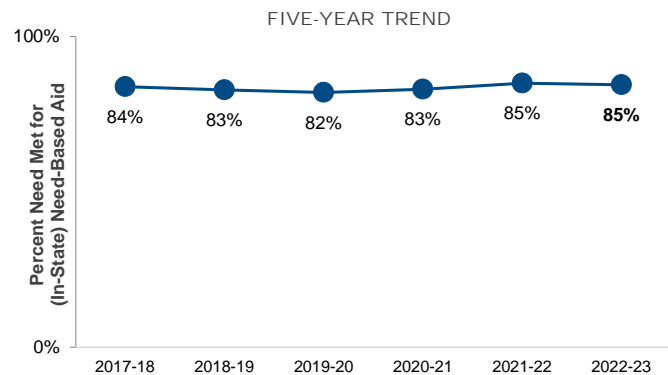
85%

Percent Need Met for
(In-State) Need-Based
Aid in 2022-23

.0

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

▲ 1

Five-year
% point change
(vs. 2017-18)

UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

\$29.8k

Average Debt Load
in 2022

▼ 5%

One-year
% change
(vs. 2021)

▼ 7%

Five-year
% change
(vs. 2018)

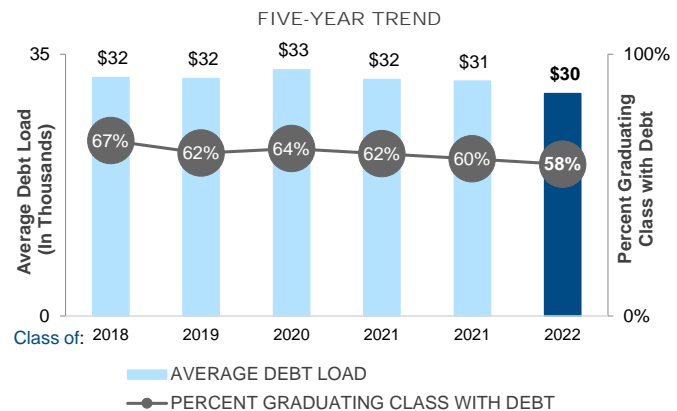
58%

Percent Graduating
Class with Debt
in 2022

▼ 2

One-year
% point change
(vs. 2021)

▼ 9

Five-year
% point change
(vs. 2018)

ACCESS AND AFFORDABILITY

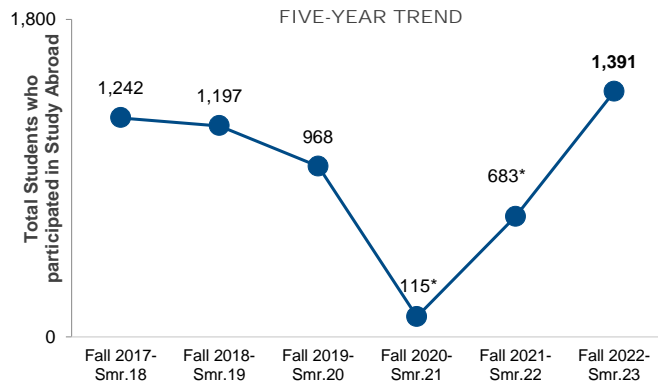
TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

1,391
Students who participated
in Study Abroad
in Fall 2022-Smr.23

▲ 708
One-year
nominal change
vs. Fall 2021-Smr.22

▲ 149
Five-year
nominal change
vs. Fall 2017-Smr.18

*Terms affected by pandemic.



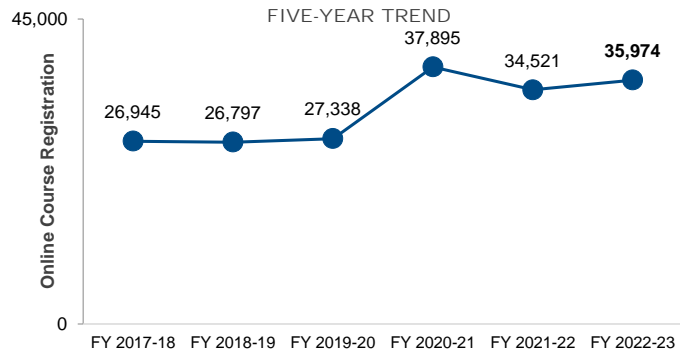
TOTAL ONLINE COURSE REGISTRATIONS

35,974
Online Course
Registrations
in FY 2022-23

▲ 4%
One-year
% change
(vs. FY 2021-22)

▲ 34%
Five-year
% change
(vs. FY 2017-18)

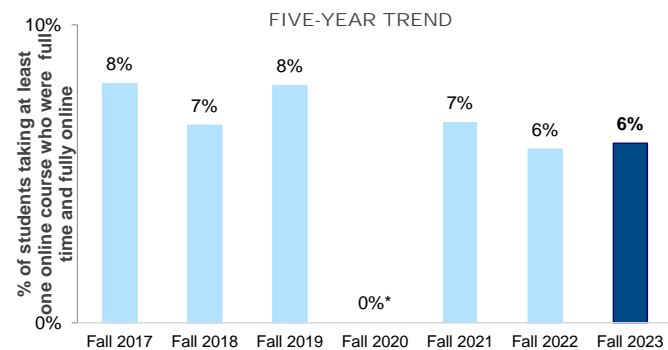
*Terms affected by pandemic



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

6%
Students taking at least
one online course
who were full time
and fully online
in Fall 2023

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



STUDENT SUCCESS AND SATISFACTION

FRESHMEN ONE-YEAR RETENTION RATE

91%

Freshmen One-Year Retention Rate in Fall 2023

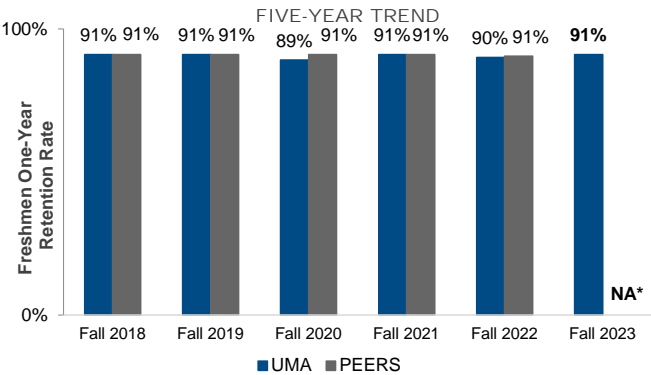
▲ 1

One-year % point change (vs. Fall 2022)

• 0

Five-year point (vs. Fall 2018)

*Peer data for Fall 2023 not available for reporting purposes.



FRESHMEN FOUR-YEAR GRADUATION RATES

73%

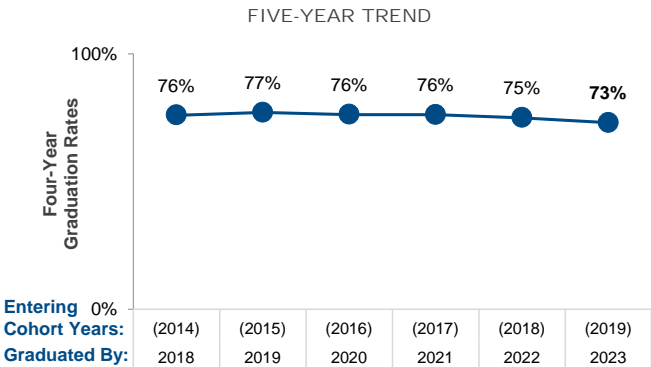
Freshmen Four-Year Graduation Rates in 2023

▼ 2

One-year % point change (vs. 2022)

▼ 3

Five-year % point change (vs. 2018)



FRESHMEN SIX-YEAR GRADUATION RATE

83%

UMA Freshmen Six-Year Graduation Rates in Fall 2023

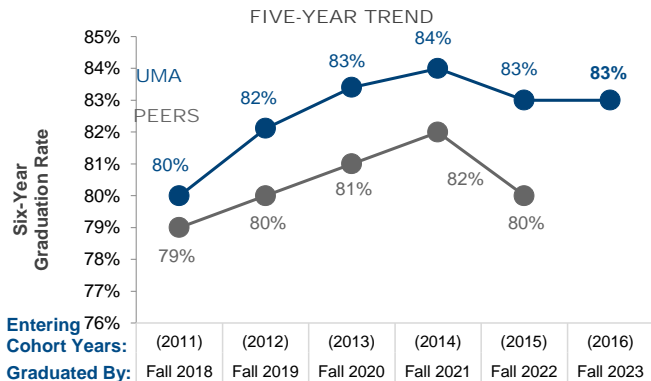
• 0

One-year % point change (vs. Fall 2022)

▲ 3

Five-year % point change (vs. Fall 2018)

*Peer data for Fall 2023 not currently available.



STUDENT SUCCESS AND SATISFACTION

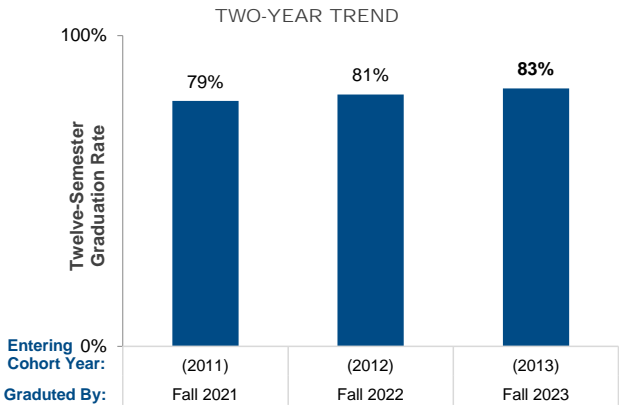
FRESHMEN TWELVE-SEMESTER GRADUATION RATE

83%

UMA Freshmen
Twelve-semester
Graduation Rates
in Fall 2023

▲ 2

One-year
% point change
(vs. Fall 2022)



TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

89%

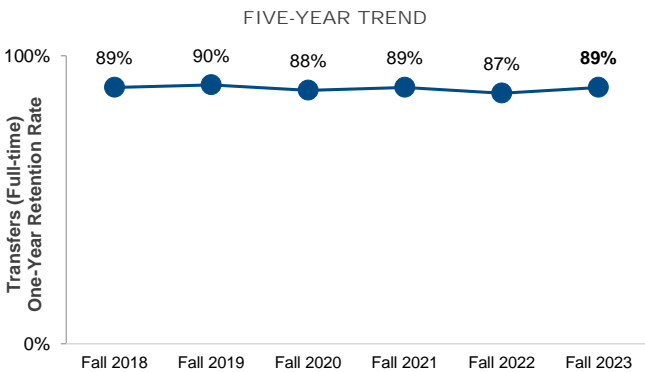
Transfers (Full-time)
One-Year
Retention Rate
in Fall 2023

▲ 2

One-year
% point change
(vs. Fall 2022)

● 0

Five-year
% point change
(vs. Fall 2018)



TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

85%

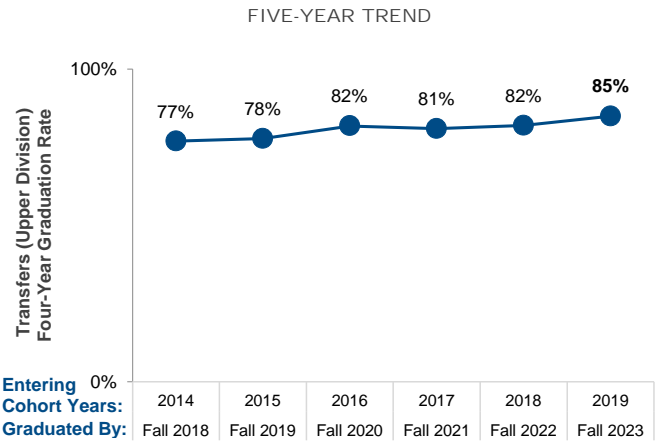
Transfers (Upper
Division) Four-Year
Graduation Rates
in Fall 2023

▲ 3

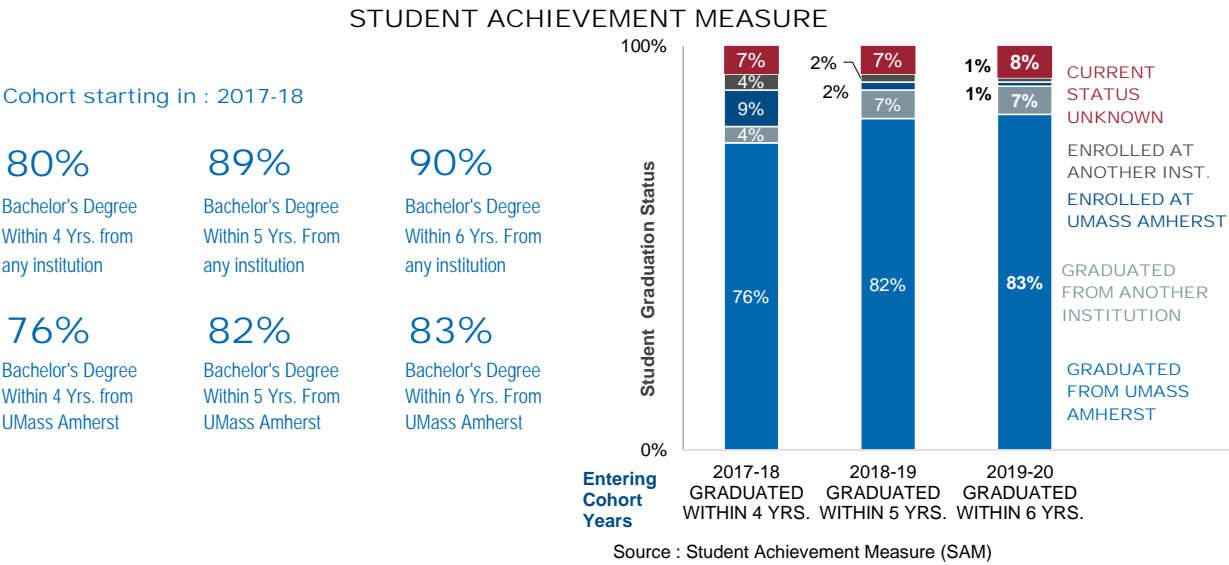
One-year
% point change
(vs. Fall 2022)

▲ 8

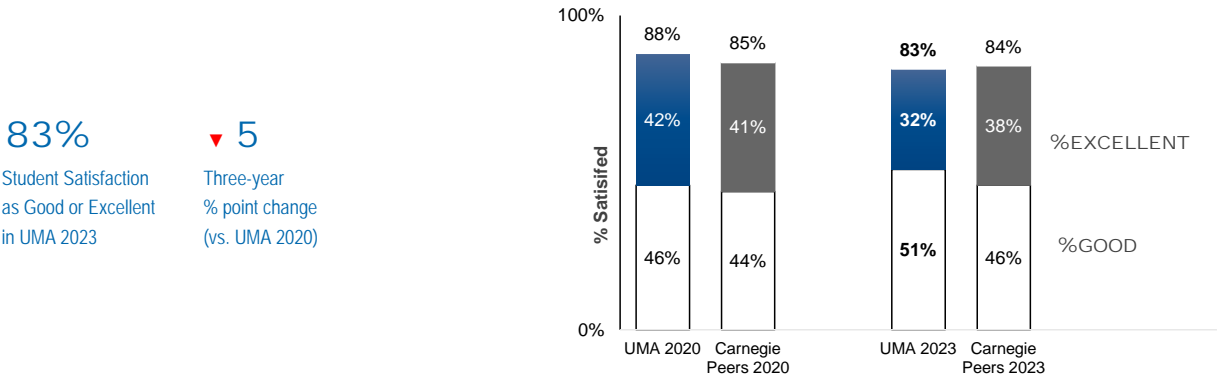
Five-year
% point change
(vs. Fall 2018)



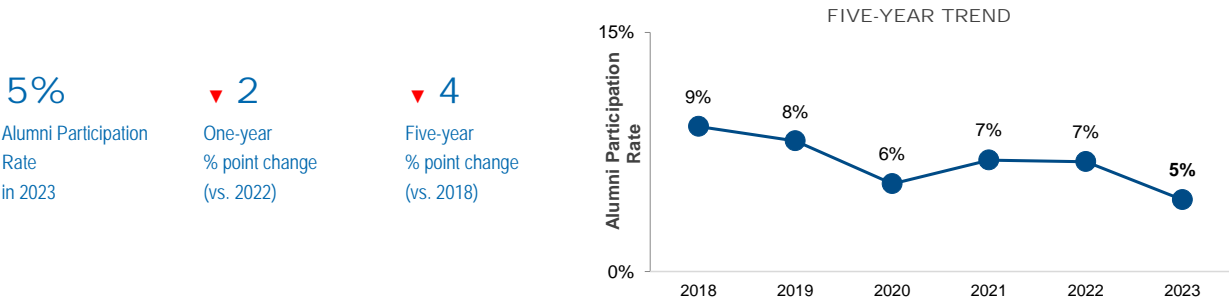
STUDENT SUCCESS AND SATISFACTION



STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE



ALUMNI PARTICIPATION RATE



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

9,251

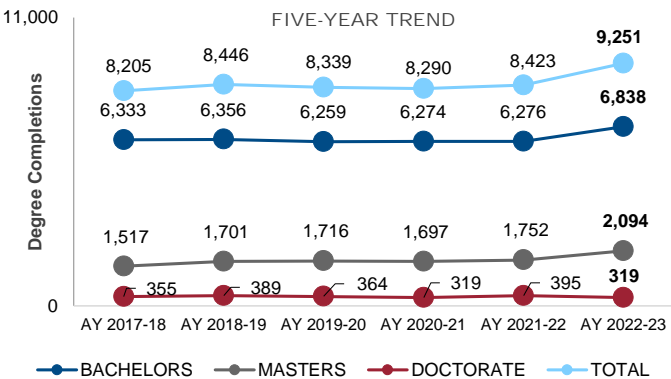
Total degree completions
AY 2022-23

▲ 10%

One-year % change
in total degree completions
(vs. AY 2021-22)

▲ 13%

Five-year % change
in total degree completions
(vs. AY 2017-18)



NUMBER OF PATENT APPLICATIONS

26

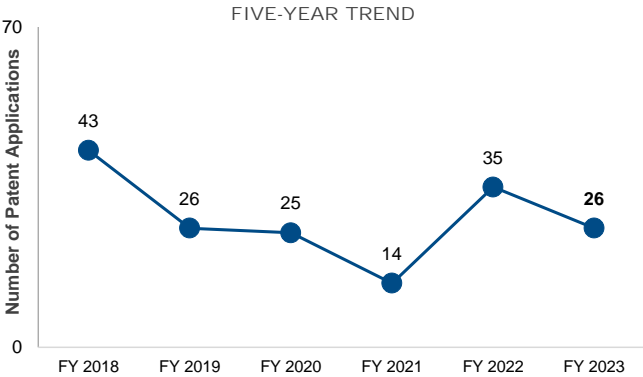
Patent Applications
in FY 2023

▼ 9

One-year nominal change
(vs. FY 2022)

▼ 17

Five-year nominal change
(vs. FY 2018)



TOTAL R&D EXPENDITURES

\$268.7

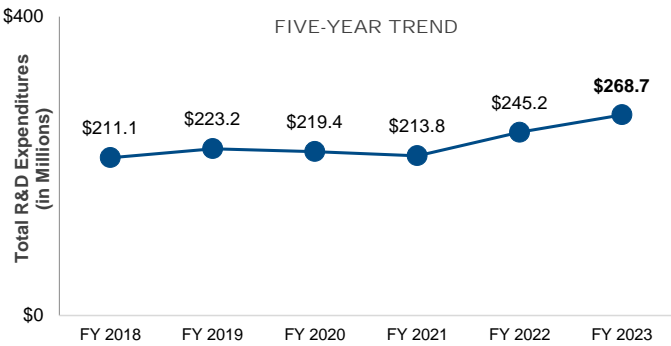
Total R&D (Millions) N
in FY 2023

▲ 10%

One-year % change
(vs. FY 2022)

▲ 30%

Five-year % change
(vs. FY 2018)



SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES RANKINGS

111

Total R&D Expenditures
Overall Rankings
in FY 2022

▲ 4

One-year
nominal change
(vs. FY 2021)

▼ 7

Five-year
nominal change
(vs. FY 2017)

12

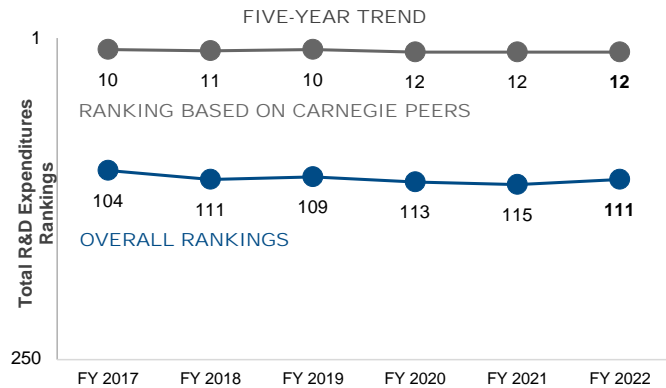
Rankings based on
Carnegie Peers
in FY 2022

● 0

One-year
nominal change
(vs. FY 2021)

▼ 2

Five-year
nominal change
(vs. FY 2017)



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

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

TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

\$241k

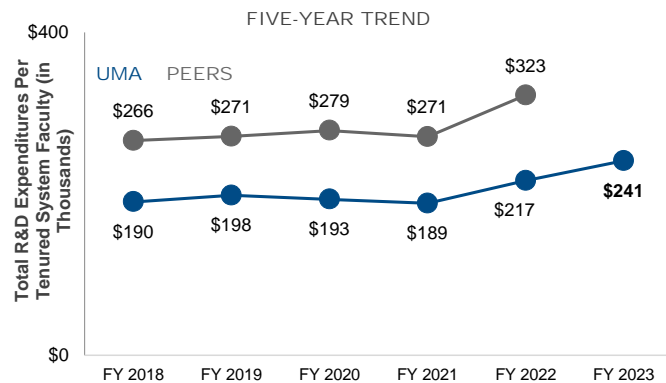
Total R&D Expenditure
Per Tenured
System Faculty
in FY 2023

▲ 11%

One-year
% change
(vs. FY 2022)

▲ 27%

Five-year
% change
(vs. FY 2018)



* Peer data for FY 2023 is currently not available.

DEGREES AWARDED IN STEM FIELDS

2,557

UG degrees awarded
in STEM fields
in 2022-23

▲ 10%

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

▲ 22%

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

37%

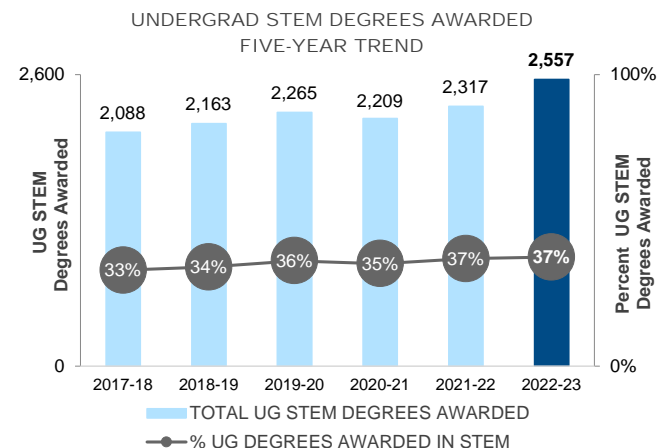
Percent of total UG
degrees awarded in
STEM fields
in 2022-23

● 0

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

▲ 4

Five-year
% point change
(vs. 2017-18)



*Values of 0 may be shown due to rounding.

SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN STEM FIELDS

921

Grad degrees awarded
in STEM fields
in 2022-23

▲ 29%

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

▲ 58%

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

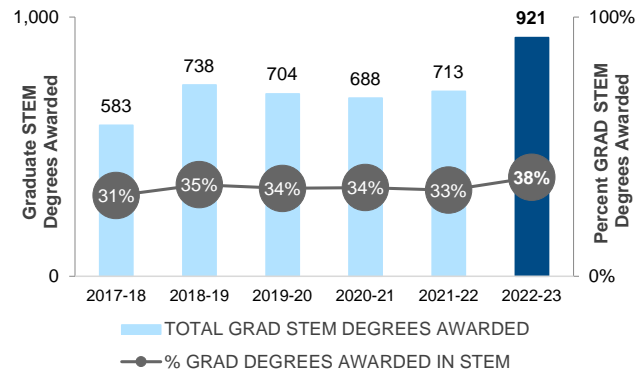
38%

Percent of total Grad
degrees awarded in
STEM fields
in 2022-23

▲ 5

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

▲ 7

Five-year
% point change
(vs. 2017-18)*Prior years can look different now
due to CIP code and STEM designation changes.GRAD STEM DEGREES AWARDED
FIVE-YEAR TREND

3,478

Total degrees awarded
in STEM fields
in 2022-23

▲ 15%

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

▲ 30%

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

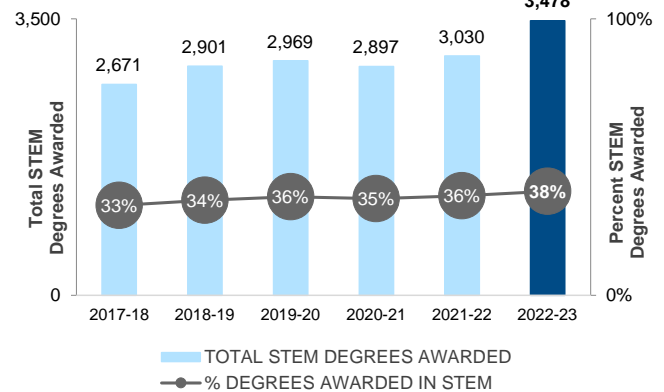
38%

Percent of Total
degrees awarded in
STEM fields
in 2022-23

▲ 2

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

▲ 5

Five-year
% point change
(vs. 2017-18)TOTAL STEM DEGREES AWARDED
FIVE-YEAR TREND

CERTIFICATES AWARDED IN STEM FIELDS

117

Total Certificates awarded
in STEM fields
in 2022-23

▲ 17

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

▲ 56

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

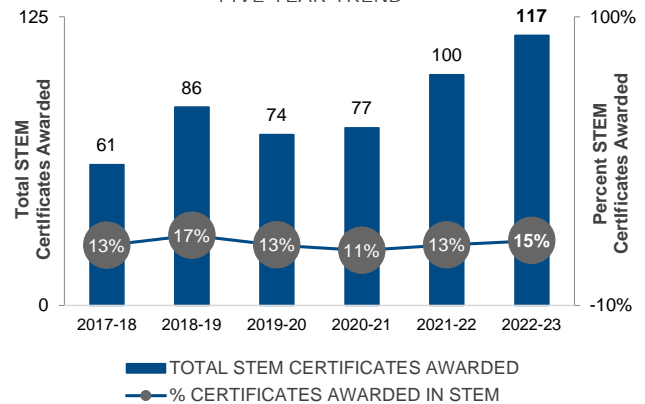
15%

Percent of Total
Certificates awarded in
STEM fields
in 2022-23

▲ 2

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

▲ 2

Five-year
% point change
(vs. 2017-18)TOTAL STEM CERTIFICATES AWARDED
FIVE-YEAR TREND

SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN HEALTHCARE FIELDS

650

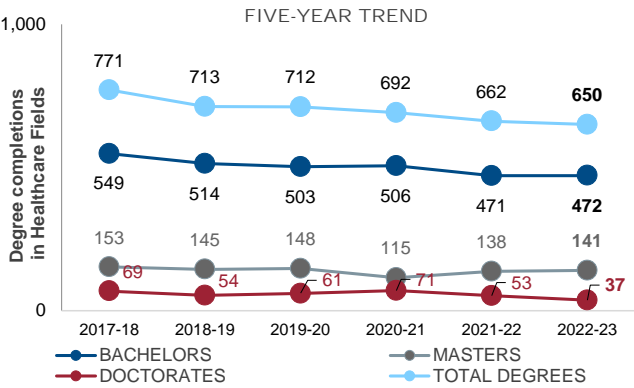
Total degrees awarded
in HealthCare fields
in 2022-23

▼ 2%

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

▼ 16%

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



CERTIFICATES AWARDED IN HEALTHCARE FIELDS

46

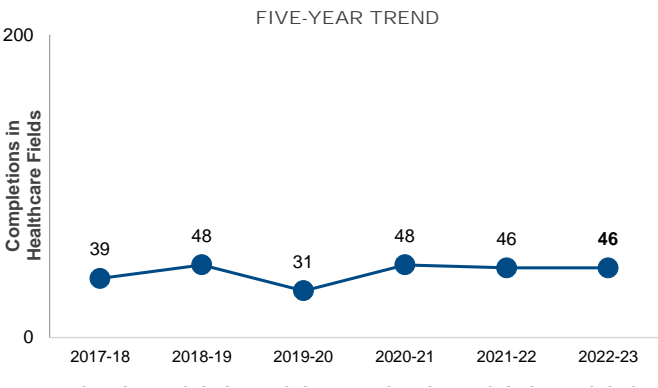
Total Certificates awarded
in HealthCare fields
in 2022-23

• 0%

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

▲ 18%

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



LICENSE INCOME

\$633.3k

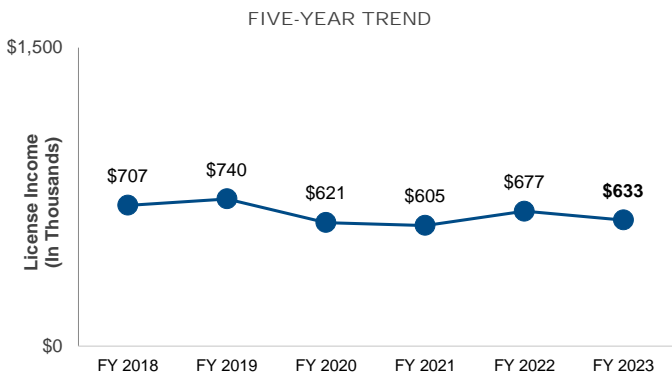
License Income
in FY 2023

▼ 6%

One-year
% change
(vs. FY 2022)

▼ 10%

Five-year
% change
(vs. FY 2018)



SERVICE TO THE COMMONWEALTH

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

53%

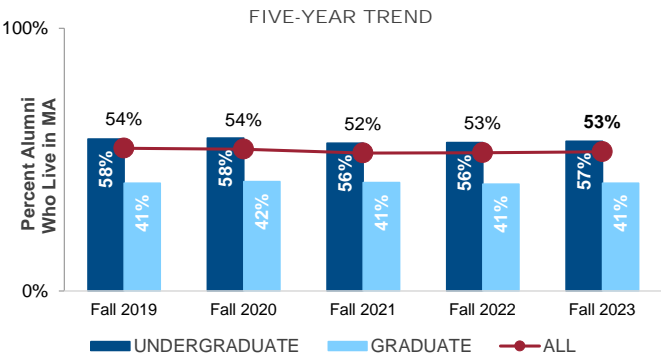
Of all UMass Alumni
live in the Commonwealth
in Fall 2023

.0

One-year
% point change
(vs. Fall 2022)

▼ 1

Five-year
% point change
(vs. Fall 2018)



FINANCIAL HEALTH

ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

\$507M

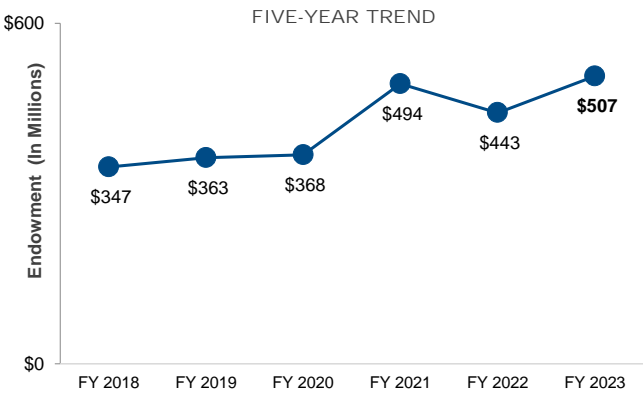
Endowment Assets
in FY 2023

▲ 15%

One-year
% change
(vs. FY 2022)

▲ 46%

Five-year
% change
(vs. FY 2018)



ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

15%

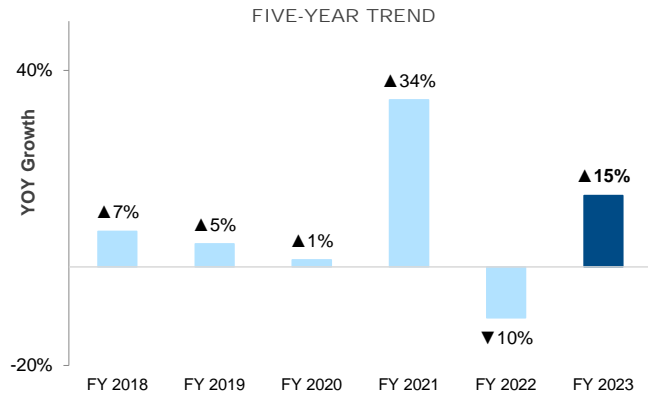
Annual Growth
in FY 2023

▲ 25

One-year
% point change
(vs. FY 2022)

▲ 7

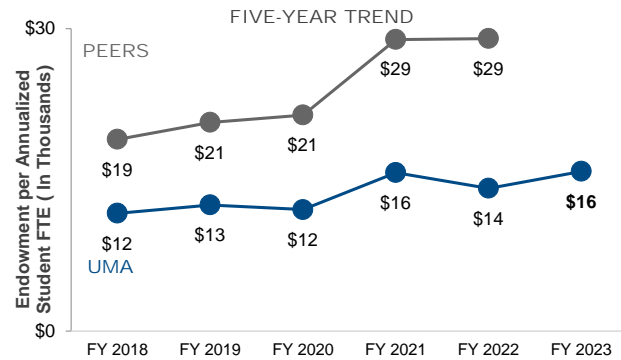
Five-year
% point change
(vs. FY 2018)



FINANCIAL HEALTH

ENDOWMENT PER ANNUALIZED STUDENT FTE

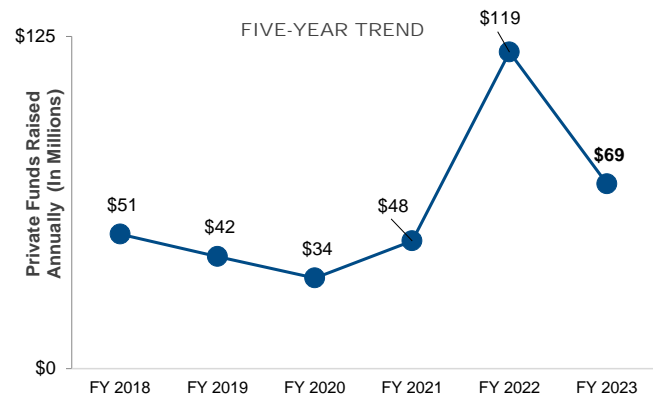
\$15.8k ▲ **12%** ▲ **35%**
 Endowment per Annualized Student FTE
 in FY 2023 % change (vs. FY 2022) % change (vs. FY 2018)



* Peer data for FY 2023 not available for reporting purposes.

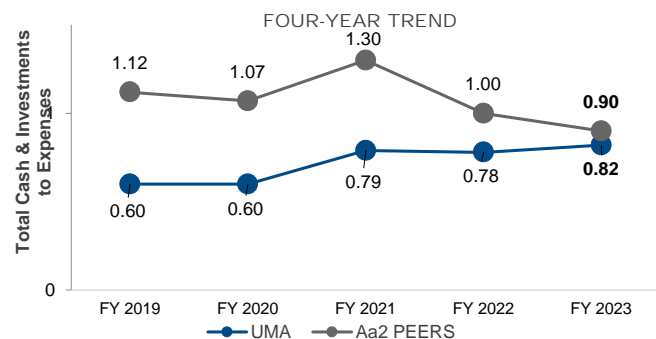
PRIVATE FUNDS RAISED ANNUALLY

\$69M ▼ **42%** ▲ **37%**
 Private Funds Raised Annually
 in FY 2023 % change (vs. FY 2022) % change (vs. FY 2018)



TOTAL CASH & INVESTMENTS TO EXPENSES

0.82
 Total Cash & Investments to Expenses
 in FY 2023



FINANCIAL HEALTH

DEBT SERVICE BURDEN

5.4%

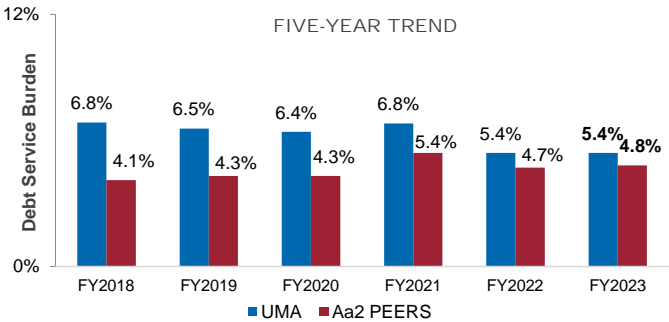
Debt Service Burden in FY2023

0.0

One-year % Point change (vs. FY2022)

▼ 1.4

Five-year % Point change (vs. FY2018)



OPERATING MARGIN (%)

6.9%

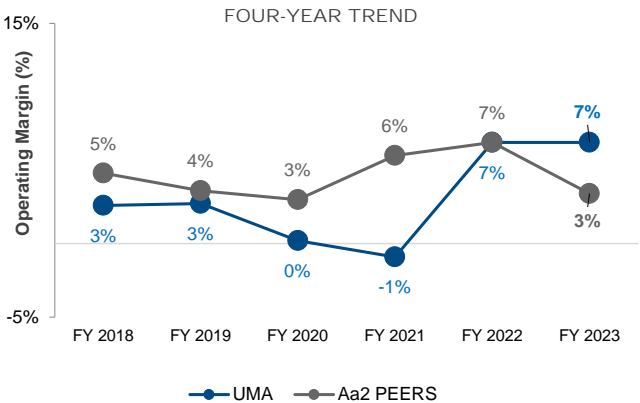
Operating Margin (%) in FY 2023

0.0

One-year % Point change (vs. FY 2022)

▲ 4.0

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



DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Average High School GPA of First-Time Freshmen. Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

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

Average GPA of Entering Transfer Students. Average Cumulative GPA of entering transfer students according to DHE admissions policy (includes only state-supported students).

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

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

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

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

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

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

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

STUDENT SUCCESS AND SATISFACTION INDICATORS

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

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

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

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

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

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

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

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

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

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

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

DEFINITIONS AND SOURCES

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

Percent Alumni who Live in Massachusetts. Percentage of total alumni who currently reside in Massachusetts based on alumni records.

FINANCIAL HEALTH INDICATORS

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

PEER INSTITUTIONS FOR UMASS AMHERST

Indiana University-Bloomington

*Iowa State University

*Rutgers University System

Stony Brook University

*University of California-Santa Barbara

*University of Colorado-Boulder

*University of Connecticut System

University of Delaware

*University of Maryland-College Park

University of Oregon

***Financial Peer**

Moody's Aa2 Peers

Alamo Community College District, TX

Arizona State University, AZ

Auburn University, AL

Board of Regents of The University System of Georgia, GA

California State University, CA

City University of New York, NY

Clemson University, SC

Cuyahoga Community College District, OH

Florida State University, FL

Houston Community College System, TX

Iowa State University of Science & Technology, IA

Michigan State University, MI

Mississippi Institutions of Higher Learning, MS

Nevada System of Higher Education, NV

State University of New York, NY

State University System of Florida, FL

Texas State University System, TX

University of Alabama at Birmingham, AL

University of Alabama, AL

University of Arizona, AZ

University of Arkansas, AR

University of California, CA

University of Florida, FL

University of Georgia, GA

University of Hawaii, HI

University of Houston System, TX

University of Kansas, KS

University of Kentucky, KY

University of Massachusetts, MA

University of North Texas System, TX

University of Oregon, OR

University of South Carolina, SC

University of Wyoming, WY

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



BOSTON

HEADLINES

ACADEMIC QUALITY

Improve Student Learning Experience

We continue to attract well-qualified first-year students and transfers to our entering classes in greater numbers. We emphasize the high school GPA for admissions decisions and have successfully maintained an average GPA of over 3.3 for the last five entering classes, rising to 3.50 in Fall 2023.

UMass Boston stands out as a model of excellence for urban universities. UMass Boston's graduate programs in education, nursing, business, and public affairs are ranked as top 100 programs on *U.S. News & World Report's* 2024-25 Best Graduate Schools list. Six UMass Boston programs have new rankings: Graduate programs in Education, 46; Master of Nursing, 52; Master's programs in Public Affairs, 70; Doctor of Nursing Practice, 90; Part-time MBA program, 87; and Computer Science, 120. Citing positive marks on class sizes, faculty expertise, and graduation rates, UMass Boston tied with several other schools for No. 216 in the 2024 [Best National University Rankings](#), and No. 116 overall among national public universities. The university ranked No. 47 among national universities — and No. 1 in New England — for social mobility. *U.S. News* also ranked UMass Boston's undergraduate psychology program No. 98 in the nation, and its engineering program and computer science program at No. 58 and No. 192, respectively. The university's undergraduate business program was ranked No. 159.

Strengthen Research and Development

UMass Boston continues to advance as an increasingly sophisticated research university. UMass Boston's annual R&D expenditures have remained above \$60 million for the past ten years; and in FY23 set a record \$70.98 million. In terms of sponsored instruction and outreach per faculty, this figure has increased to over \$150,000 per faculty member in FY23 (a 23% increase over FY18).

Assistant Professor of Physics Mohamed Amine Gharbi has been honored with a Faculty Early Career Development (CAREER) award by the National Science Foundation (NSF) to advance the understanding of how interfaces impact the mobility of living microorganisms. This research

carries promising technological prospects as it opens avenues for the development of new functional systems applicable across various fields, such as biosensing, bioremediation, and disease treatment. Gharbi's work is poised to make a lasting impact on interdisciplinary scientific advancements.

The National Science Foundation ADVANCE program has awarded a three-year \$1 million grant to a multidisciplinary team of five faculty members for *ADVANCE Adaptation: UMass Boston CARES: Communities, Acknowledgment, Recognition, and Equity through a Culture of Sponsorship*. The project is designed to further advance UMass Boston's ongoing efforts to be a leader in increasing gender and racial equity among science, technology, engineering, and mathematics (STEM) faculty. UMass Boston was one of only six higher education institutions in the United States to receive an NSF ADVANCE Adaptation grant during the 2023 grant cycle.

The Institute of Education Sciences at the U.S. Department of Education has awarded a five-year \$3.6 million grant to Abbey Eisenhower, professor of psychology, for her work evaluating Smooth Sailing, a professional development program preparing elementary school educators to form positive, strong relationships with their autistic students. Eisenhower's project, Intervention to Enhance Student-Teacher Relationships and School Outcomes for Autistic Children: A Randomized Controlled Trial, will use the IES funding to evaluate Smooth Sailing's effectiveness. The participating kindergarten through 2nd grade teachers will come from a range of urban, suburban, and rural school districts across the Greater Boston and Worcester metropolitan areas in Massachusetts and the Southern California / Inland Empire areas of California.

Professor of Physics Jonathan Celli has been awarded \$608,000 from the National Cancer Institute (NCI) of the National Institutes of Health as part of a five-year \$2.87 million multi-PI NCI cooperative agreement in collaboration with Tayyaba Hasan, professor of dermatology at Massachusetts General Hospital and Harvard Medical School, and Rongguang Liang, professor of optical sciences at the University of Arizona. The

HEADLINES

ACADEMIC QUALITY

project aims to create an affordable, user-friendly handheld device for photodynamic therapy to screen for early signs of oral cancer, identify lesion locations, and provide immediate treatment at the point of care. It is a method that has already shown great promise in treating oral cancers, particularly in places such as rural India and other parts of South Asia with high incidence of oral cancers. Justice in Aging, a national legal advocacy nonprofit that fights senior poverty through law, has formed an innovative partnership with the Gerontology Institute's LeadingAge LTSS Center @UMass Boston to support research while enhancing the nonprofit's capacity to interpret data. The Justice in Aging Data for Equity Fellowship will provide annual support for a UMass Boston gerontology graduate student whose research aligns with Justice in Aging's priorities and who will train the organization's staff members on data literacy and analysis.

Recent faculty awards include: John Butterworth Jr./Institute for Community Inclusion received \$499,702 from the Maryland Dept. of Health & Mental Hygiene for Employment First Expansion and Employment Data; Darren Kew/Conflict Resolution received \$399,432 from the U.S. Department of Justice for A Community-Based Early Warning and Early Response Mechanism to Prevent and Address Hate in Boston; Anne Douglass/Institute for Early Education Leadership and Innovation received \$350,000 from the MA Department of Early Education and Care for Metro Boston Professional Development Centers; Lauren Bowen/English received \$223,987 from Davis

Educational Foundation for Improving Writing Instruction Across Disciplines through the University WAC Program.

We continue to serve residents of Greater Boston communities and communities throughout the Commonwealth, fulfilling our mission of access to diverse populations. Many of our undergraduates are from Massachusetts (84%).

A majority of UMass Boston students are non-white, a majority are first-generation college students, and a majority are immigrants or children of immigrants who speak languages other than English at home or with families. Our students are also very diverse in age and national origin. In keeping with UMass Boston's strategic goal of global engagement, more than 10% of the students are international.

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

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

STUDENT SUCCESS AND SATISFACTION

Diversity and Positive Climate

UMass Boston serves a vital function in the region as the only public research university in Boston. The campus is well known for the diversity of its student population, which exceeds the population diversity of the region. With more than 7600 undergraduates who identify as ALANA (Asian, Latinx, African American / Black, or Native American). UMass Boston has the most diverse undergraduate student population of any public four-year university in New England. In Fall 2023, 58 percent of our U.S. domestic undergraduate students identified as ALANA.

The one-year retention rates for first-year students have remained comparable to our peers over the past five years, 73 % for full-time undergraduates who entered Fall 2022 and 78% for full-time transfer students. The six-year graduation rate for the first-time, full-time cohort that started in Fall 2017 reached an all-time high of 51%. The four-year graduation rate for undergraduates who transferred to UMB in Fall 2019 was 72%.

HEADLINES

STUDENT SUCCESS AND SATISFACTION

In February 2022, UMass Boston received its fifth grant, totaling \$9.5 million, as an Asian American and Native American Pacific Islander-Serving Institution (AANAPISI). This grant will facilitate collaborations with Bunker Hill Community College (BHCC) to implement a culturally sustaining transfer pathway. These grants strengthen UMass Boston's capacity as the only AANAPISI-designated research university in New England and one of a handful in the country—a status held by the university since 2008. Since 2010 UMass Boston has received five five-year and four one-year AANAPISI grants to develop, pilot, institutionalize, and disseminate a wide range of activities to increase college access, retention, and graduation for low-income, first-generation Asian American students, who comprise 14 percent of the student body. The aim is to increase the academic performance and retention, persistence and graduation rates of high-need, low-income, first-generation Asian American students; develop capacity of faculty to meet the needs of students; and align the university's research efforts to contribute to this effort.

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

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

SERVICE TO THE COMMONWEALTH

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

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

Enrollments continue to grow steadily in Science, Technology, Engineering, and Mathematics (STEM), with roughly 5000 students in these disciplines in Fall 2023 and a third of undergraduate students pursuing a STEM discipline. In the last ten years, STEM degrees and certificates increased from 15% of degrees to 19%, while the total number of STEM degrees conferred grew by 50%.

With \$1 million in federal community project funding secured by Congressman Stephen Lynch in spring 2024, UMass Boston will create an Offshore Workforce Development Center. The center is an innovative way to educate and train students in emerging career fields related to renewable energy development, which is critically important to fighting climate change. The funding will help UMass Boston engage and prepare the next generation to meet the demand for talent in the offshore wind industry, venture further into STEM education, and develop a pipeline of workforce-ready people who will power the regional economy in emerging fields.

In spring 2023, UMass Boston announced the creation of The Paul English Applied Artificial Intelligence (A.I.) Institute, the nation's first university-based institute dedicated to optimizing and democratizing the use of A.I. tools across a

HEADLINES

SERVICE TO THE COMMONWEALTH

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

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

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

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

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

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

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

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

FINANCIAL HEALTH

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

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

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

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

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

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

HEADLINES

FINANCIAL HEALTH

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

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

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

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

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

AT-A-GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	3.50	• Technology-Enhanced Classrooms	272
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	55%
<i>Arithmetic Mean</i>	1185	• Faculty FTE	855
<i>25th – 75th Percentile</i>	1090-1290	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	3.05	<i>Percent Faculty-of-Color</i>	35%
• Student-Faculty Ratio	15:1	<i>Percent Women Faculty</i>	52%

ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	84%	• Percent In-State Pell Grant Recipients	47%
• Percent Undergraduates who are Students of Color	65%	• Percent of Need Met for In-State Students Awarded Need-Based Aid	82%
• Percent Undergraduates who are International	7%	• Average Debt of Students (UG Graduating Class)	\$27,371
• Percent First-Time Undergraduates who are First Generation in College	58%	• Percent Graduating Class with Debt (UG)	65%
• Percent First-Time Undergraduates with English as a Second Language	59%	• Total Students who Participated in a Study Abroad Program	147
• Percent Undergraduates Who Are Of Transfer Origin	35%	• Online Course Registrations	22,026
• Number of First-degree Bachelor-seeking Students Aged 25+	1,878	Percentage of degree-seeking students taking at least one online course who were full time and fully online.	10%
• Dual Enrolled Students (Headcount)	107		

STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	73%	• Transfer (Full-time) One-Year Retention Rate	78%
• Freshmen Four-Year Graduation Rate	31%	• Transfer (Upper Division) Four-Year Graduation Rate	72%
• Freshmen Six-Year Graduation Rate	51%	• Student Satisfaction With Educational Experience	76%
• Freshmen Twelve-Semester Graduation Rate	58%	• Alumni Participation Rate	4%

AT-A-GLANCE

SERVICE TO THE COMMONWEALTH

• Degree Completions	3,363	• Degrees Awarded in STEM Fields	696
<i>Bachelor's</i>	2389	<i>Undergraduate</i>	528
<i>Master's</i>	863	<i>Graduate</i>	168
<i>Doctorates</i>	111	• Certificates Awarded in STEM Fields	0
• Patent Applications	1	• Degrees Awarded in Healthcare Fields	656
• Total R&D Expenditures	\$71M	<i>Undergraduate</i>	519
• Total R&D Expenditures Ranking	190	<i>Graduate</i>	137
Total R&D Expenditures Ranking among		• Certificates Awarded in Healthcare	
• Carnegie Peers, US Publics, Non-Medical	19	Fields	33
• Total R&D Expenditures per Tenure	\$151,987	• License Income	\$4,233
• System Faculty		• Percent Alumni who Remain in MA	60%

FINANCIAL HEALTH

• Total Endowment	\$147.5M	• Total Cash & Investments to Expenses	0.61
• Annual Growth in Endowment	16.6%	• Debt Service Burden	6.6%
• Endowment per Annualized Student FTE	\$11,479	• Operating Margin (%)	2.9%
• Private Funds Raised Annually	\$37.4M		

ACADEMIC QUALITY

AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

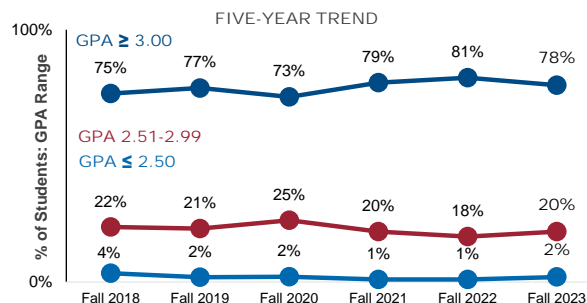
3.50

Average HS
GPA
in Fall 2023

▲ 0.02

One-year
nominal change
(vs. Fall 2022)

▲ 0.16

Five-year
nominal change
(vs. Fall 2018)

SAT SCORES OF FRESHMEN

1290

SAT Scores of Freshmen
75th Percentile
in Fall 2023

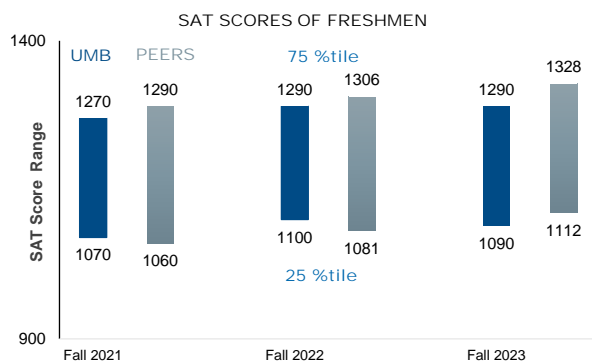
• 0

One-year
nominal change
(vs. Fall 2022)

1090

SAT Scores of Freshmen
25th Percentile
in Fall 2023

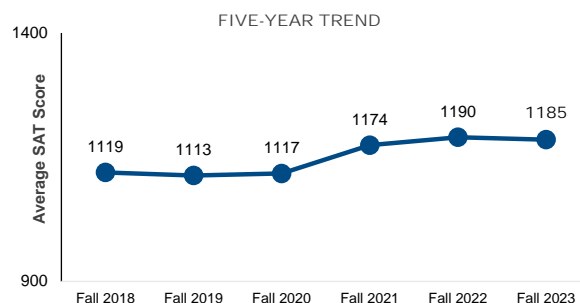
▼ 10

One-year
nominal change
(vs. Fall 2022)

1185

Average SAT Scores
of Freshmen
in Fall 2023

▼ 5

One-year
nominal change
(vs. Fall 2022)

ACADEMIC QUALITY

AVERAGE GPA OF ENTERING TRANSFER STUDENTS

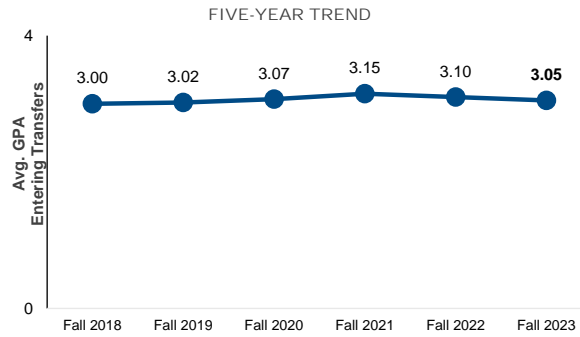
3.05

Average transfer
GPA
in Fall 2023

▼ 0.05

One-year
nominal change
(vs. Fall 2022)

▲ 0.05

Five-year
nominal change
(vs. Fall 2018)

STUDENT-FACULTY RATIO

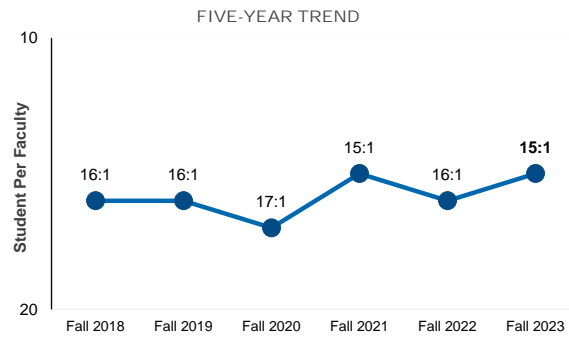
15:1

Student-Faculty
Ratio
in Fall 2023

▲ 1

One-year
nominal change
(vs. Fall 2022)

▲ 1

Five-year
nominal change
(vs. Fall 2018)

TECHNOLOGY-ENHANCED CLASSROOMS

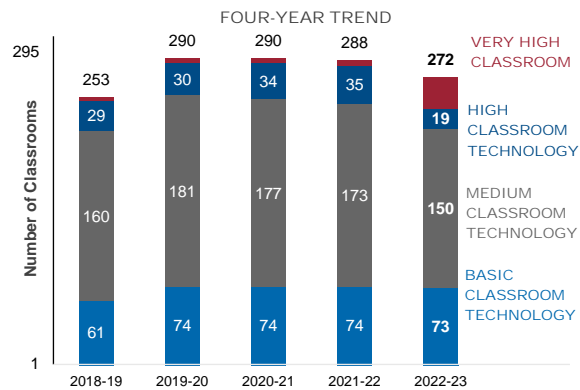
272

Total Technology
Enhanced Classrooms
in 2022-23

▼ 6%

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

▲ 8%

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

ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

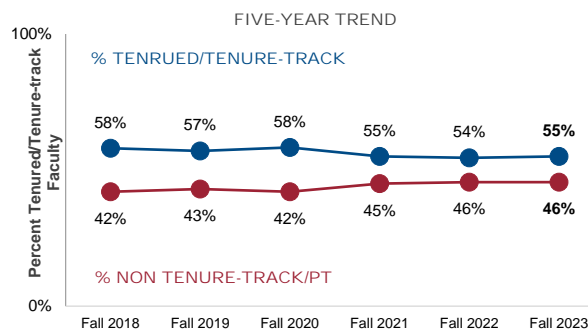
55%

Percent Tenured/
Tenure-track Faculty
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▼ 3

Five-year
% point change
(vs. Fall 2018)

FACULTY FTE

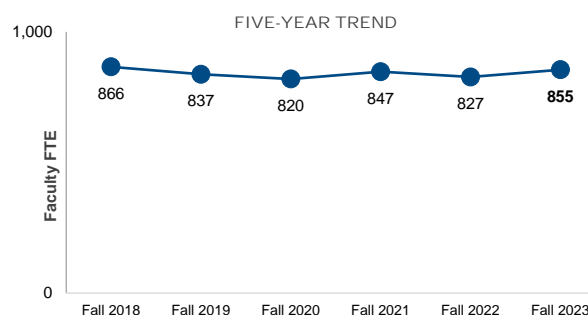
855

Faculty FTE
in Fall 2023

▲ 3%

One-year
% change
(vs. Fall 2022)

▼ 1%

Five-year
% change
(vs. Fall 2018)

FACULTY-OF-COLOR

245

Faculty Of Color
in Fall 2023

▲ 39

One-year
nominal change
(vs. Fall 2022)

▲ 47

Five-year
nominal change
(vs. Fall 2018)

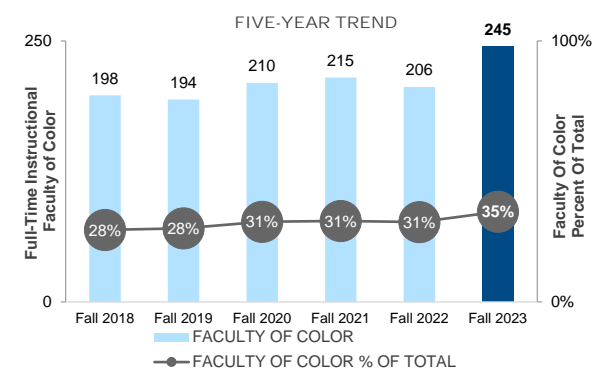
35%

Percent of
Faculty Of Color
in Fall 2023

▲ 4

One-year
% point
(vs. Fall 2022)

▲ 7

Five-year
% point
(vs. Fall 2018)

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

ACADEMIC QUALITY

WOMEN FACULTY

366

Women Faculty
in Fall 2023

▲ 15

One-year
nominal change
(vs. Fall 2022)

▼ 5

Five-year
nominal change
(vs. Fall 2018)

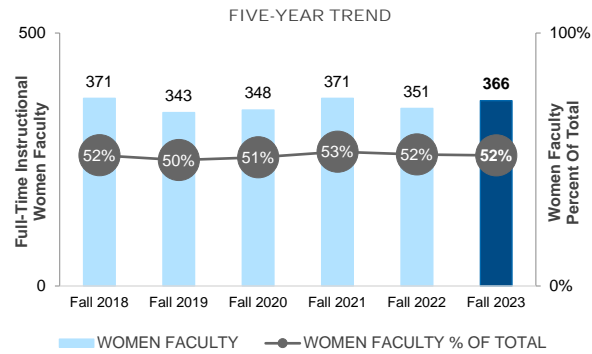
52%

Percent of
Women Faculty
in Fall 2023

● 0

One-year
nominal change
(vs. Fall 2022)

● 0

Five-year
nominal change
(vs. Fall 2018)

Source : The Top American Research Universities

ACCESS AND AFFORDABILITY

UNDERGRADUATES FROM MASSACHUSETTS

10,303

Undergraduates from
Massachusetts
in Fall 2023

▼ 2%

One-year
% change
(vs. Fall 2022)

▼ 5%

Five-year
% change
(vs. Fall 2018)

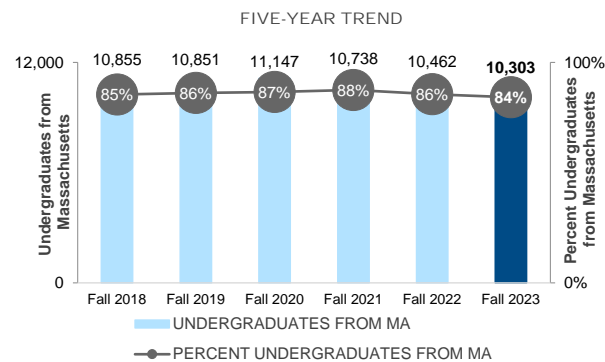
84%

% Undergraduates
from Massachusetts
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

● 0

Five-year
% point change
(vs. Fall 2018)

UNDERGRADUATE STUDENTS OF COLOR

6,933

Undergraduates
Students of Color
in Fall 2023

▲ 2%

One-year
% change
(vs. Fall 2022)

▲ 10%

Five-year
% change
(vs. Fall 2018)

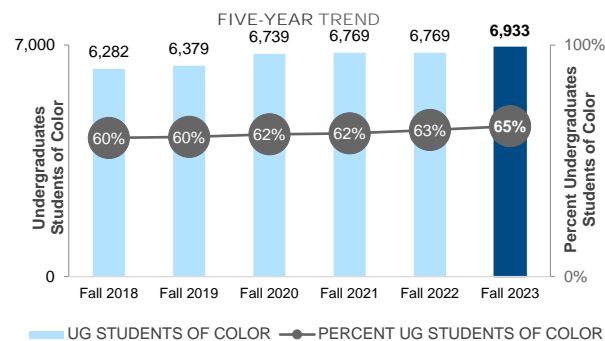
65%

% Undergraduates
Students of Color
in Fall 2023

▲ 2

One-year
% point change
(vs. Fall 2022)

▲ 5

Five-year
% point change
(vs. Fall 2018)

ACCESS AND AFFORDABILITY

UNDERGRADUATES WHO ARE INTERNATIONAL

844

International UG
Enrollment
in Fall 2023

▲ 8%

One-year
% change
(vs. Fall 2022)

▼ 39%

Five-year
% change
(vs. Fall 2018)

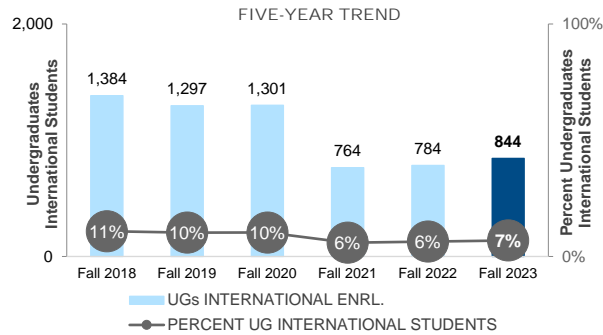
7%

% International UG
Enrollment
in Fall 2023

▲ 1

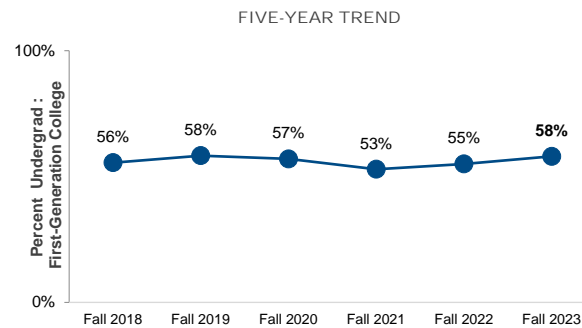
One-year
% point change
(vs. Fall 2022)

▼ 4

Five-year
% point change
(vs. Fall 2018)

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

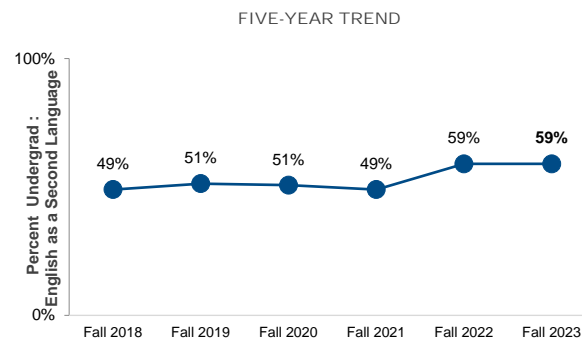
58%

Percent first-time
Undergraduates
who are First-Generation
College in Fall 2023

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

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

59%

Percent Undergraduates
Speak English as a
Second Language
in Fall 2023

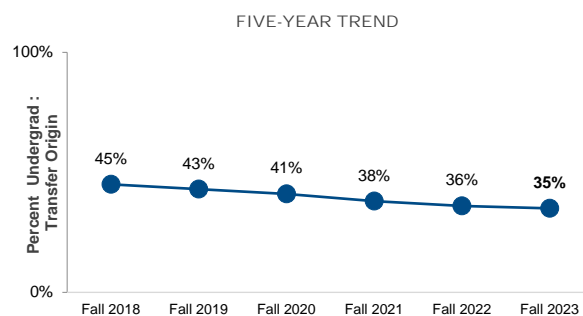
*The data source from Fall 2018 updated
to Common Application responses.

ACCESS AND AFFORDABILITY

PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

35%

Percent Undergraduates
who are of Transfer-Origin
in Fall 2023



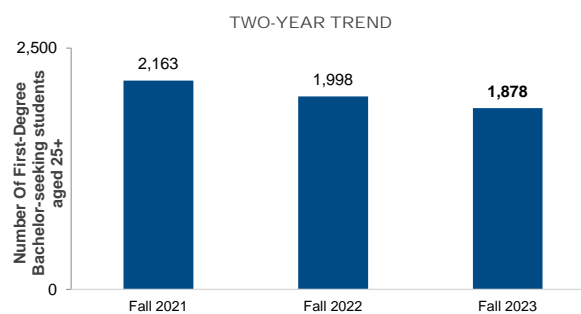
NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

1,878

Number of First-Degree
Bachelor-Seeking
Students Aged 25+
in Fall 2023

▼ 120

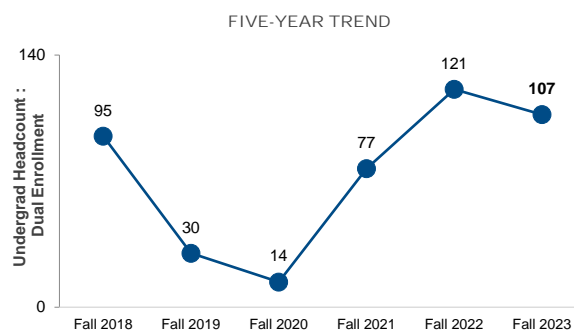
One-year
nominal change
vs. Fall 2022



DUAL ENROLLMENT STUDENTS (HEADCOUNT)

107

Dual Enrolled
Students
in Fall 2023



ACCESS AND AFFORDABILITY

PERCENT IN-STATE PELL GRANT RECIPIENTS

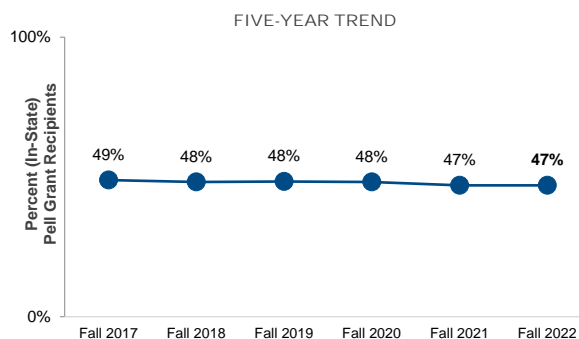
47%

Percent (In-State)
Pell Grant Recipients
in Fall 2022

• 0

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

▼ 2

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

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

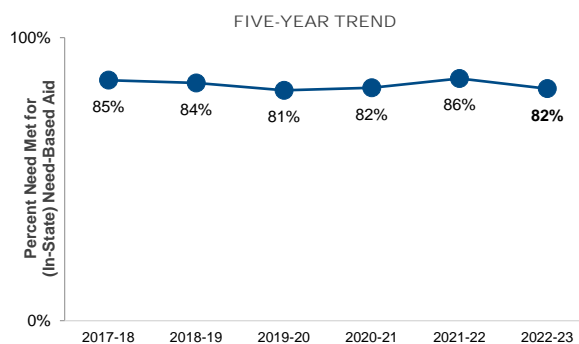
82%

Percent Need Met for
(In-State) Need-Based
Aid in 2022-23

▼ 4

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

▼ 3

Five-year
% point change
(vs. 2017-18)

UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

\$27.4k

Average Debt Load
in 2023

▲ 1%

One-year
% change
(vs. 2022)

▲ 8%

Five-year
% change
(vs. 2018)

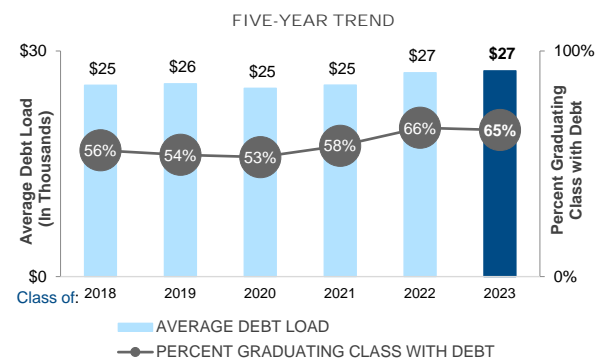
65%

Percent Graduating
Class with Debt
in 2023

▼ 1

One-year
% point change
(vs. 2022)

▲ 9

Five-year
% point change
(vs. 2018)

ACCESS AND AFFORDABILITY

TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

147

Students who participated
in Study Abroad
in Fall 2022-Smr.23

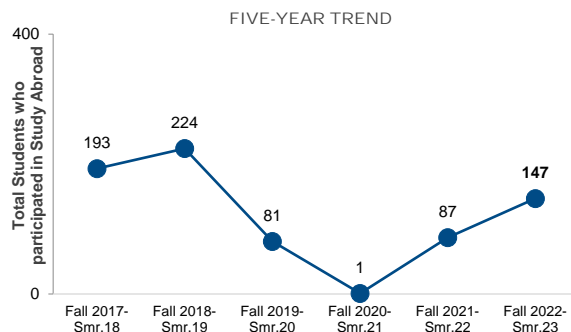
*Fall 2020 - Smr. 21
decreased due
to pandemic.

▲ 60

One-year
nominal change
vs. Fall 2021-Smr.22

▼ 46

Five-year
nominal change
vs Fall 2017-Smr.18



TOTAL ONLINE COURSE REGISTRATIONS

22,026

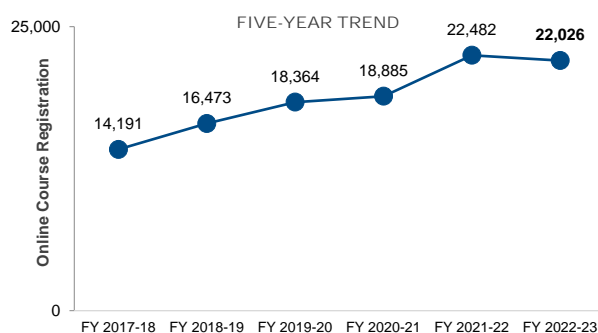
Online Course
Registrations
in FY 2022-23

▼ 2%

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

▲ 55%

Five-year
% change
(vs. FY 2017-18)

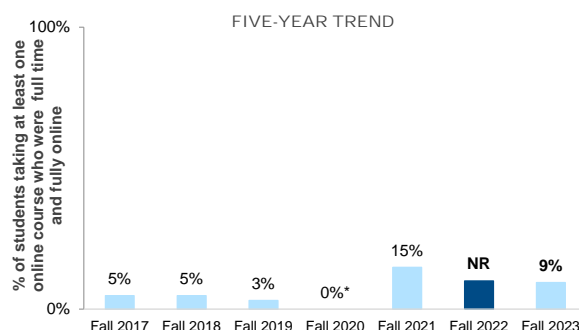


PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

10%

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

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



STUDENT SUCCESS AND SATISFACTION

FRESHMEN ONE-YEAR RETENTION RATE

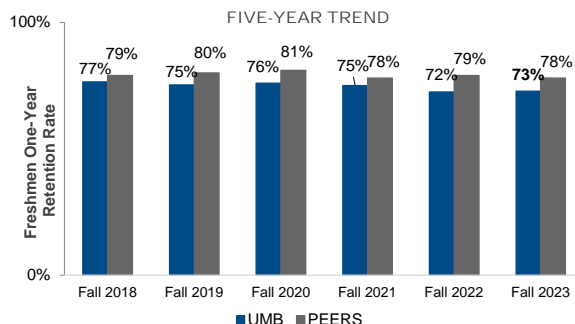
73%

Freshmen One-Year
Retention Rate
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▼ 4

Five-year
point
(vs. Fall 2018)

*Peer data for Fall 2023 not available for reporting purposes.

FRESHMEN FOUR-YEAR GRADUATION RATES

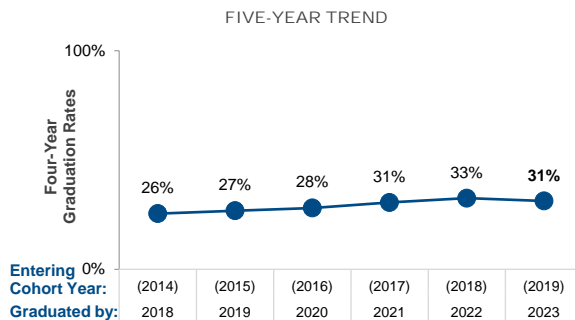
31%

Freshmen Four-Year
Graduation Rates
in 2023

▼ 2

One-year
% point change
(vs. 2022)

▲ 5

Five-year
% point change
(vs. 2018)

FRESHMEN SIX-YEAR GRADUATION RATE

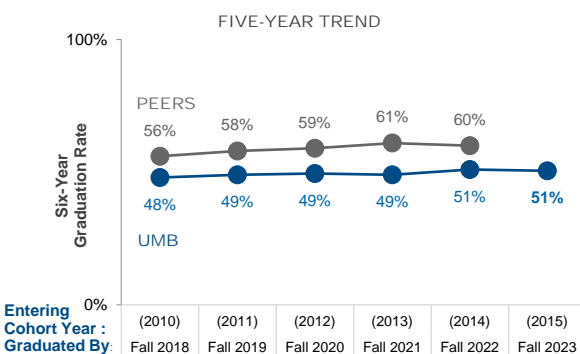
51%

UMB Freshmen Six-Year
Graduation Rates
in Fall 2023

● 0

One-year
% point change
(vs. Fall 2022)

▲ 3

Five-year
% point change
(vs. Fall 2018)

STUDENT SUCCESS AND SATISFACTION

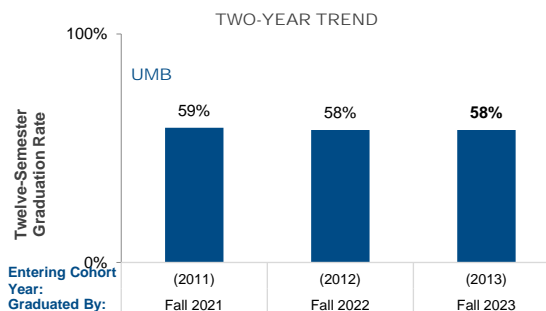
FRESHMEN TWELVE-SEMESTER GRADUATION RATE

58%

UMB Freshmen
Twelve-semester
Graduation Rates
in Fall 2023

• 0

One-year
% point change
(vs. Fall 2022)



TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

78%

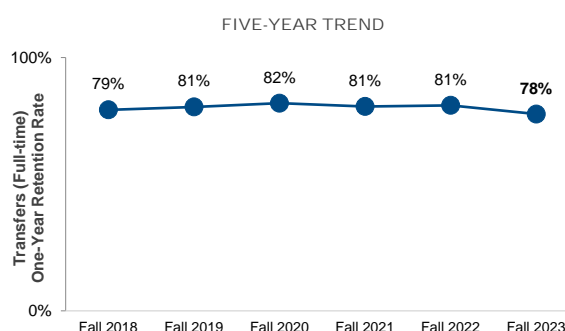
Transfers (Full-time)
One-Year
Retention Rate
in Fall 2023

▼ 3

One-year
% point change
(vs. Fall 2022)

▼ 1

Five-year
% point change
(vs. Fall 2018)



TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

72%

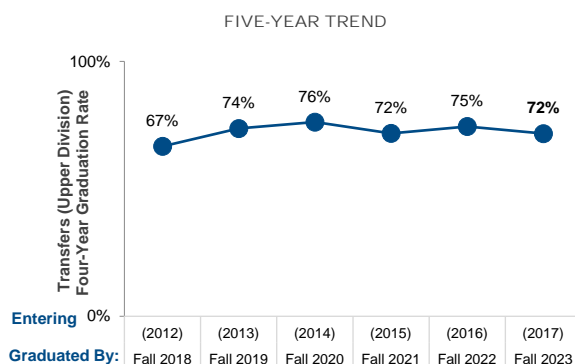
Transfers (Upper
Division) Four-Year
Graduation Rates
in Fall 2023

▼ 3

One-year
% point change
(vs. Fall 2022)

▲ 5

Five-year
% point change
(vs. Fall 2018)



STUDENT SUCCESS AND SATISFACTION

STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2017-18

45%

Bachelor's Degree
Within 4 Yrs. from
any institution

61%

Bachelor's Degree
Within 5 Yrs. From
any institution

64%

Bachelor's Degree
Within 6 Yrs. From
any institution

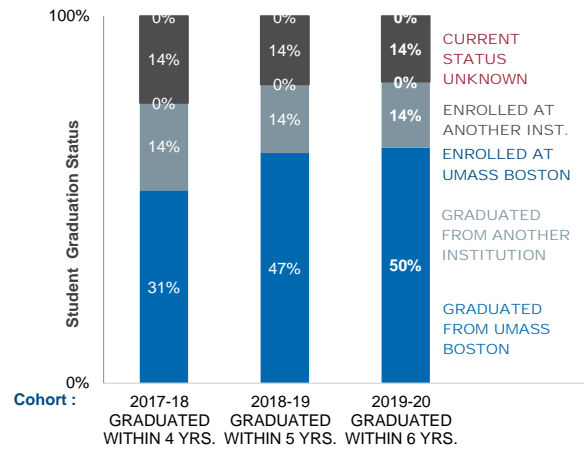
31%

Bachelor's Degree
Within 4 Yrs. from
UMass Boston

47%

Bachelor's Degree
Within 5 Yrs. From
UMass Boston

50%

Bachelor's Degree
Within 6 Yrs. From
UMass Boston

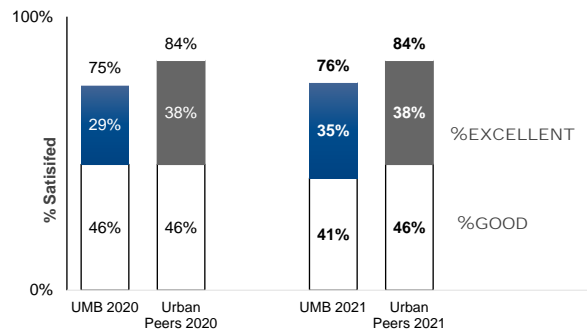
Source : Student Achievement Measure (SAM)

STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

76%

Student Satisfaction
as Good or Excellent
in UMB 2021

▲ 1

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

ALUMNI PARTICIPATION RATE

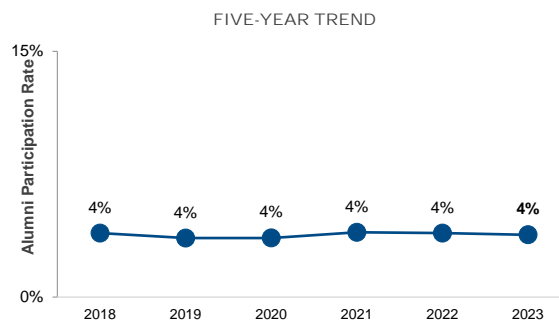
4%

Alumni Participation
Rate
in 2023

● 0

One-year
% point change
(vs. 2022)

● 0

Five-year
% point change
(vs. 2018)

SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

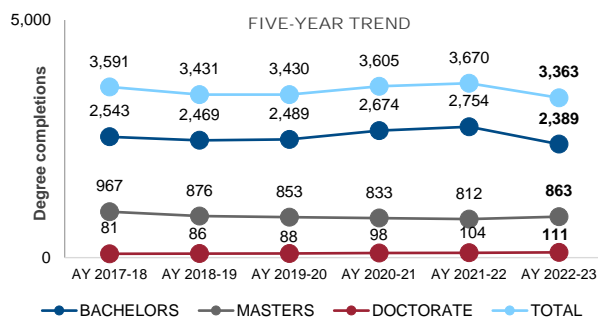
3,363

Total degree
completions
AY 2022-23

▼ 8%

One-year
% change
in total degree
completions
(vs. AY 2021-22)

▼ 6%

Five-year
% change
in total degree
completions
(vs. AY 2017-18)

NUMBER OF PATENT APPLICATIONS

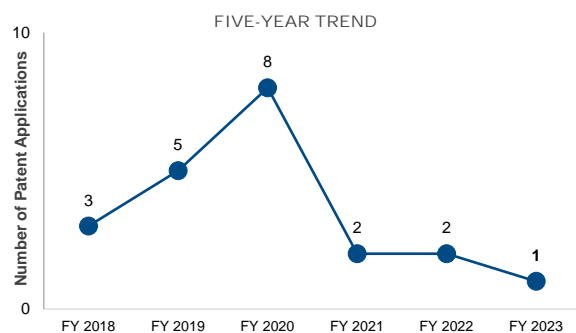
1

Patent
Applications
in FY 2023

▼ 1

One-year
nominal change
(vs. FY 2022)

▼ 2

Five-year
nominal change
(vs. FY 2018)

TOTAL R&D EXPENDITURES

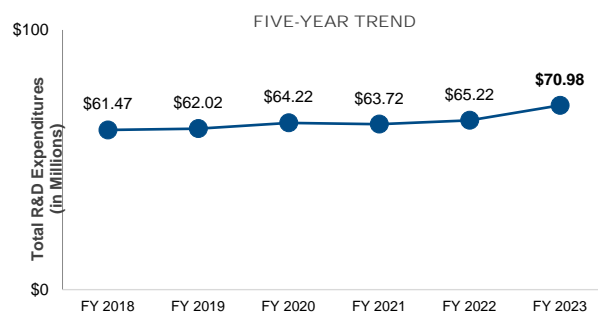
\$71.0

Total R&D (Millions)
in FY 2023

▲ 9%

One-year
% change
(vs. FY 2022)

▲ 15%

Five-year
% change
(vs. FY 2018)

SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES RANKINGS

190

Total R&D Expenditures
Overall Rankings
in FY 2022

▼ 3

One-year
nominal change
(vs. FY 2021)

▼ 18

Five-year
nominal change
(vs. FY 2017)

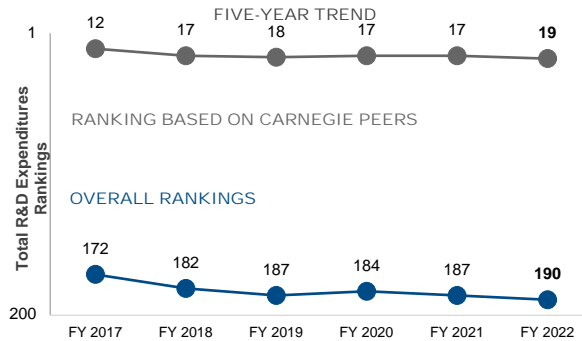
19

Rankings based on
Carnegie Peers
in FY 2022

▼ 2

One-year
nominal change
(vs. FY 2021)

▼ 7

Five-year
nominal change
(vs. FY 2017)

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

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

TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

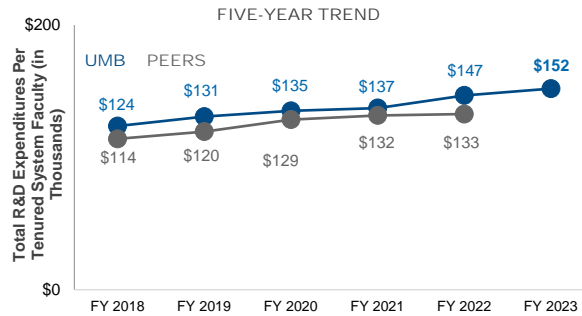
\$152k

Total R&D Expenditure
Per Tenured
System Faculty
in FY 2023

▲ 3%

One-year
% change
(vs. FY 2022)

▲ 23%

Five-year
% change
(vs. FY 2018)

*Peer data for FY 2023 is currently not available.

DEGREES AWARDED IN STEM FIELDS

528

UG degrees awarded
in STEM fields
in 2022-23

▼ 7%

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

▲ 9%

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

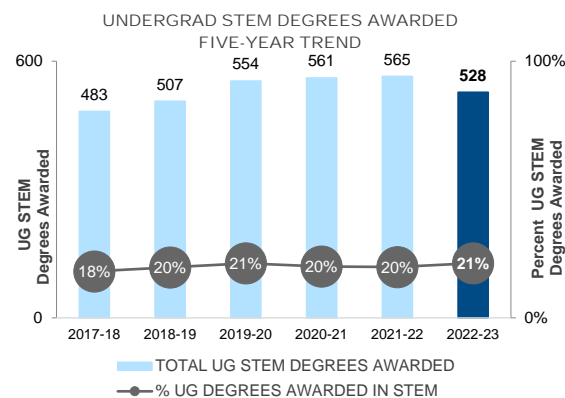
21%

Percent of total UG
degrees awarded in
STEM fields
in 2022-23

▲ 1

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

▲ 3

Five-year
% point change
(vs. 2017-18)

SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN STEM FIELDS

168

Grad degrees awarded
in STEM fields
in 2022-23

▲ 65%

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

▲ 24%

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

18%

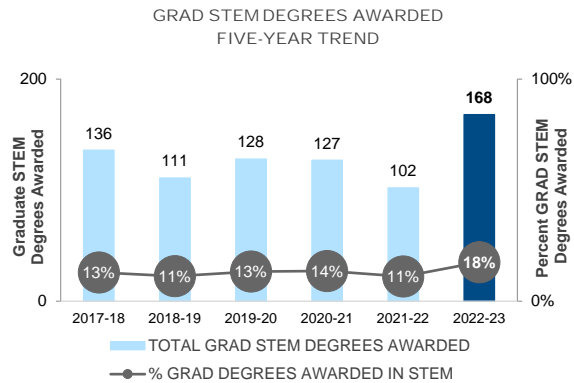
Percent of total Grad
degrees awarded in
STEM fields
in 2022-23

▲ 6.4

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

▲ 5

Five-year
% point change
(vs. 2017-18)



696

Total degrees awarded
in STEM fields
in 2022-23

▲ 4%

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

▲ 12%

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

20%

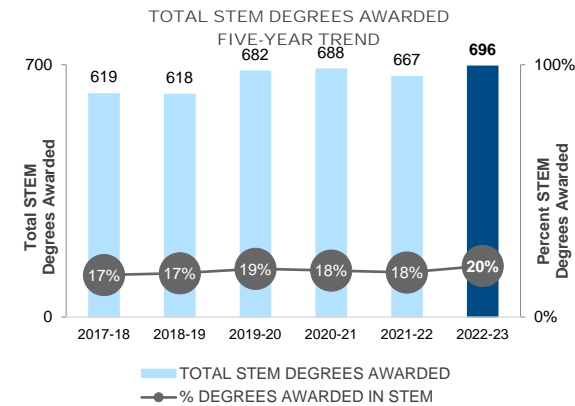
Percent of Total
degrees awarded in
STEM fields
in 2022-23

▲ 2.6

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

▲ 4

Five-year
% point change
(vs. 2017-18)



CERTIFICATES AWARDED IN STEM FIELDS

0

Total Certificates awarded
in STEM fields
in 2022-23

▼ 1

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

. 0

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

0%

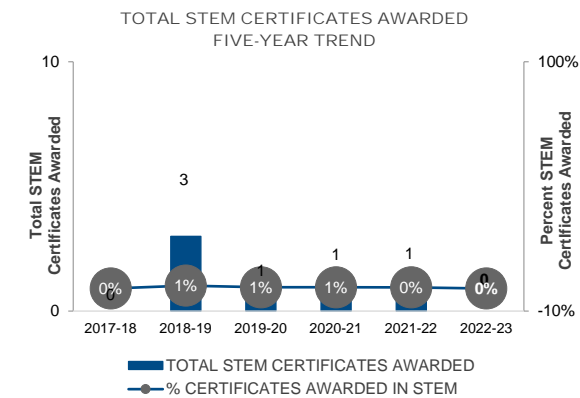
Percent of Total
Certificates awarded in
STEM fields
in 2022-23

. 0

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

. 0

Five-year
% point change
(vs. 2017-18)



SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN HEALTHCARE FIELDS

656

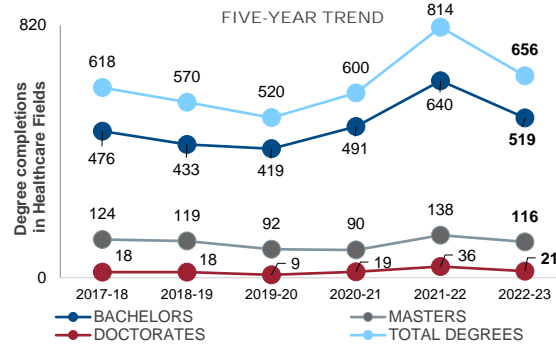
Total degrees awarded
in HealthCare fields
in 2022-23

▼ 19%

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

▲ 6%

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



CERTIFICATES AWARDED IN HEALTHCARE FIELDS

33

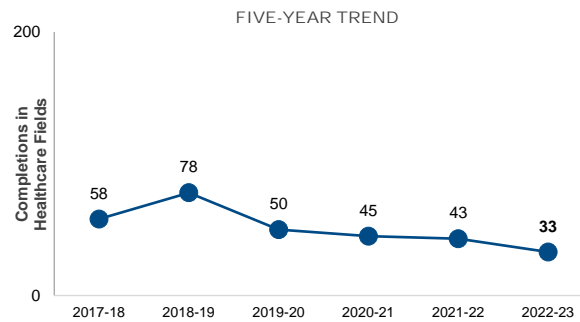
Total Certificates awarded
in HealthCare fields
in 2022-23

▼ 23%

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

▼ 43%

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



LICENSE INCOME

\$4,233

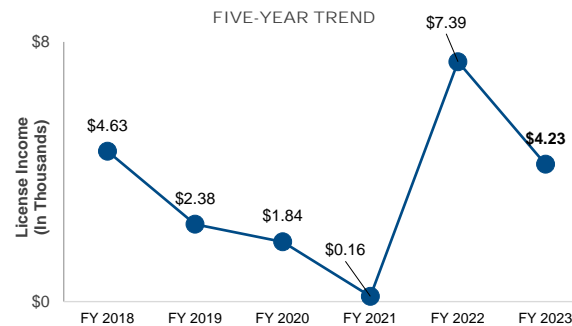
License Income
in FY 2023

▼ 43%

One-year
% change
(vs. FY 2022)

▼ 9%

Five-year
% change
(vs. FY 2018)



SERVICE TO THE COMMONWEALTH

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

60%

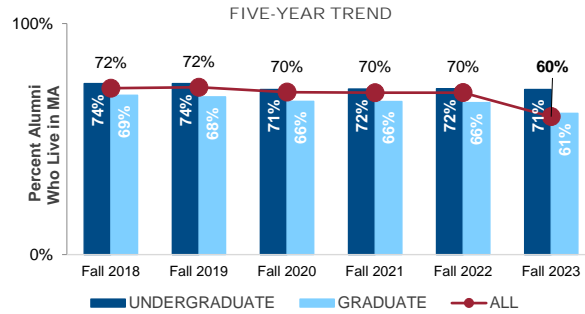
Of all UMass Alumni
live in the Commonwealth
in Fall 2023

▼ 10

One-year
% point change
(vs. Fall 2022)

▼ 12

Five-year
% point change
(vs. Fall 2018)



ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

\$147.5M

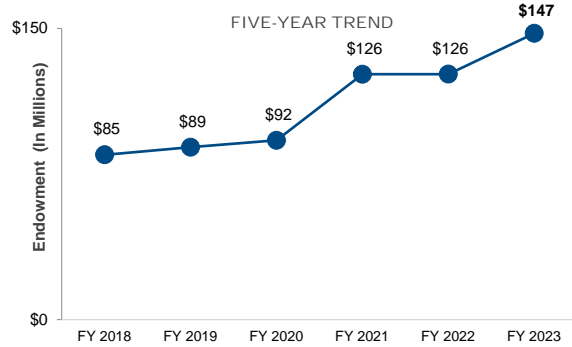
Endowment Assets
in FY 2023

▲ 17%

One-year
% change
(vs. FY 2022)

▲ 74%

Five-year
% change
(vs. FY 2018)



ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

17%

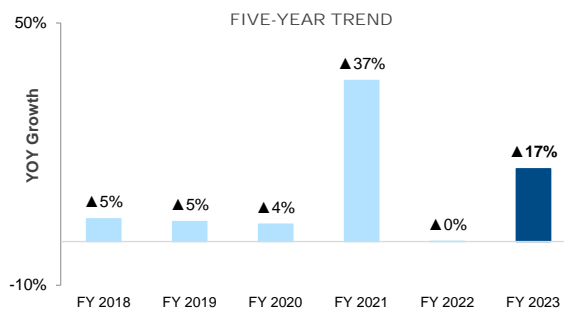
Annual Growth
in FY 2023

▲ 17

One-year
% point change
(vs. FY 2022)

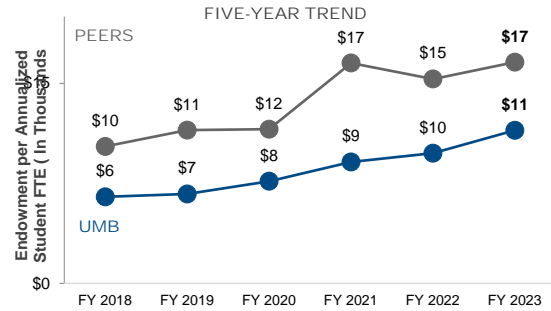
▲ 12

Five-year
% point change
(vs. FY 2018)

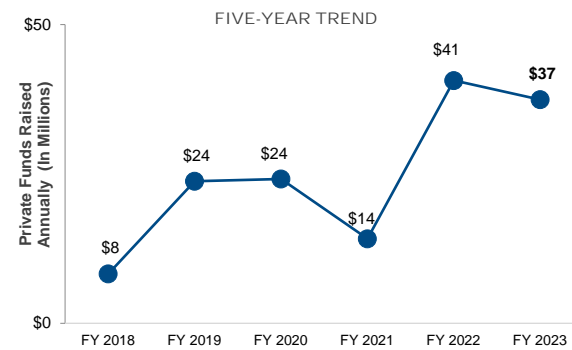


FINANCIAL HEALTH

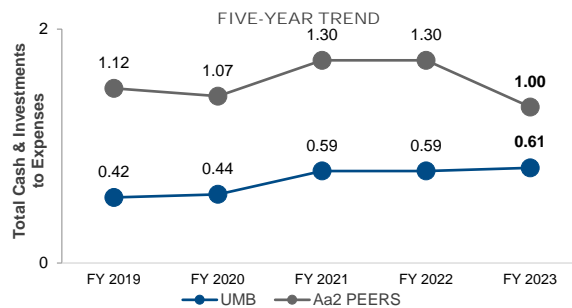
ENDOWMENT PER ANNUALIZED STUDENT FTE

\$11.5kEndowment per Annualized
Student FTE
in FY 2023**▲ 18%**One-year
% change
(vs. FY 2022)**▲ 77%**Five-year
% change
(vs. FY 2018)

PRIVATE FUNDS RAISED ANNUALLY

\$37.4MPrivate Funds
Raised Annually
in FY 2023**▼ 8%**One-year
% change
(vs. FY 2022)**▲ 353%**Five-year
% change
(vs. FY 2018)

TOTAL CASH & INVESTMENTS TO EXPENSES

0.61Total Cash &
Investments to Expenses
in FY 2023

FINANCIAL HEALTH

DEBT SERVICE BURDEN

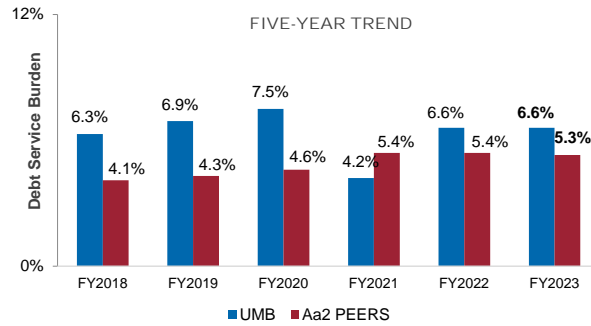
6.6%

Debt Service
Burden
in FY2023

• 0.0

One-year
% Point change
(vs. FY2022)

▲ 0.3

Five-year
% Point change
(vs. FY2018)

OPERATING MARGIN (%)

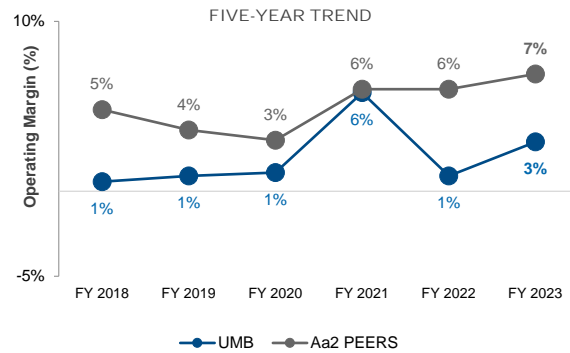
2.9%

Operating Margin (%)
in FY 2023

▲ 2.0

One-year
% Point change
(vs. FY 2022)

▲ 2.0

Five-year
% Point change
(vs. FY 2019)

DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Average High School GPA of First-Time Freshmen. Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

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

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

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

Technology-Enhanced Classrooms.

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

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

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

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

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

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

STUDENT SUCCESS AND SATISFACTION INDICATORS

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

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

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

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

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

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

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

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

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

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

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

DEFINITIONS AND SOURCES

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

Percent Alumni who Live in Massachusetts. Percentage of total alumni who currently reside in Massachusetts based on alumni records.

FINANCIAL HEALTH INDICATORS

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

PEER INSTITUTIONS FOR UMASS BOSTON

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

Moody's Aa2 Peers	University of California, CA
Alamo Community College District, TX	University of Florida, FL
Arizona State University, AZ	University of Georgia, GA
Auburn University, AL	University of Hawaii, HI
Board of Regents of The University System of Georgia, GA	University of Houston System, TX
California State University, CA	University of Kansas, KS
City University of New York, NY	University of Kentucky, KY
Clemson University, SC	University of Massachusetts, MA
Cuyahoga Community College District, OH	University of North Texas System, TX
Florida State University, FL	University of Oregon, OR
Houston Community College System, TX	University of South Carolina, SC
Iowa State University of Science & Technology, IA	University of Wyoming, WY
Michigan State University, MI	
Mississippi Institutions of Higher Learning, MS	
Nevada System of Higher Education, NV	
State University of New York, NY	
State University System of Florida, FL	
Texas State University System, TX	
University of Alabama at Birmingham, AL	
University of Alabama, AL	
University of Arizona, AZ	
University of Arkansas, AR	

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



DARTMOUTH

HEADLINES

ACADEMIC QUALITY

The University of Massachusetts Dartmouth is a vibrant, national public research university actively engaged in personalized teaching and innovative research and promoting regional economic, social, and cultural development. UMass Dartmouth offers a world-class education to more than 7,500 undergraduate and graduate students annually in nearly 60 undergraduate and 50 graduate (MS & PhD) programs.

Ranked in the top 10 public "R2" universities with fewer than 10,000 students, UMass Dartmouth's reputation as a top research institution and educational destination of choice is growing. Since its inclusion in *US News & World Report's* National Universities rankings in 2013, UMass Dartmouth has maintained a strong position among academic program rankings.

The University continued its [climb in the annual US News & World Report rankings in 2024](#), becoming the 3rd highest-ranked public National University in Massachusetts. Notably, the Charlton College of Business (CCB) ranked 135 in the country for Top Business Programs (a 60-spot rise since 2020), and the [online bachelor's in business programs moved into the top 5%](#) of US programs. UMass Dartmouth's online MBA program also ranks in the top third among programs nationwide by *US News & World Report*, and Best Value Schools ranked UMass Dartmouth's master's in data science program #7 in the United States.

The College of Nursing & Health Sciences moved up 41 spots to 52 among Undergraduate Nursing Programs and ranks in the top 8% of nursing schools nationwide for its Bachelor of Science in Nursing (BSN) Program. The College of Engineering ranked 150 among the Best Undergraduate Engineering Programs out of 208 universities (Offering Doctorates). UMass Dartmouth is also home to the only public law school in the Commonwealth.

UMass Dartmouth's accredited, nationally ranked academic programs combine hands-on learning with individualized attention, creating endless opportunities for students to customize their education. Mentored by distinguished faculty, UMass Dartmouth students tackle real-world problems and conduct research in critical areas like climate change mitigation, understanding diseases, machine learning and artificial

intelligence, mental health in vulnerable communities, legal advocacy, and more.

Student Academic Quality. In Fall 2023, the law school continued its strong upward trajectory, with an entering class among the most academically qualified in its history, as measured by median LSAT (Law School Admission Test) score and undergraduate GPA.

Research Activity. UMass Dartmouth is one of only 93 public universities in the country that achieved the Carnegie R2 designation for high research activity. As the only Massachusetts national research university south of Boston, it is a key driver of the innovation economy in marine science and technology industries along the SouthCoast of Massachusetts. The University boasts a dedicated faculty of accomplished scholars and professionals in their respective fields. Their research focuses on key areas of marine science and technology, high-performance computing, renewable energy, life sciences, fisheries and coastal sustainability, cybersecurity, and more.

During FY23, UMassD's research portfolio exceeded \$97M, with new awards growing by 83% from FY19 and research expenditures growing by 70% from FY19. Most funding is from national competitive sources such as the National Science Foundation, the National Institutes of Health, and the Department of Defense.

As a key driver of New England's blue economy, UMass Dartmouth has secured more than \$20M from the Office of Naval Research for marine and undersea technology research. UMass Dartmouth was the lead Massachusetts partner in the federal government-designated Ocean Tech Hub of Southeastern New England and is also a partner in the new Academic Center for the Reliability and Resilience of Offshore Wind and NASA's Laser Interferometer Space Antenna (LISA) mission.

HEADLINES

ACADEMIC QUALITY

The University also belongs to an \$11.9M initiative to enhance offshore wind energy reliability nationwide. The Cybersecurity Center,

recognized by the NSA and Department of Homeland Security, spearheads efforts in cyber defense.

ACCESS AND AFFORDABILITY

UMass Dartmouth has remained committed to promoting access and affordability by offering competitive tuition rates, a range of financial aid options, including scholarships and grants, and exploring affordability initiatives to make it easier for students to pursue their academic goals while managing their financial obligations and graduating college with minimal debt. In 2023, the University met 84% of the financial need for in-state students.

A growing number of top local high school students are making UMass Dartmouth their destination of choice for college. As such, enrollment in the Honors College has increased by 32% in three years. Among them are the next two Founders' Scholars, who received a four-year "full ride" scholarship.

Maintaining a commitment to social mobility in the SouthCoast and beyond, the University has enrolled nearly 200 students from Brockton, Fall River, New Bedford, and Taunton in the early college program through the Commonwealth Collegiate Academy. This program allows high school juniors and seniors to receive free college credit.

More than half (56%) of students in the University's recent entering Class are the first in their families to attend college; 37% of in-state students are Pell Grant recipients. In its 2024 rankings, US News & World Report ranked UMass Dartmouth 78th among national universities. The University ranked fourth in New England and Massachusetts for social mobility.

STUDENT SUCCESS AND SATISFACTION

UMass Dartmouth celebrates its unique and diverse student body, which encompasses various backgrounds, perspectives, and experiences, with students from various cultural and socioeconomic backgrounds. 87% of UMass Dartmouth undergraduate students are from Massachusetts, 42% of undergraduates are students of color, and 11% of first-time undergraduates identify English as their second language.

The University has focused on addressing the social, financial, and academic factors influencing student retention and how retention translates into student success. Collaborating with all colleges and schools, the Provost's Office leads targeted efforts to improve first-to-second-year retention and student success more broadly. Student Affairs has created vibrant new programs to bolster student engagement and offer students the support services they need to be successful.

The retention rate for transfer students is currently at its highest in the last decade (85%) with a 76% four-year upper division transfer graduation rate. While UMass Dartmouth has seen decreasing retention rates over the past decade, the strategic focus on retention in recent years is starting to produce positive outcomes, evident in the upward trend of graduation rates.

In critical junctures after graduating, the Class of 2023 excelled, with 96% of nursing students passing the NCLEX, beating the national average of 90% and 80% of UMass Law students passing the Bar on their first try, the 5th highest rate in Massachusetts. Over 90% of undergraduate students in the Class of 2023 found jobs, and 28% were enrolled in graduate or professional school within six months of graduating. UMass Dartmouth students emerge ready to make their mark on the world, with 95% of our graduates employed or pursuing advanced degrees within six months of graduation.

HEADLINES

SERVICE TO THE COMMONWEALTH

In AY2023, UMass Dartmouth graduated 1,771 students, awarding 1,836 degrees and certificates. Because 68% of UMassD graduates remain in Massachusetts, the degrees granted directly and significantly contribute to the Commonwealth's economy.

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

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

UMass Dartmouth goes beyond producing graduates by cultivating engaged citizens who actively contribute to their communities as students through service-learning projects, community service, and pro bono legal work. In 2022 alone, UMassD students performed over 211,000 hours of service to the community. Since 2010, UMass Law students have dedicated over 200,000 pro bono legal services, exemplifying the University's strong commitment to public service and addressing the needs of the Commonwealth.

FINANCIAL HEALTH

UMass Dartmouth continues to explore new ways to grow revenues and make operating and capital investments that enhance the student academic and social experience and ensure that UMass Dartmouth is a good long-term steward of its campus resources. UMass Dartmouth achieves the financial metrics required by the System and partners with the President's Office and the other UMass campuses to support the economic and operating capacity of the University.

The University, in partnership with non-profit Provident, opened a \$140 million, 267,500 sq. ft., 1210-bedroom resident hall and a

state-of-the-art 38,000 sq. ft., 800-seat dining facility in 2020, which enhances the university's ability to attract new students. UMass Dartmouth received \$81M in new funding from the Division of Capital Asset Management and Maintenance (DCAMM) to continue upgrades planned to the campus's main academic facilities, the Liberal Arts & Sciences Building (LARTS). This funding will enhance classrooms, labs, office spaces, and spaces housing vital student support services and common spaces throughout the building.

AT-A-GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	3.30	• Technology-Enhanced Classrooms	142
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	60%
<i>Arithmetic Mean</i>	1140	• Faculty FTE	447
<i>25th – 75th Percentile</i>	1060-1240	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	3.23	<i>Percent Faculty-of-Color</i>	24%
• Student-Faculty Ratio	15:1	<i>Percent Women Faculty</i>	40%

ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	87%	• Percent In-State Pell Grant Recipients	37%
• Percent Undergraduates who are Students of Color	42%	• Percent of Need Met for In-State Students Awarded Need-Based Aid	84%
• Percent Undergraduates who are International	1%	• Average Debt of Students (UG Graduating Class)	\$32,059
• Percent First-Time Undergraduates who are First Generation in College	56%	• Percent Graduating Class with Debt (UG)	80%
• Percent First-time Undergraduates with English as a Second Language	11%	• Total Students who Participated in a Study Abroad Program	66
• Percent Undergraduates Who Are Of Transfer Origin	25%	• Online Course Registrations	12,589
• Number of First-degree Bachelor-seeking Students Aged 25+	9	Percentage of degree-seeking students taking at least one online course who were full time and fully online.	15%
• Dual Enrollment Students (Headcount)	241		

STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	64%	• Transfer (Full-time) One-Year Retention Rate	85%
• Freshmen Four-Year Graduation Rate	34%	• Transfer (Upper Division) Four-Year Graduation Rate	76%
• Freshmen Six-Year Graduation Rate	49%	• Alumni Participation Rate	1%
• Freshmen Twelve-Semester Graduation Rate	59%	• Student Satisfaction With Educational Experience	83%

AT-A-GLANCE

SERVICE TO THE COMMONWEALTH

• Degree Completions	1,741	• Degrees Awarded in STEM Fields	389
<i>Bachelor's</i>	1,161	<i>Undergraduate</i>	250
<i>Master's</i>	438	<i>Graduate</i>	139
<i>Doctorates</i>	142	• Certificates Awarded in STEM Fields	10
• Patent Applications	9	• Degrees Awarded in Healthcare Fields	233
• Total R&D Expenditures	\$42M	<i>Undergraduate</i>	209
• Total R&D Expenditures Ranking	242	<i>Graduate</i>	24
Total R&D Expenditures Ranking among		• Certificates Awarded in Healthcare	
• Carnegie Peers, US Publics, Non-Medical	33	Fields	18
• Total R&D Expenditures per Tenure	\$155,622	• License Income	\$60,348
• System Faculty		• Percent Alumni who Remain in MA	68%

FINANCIAL HEALTH

• Total Endowment	\$75.9M	• Total Cash & Investments to Expenses	0.68
• Annual Growth in Endowment	13.1%	• Debt Service Burden	5.4%
• Endowment per Annualized Student FTE	\$11,674	• Operating Margin (%)	2.2%
• Private Funds Raised Annually	\$2.3M		

ACADEMIC QUALITY

AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN

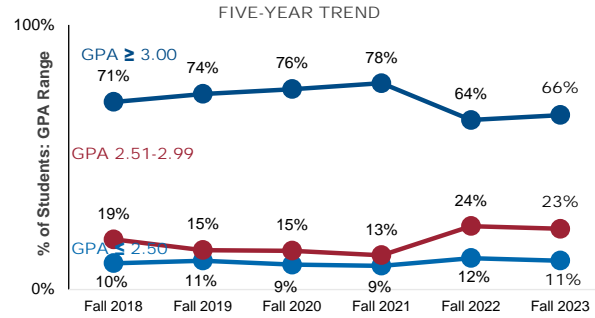
3.30

Average HS
GPA
in Fall 2023

▲ 0.03

One-year
nominal change
(vs. Fall 2022)

▲ 0.05

Five-year
nominal change
(vs. Fall 2018)

SAT SCORES OF FRESHMEN

1240

SAT Scores of Freshmen
75th Percentile
in Fall 2023

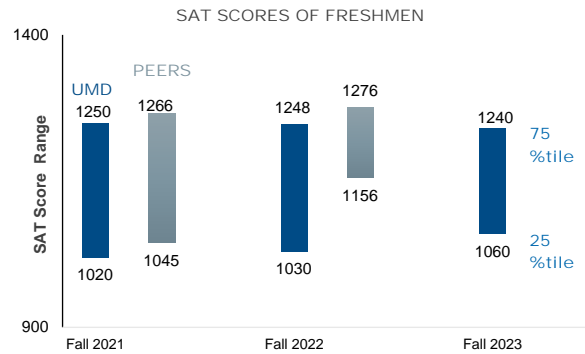
▼ 8

One-year
nominal change
(vs. Fall 2022)

1060

SAT Scores of Freshmen
25th Percentile
in Fall 2023

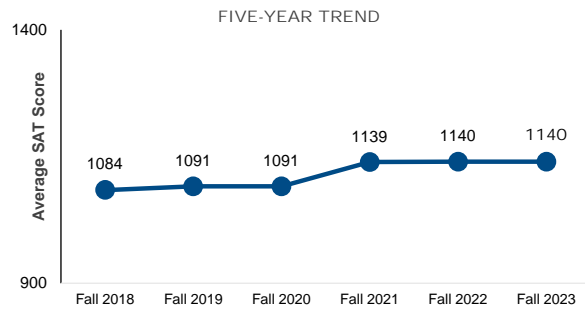
▲ 30

One-year
nominal change
(vs. Fall 2022)

1140

Average SAT Scores
of Freshmen
in Fall 2023

. 0

One-year
nominal change
(vs. Fall 2022)

ACADEMIC QUALITY

AVERAGE GPA OF ENTERING TRANSFER STUDENTS

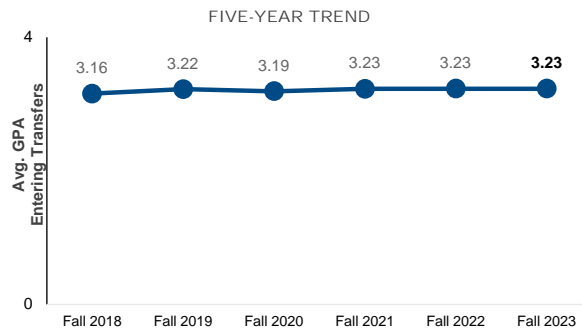
3.23

Average transfer
GPA
in Fall 2023

• 0.00

One-year
nominal change
(vs. Fall 2022)

▲ 0.07

Five-year
nominal change
(vs. Fall 2018)

STUDENT-FACULTY RATIO

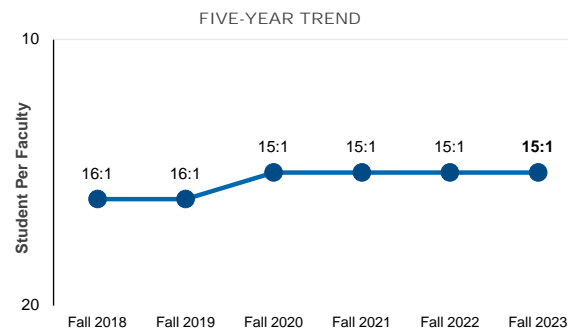
15:1

Student-Faculty
Ratio
in Fall 2023

• 0

One-year
nominal change
(vs. Fall 2022)

▲ 1

Five-year
nominal change
(vs. Fall 2018)

TECHNOLOGY-ENHANCED CLASSROOMS

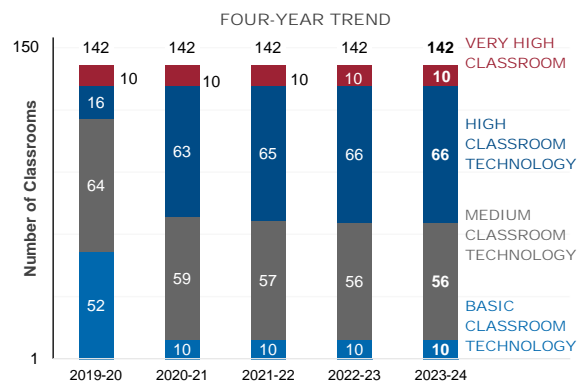
142

Total Technology
Enhanced Classrooms
in 2023-24

• 0%

One-year
% change
(vs. 2022-23)

• 0%

Four-year
% change
(vs. 2019-20)

ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

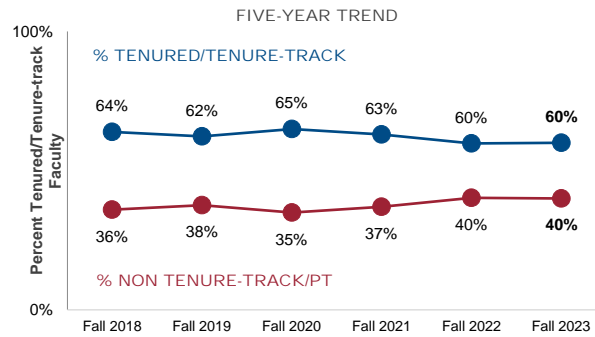
60%

Percent Tenured/
Tenure-track Faculty FTE
in Fall 2023

• 0

One-year
% point change
(vs. Fall 2022)

▼ 4

Five-year
% change
(vs. Fall 2018)

FACULTY FTE

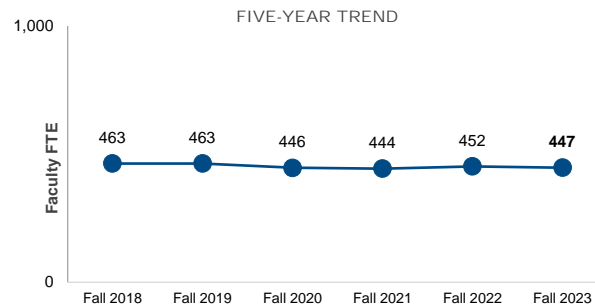
447

Faculty FTE
in Fall 2023

▼ 1%

One-year
% change
(vs. Fall 2022)

▼ 3%

Five-year
% change
(vs. Fall 2018)

FACULTY-OF-COLOR

132

Faculty Of Color
in Fall 2023

▲ 7

One-year
nominal change
(vs. Fall 2022)

▲ 42

Five-year
nominal change
(vs. Fall 2018)

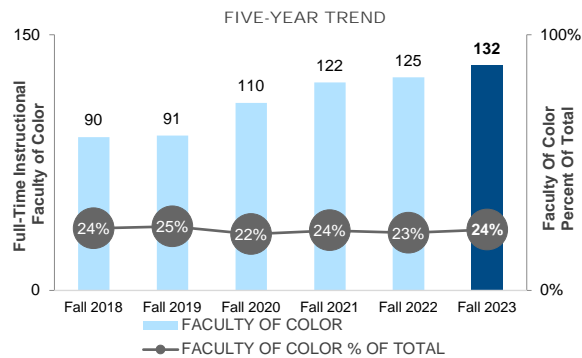
24%

Percent of
Faculty Of Color
in Fall 2023

▲ 1

One-year
% point
(vs. Fall 2022)

• 0

Five-year
% point
(vs. Fall 2018)

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

ACADEMIC QUALITY

WOMEN FACULTY

154

Women Faculty
in Fall 2023

▼ 30

One-year
nominal change
(vs. Fall 2022)

▼ 37

Five-year
nominal change
(vs. Fall 2018)

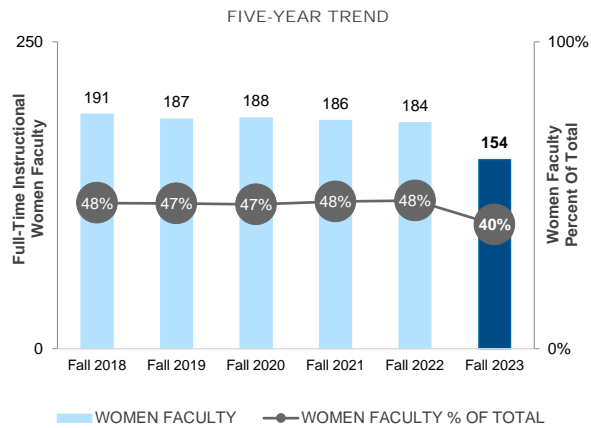
40%

Percent of
Women Faculty
in Fall 2023

▼ 8

One-year
nominal change
(vs. Fall 2022)

▼ 8

Five-year
nominal change
(vs. Fall 2018)

ACCESS AND AFFORDABILITY

UNDERGRADUATES FROM MASSACHUSETTS

4,856

Undergraduates from
Massachusetts
in Fall 2023

• 0%

One-year
% change
(vs. Fall 2022)

▼ 20%

Five-year
% change
(vs. Fall 2018)

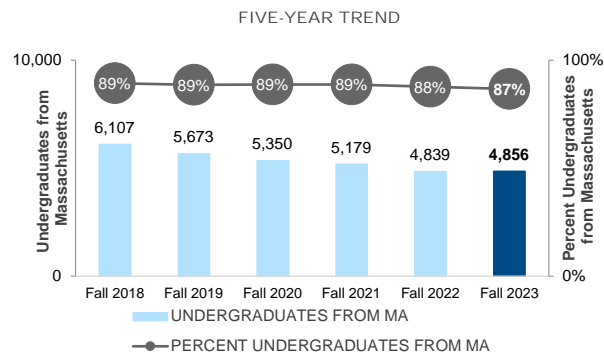
87%

% Undergraduates
from Massachusetts
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

▼ 2

Five-year
% point change
(vs. Fall 2018)

UNDERGRADUATE STUDENTS OF COLOR

2,157

Undergraduates
Students of Color
in Fall 2023

▲ 1%

One-year
% change
(vs. Fall 2022)

▼ 8%

Five-year
% change
(vs. Fall 2018)

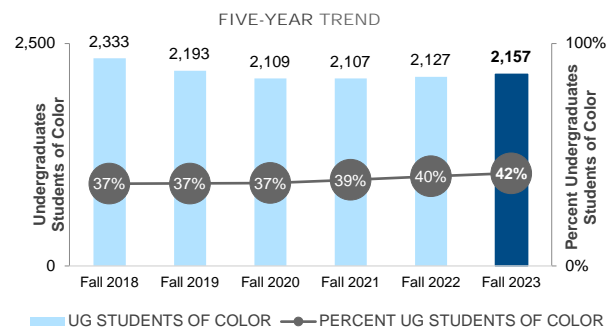
42%

% Undergraduates
Students of Color
in Fall 2023

▲ 2

One-year
% point change
(vs. Fall 2022)

▲ 5

Five-year
% point change
(vs. Fall 2018)

ACCESS AND AFFORDABILITY

UNDERGRADUATES WHO ARE INTERNATIONAL

76

International UG
Enrollment
in Fall 2023

▲ 7%

One-year
% change
(vs. Fall 2022)

▼ 58%

Five-year
% change
(vs. Fall 2018)

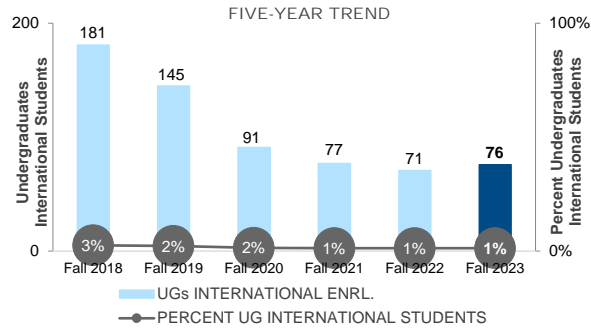
1%

% International UG
Enrollment
in Fall 2023

● 0

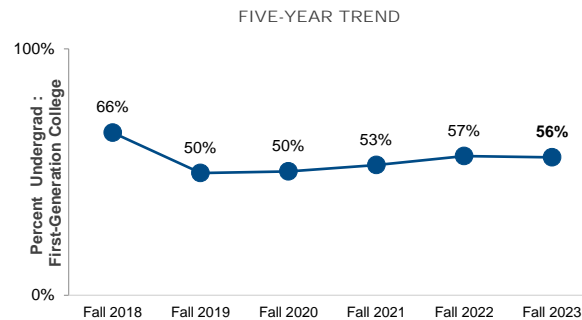
One-year
% point change
(vs. Fall 2022)

▼ 2

Five-year
% point change
(vs. Fall 2018)

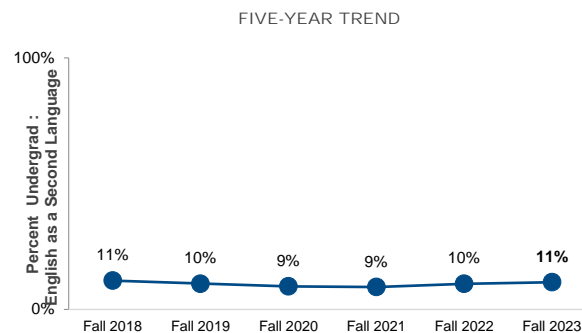
PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE

56%

Percent first-time
Undergraduates
who are First-Generation
College in Fall 2023* The data source from Fall 2018 updated
to Common Application responses.

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

11%

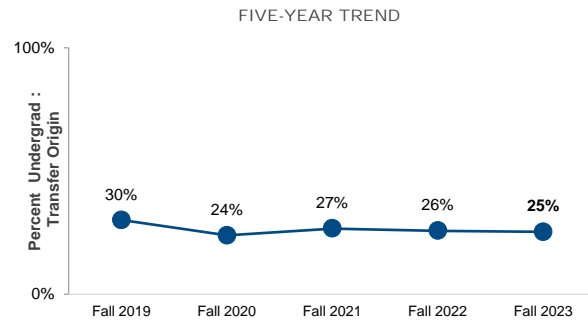
Percent Undergraduates
Speak English as a
Second Language
in Fall 2023* The data source from Fall 2018 updated
to Common Application responses.

ACCESS AND AFFORDABILITY

PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

25%

Percent Undergraduates
who are of Transfer-Origin
in Fall 2023



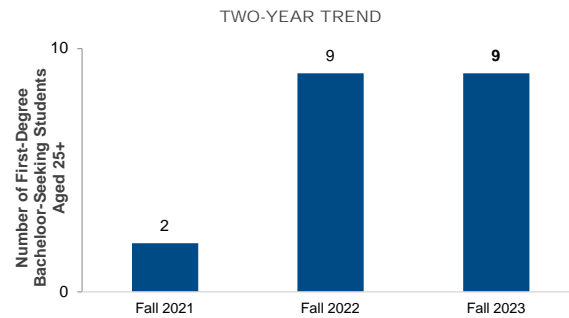
NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

9

Number of First-Degree
Bachelor-Seeking
Students Aged 25+
in Fall 2023

• 0

One-year
nominal change
(vs. Fall 2022)

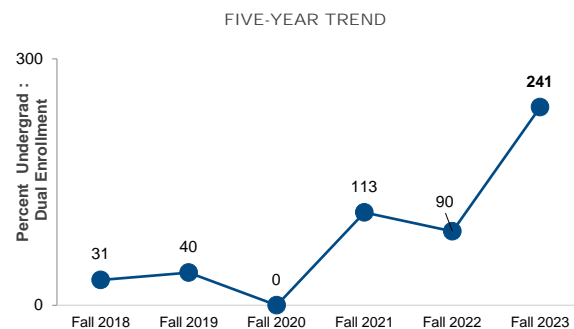


DUAL ENROLLMENT STUDENTS (HEADCOUNT)

241

Dual Enrolled
Students
in Fall 2023

*No Dual enrollment
in Fall 2020 due to COVID



ACCESS AND AFFORDABILITY

PERCENT IN-STATE PELL GRANT RECIPIENTS

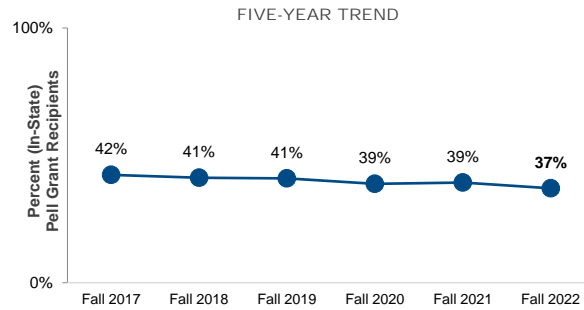
37%

Percent (In-State)
Pell Grant Recipients
in Fall 2022

▼ 2

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

▼ 5

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

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

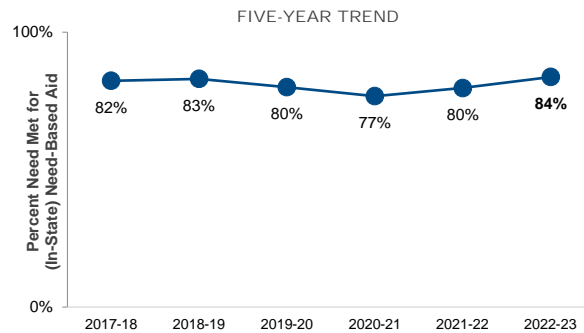
84%

Percent Need Met for
(In-State) Need-Based
Aid in 2022-23

▲ 4

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

▲ 2

Five-year
% point change
(vs. 2017-18)

UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

\$32.1k

Average Debt Load
in 2023

▲ 1%

One-year
% change
(vs. 2022)

▲ 10%

Five-year
% change
(vs. 2018)

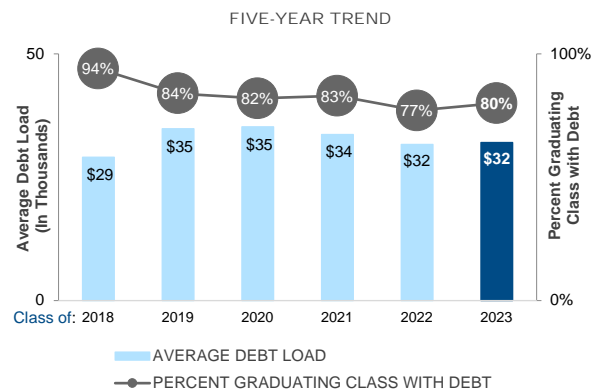
80%

Percent Graduating
Class with Debt
in 2023

▲ 3

One-year
% point change
(vs. 2022)

▼ 14

Five-year
% point change
(vs. 2018)

ACCESS AND AFFORDABILITY

TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

66

Students who participated
in Study Abroad
in Fall 2022-Smr.23

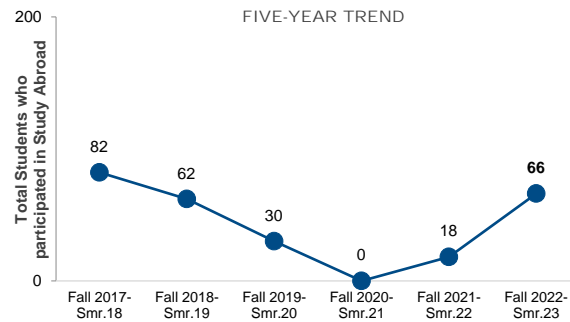
* Fall 2020-Smr. 21
was during COVID

▲ 48

One-year
nominal change
vs. Fall 2021-Smr.22

▼ 16

Five-year
nominal change
vs Fall 2017-Smr.18



TOTAL ONLINE COURSE REGISTRATIONS

12,589

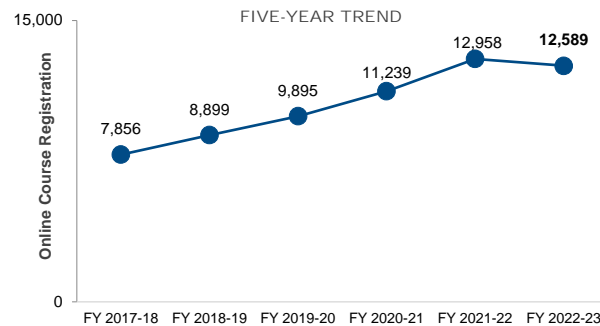
Online Course
Registrations
in FY 2022-23

▼ 3%

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

▲ 60%

Five-year
% change
(vs. FY 2017-18)

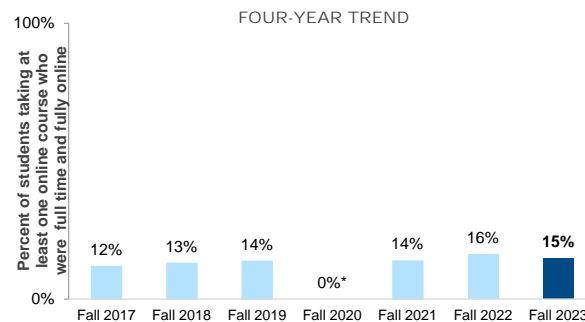


PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

15%

Students taking at least
one online course
who were full time
and fully online
in Fall 2023

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



STUDENT SUCCESS AND SATISFACTION

FRESHMEN ONE-YEAR RETENTION RATE

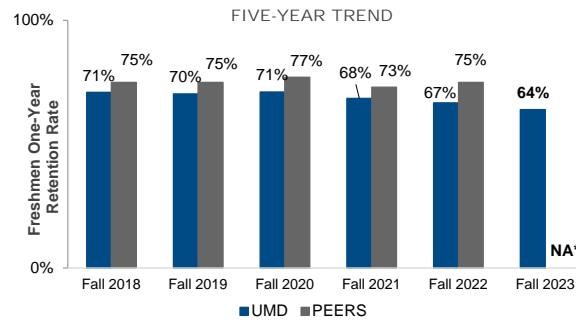
64%

Freshmen One-Year
Retention Rate
in Fall 2023

▼ 3

One-year
% point change
(vs. Fall 2022)

▼ 7

Five-year
% point change
(vs. Fall 2018)

* Peer data for Fall 2023 not available for reporting purposes.

FRESHMEN FOUR-YEAR GRADUATION RATES

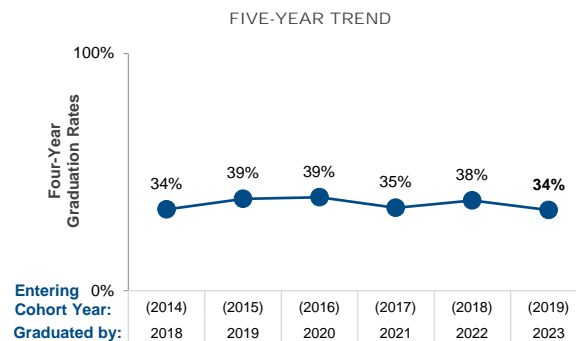
34%

Freshmen Four-Year
Graduation Rates
in 2023

▼ 4

One-year
% point change
(vs. 2022)

• 0

Five-year
% point change
(vs. 2018)

FRESHMEN SIX-YEAR GRADUATION RATE

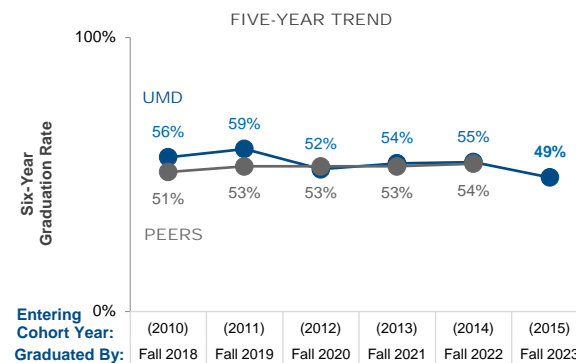
49%

UMD Freshmen Six-Year
Graduation Rates
in Fall 2023

▼ 6

One-year
% point change
(vs. Fall 2022)

▼ 7

Five-year
% point change
(vs. Fall 2018)

*Peer data for Fall 2023 not currently available.

STUDENT SUCCESS AND SATISFACTION

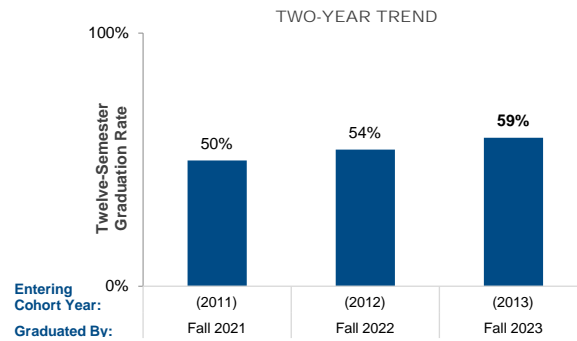
FRESHMEN TWELVE-SEMESTER GRADUATION RATE

59%

UMD Freshmen
Twelve-semester
Graduation Rates
in Fall 2023

▲ 5

One-year
% point change
(vs. Fall 2012)



TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

85%

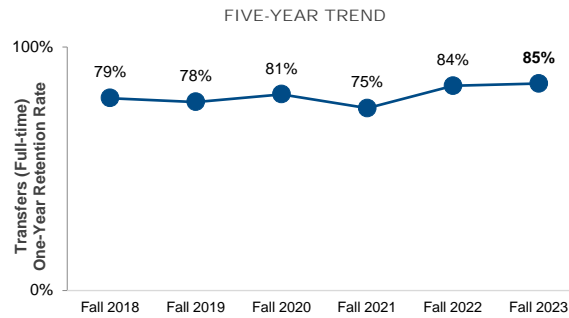
Transfers (Full-time)
One-Year
Retention Rate
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▲ 6

Five-year
% point change
(vs. Fall 2018)



STUDENT SUCCESS AND SATISFACTION

TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

76%

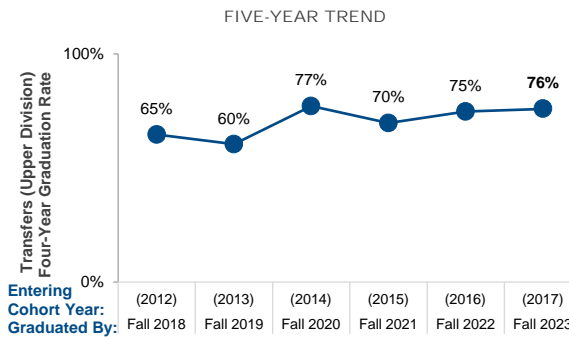
Transfers (Upper
Division) Four-Year
Graduation Rates
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▲ 11

Five-year
% point change
(vs. Fall 2018)



STUDENT SUCCESS AND SATISFACTION

STUDENT ACHIEVEMENT MEASURE

Cohort starting in Fall 2017

41%

Bachelor's Degree
Within 4 Yrs. from
any institution

34%

Bachelor's Degree

Within 4 Yrs. from
UMass Dartmouth

58%

Bachelor's Degree
Within 5 Yrs. From
any institution

45%

Bachelor's Degree

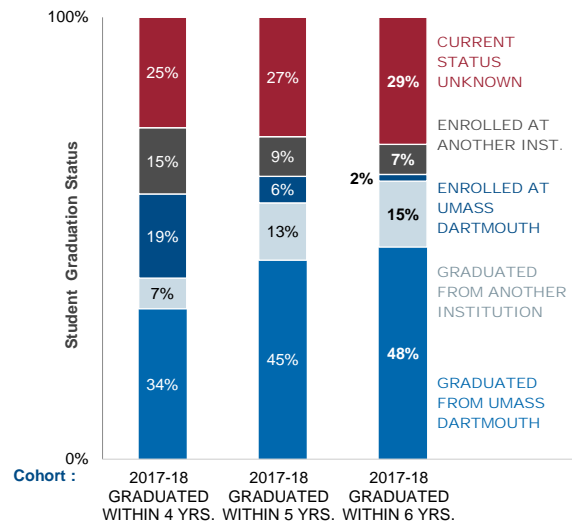
Within 5 Yrs. From
UMass Dartmouth

63%

Bachelor's Degree
Within 6 Yrs. From
any institution

48%

Bachelor's Degree

Within 6 Yrs. From
UMass Dartmouth

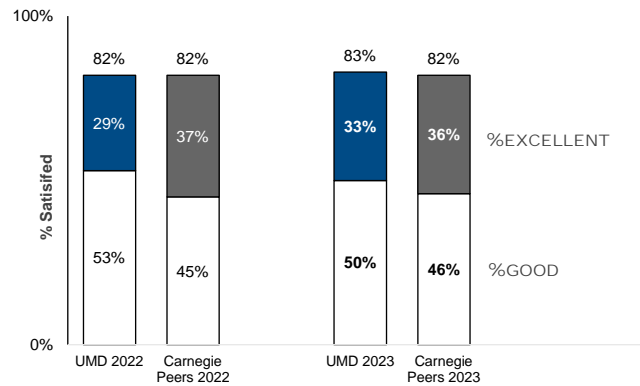
Source : Student Achievement Measure (SAM)

STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

83%

Student Satisfaction
as Good or Excellent
in UMD 2023

▲ 1

Three-year
% point change
(vs. UMD 2021)

STUDENT SUCCESS AND SATISFACTION

ALUMNI PARTICIPATION RATE

1%

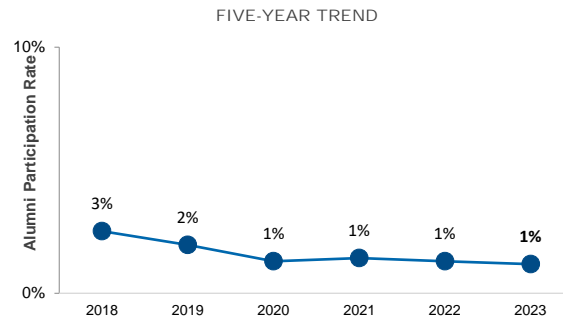
Alumni Participation
Rate
in 2023

.0

One-year
% point change
(vs. 2022)

▼ 2

Five-year
% point change
(vs. 2018)



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

1,741

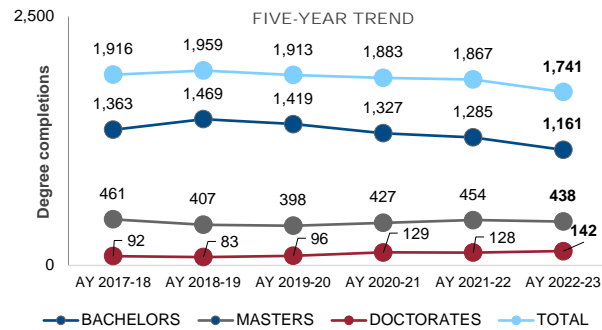
Total degree
completions
AY 2022-23

▼ 7%

One-year
% change
in total degree
completions
(vs. AY 2021-22)

▼ 9%

Five-year
% change
in total degree
completions
(vs. AY 2017-18)



NUMBER OF PATENT APPLICATIONS

9

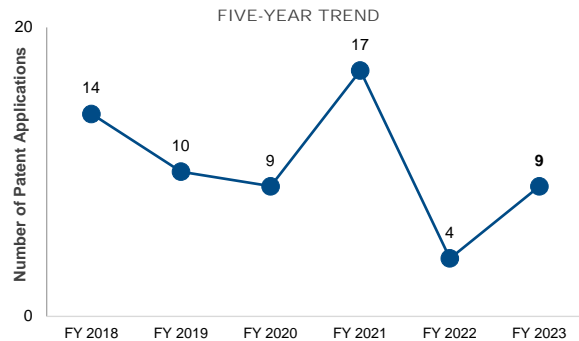
Patent
Applications
in FY 2023

▲ 5

One-year
nominal change
(vs. FY 2022)

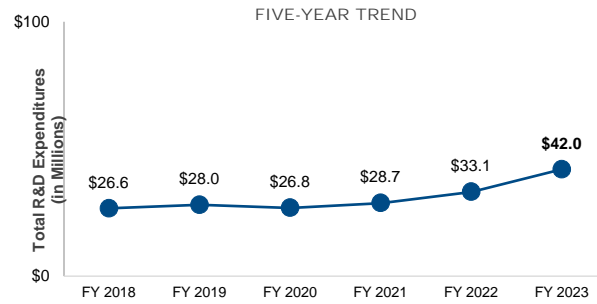
▼ 5

Five-year
nominal change
(vs. FY 2018)

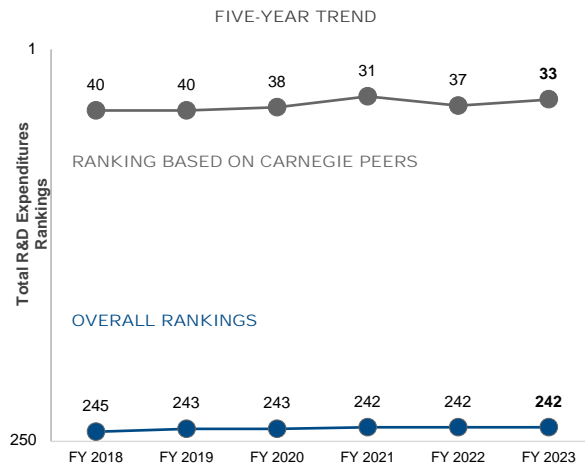


SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES

\$42.0Total R&D (Millions)
in FY 2023▲ **27%**One-year
% change
(vs. FY 2022)▲ **58%**Five-year
% change
(vs. FY 2018)

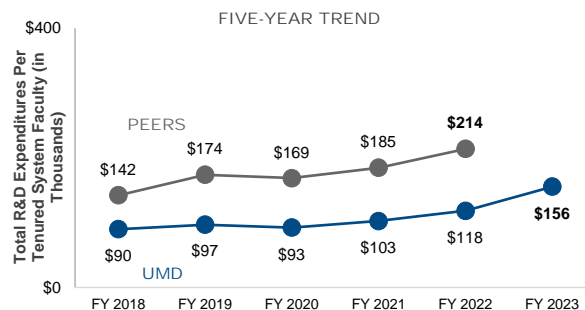
TOTAL R&D EXPENDITURES RANKINGS

242Total R&D Expenditures
Overall Rankings
in FY 2023● **0**One-year
nominal change
(vs. FY 2022)▲ **3**Five-year
nominal change
(vs. FY 2018)**33**Rankings based on
Carnegie Peers
in FY 2023▲ **4**One-year
nominal change
(vs. FY 2022)▲ **7**Five-year
nominal change
(vs. FY 2018)

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

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

TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY

\$156kTotal R&D Expenditure
Per Tenured
System Faculty
in FY 2023▲ **32%**One-year
% change
(vs. FY 2022)▲ **72%**Five-year
% change
(vs. FY 2018)

* Peer data for FY 2023 is currently not available.

SERVICE TO THE COMMONWEALTH

DEGREES AWARDED IN STEM FIELDS

250

UG degrees awarded
in STEM fields
in 2021-23

▼ 15%

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

▼ 23%

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

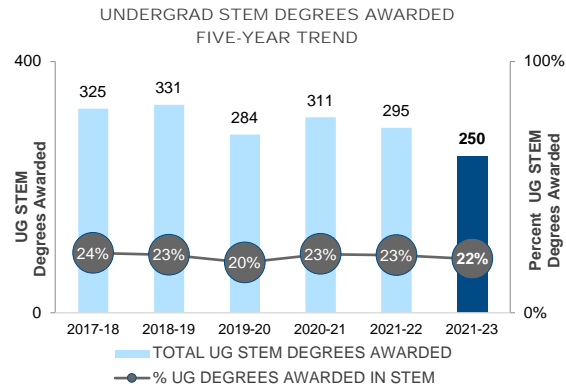
22%

Percent of total UG
degrees awarded in
STEM fields
in 2021-23

▼ 1

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

▼ 2

Five-year
% point change
(vs. 2017-18)

139

Grad degrees awarded
in STEM fields
in 2022-23

▲ 9%

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

▼ 1%

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

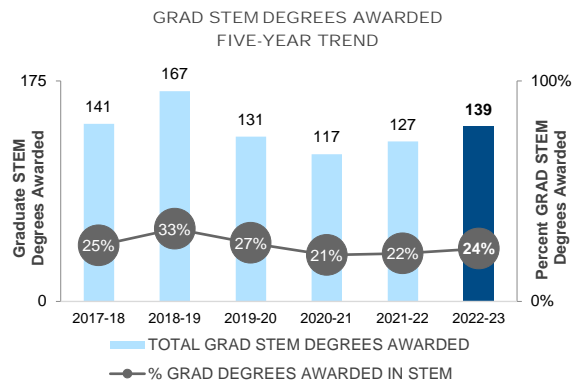
24%

Percent of total Grad
degrees awarded in
STEM fields
in 2022-23

▲ 2

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

▼ 1

Five-year
% point change
(vs. 2017-18)

389

Total degrees awarded
in STEM fields
in 2022-23

▼ 8%

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

▼ 17%

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

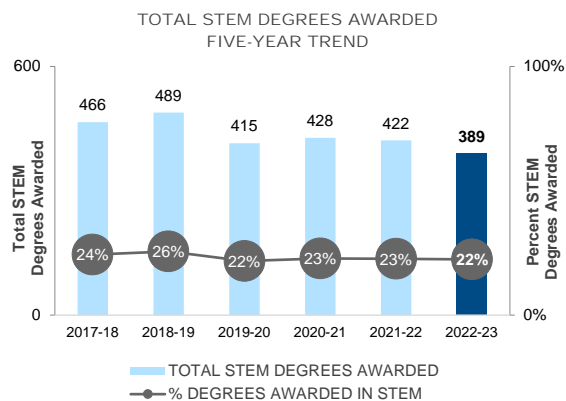
22%

Percent of Total
degrees awarded in
STEM fields
in 2022-23

▼ 1

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

▼ 2

Five-year
% point change
(vs. 2017-18)

SERVICE TO THE COMMONWEALTH

CERTIFICATES AWARDED IN STEM FIELDS

10

Total Certificates awarded
in STEM fields
in 2022-23

▲ 6

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

▲ 5

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

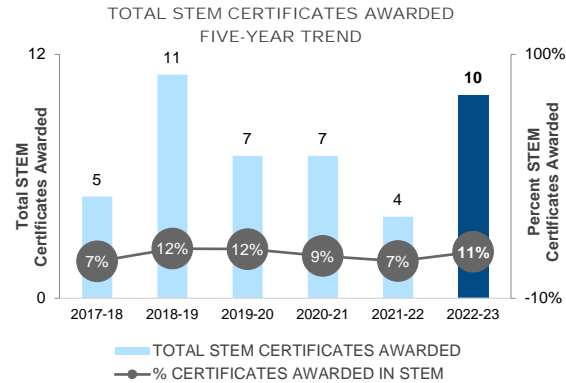
11%

Percent of Total
Certificates awarded in
STEM fields
in 2022-23

▲ 4

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

▲ 4

Five-year
% point change
(vs. 2017-18)

DEGREES AWARDED IN HEALTHCARE FIELDS

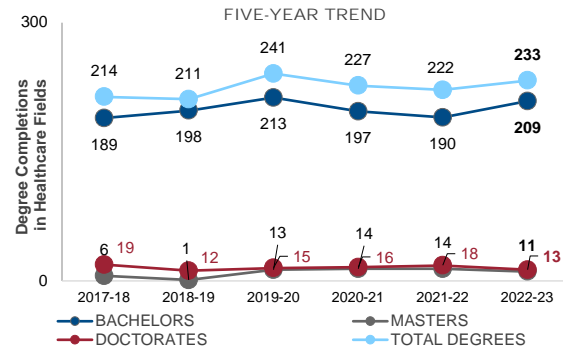
233

Total degrees awarded
in HealthCare fields
in 2022-23

▲ 5%

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

▲ 9%

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

CERTIFICATES AWARDED IN HEALTHCARE FIELDS

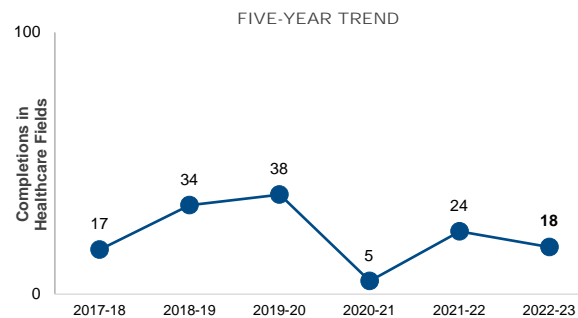
18

Total Certificates awarded
in HealthCare fields
in 2022-23

▼ 25%

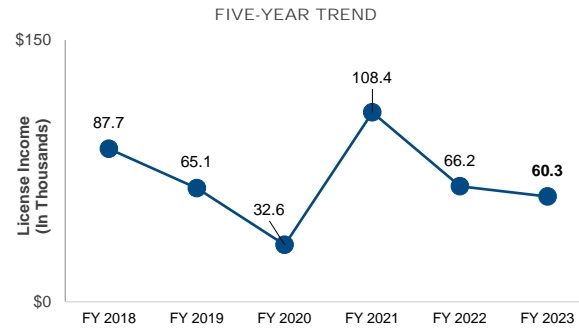
One-year
% change
(vs. 2021-22)

▲ 6%

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

SERVICE TO THE COMMONWEALTH

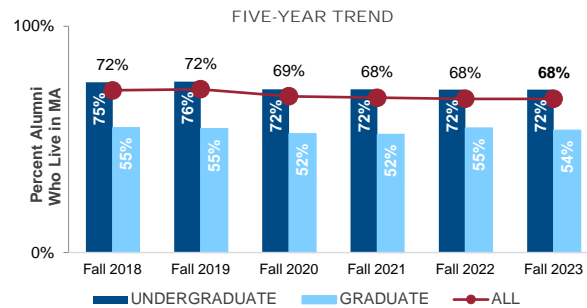
LICENSE INCOME

\$60.3kLicense Income
in FY 2023▼ **9%**One-year
% change
(vs. FY 2022)▼ **31%**Five-year
% change
(vs. FY 2018)

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

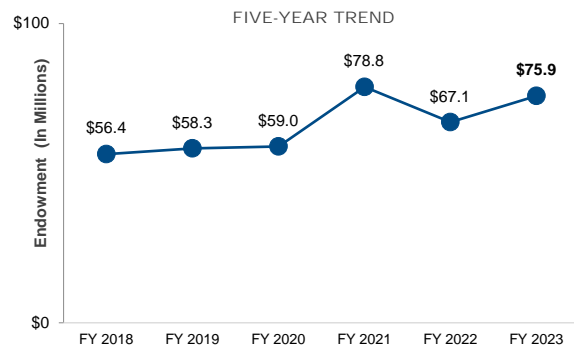
68%Of all UMass Alumni
live in the Commonwealth
in Fall 2023

.0

One-year
% point change
(vs. Fall 2022)▼ **4**Five-year
% point change
(vs. Fall 2018)

FINANCIAL HEALTH

ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

\$75.9MEndowment Assets
in FY 2023▲ **13%**One-year
% change
(vs. FY 2022)▲ **34%**Five-year
% change
(vs. FY 2018)

FINANCIAL HEALTH

ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

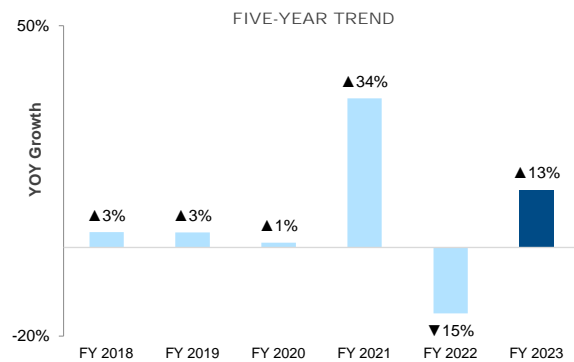
13%

Annual Growth
in FY 2023

▲ 28

One-year
% point change
(vs. FY 2022)

▲ 10

Five-year
% point change
(vs. FY 2018)

ENDOWMENT PER ANNUALIZED STUDENT FTE

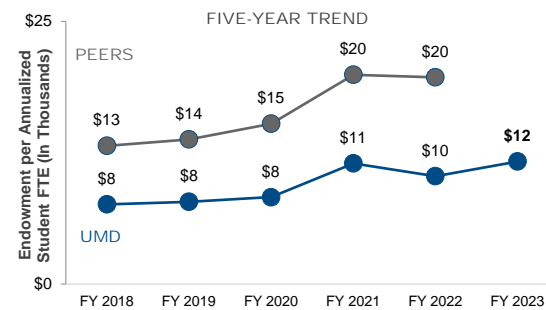
\$11.7k

Endowment per Annualized
Student FTE
in FY 2023

▲ 14%

One-year
% change
(vs. FY 2022)

▲ 54%

Five-year
% change
(vs. FY 2018)

* Peer data for FY 2023 not available for reporting purposes.

PRIVATE FUNDS RAISED ANNUALLY

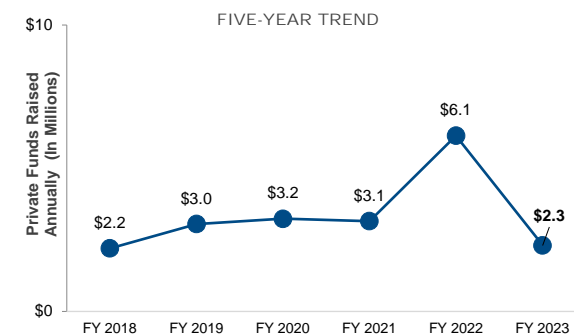
\$2.3M

Private Funds
Raised Annually
in FY 2023

▼ 62%

One-year
% change
(vs. FY 2022)

▲ 5%

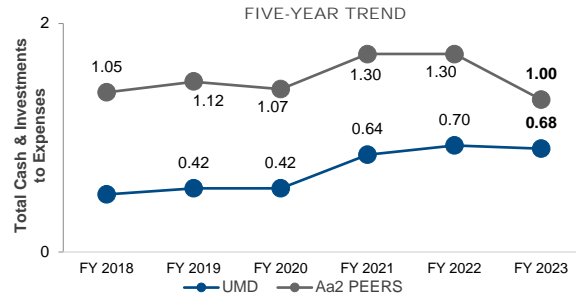
Five-year
% change
(vs. FY 2018)

FINANCIAL HEALTH

TOTAL CASH & INVESTMENTS TO EXPENSES

0.68

Total Cash &
Investments to Expenses
in FY 2023



DEBT SERVICE BURDEN

5.4%

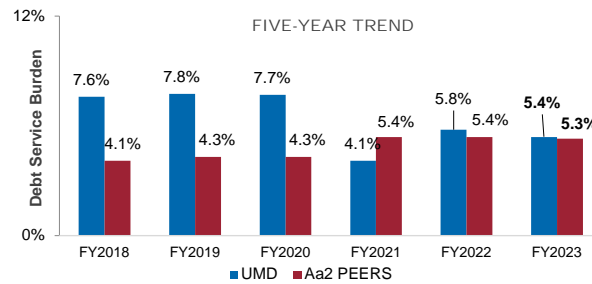
Debt Service
Burden
in FY2023

▼ 0.4

One-year
% Point change
(vs. FY2022)

▼ 2.2

Five-year
% Point change
(vs. FY2018)



OPERATING MARGIN (%)

2.2%

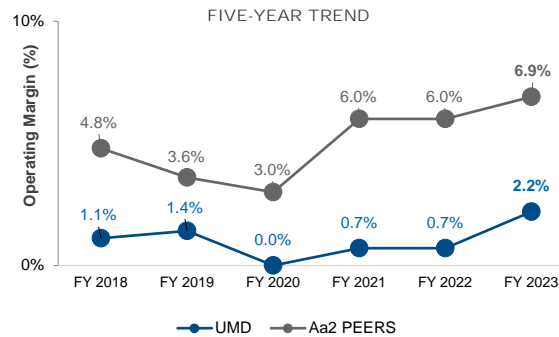
Operating Margin (%)
in FY 2023

▲ 1.5

One-year
% Point change
(vs. FY 2022)

▲ 1.1

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



DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Average High School GPA of First-Time Freshmen. Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

SAT Scores of Freshmen. SAT scores of Freshmen. All reported SAT scores are based on the sum of the SAT MSS and the ERWS for entering freshmen.. The average is the arithmetic mean of these SAT scores. Peer data are from IPEDS.

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

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

Technology-Enhanced Classrooms.

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

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

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

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

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

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

STUDENT SUCCESS AND SATISFACTION INDICATORS

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

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

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

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

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

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

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

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

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

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

Total R&D Expenditures. Research and development (R&D) expenditures in all academic

fields from all sources (federal, state, local governments, industry, private and institutional) as reported to NSF.

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

DEFINITIONS AND SOURCES

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

Percent Alumni who Live in Massachusetts. Percentage of total alumni who currently reside in Massachusetts based on alumni records.

FINANCIAL HEALTH INDICATORS

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

PEER INSTITUTIONS FOR UMASS DARTMOUTH

Cleveland State University (OH)*

Idaho State University

Louisiana Tech University

Marshall University (WV)

SUNY at Binghamton (NY)*

The University of Montana*

The University of Texas at Dallas*

University of Arkansas at Little Rock

University of Idaho

University of New Orleans (LA)

University of North Dakota*

University of South Dakota

University of Southern Maine

Wichita State University (KS)*

**Aspirant Peers*

Moody's Aa2 Peers

Alamo Community College District, TX

Arizona State University, AZ

Auburn University, AL

Board of Regents of The University System of Georgia, GA

California State University, CA

City University of New York, NY

Clemson University, SC

Cuyahoga Community College District, OH

Florida State University, FL

Houston Community College System, TX

Iowa State University of Science & Technology, IA

Michigan State University, MI

Mississippi Institutions of Higher Learning, MS

Nevada System of Higher Education, NV

State University of New York, NY

State University System of Florida, FL

Texas State University System, TX

University of Alabama at Birmingham, AL

University of Alabama, AL

University of Arizona, AZ

University of Arkansas, AR

University of California, CA

University of Florida, FL

University of Georgia, GA

University of Hawaii, HI

University of Houston System, TX

University of Kansas, KS

University of Kentucky, KY

University of Massachusetts, MA

University of North Texas System, TX

University of Oregon, OR

University of South Carolina, SC

University of Wyoming, WY

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



LOWELL

HEADLINES

ACADEMIC QUALITY

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

The Fall 2023 cohort's average high school GPA was 3.72, and the average SAT score was 1263. UML's transfer students posted an average entering GPA of 3.24, slightly up from last year. Graduate enrollment showed a slight decline down to over 4,800 students in Fall 2023. The Honors College at UMass Lowell continues to grow over 2,500 students in Fall 2023.

Externally sponsored research per faculty member is important to UMass Lowell both as a measure of faculty scholarship and as a measure of assisting innovation in the regional economy. In FY 2023, the average amount of R&D expenditures per tenure-stream faculty member was \$255,556. UMass Lowell ranked 168 in R&D Expenditures in FY 2022, up one from the prior year. UMass Lowell fell one point, ranking 8th, when compared

to public Carnegie class peers without a medical school.

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

UMass Lowell's focus on strengthening research and building new academic programs has been assisted by the increased size of the faculty. The percent of tenured/tenure-track faculty FTE remains steady at 58%. The proportion of faculty of color in Fall 2023 was 29%, consistent with prior years.

ACCESS AND AFFORDABILITY

UMass Lowell strives to provide affordable, accessible, and experience-based education. By providing financial need assistance and increasing merit awards for new freshmen and grants for transfer students, UMass Lowell aims to maintain affordability and increase accessibility. On average 91% of in-state undergraduate students need was met in FY23. One in three UMass Lowell undergraduate students receive Federal Pell Grants, which are based on student need.

UMass Lowell has increased access to college for those populations that do not traditionally consider attending a postsecondary institution. Forty-four percent of UMass Lowell incoming first-year undergraduate students self-identified as the first in their family to attend college in Fall 2023. Forty-five percent of undergraduates identify themselves as students of color.

STUDENT SUCCESS AND SATISFACTION

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

Student success indicators increased this year for our students. For those who entered directly out of high school, UMass Lowell's one-year retention rate was 82%. The four-year graduation rate increased to 47%, and the six-year graduation rate remained steady at 70%. For students who entered

as transfers, 84% returned for their second year at UMass Lowell while the comparable graduation rate (four-year) for transfer students was 81%.

HEADLINES

SERVICE TO THE COMMONWEALTH

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

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

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

evidenced in the number of students it graduates in STEM and Healthcare programs. Over one-third of all degrees awarded at UMass Lowell in AY 2022-23 were in STEM fields. Over ten percent of all degrees awarded were in health-care fields. UMass Lowell's Division of Graduate and Professional Studies (GPS) provides high-quality professional studies in innovative formats including campus-based classes, online education, and customized corporate training. Numerous GPS programs serve various economic sectors, partnering with companies to deliver customized education and training programs for their employees, often on-site. The result is continued significant growth in the number of online course enrollments at UMass Lowell. AY 2022-23 online course registrations remained on par the previous year at 40,212, seeing 30% change in online course registrations compared to AY2017-18.

FINANCIAL HEALTH

New efforts to grow revenues and control expenditures are implemented each year. Growth in revenues will further contribute to UMass Lowell's primary reserve and improving financial health. The endowment remained strong this year, nearing \$150 million. This affected the endowment per annualized FTE metric, which came in just under \$13K. Private funds raised annually almost remained strong at \$37.5M.

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

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

AT-A-GLANCE

ACADEMIC QUALITY

• Average HS GPA of Freshmen	3.72	• Technology-Enhanced Classrooms	189
• Average SAT Scores of Freshmen		• Percent Tenured/Tenure-Track Faculty FTE	58%
<i>Arithmetic Mean</i>	1263	• Faculty FTE	748
<i>25th – 75th Percentile</i>	1190-1320	• Full-Time Instructional Faculty	
• Average GPA of Entering Transfer Students	3.24	<i>Percent Faculty-of-Color</i>	29%
• Student-Faculty Ratio	17:1	<i>Percent Women Faculty</i>	47%

ACCESS AND AFFORDABILITY

• Percent Undergraduates from Students from MA	87%	• Percent In-State Pell Grant Recipients	29%
• Percent Undergraduates who are Students of Color	45%	• Percent of Need Met for In-State Students Awarded Need-Based Aid	91%
• Percent Undergraduates who are International	2%	• Average Debt of Students (UG Graduating Class)	\$30,316
• Percent First-Time Undergraduates who are First Generation in College	44%	• Percent Graduating Class with Debt (UG)	76%
• Percent First-Time Undergraduates with English as a Second Language	NA*	• Total Students who Participated in a Study Abroad Program	296
• Percent Undergraduates Who Are Of Transfer Origin	25%	• Online Course Registrations	40,212
• Number of First-degree Bachelor-seeking Students Aged 25+	1666	Percentage of degree-seeking students taking at least one online course who were full time and fully online	18%
• Dual Enrolled Students (Headcount)	232		

STUDENT SUCCESS AND SATISFACTION

• Freshmen One-Year Retention Rate	82%	• Transfer (Full-time) One-Year Retention Rate	84%
• Freshmen Four-Year Graduation Rate	47%	• Transfer (Upper Division) Four-Year Graduation Rate	81%
• Freshmen Six-Year Graduation Rate	70%	• Student Satisfaction With Educational Experience	85%
• Freshmen Twelve-Semester Graduation Rate	69%	• Alumni Participation Rate	5%

AT-A-GLANCE

SERVICE TO THE COMMONWEALTH

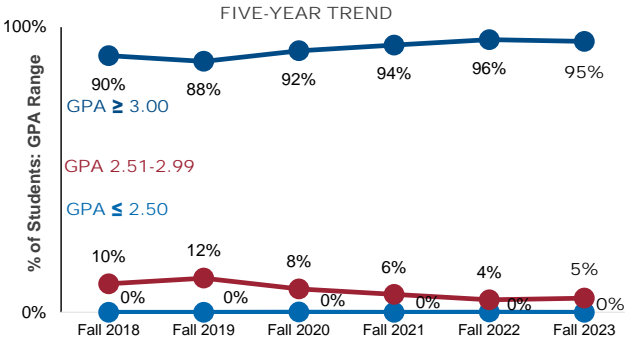
• Degree Completions	4,514	• Degrees Awarded in STEM Fields	1,878
<i>Bachelor's</i>	2918	<i>Undergraduate</i>	1,258
<i>Master's</i>	1449	<i>Graduate</i>	620
<i>Doctorates</i>	147	• Certificates Awarded in STEM Fields	102
• Patent Applications	28	• Degrees Awarded in Healthcare Fields	480
• Total R&D Expenditures	\$117M	<i>Undergraduate</i>	304
• Total R&D Expenditures Ranking	168	<i>Graduate</i>	176
Total R&D Expenditures Ranking among		• Certificates Awarded in Healthcare	
• Carnegie Peers, US Publics, Non-Medical	8	Fields	31
• Total R&D Expenditures per Tenure System Faculty	\$255,556	• License Income	\$51,993
		• Percent Alumni who Remain in MA	59%

FINANCIAL HEALTH

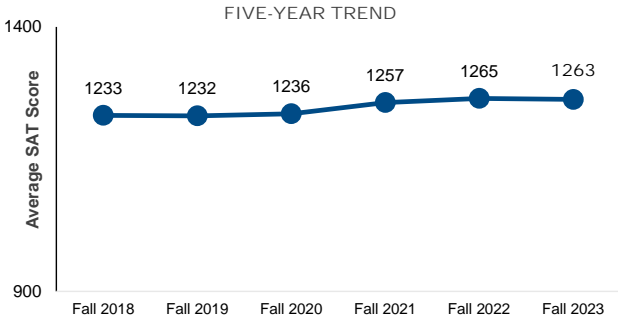
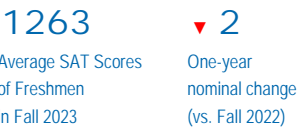
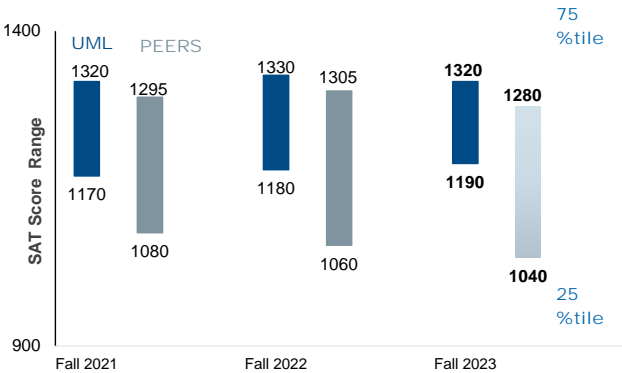
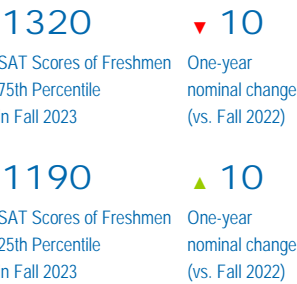
• Total Endowment	\$149.0M	• Total Cash & Investments to Expenses	0.59
• Annual Growth in Endowment	14.2%	• Debt Service Burden	6.7%
• Endowment per Annualized Student FTE	\$12,968	• Operating Margin (%)	1.2%
• Private Funds Raised Annually	\$37.5M		

ACADEMIC QUALITY

AVERAGE HIGH-SCHOOL GPA OF FIRST-TIME FRESHMEN



SAT SCORES OF FRESHMEN



ACADEMIC QUALITY

AVERAGE GPA OF ENTERING TRANSFER STUDENTS

3.24

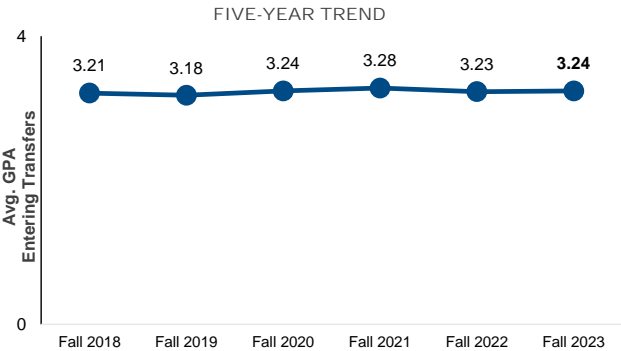
Average transfer GPA in Fall 2023

▲ 0.01

One-year nominal change (vs. Fall 2022)

▲ 0.03

Five-year nominal change (vs. Fall 2018)



STUDENT-FACULTY RATIO

17:1

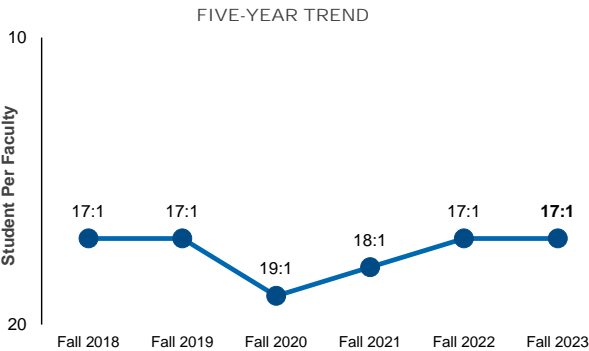
Student-Faculty Ratio in Fall 2023

• 0

One-year nominal change (vs. Fall 2022)

• 0

Five-year nominal change (vs. Fall 2018)



TECHNOLOGY-ENHANCED CLASSROOMS

189

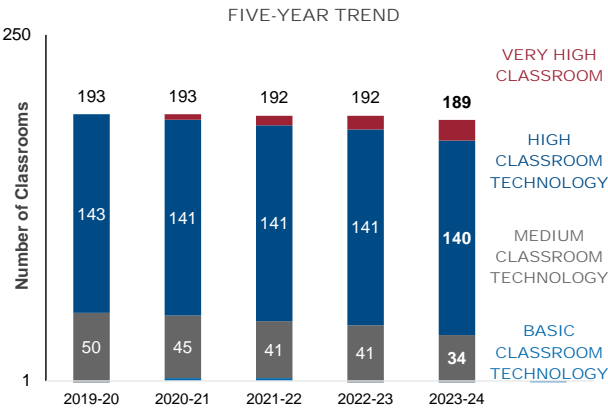
Total Technology Enhanced Classrooms in 2023-24

▼ 2%

One-year % change (vs. 2022-23)

▼ 2%

Four-year % change (vs. 2019-20)



ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

58%

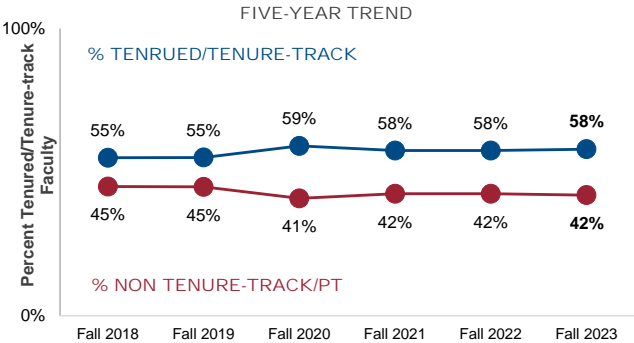
Percent Tenured/
Tenure-track Faculty
in Fall 2023

• 0

One-year
% point change
(vs. Fall 2022)

▲ 3

Five-year
% point change
(vs. Fall 2018)



FACULTY FTE

748

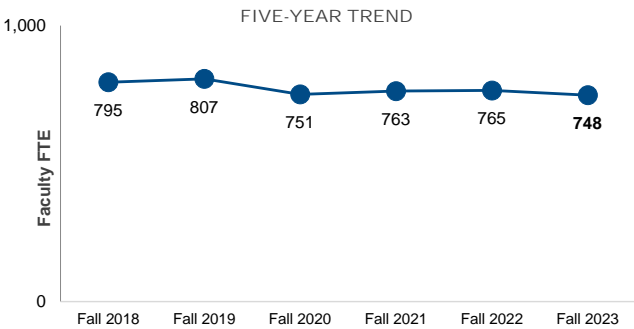
Faculty FTE
in Fall 2023

▼ 2%

One-year
% change
(vs. Fall 2022)

▼ 6%

Five-year
% change
(vs. Fall 2018)



FACULTY-OF-COLOR

174

Faculty Of Color
in Fall 2023

▼ 4

One-year
nominal change
(vs. Fall 2022)

▲ 9

Five-year
nominal change
(vs. Fall 2018)

29%

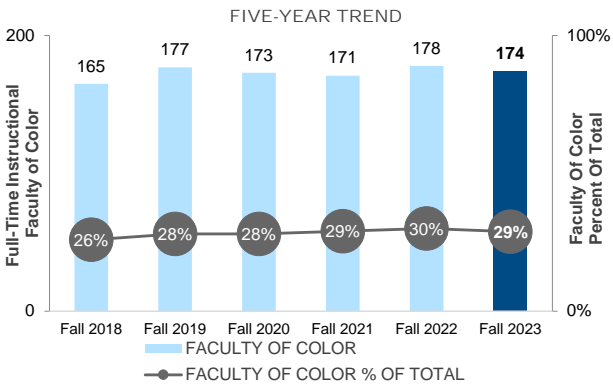
Percent of
Faculty Of Color
in Fall 2023

▼ 1

One-year
% point
(vs. Fall 2022)

▲ 3

Five-year
% point
(vs. Fall 2018)



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

ACADEMIC QUALITY

WOMEN FACULTY

285

Women Faculty
in Fall 2023

▼ 5

One-year
nominal change
(vs. Fall 2022)

▼ 1

Five-year
nominal change
(vs. Fall 2018)

47%

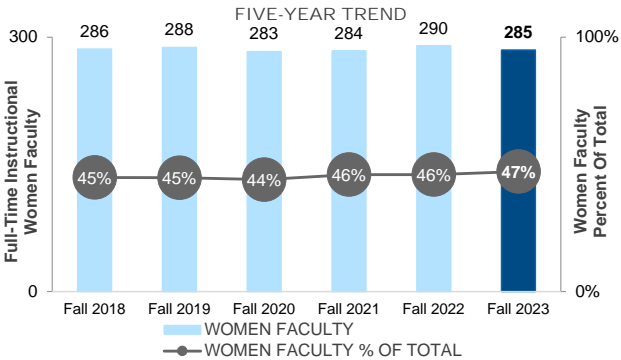
Percent of
Women Faculty
in Fall 2023

▲ 1

One-year
nominal change
(vs. Fall 2022)

▲ 2

Five-year
nominal change
(vs. Fall 2018)



UNDERGRADUATES FROM MASSACHUSETTS

10,539

Undergraduates from
Massachusetts
in Fall 2023

▼ 2%

One-year
% change
(vs. Fall 2022)

▼ 11%

Five-year
% change
(vs. Fall 2018)

87%

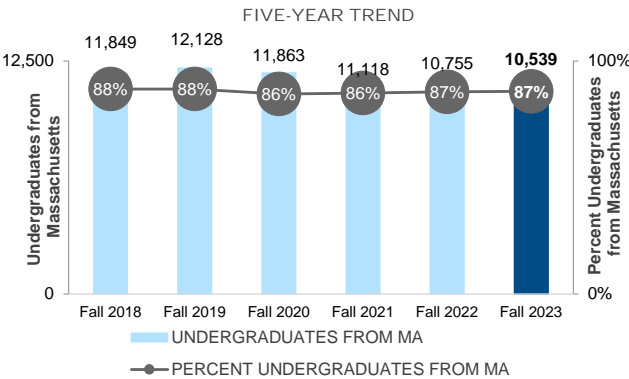
% Undergraduates
from Massachusetts
in Fall 2023

● 0

One-year
% point change
(vs. Fall 2022)

▼ 1

Five-year
% point change
(vs. Fall 2018)



UNDERGRADUATE STUDENTS OF COLOR

5,166

Undergraduates
Students of Color
in Fall 2023

▲ 5%

One-year
% change
(vs. Fall 2022)

▲ 15%

Five-year
% change
(vs. Fall 2018)

45%

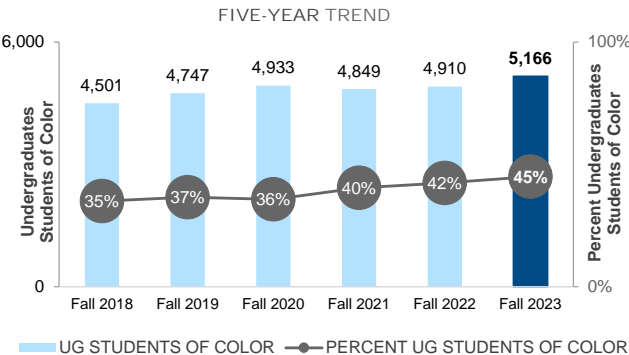
% Undergraduates
Students of Color
in Fall 2023

▲ 3

One-year
% point change
(vs. Fall 2022)

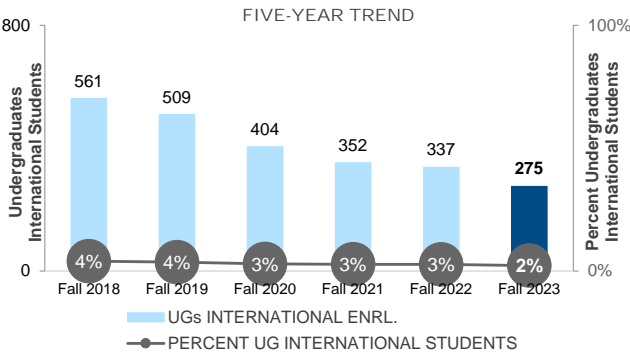
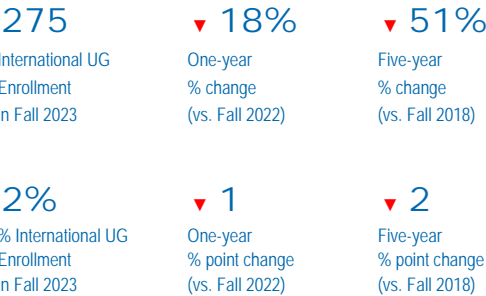
▲ 10

Five-year
% point change
(vs. Fall 2018)

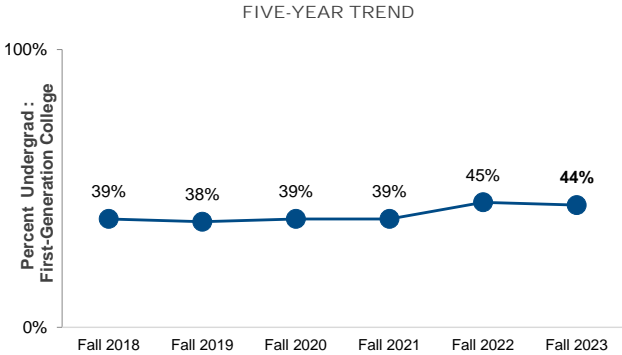
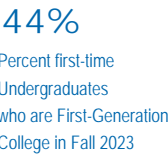


ACCESS AND AFFORDABILITY

UNDERGRADUATES WHO ARE INTERNATIONAL

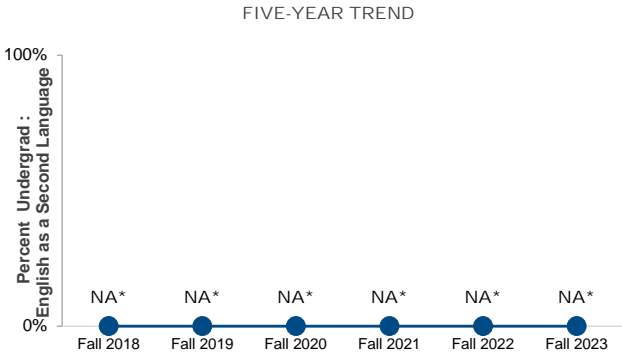
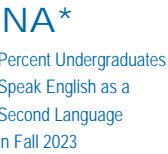


PERCENT FIRST-TIME UNDERGRADUATES WHO ARE FIRST-GENERATION IN COLLEGE



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

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

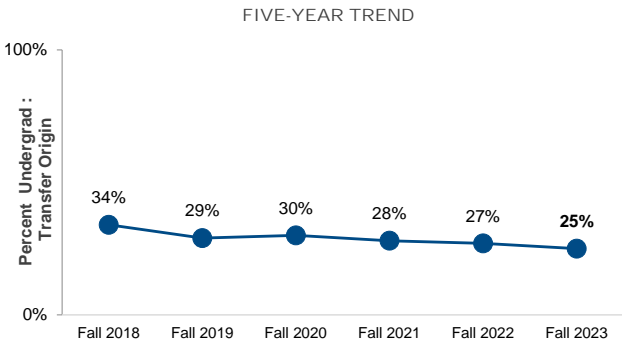


*The data source from Fall 2018 updated to Common Application responses.

ACCESS AND AFFORDABILITY

PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

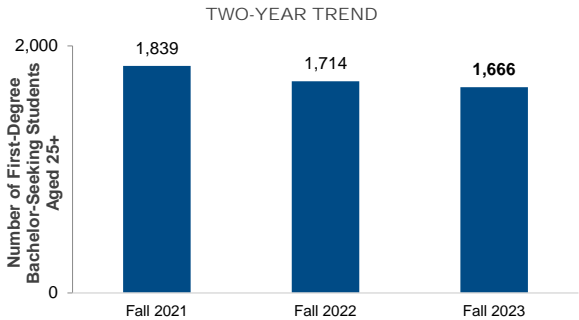
25%
Percent Undergraduates
who are of Transfer-Origin
in Fall 2023



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

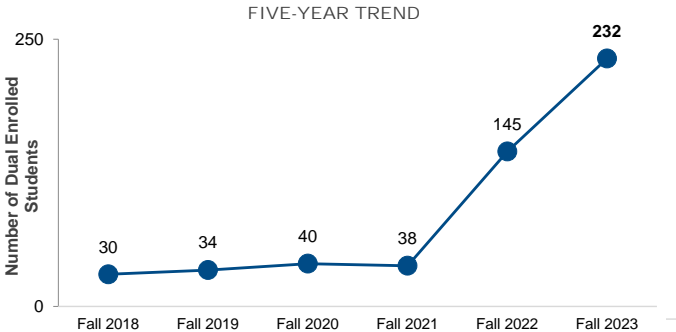
1,666
Number of First-Degree
Bachelor-Seeking
Students Aged 25+
in Fall 2023

▼ 48
One-year
nominal change
(vs. Fall 2022)



DUAL ENROLLMENT STUDENTS (HEADCOUNT)

232
Dual Enrolled
Students
in Fall 2023



ACCESS AND AFFORDABILITY

PERCENT IN-STATE PELL GRANT RECIPIENTS

29%

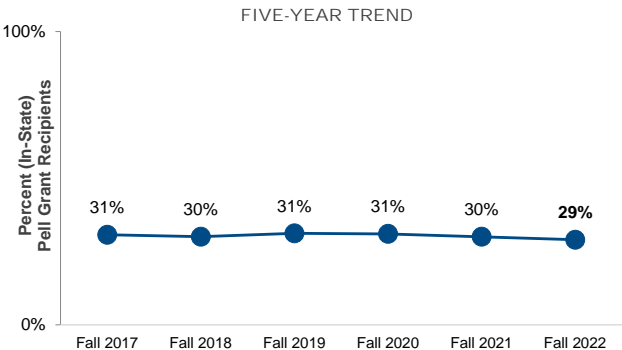
Percent (In-State)
Pell Grant Recipients
in Fall 2022

▼ 1

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

▼ 2

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



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

91%

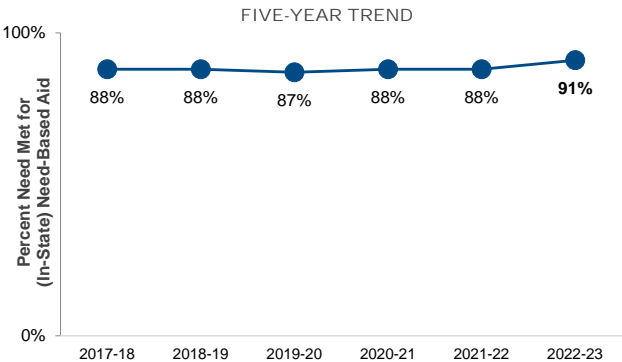
Percent Need Met for
(In-State) Need-Based
Aid in 2022-23

▲ 3

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

▲ 3

Five-year
% point change
(vs. 2017-18)



UNDERGRADUATE STUDENT DEBT LOAD OF GRADUATING CLASS

\$30.3k

Average Debt Load
in 2022

▼ 4%

One-year
% change
(vs. 2021)

▼ 6%

Five-year
% change
(vs. 2018)

76%

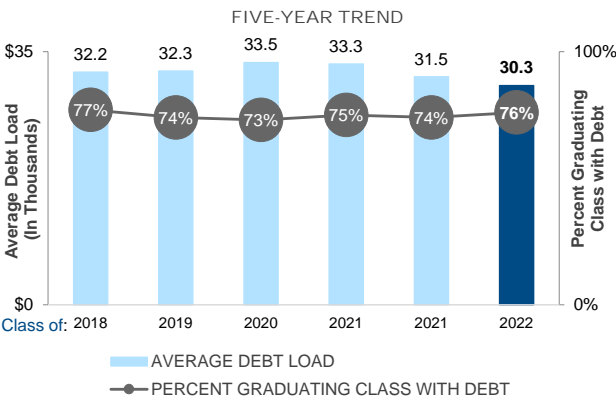
Percent Graduating
Class with Debt
in 2022

▲ 2

One-year
% point change
(vs. 2021)

▼ 1

Five-year
% point change
(vs. 2018)



ACCESS AND AFFORDABILITY

TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

296

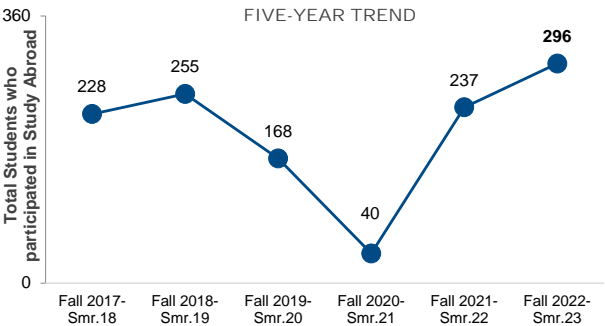
Students who participated
in Study Abroad
in Fall 2022-Smr.23

▲ 59

One-year
nominal change
vs. Fall 2021-Smr.22

▲ 68

Five-year
nominal change
vs Fall 2017-Smr.18



TOTAL ONLINE COURSE REGISTRATIONS

40,212

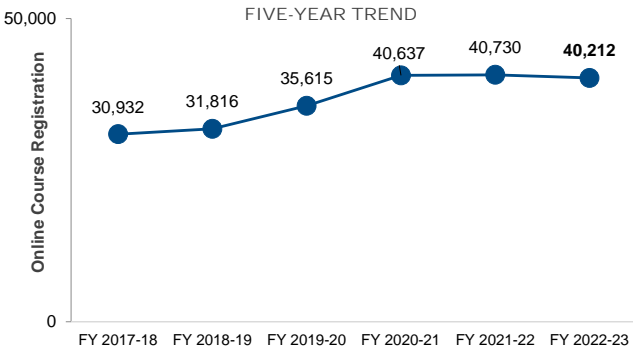
Online Course
Registrations
in FY 2022-23

▼ 1%

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

▲ 30%

Five-year
% change
(vs. FY 2017-18)

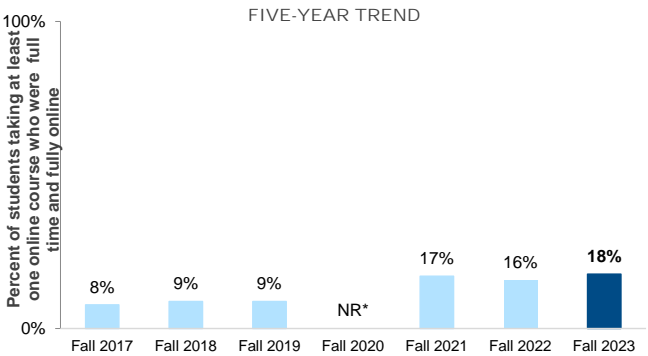


PERCENTAGE OF DEGREE-SEEKING STUDENTS TAKING AT LEAST ONE ONLINE COURSE WHO WERE FULL TIME AND FULLY ONLINE

18%

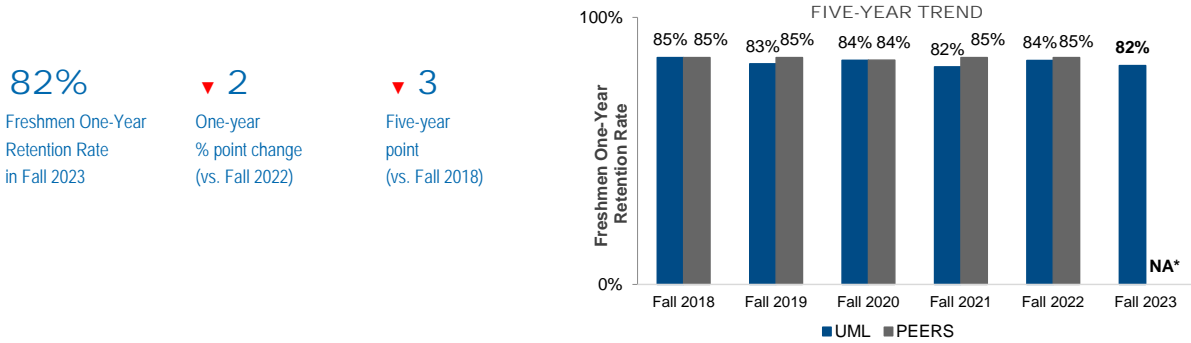
Students taking at least
one online course
who were full time
and fully online
in Fall 2023

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



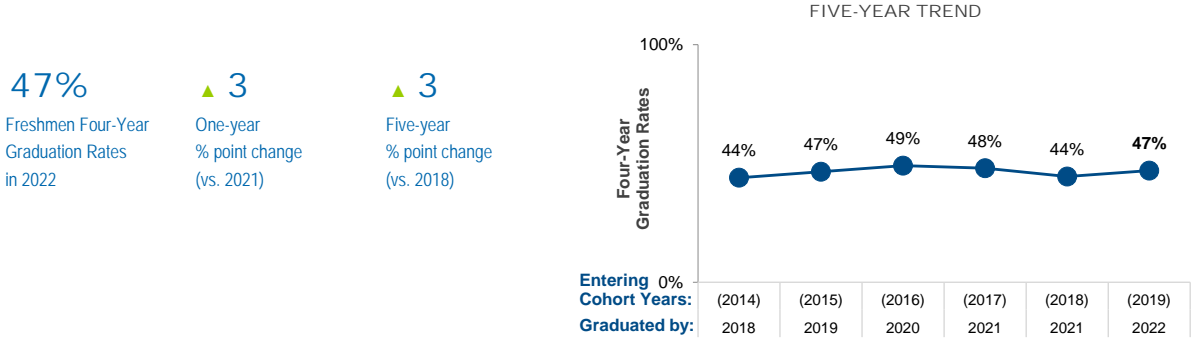
STUDENT SUCCESS AND SATISFACTION

FRESHMEN ONE-YEAR RETENTION RATE

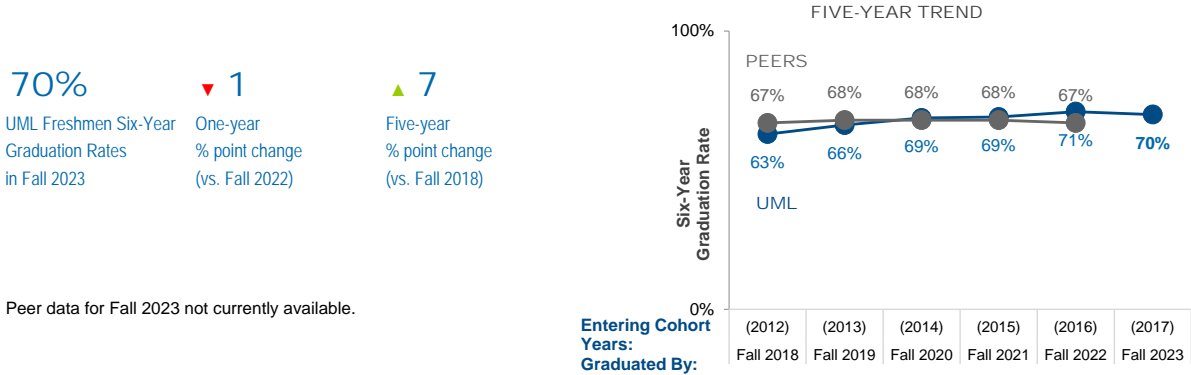


* Peer data for Fall 2023 not available for reporting purposes.

FRESHMEN FOUR-YEAR GRADUATION RATES



FRESHMEN SIX-YEAR GRADUATION RATE



Peer data for Fall 2023 not currently available.

STUDENT SUCCESS AND SATISFACTION

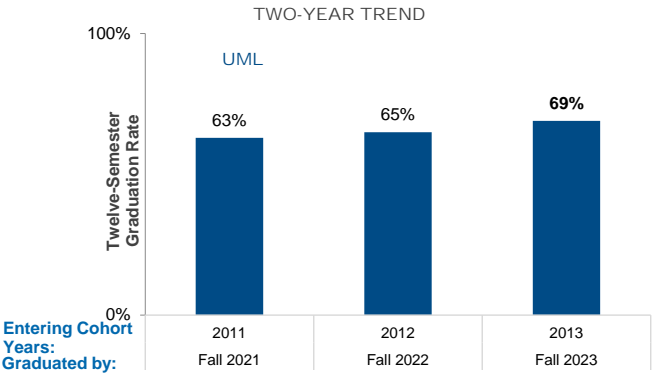
FRESHMEN TWELVE-SEMESTER GRADUATION RATE

69%

UML Freshmen
Twelve-semester
Graduation Rates
in Fall 2023

▲ 4

One-year
% point change
(vs. Fall 2022)



TRANSFER (FULL-TIME) ONE-YEAR RETENTION RATE

84%

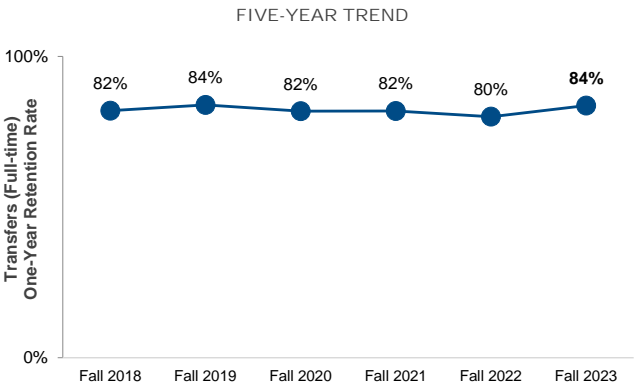
Transfers (Full-time)
One-Year
Retention Rate
in Fall 2023

▲ 4

One-year
% point change
(vs. Fall 2022)

▲ 2

Five-year
% point change
(vs. Fall 2018)



TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

81%

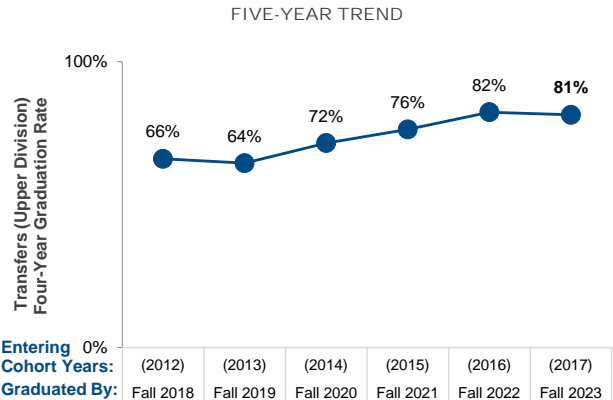
Transfers (Upper
Division) Four-Year
Graduation Rates
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

▲ 15

Five-year
% point change
(vs. Fall 2018)



STUDENT SUCCESS AND SATISFACTION

STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2017-18

54%

Bachelor's Degree
Within 4 Yrs. from
any institution

74%

Bachelor's Degree
Within 5 Yrs. From
any institution

80%

Bachelor's Degree
Within 6 Yrs. From
any institution

48%

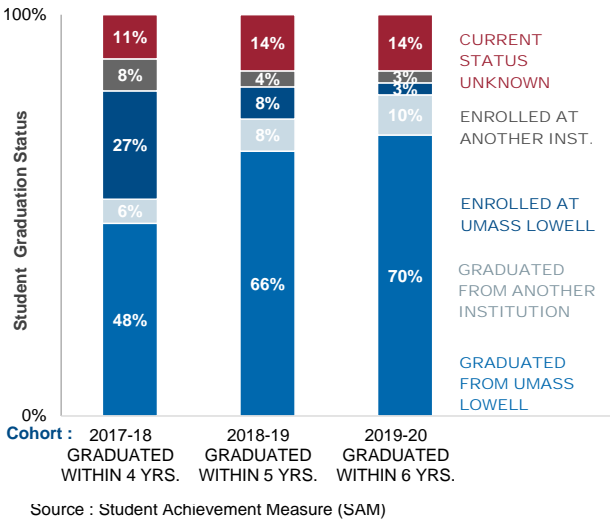
Bachelor's Degree
Within 4 Yrs. from
UMass Lowell

66%

Bachelor's Degree
Within 5 Yrs. From
UMass Lowell

70%

Bachelor's Degree
Within 6 Yrs. From
UMass Lowell



STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

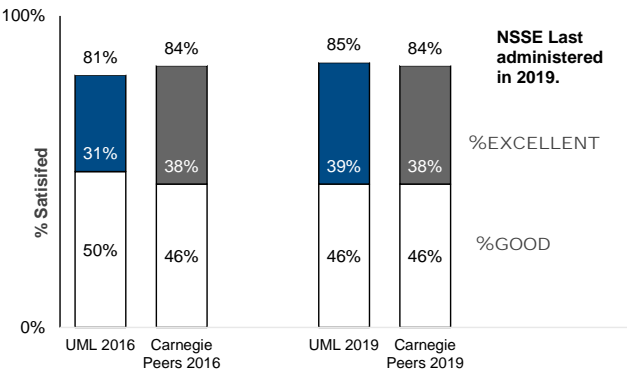
85%

Student Satisfaction
as Good or Excellent
in UML 2019

▲ 4

Three-year
% point change
(vs. UML 2016)

*Last NSSE administration was in 2019.



ALUMNI PARTICIPATION RATE

5%

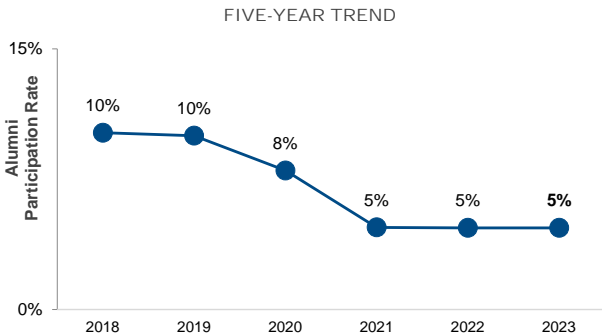
Alumni Participation
Rate
in 2023

● 0

One-year
% point change
(vs. 2022)

▼ 5

Five-year
% point change
(vs. 2018)



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

4,514

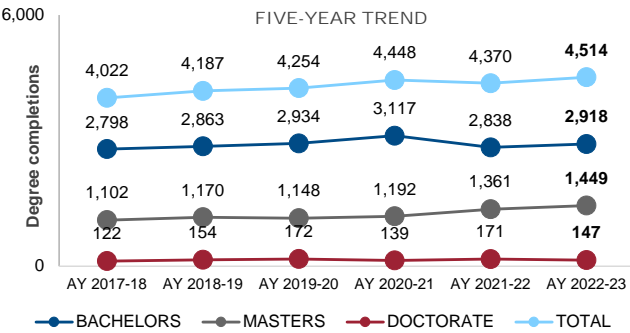
Total degree completions
AY 2022-23

▲ 3%

One-year % change
in total degree completions
(vs. AY 2021-22)

▲ 12%

Five-year % change
in total degree completions
(vs. AY 2017-18)



NUMBER OF PATENT APPLICATIONS

28

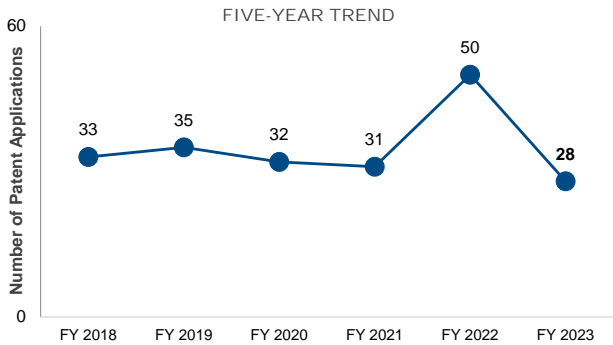
Patent Applications
in FY 2023

▼ 22

One-year nominal change
(vs. FY 2022)

▼ 5

Five-year nominal change
(vs. FY 2018)



TOTAL R&D EXPENDITURES

\$117.3

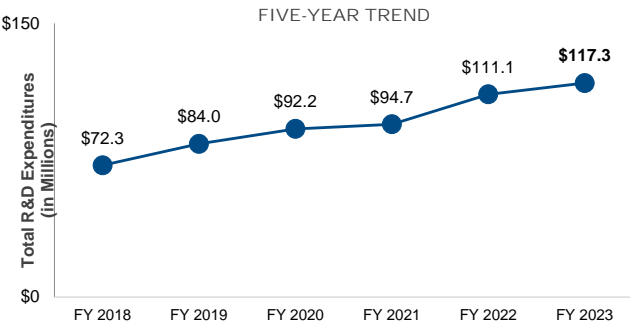
Million
in FY 2023

▲ 6%

One-year % change
(vs. FY 2022)

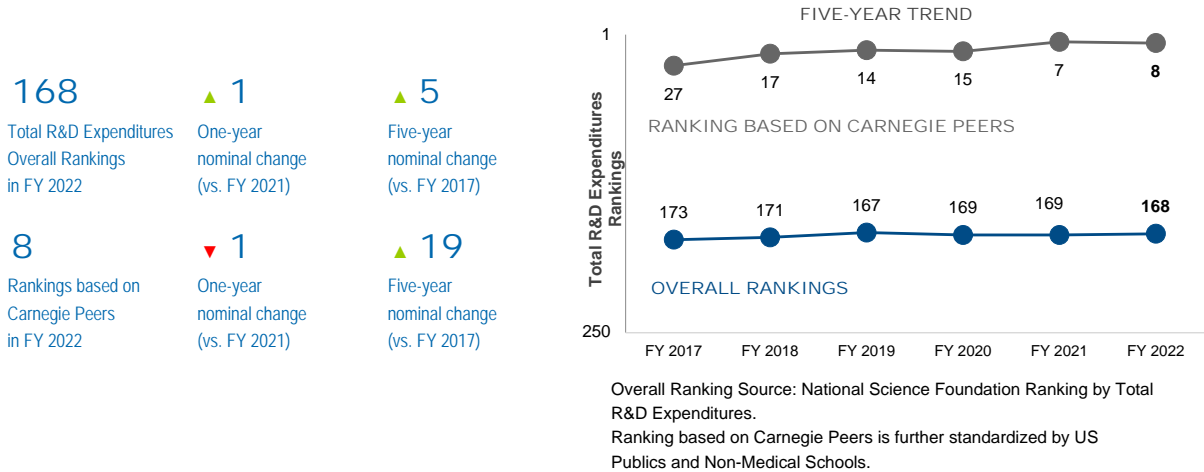
▲ 62%

Five-year % change
(vs. FY 2018)



SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES RANKINGS

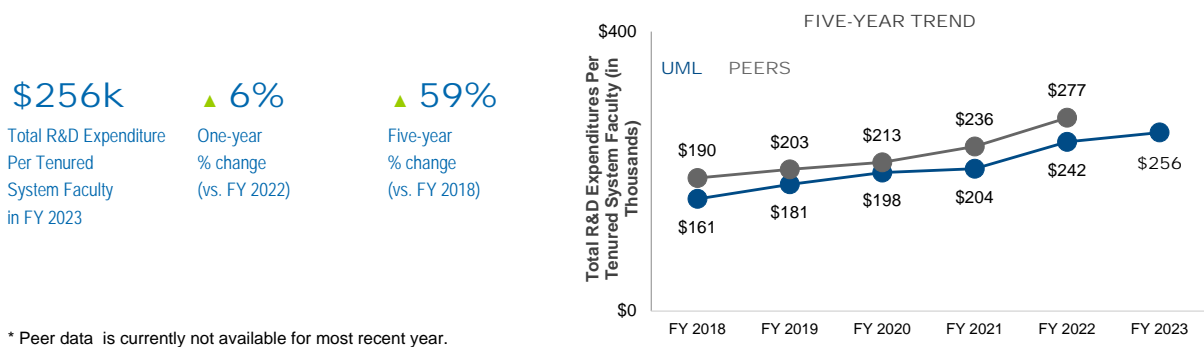


FIVE-YEAR TREND

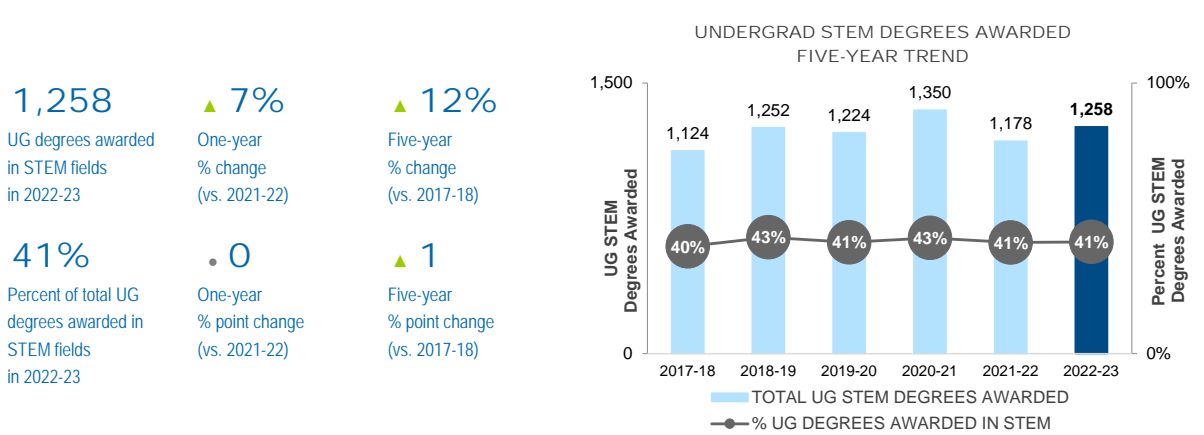
Fiscal Year	Ranking Based on Carnegie Peers	Overall Rankings
FY 2017	27	173
FY 2018	17	171
FY 2019	14	167
FY 2020	15	169
FY 2021	7	169
FY 2022	8	168

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

TOTAL R&D EXPENDITURES PER TENURED SYSTEM FACULTY



DEGREES AWARDED IN STEM FIELDS



UNDERGRAD STEM DEGREES AWARDED
FIVE-YEAR TREND

Year	Total UG STEM Degrees Awarded	% UG Degrees Awarded in STEM
2017-18	1,124	40%
2018-19	1,252	43%
2019-20	1,224	41%
2020-21	1,350	43%
2021-22	1,178	41%
2022-23	1,258	41%

SERVICE TO THE COMMONWEALTH

GRAD STEM DEGREES AWARDED FIVE-YEAR TREND

620

Grad degrees awarded
in STEM fields
in 2022-23

▲ 15%

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

▲ 23%

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

34%

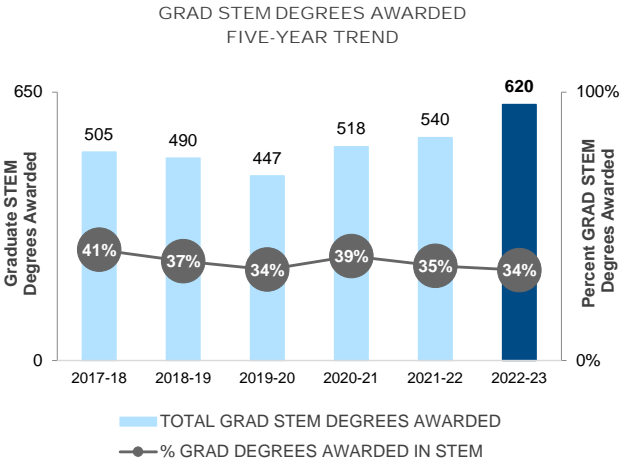
Percent of total Grad
degrees awarded in
STEM fields
in 2022-23

▼ 1

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

▼ 7

Five-year
% point change
(vs. 2017-18)



TOTAL STEM DEGREES AWARDED

1,878

Total degrees awarded
in STEM fields
in 2022-23

▲ 9%

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

▲ 15%

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

38%

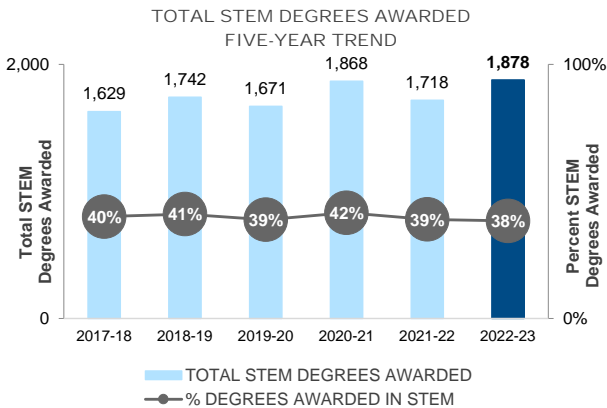
Percent of Total
degrees awarded in
STEM fields
in 2022-23

▼ 1

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

▼ 2

Five-year
% point change
(vs. 2017-18)



CERTIFICATES AWARDED IN STEM FIELDS

102

Total Certificates awarded
in STEM fields
in 2022-23

▼ 12

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

▼ 82

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

29%

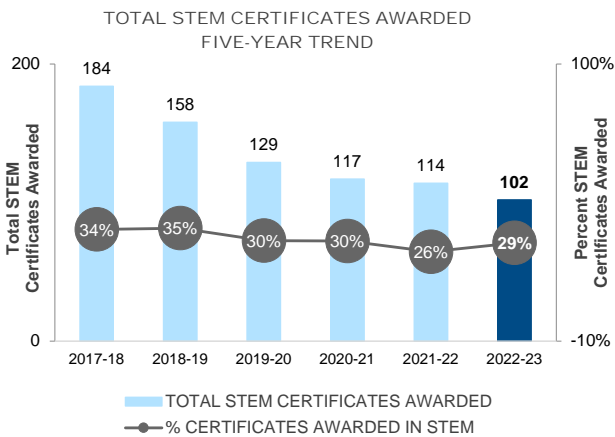
Percent of Total
Certificates awarded in
STEM fields
in 2022-23

▲ 3

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

▼ 5

Five-year
% point change
(vs. 2017-18)



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS IN HEALTHCARE FIELDS

480

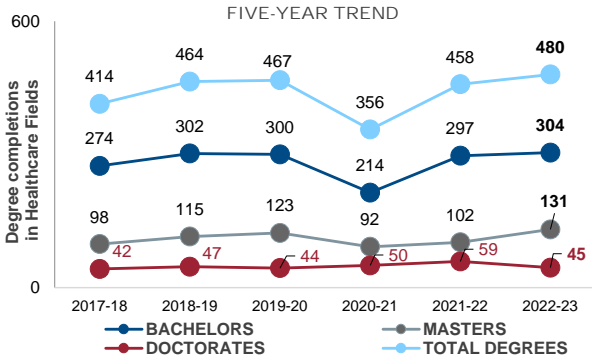
Total degrees awarded
in HealthCare fields
in 2022-23

▲ 5%

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

▲ 16%

Five-year
% point change
(vs. 2017-18)



CERTIFICATES AWARDED IN HEALTHCARE FIELDS

31

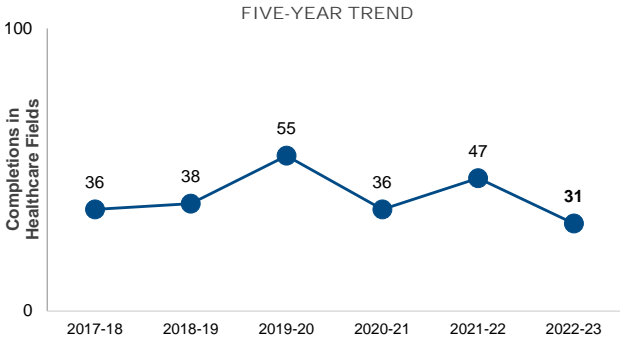
Total Certificates awarded
in HealthCare fields
in 2022-23

▼ 34%

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

▼ 14%

Five-year
% point change
(vs. 2017-18)



LICENSE INCOME

\$52k

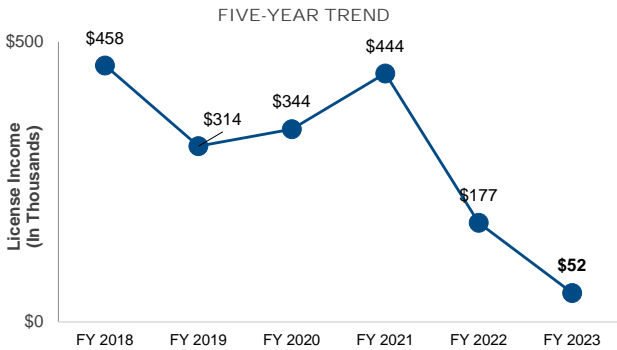
License Income
in FY 2023

▼ 71%

One-year
% change
(vs. FY 2022)

▼ 89%

Five-year
% change
(vs. FY 2018)



FINANCIAL HEALTH

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

59%

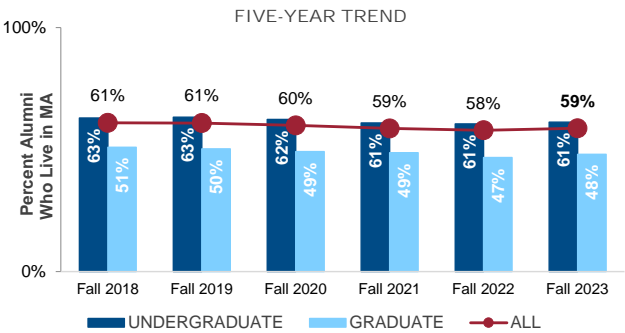
Of all UMass Alumni
live in the Commonwealth
in Fall 2023

▲ 1

One-year
% point change
(vs. Fall 2022)

▼ 2

Five-year
% point change
(vs. Fall 2018)



ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

\$149M

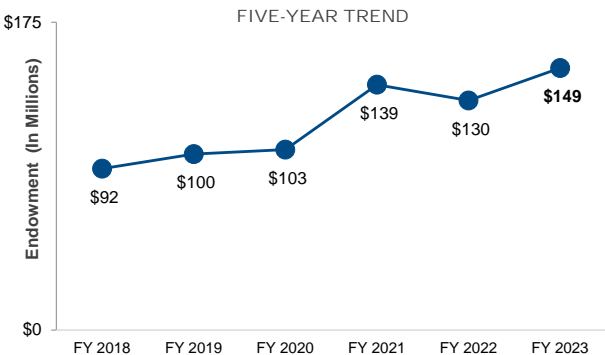
Endowment Assets
in FY 2023

▲ 14%

One-year
% change
(vs. FY 2022)

▲ 62%

Five-year
% change
(vs. FY 2018)



ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

14%

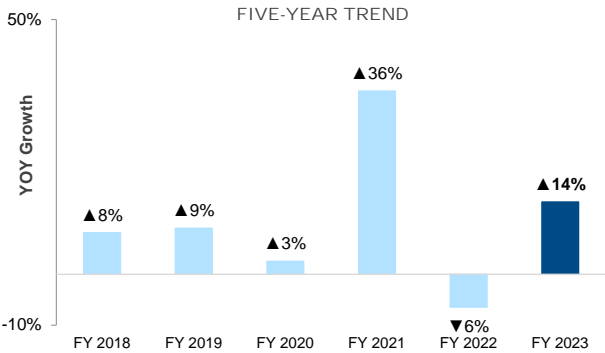
Annual Growth
in FY 2023

▲ 20

One-year
% point change
(vs. FY 2022)

▲ 6

Five-year
% point change
(vs. FY 2018)



FINANCIAL HEALTH

ENDOWMENT PER ANNUALIZED STUDENT FTE

\$13.0k

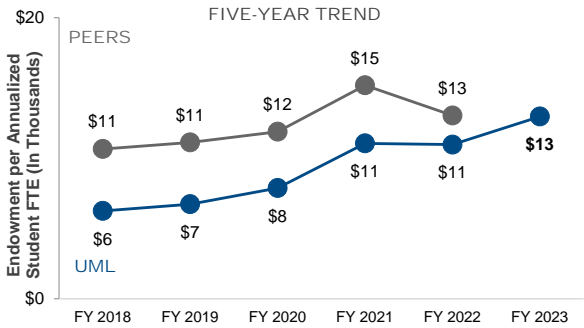
Endowment per Annualized Student FTE in FY 2023

▲ 18%

One-year % change (vs. FY 2022)

▲ 107%

Five-year % change (vs. FY 2018)



* Peer data not available for most recent year.

PRIVATE FUNDS RAISED ANNUALLY

\$37.5M

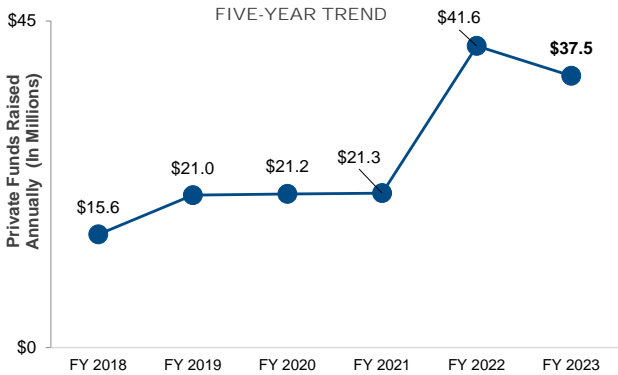
Private Funds Raised Annually in FY 2023

▼ 10%

One-year % change (vs. FY 2022)

▲ 140%

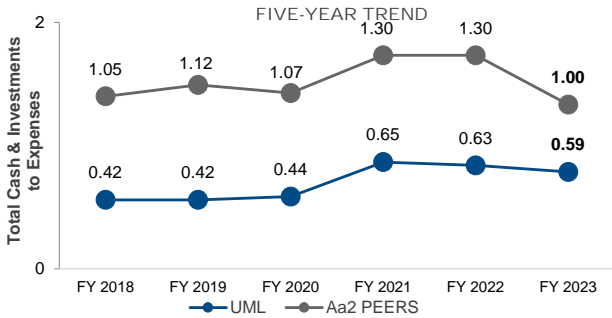
Five-year % change (vs. FY 2018)



TOTAL CASH & INVESTMENTS TO EXPENSES

0.59

Total Cash & Investments to Expenses in FY 2023



FINANCIAL HEALTH

DEBT SERVICE BURDEN

6.7%

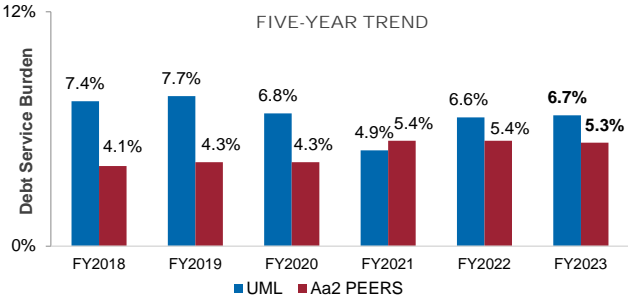
Debt Service Burden in FY2023

▲ 0.1

One-year % Point change (vs. FY2022)

▼ 0.7

Five-year % Point change (vs. FY2018)



OPERATING MARGIN (%)

1.2%

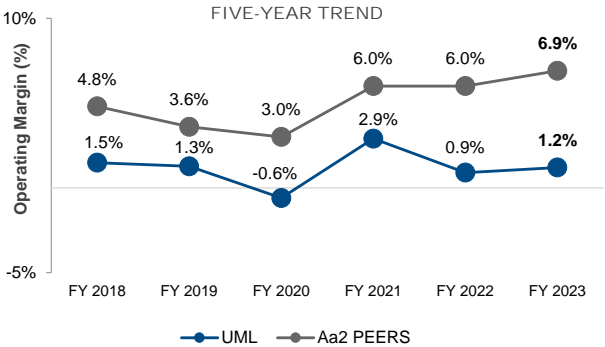
Operating Margin (%) in FY 2023

▲ 0.3

One-year % Point change (vs. FY 2022)

▼ 0.3

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



DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Average High School GPA of First-Time Freshmen. Cumulative GPA for college prep courses with additional weight to honors and AP courses, according to DHE admissions policy, reported on all first-time students.

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

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

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

Technology-Enhanced Classrooms.

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

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

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

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

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

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

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

DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

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

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

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

Number of First-degree Bachelor-seeking Students Aged 25+. Number of currently enrolled first-degree bachelor-seeking students who are aged 25+ as of Sept 1 of the Fall semester. Includes undergraduate, bachelor's-seeking students who came in as freshmen or transfers; excludes second degree transfers.

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

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

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

Average Student Debt Load of Graduating Class (UG). Average debt load is based on the total debt borrowed by an Institution's graduating

class (bachelor's, first-time only) divided by the number of students of that cohort that carried any amount of debt. It does not include those students with no debt load. It does not include students who have transferred in. The graduating class includes those that graduated between July 1 and June 30 of the reporting year. Data is from CDS.

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

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

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

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

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

DEFINITIONS AND SOURCES

STUDENT SUCCESS AND SATISFACTION INDICATORS

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

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

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

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

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

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

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

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

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

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

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

DEFINITIONS AND SOURCES

SERVICE TO THE COMMONWEALTH INDICATORS

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

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

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

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

Percent Alumni who Live in Massachusetts. Percentage of total alumni who currently reside in Massachusetts based on alumni records.

FINANCIAL HEALTH INDICATORS

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

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

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

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

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

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

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

DEFINITIONS AND SOURCES

PEER INSTITUTIONS FOR UMASS LOWELL

Georgia State University	University of Rhode Island*
San Diego State University	University of Wisconsin – Milwaukee
University of Maine (Orono)	Virginia Commonwealth University
University of Maryland -- Baltimore County	* <i>Aspirant peer</i>
University of New Hampshire*	

Moody's Aa2 Peers	University of Alabama at Birmingham, AL
Alamo Community College District, TX	University of Alabama, AL
Arizona State University, AZ	University of Arizona, AZ
Auburn University, AL	University of Arkansas, AR
Board of Regents of The University System of Georgia, GA	University of California, CA
California State University, CA	University of Florida, FL
City University of New York, NY	University of Georgia, GA
Clemson University, SC	University of Hawaii, HI
Cuyahoga Community College District, OH	University of Houston System, TX
Florida State University, FL	University of Kansas, KS
Houston Community College System, TX	University of Kentucky, KY
Iowa State University of Science & Technology, IA	University of Massachusetts, MA
Michigan State University, MI	University of North Texas System,
Mississippi Institutions of Higher Learning, MS	TX University of Oregon, OR
Nevada System of Higher Education, NV	University of South Carolina, SC
State University of New York, NY	University of Wyoming, WY
State University System of Florida, FL	
Texas State University System, TX	

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



CHAN MEDICAL SCHOOL

HEADLINES

The Medical School currently enjoys a position of stability and promise as it executes to its strategic vision, buoyed in no small measure by the transformational \$175 Million philanthropic commitment made by The Morningside Foundation in 2021. This unrestricted endowment gift, to be paid over five years, is a significant validation of the approach taken to investments in research programs, the educational mission and importantly, faculty and student recruitment and retention. The campus – now UMass Chan Medical School – continues to make significant advances in all its mission areas.

UMass Chan has continued to achieve in research, academic, and fundraising initiatives, including significant increases in research support, approval by the Liaison Committee on Medical Education accrediting body to launch its second regional campus for the T.H. Chan School of Medicine. UMass Chan-Lahey, in partnership with Lahey Hospital & Medical Center, part of Beth Israel Lahey Health, will welcome its first cohort of approximately 25 students in August 2024. Students enrolled in this new LEAD@Lahey program will follow the core curriculum of the T.H. Chan School of Medicine with an added focus on leadership, health systems science and interprofessional education. The UMass Chan-Lahey campus will also include a new research collaboration with the goal of fostering innovation in digital medicine, population health and health care delivery.

The Morningside Foundation commitment will impact a number of initiatives already contemplated in the campus strategic plan, especially investments in the educational program, the research enterprise, workforce development, information technology, and organizational development. In early 2023, the campus completed and shared with its campus community the annual progress report for its IMPACT 2025 strategic plan, which can be [read here](#).

Goals for IMPACT 2025 position UMass Chan Medical School to build upon its first 50 years by looking forward to the next 50 as an opportunity to further demonstrate our contributions as a leading-edge medical school known for propagating an enhanced social mission. Specifically, we will:

- Design innovative and inter-professional learning modalities for diverse learners and evolving workforce needs.

- Enable the engine of discovery to generate groundbreaking scientific knowledge, while expanding our ability to invest in emerging opportunities such as human genetics and areas of world-class strength such as gene therapy and RNAi, neuroscience, digital medicine, health equity, inflammation and immunity.
- Launch a Collaborative in Health Equity to harness and improve the health and welfare of the residents of Massachusetts and the citizens of the world as part of the Medical School's enhanced social mission that engages community partners, advances health equity research and promotes public health interventions for the benefit of those greatest in need;
- Enhance innovation and increase impact by advancing the science of translation and channeling more discoveries into development and practice;
- Establish models for outstanding support services, vibrant working environments, and highly efficient infrastructure to propel UMass Chan to new heights.
- Create inclusive, equitable environments across the campus so that UMass Chan can better attract, support and advance diverse staff, faculty and learners.

The campus is well positioned for this new vision, as research and faculty achievement and intense efforts in resource maximization and operational efficiencies continue, coupled with full accreditation approval from the New England Commission of Higher Education for a period of 10 years, through 2032. Extramurally funded research surpasses \$300 million annually and in 2024 the Medical School opened its new education and research building. In addition, the Medical School was proud to be the only institution of higher education in Massachusetts to be named to *The Boston Globe's* 2023 Top Places to Work for the second year – a distinction that is particularly noteworthy and satisfying because it was based upon survey data and feedback from Medical School employees. The Medical School was also recognized for its diversity, equity and inclusion practices by *The Boston Globe*.

HEADLINES

Ongoing and active efforts to prioritize educational and research initiatives continue, but an unyielding commitment to education, research, service, innovation, and training remains the hallmark of the commonwealth's great public medical school.

Licensing of the medical school's intellectual property reflects keen national and international interest in the work of the faculty, including ongoing clinical trials for a growing number of rare diseases, neurodegenerative diseases once thought intractable to treatment and an expansion of a clinical trial for an antibody prophylaxis for Lyme disease that may usher in a new approach to preventive therapeutics. UMass Chan researchers continue to compete at an exceptionally high level for federal funding, even in a shrinking federal research pool and attract investment from a wide range of new and long-established biotechnology research and manufacturing entities.

- **Academic quality:** UMass Chan continues to attract outstanding students to the T.H. Chan School of Medicine, as judged by admission test scores, residency match results, and performance on licensing exams, even in a time of unusual upheaval and uncertainty; the quality of the incoming class remains on a par with previous years. The increase in class size has been successful, increasing the number of physicians in training with no negative impact on student quality, performance, or satisfaction. The applicant pool for the limited number of spaces for highly qualified out-of-state students is robust; the Population-based Urban and Rural Community Health (PURCH) track students are distinguished by their passion for this targeted curricular offering, and a similar response to the new UMass Chan-Lahey regional medical campus is anticipated. Medical School graduates continue to rank their educational experience as highly satisfactory - literally in the 100th percentile in some categories. Agreements with Lahey, Baystate Health and Cape Cod Healthcare not only create superb clinical opportunities for medical students but increase the school's profile in new regions. The Tan Chingfen Graduate School of Nursing is capably managing its curriculum, course offerings, and cross-disciplinary involvement in a changing academic and practice environment. Graduates from the Masters of Science in Nursing, Doctorate of Nursing Practice degree program, the Graduate Entry Pathway, and the doctoral program are meeting important needs in areas of practice,

research, and education for the campus and the region.

The Morningside Graduate School of Biomedical Sciences continues to track favorably to peer institutions and the school is recognized for its efforts to prepare students for multidisciplinary careers, whether in academia, industry or any number of compelling settings.

- **Research growth, productivity, and faculty recruitment:** Research productivity is significant across the departments, in part because of continued recruitment and investment in the clinical and translational sciences. Multidisciplinary programs in RNA therapeutics, systems biology, rare diseases, and neurosciences are creating exciting opportunities for research growth and faculty recruitment. Faculty recruitment is also aided by the stellar reputation of the graduate school of biomedical sciences. A new Translational Institute for Molecular Therapeutics is the first of its kind. Licensing and sponsored research agreements in gene therapy, vaccine development, RNA biology, and drug development support research activity across all basic science disciplines. Faculty recruitment is aided by the reputation of our graduate school of biomedical sciences.

- **Crucial to the continued success of UMass Chan** is the ability to attract high-quality students who will be able to meet the diverse cultural needs of underserved populations in the state. For the T.H. Chan School of Medicine, applicants are incredibly competitive and match or exceed class profiles of previous years. Student access and affordability can be measured and supported by the learning contract option, which in relation to tuition and fees, continues to track favorably for the current year. Out-of-state students compare favorably to historical student profiles.

- **Anecdotal evidence,** such as rankings in the *US News & World Report* "Best Graduate Schools" continues to reinforce the reputation of the Medical School as a high quality, affordable institution: the 2023 *US News* ranking places the T.H. Chan School of Medicine 13th in the nation for primary care; and 44th among research institutions. UMass Chan Medical School also ranked 37th among all US medical schools – yet #2 in New England - in NIH funding, according to the Blue Ridge Institute for

HEADLINES

Medical Research in 2022. Performance of medical students on benchmark exams and nursing students on board certification, along with residency program match results, are good supporting indicators of quality. Morningside Graduate School of Biomedical Sciences students are highly competitive for fellowship awards. Job placement data exceeds national rates. The Morningside Foundation gift, in addition to creating a foundation for campus success far into the future, is also a clear and tangible vote of confidence in the campus direction, leadership, strategic plan and ability to impact human health. As achievements and discoveries in the life sciences portend an exciting future - one where the fruits of research positively impact human lives and at a time when the need for highly talented physicians, scientists and advanced practice nurses is projected to grow dramatically - the campus remains exceptionally well-positioned to respond.

AT-A-GLANCE

ACADEMIC QUALITY

• Mean MCAT Score	514.1	• Faculty FTE	1,309
• USMLE Step 1 Pass Rate	95%	• Full-Time Instructional Faculty	
• <i>USMLE Step 2 (CK) Pass Rate</i>	99%	Percent Faculty-of-Color	32%
• USMLE Step 2 (CS) Pass Rate	N/A*	Percent Women Faculty	45%
• Nursing Board Certification Pass Rate	100%	• NIH Funding among Medical Schools	\$178,572
• Technology-Enhanced Classrooms	85	• US News & World Report Ranking	13
• Percent Tenured/Tenure-Track Faculty FTE	17%		

ACCESS AND AFFORDABILITY

• Graduates From Massachusetts	888	• Graduates Who Are International	111
• Graduate Students Of Color	516	• Tuition and Fees	\$40,228

STUDENT SUCCESS AND SATISFACTION

• Residency Choice Acceptance Rate	95%	• Alumni Participation Rate	17%
• Student Satisfaction with Medical Education Quality	85%ile		

SERVICE TO THE COMMONWEALTH

• Degree Completions	323	• Patent Applications	131
<i>Master's</i>	59	• License Income	\$30M
<i>Doctorates</i>	264	• Percent Alumni who Remain in MA	56%
• Total R&D Expenditures	\$327M	• Degrees Awarded in STEM Fields	62
• Total R&D Expenditures Ranking	81	• Degrees Awarded in Healthcare Fields	261

AT-A-GLANCE

FINANCIAL HEALTH

• Total Endowment	\$531.1M	• Debt Service Burden	6.6%
• Annual Growth in Endowment	19.8%	• Operating Margin (%)	2.3%
• Endowment per Annualized Student FTE (Includes three graduate schools)	\$407,883	• Total Cash & Investments to Expenses	0.74
• Private Funds Raised Annually	\$50.9M		

ACADEMIC QUALITY

MEAN MCAT SCORE

514

Average Score
for MCATs
in Fall 2023

• 0.0%

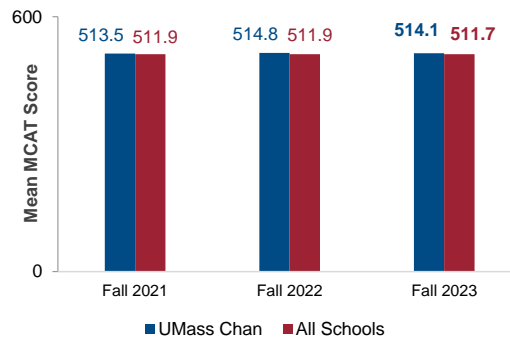
One-year
% change
(vs. Fall 2022)

• 0.0%

Two-year
% change
(vs. Fall 2021)

Peer Source: AAMC Medical Schools.

TWO-YEAR TREND



PASS RATES ON USMLE STEP 1 AND STEP 2 (CK)

95%

Pass Rate for
USMLE Step 1
in 2023

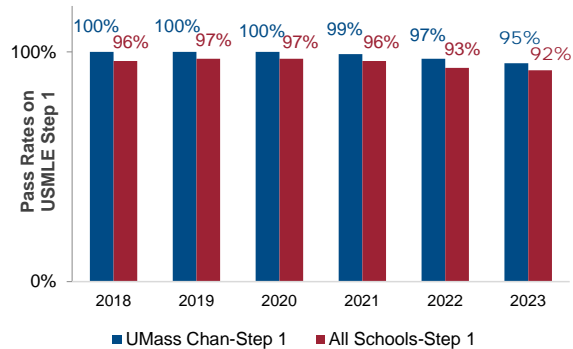
▼ 2

One-year
% Point change
(vs. 2022)

▼ 5

Five-year
% Point change
(vs. 2018)

FIVE-YEAR TREND



Source - National Board of Medical Examiners: Performance of Examinees.

99%

Pass Rate for
USMLE Step 2 (CK)
in AY 2022-23

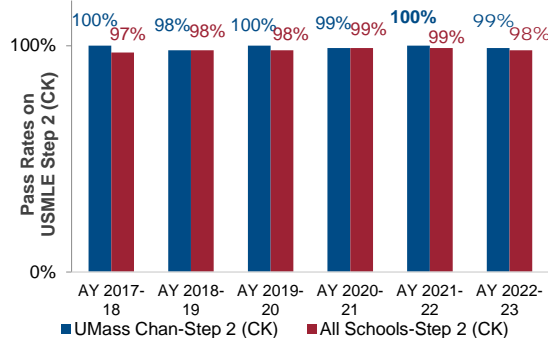
▼ 1

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

▼ 1

Five-year
% Point change
(vs. AY 2017-18)

FIVE-YEAR TREND



Source - National Board of Medical Examiners: Performance of Examinees.

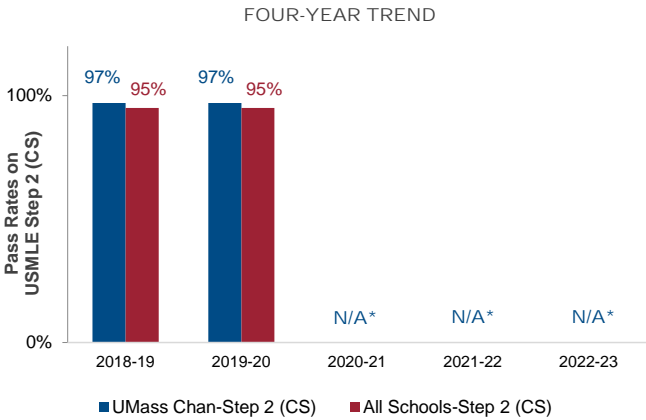
ACADEMIC QUALITY

PASS RATES ON USMLE STEP 2 (CS)

N/A*

Pass Rate for
USMLE Step 2 (CS)
in AY 2022-23

Peer Comparison - All U.S. and Canadian Medical Schools,
Data by Academic Year.
*Step 2 (CS) has been eliminated beginning AY 2020-21.



PASS RATES ON NURSING BOARD CERTIFICATION

100%

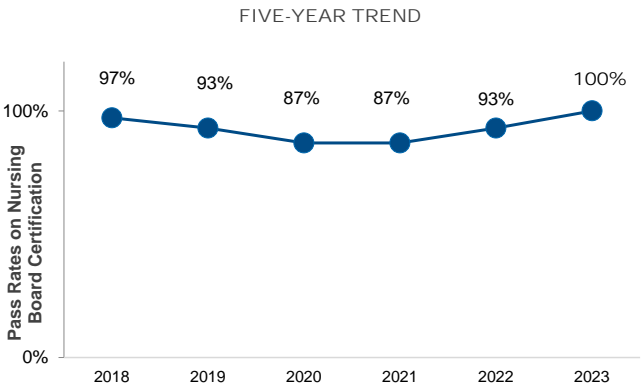
Pass Rate for
Nursing Board Cert.
in 2023

▲ 7%

One-year
% change
(vs. 2022)

▲ 3%

Five-year
% change
(vs. 2018)



Data by Calendar Year.

TECHNOLOGY-ENHANCED CLASSROOMS

85

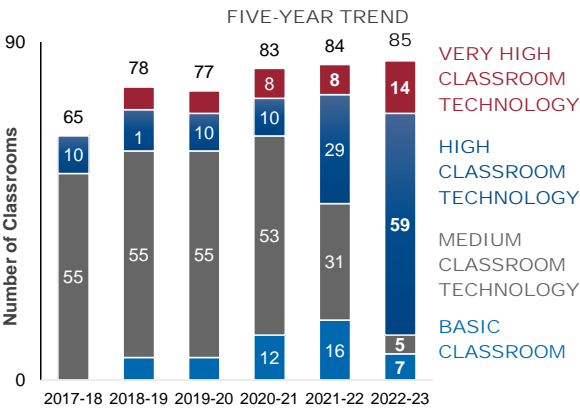
Total Technology
Enhanced Classrooms
in 2022-23

▲ 1%

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

▲ 9%

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



ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

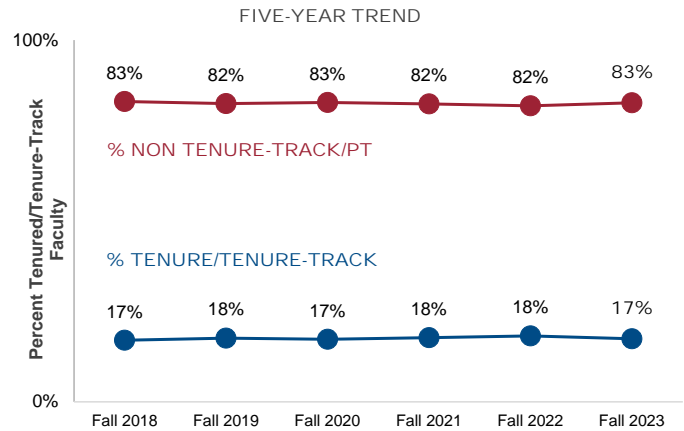
17%

Percent Tenured/
Tenure-track Faculty
in Fall 2023

▼ 1

One-year
% Point change
(vs. Fall 2022)

• 0

Five-year
% Point change
(vs. Fall 2018)

FACULTY FTE

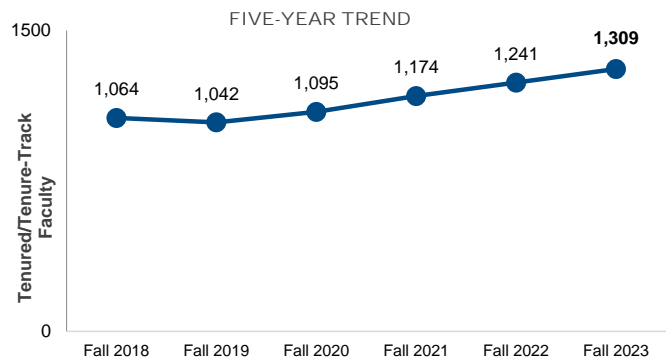
1,309

Total Tenured/
Tenure-track Faculty
in Fall 2023

▲ 5%

One-year
% change
(vs. Fall 2022)

▲ 23%

Five-year
% change
(vs. Fall 2018)

In 2016 "New Hires" were expanded to include any faculty hired from November 1 and October 31.

FACULTY-OF-COLOR

364

Faculty Of Color
in Fall 2023

▲ 2

One-year
nominal change
(vs. Fall 2022)

▲ 100

Five-year
nominal change
(vs. Fall 2018)

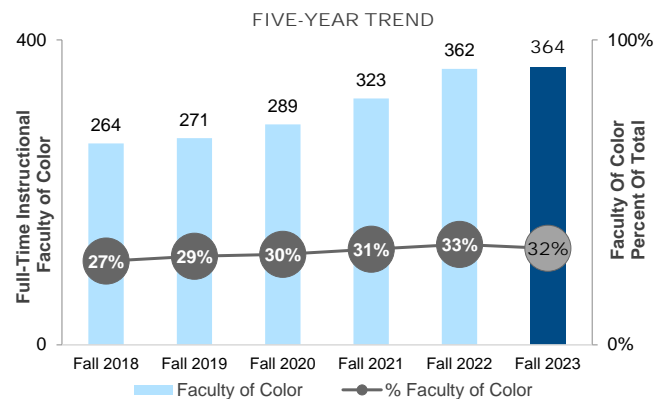
32%

Percent of
Faculty Of Color
in Fall 2023

▼ 1

One-year
% point
(vs. Fall 2022)

▲ 5

Five-year
% point
(vs. Fall 2018)

Faculty of Color based on 2010 IPEDS definitions Race/Ethnicity.
Does not include Unknowns and Non Resident Aliens.

ACADEMIC QUALITY

WOMEN FACULTY

546

Women Faculty
in Fall 2023

45%

Percent of
Women Faculty
in Fall 2023

▲ 32

One-year
nominal change
(vs. Fall 2022)

▲ 1

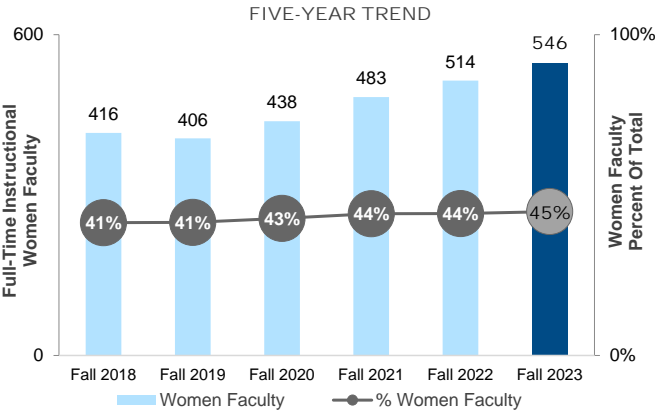
One-year
% point
(vs. Fall 2022)

▲ 130

Five-year
nominal change
(vs. Fall 2018)

▲ 4

Five-year
% point
(vs. Fall 2018)



NIH FUNDING AMONG MEDICAL SCHOOLS

\$179k

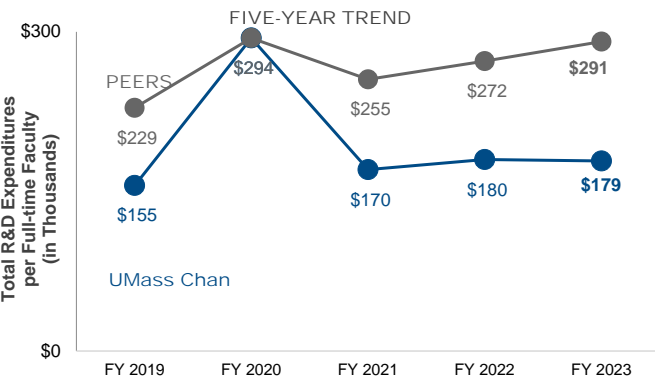
NIH Finding
among Medical Schools
in FY 2023

▼ 1%

One-year
% change
(vs. FY 2022)

▲ 11%

Five-year
% change
(vs. FY 2018)



US NEWS RANKING

13

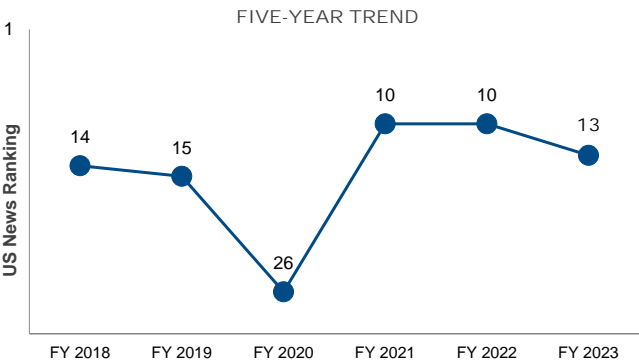
Medical Schools
Ranking
in FY 2023

▼ 3

One-year
nominal change
(vs. FY 2022)

▲ 1

Five-year
nominal change
(vs. FY 2018)



*US News ranking for FY2024 not yet available.

ACCESS AND AFFORDABILITY

GRADUATES FROM MASSACHUSETTS

888

Graduates from
Massachusetts
in Fall 2023

• 0%

One-year
% change
(vs. Fall 2022)

▲ 9%

Five-year
% change
(vs. Fall 2018)

64%

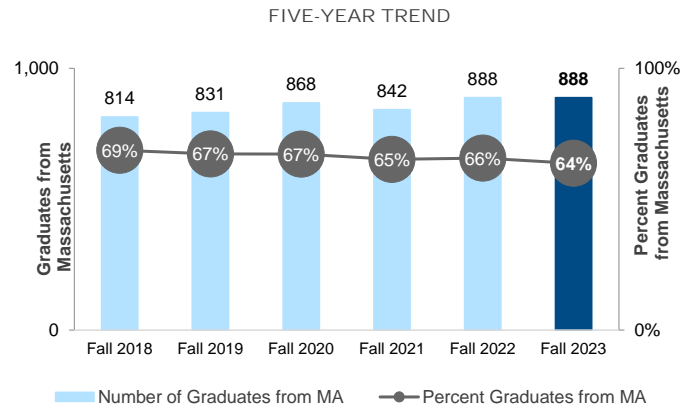
% Graduates
from Massachusetts
in Fall 2023

▼ 2

One-year
% point change
(vs. Fall 2022)

▼ 5

Five-year
% point change
(vs. Fall 2018)



GRADUATE STUDENTS OF COLOR

516

Graduates
Students of Color
in Fall 2023

▲ 14%

One-year
% change
(vs. Fall 2022)

▲ 59%

Five-year
% change
(vs. Fall 2018)

43%

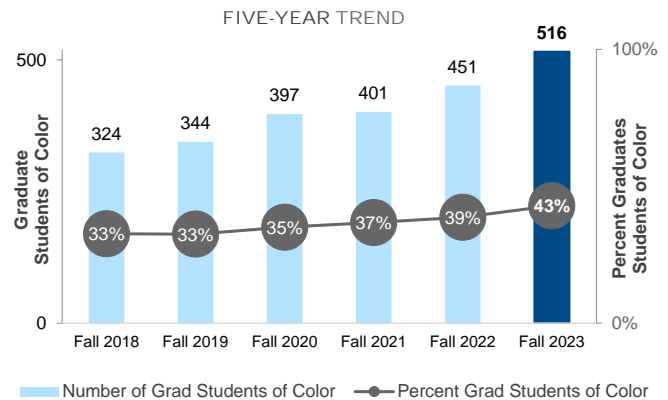
% Graduates
Students of Color
in Fall 2023

▲ 4

One-year
% point change
(vs. Fall 2022)

▲ 10

Five-year
% point change
(vs. Fall 2018)



GRADUATES WHO ARE INTERNATIONAL

111

International Graduate
Enrollment
in Fall 2023

▼ 2%

One-year
% change
(vs. Fall 2022)

▼ 14%

Five-year
% change
(vs. Fall 2018)

8%

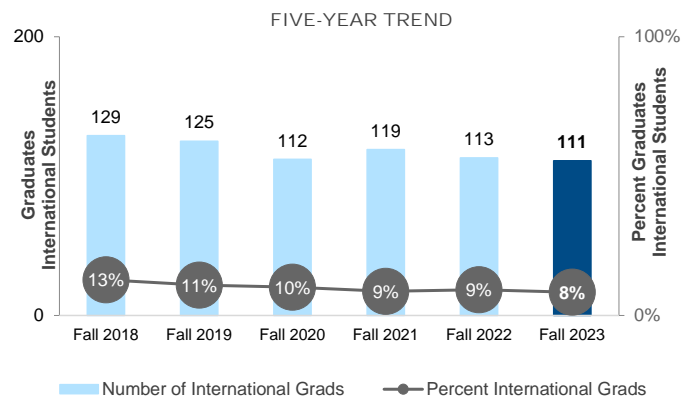
% International
Graduate Enrollment
in Fall 2023

▼ 1

One-year
% point change
(vs. Fall 2022)

▼ 3

Five-year
% point change
(vs. Fall 2018)



ACCESS AND AFFORDABILITY

TUITION AND FEES (INCLUDES ADJUSTMENT FOR LEARNING CONTRACT)

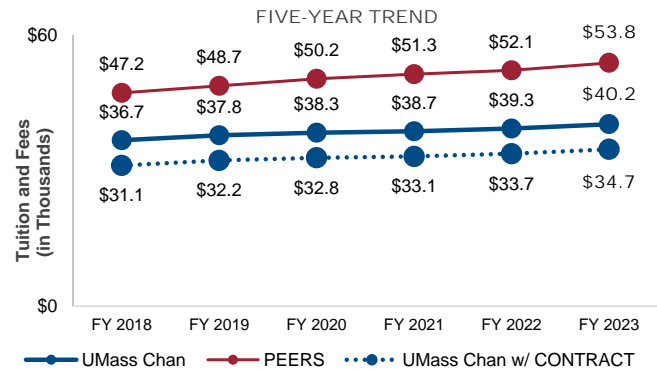
\$40.2k

Tuition &
Mandatory Fees
in FY 2023

▲ 2%

One-year
% change in
Tuition &
Mandatory Fees
(vs. FY 2022)

▲ 10%

Five-year
% change
Tuition &
Mandatory Fees
(vs. FY 2018)

STUDENT SUCCESS AND SATISFACTION

ACCEPTANCE RATE TO CHOICE OF RESIDENCY

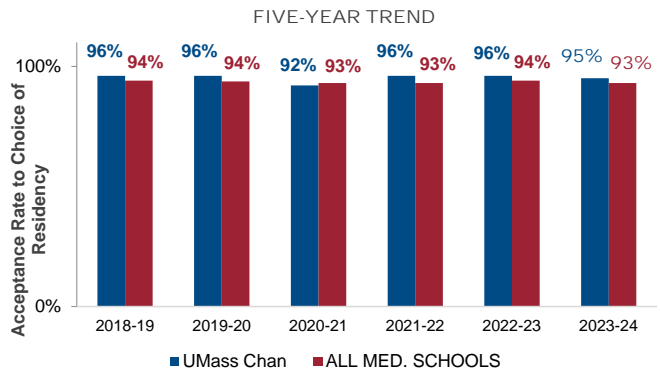
95%

Residency Choice
Acceptance Rate
in 2023-24

▼ 1

One-year
% point change
(vs. 2022-23)

▼ 1

Five-year
% point change
(vs. 2018-19)

% Matched based on those going through NRMP match

STUDENT SATISFACTION WITH QUALITY OF MEDICAL EDUCATION

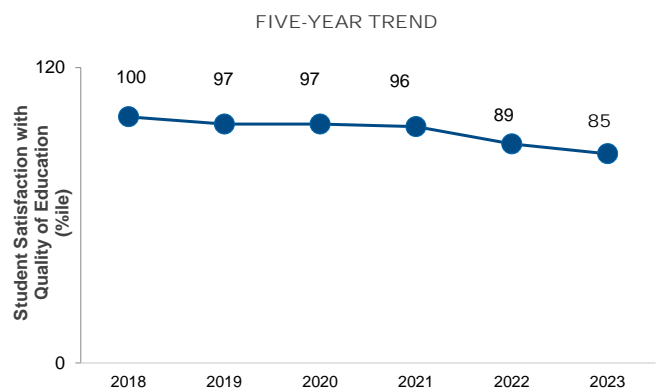
85%ile

Student Satisfaction
with Education Quality
in 2023

▼ 4

One-year
% Point change
(vs. 2022)

▼ 15

Five-year
% Point change
(vs. 2018)

Source: AAMC MMT Report, Percentile reported annually

STUDENT SUCCESS AND SATISFACTION

ALUMNI PARTICIPATION RATE

17%

Alumni Participation
Rate
in FY2023

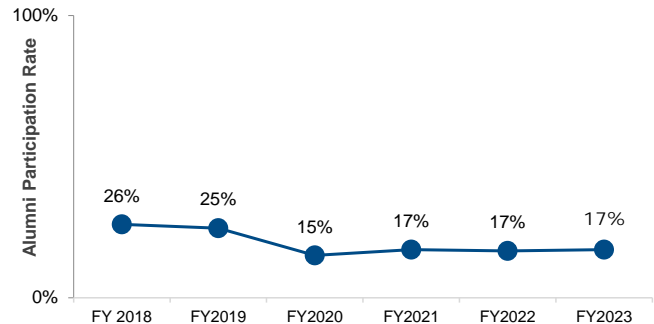
.0

One-year
% point change
(vs. FY2022)

▼ 9

Five-year
% point change
(vs. FY 2018)

FIVE-YEAR TREND



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

323

Total degree
completions
AY 2022-23

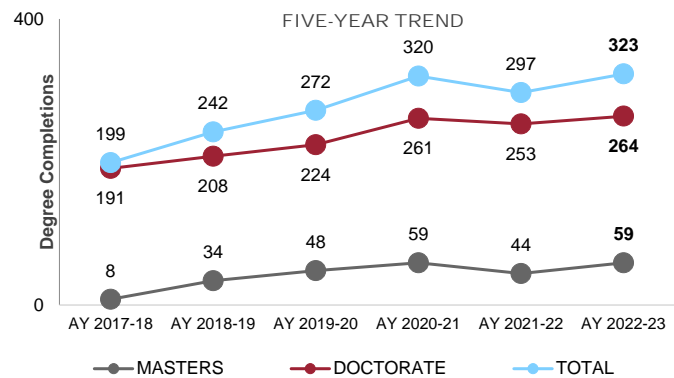
▲ 9%

One-year
% change
in total degree
completions
(vs. AY 2021-22)

▲ 62%

Five-year
% change
in total degree
completions
(vs. AY 2017-18)

FIVE-YEAR TREND



TOTAL R&D EXPENDITURES

\$327

Total R&D (Millions)
in FY 2023

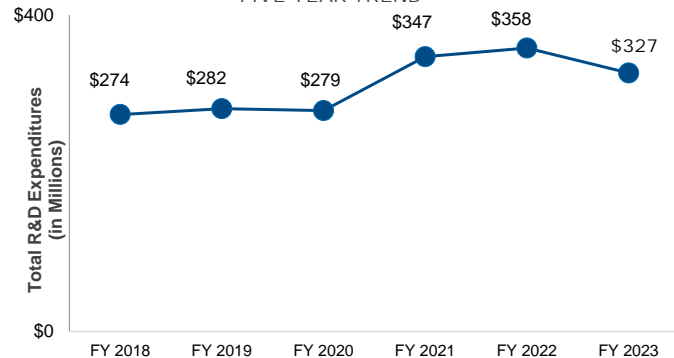
▼ 9%

One-year
% change
(vs. FY 2022)

▲ 19%

Five-year
% change
(vs. FY 2018)

FIVE-YEAR TREND



SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES RANKINGS

81

Total R&D Expenditure
Ranking
in FY 2022

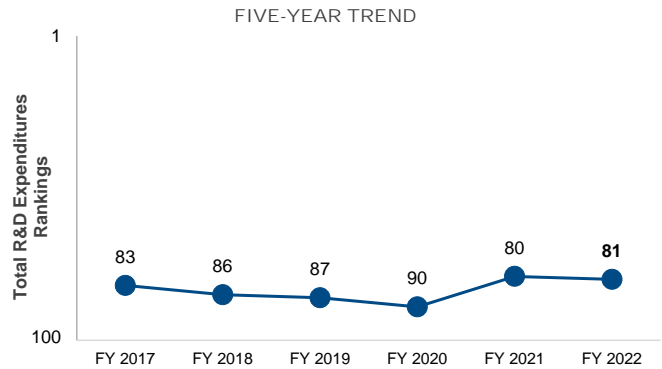
▲ 1

One-year
nominal change
(vs. FY 2021)

▼ 2

Five-year
nominal change
(vs. FY 2017)

*Information for 2023 unavailable at time of reporting.



PATENT APPLICATIONS

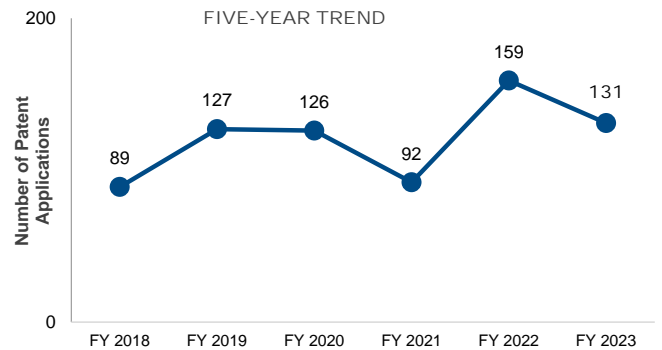
131

Patent
Applications
in FY 2023

▼ 28

One-year
nominal change
(vs. FY 2022)

▲ 42

Five-year
nominal change
(vs. FY 2018)

LICENSE INCOME

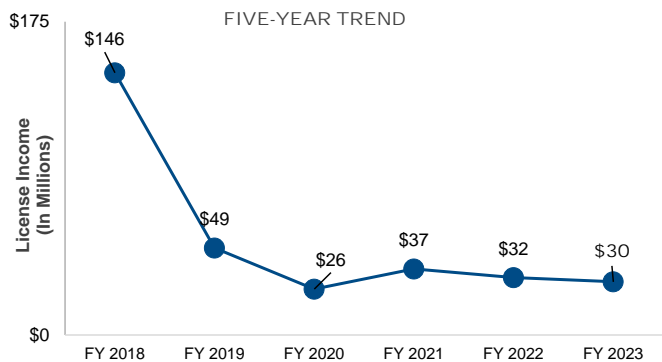
\$30M

License Income
in FY 2023

▼ 7%

One-year
% change
(vs. FY 2022)

▼ 80%

Five-year
% change
(vs. FY 2018)

SERVICE TO THE COMMONWEALTH

PERCENT ALUMNI WHO LIVE IN MASSACHUSETTS

56%

Alumni Who Live
in Massachusetts
in Fall 2023

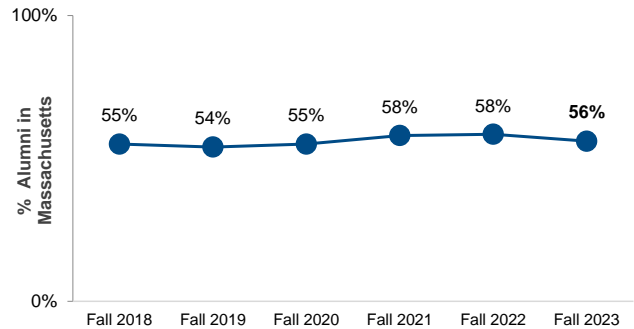
▼ 2

One-year
% point change
(vs. Fall 2022)

▲ 1

Five-year
% point change
(vs. Fall 2018)From Fall 2020 onward, calculated using data from the
Fall Data Template, Table 18

FIVE-YEAR TREND



DEGREES AWARDED IN STEM FIELDS

62

STEM Degrees
Awarded in
in 2022-23

▲ 19%

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

▼ 13%

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

19%

Percent of
degrees in
STEM fields
in 2022-23

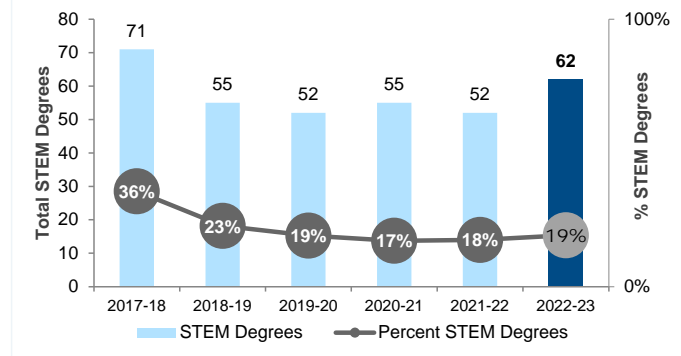
▲ 1

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

▼ 17

Five-year
% point change
(vs. 2017-18)

FIVE-YEAR TREND



DEGREES IN HEALTHCARE PROGRAMS

261

Healthcare Degrees
Awarded in
in 2022-23

▲ 7%

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

▲ 104%

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

81%

Percent of
degrees in
Healthcare fields
in 2022-23

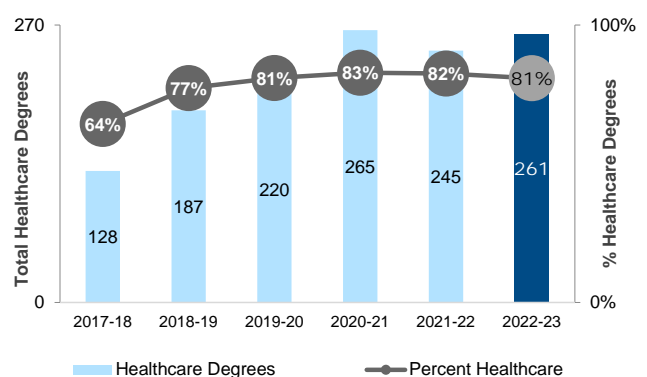
▼ 1

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

▲ 17

Five-year
% point change
(vs. 2017-18)

FIVE-YEAR TREND



FINANCIAL HEALTH

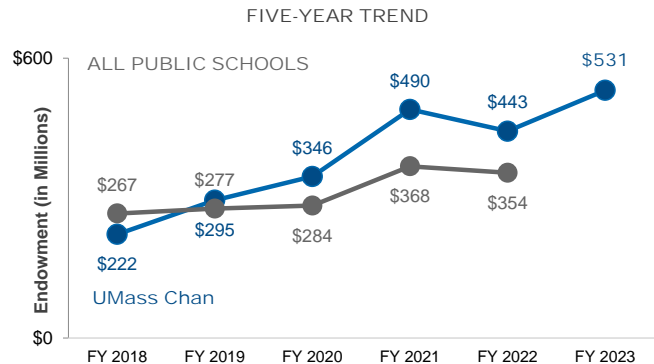
ENDOWMENT ASSETS

\$531MEndowment Assets
in FY 2023

▲ 20%

One-year
% change
(vs. FY 2022)

▲ 139%

Five-year
% change
(vs. FY 2018)

FY 2023 All Public Schools* data are not available.

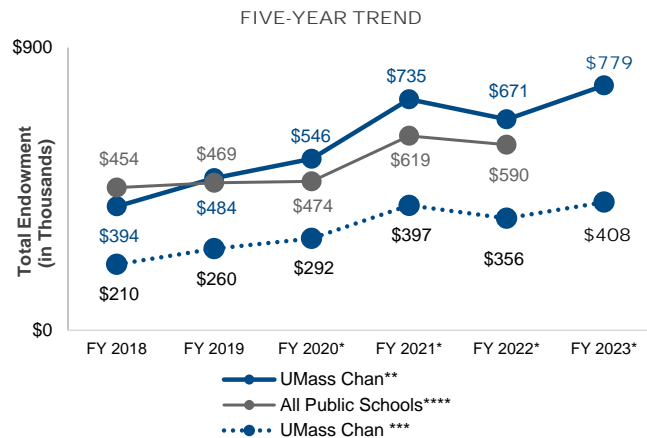
ENDOWMENT PER ANNUALIZED STUDENT FTE

\$408kEndowment per FTE
All Schools
in FY 2023*

▲ 14%

One-year
% change in
Endowment per FTE
All Schools
(vs. FY 2022*)

▲ 94%

Five-year
% change
Endowment per FTE
All Schools
(vs. FY 2018)

FY 2023*All Public Schools**** are currently not available

** Total endowment per UMass Chan annualized student FTE -
T.H. Chan School of Medicine only

*** Total endowment UMass Chan annualized student FTE - All 3 Schools

**** Total endowment per student enrollment - All public medical schools

FINANCIAL HEALTH

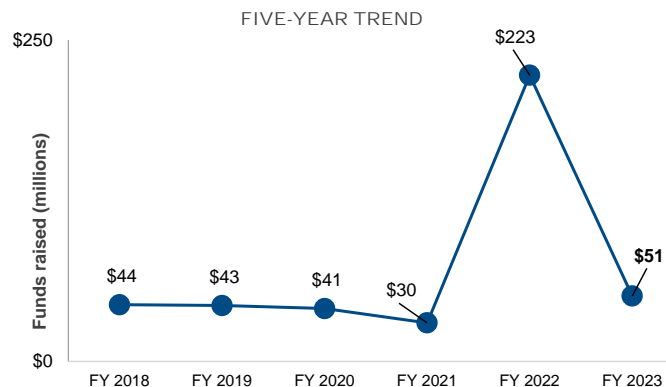
PRIVATE FUNDS RAISED ANNUALLY*

\$51MMillion
in FY 2023

▼ 77%

One-year
% change in
(vs. FY 2022)

▲ 15%

Five-year
% change
(vs. FY 2018)

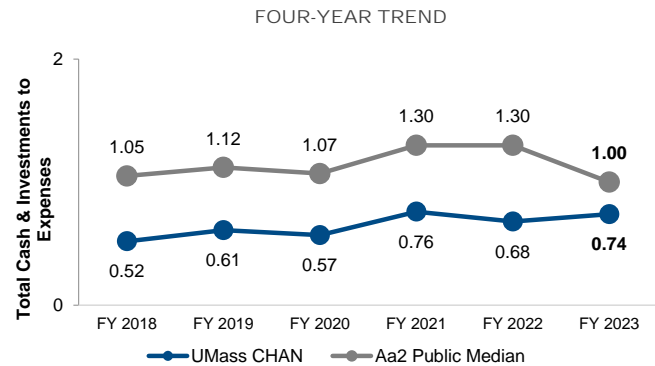
* Includes cash, pledges and grants

FINANCIAL HEALTH

TOTAL CASH & INVESTMENTS TO EXPENSES

0.74

Total Cash &
Investments to
Expenses
in FY 2023



DEBT SERVICE BURDEN

6.6%

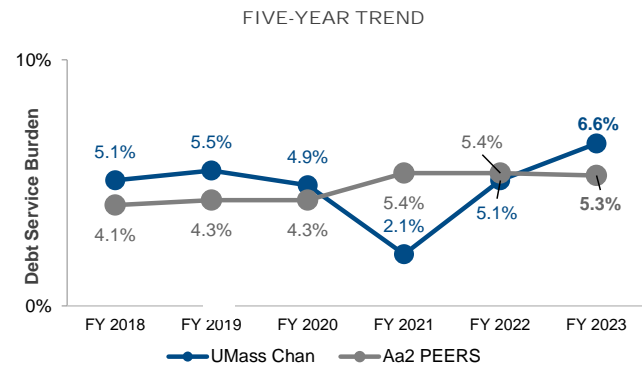
Debt Service
Burden
in FY 2023

▲ 1.5

One-year
Point change
(vs. FY 2022)

▲ 1.5

Five-year
Point change
(vs. FY 2018)



OPERATING MARGIN (%)

2.3%

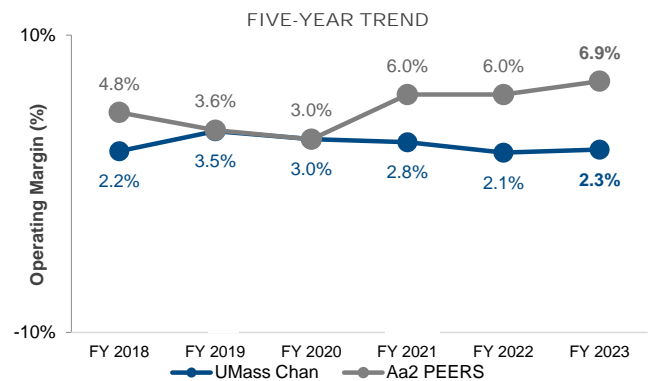
Operating Margin (%)
in FY 2023

▲ 0.2

One-year
Point change
(vs. FY 2022)

▲ 0.1

Five-year
Point change
(vs. FY 2018)



DEFINITIONS AND SOURCES

ACADEMIC QUALITY INDICATORS

Mean MCAT Score. Mean biology MCAT score for new medical students. Peer data calculated from AAMC website.

Pass Rates on USMLE Step 1 and Step 2 (CK, CS). The percentage of medical students passing Step 1 and Step 2 on their first attempt. Peer data represents national results from National Board of Medical Examiners (NBME).

Pass Rate on Nursing Board Certification. The percentage of nursing graduates who passed the board certification examination on their first attempt. National results (provided by the American Nurses Association Credentialing Center) represent pass rates by registered nursing graduates from all graduate nursing schools in the United States. Peer data not available.

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

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

Faculty FTE. The difference in the total FTE, from one Fall semester to the next, for all full-time and part-time instructional faculty. Includes faculty members who are on paid leave. Does not include individuals whose primary responsibility is administrative. Definition of Faculty FTE is per the Common Data Set, and includes all faculty teaching credit courses, including credit courses offered via Continuing Education.

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

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

NIH Funding Among Medical Schools. Annual amount of NIH Funding. UMass Chan Medical School and peer data are from NIH Ad Hoc Report, 20-school peer list.

US News Ranking. U.S. News annual ranking of medical schools with emphasis in Primary Care.

ACCESS AND AFFORDABILITY INDICATORS

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

Percent Graduates who are Students of Color. Graduates who self-identify as either

African American/Black, Hispanic/ Latino, Asian, Hawaiian/Pacific Islander, American Indian/Alaskan Native, and/or Two or more races. Hispanic students who list one or more additional groups will be coded as Hispanic. Cape Verdean students who identify solely as Cape Verdean will be coded as Not Reported. Included only for U.S. Citizens and Permanent Residents who report race and ethnicity divided by total undergraduate U.S. citizens and permanent residents who report race/ethnicity.

DEFINITIONS AND SOURCES

ACCESS AND AFFORDABILITY INDICATORS

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

Tuition and Fees. Annual tuition and mandatory fees for in-state students including adjustment for learning contracts. Peer data from AAMC.

STUDENT SUCCESS AND SATISFACTION INDICATORS

Acceptance Rate to Choice of Residency. Percent of graduating students accepted to their choice of residency. National results provided by NRMP.

satisfied" with the quality of their medical education. UMass Chan Medical School percentile compares to national peer data from AAMC MMT Annual Report.

Student Satisfaction With Quality of Medical Education. The percentile of graduating medical students indicating "very

Alumni Participation Rate. The number of alumni donors divided by the number of alumni of record where alumni of record is defined as all living alumni.

SERVICE TO THE COMMONWEALTH INDICATORS

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

Percent Alumni Who Live in Massachusetts. The percentage of UMass Chan Medical School alumni who live in Massachusetts.

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

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

Total R&D Expenditures Ranking. Annual NSF ranking of Total R&D expenditures, for all postsecondary institutions participating in the NSF HERD Survey. Data source NCES WebCaspar/NSF HERD data tables.

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

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

License Income. Amount of annual income from license agreements. Data reported by each UMass campus to President's Office, OTCV.

FINANCIAL HEALTH INDICATORS

Endowment Assets and Annual Growth in Endowment. The total value of the endowment (includes true and quasi-endowments) at the end of the fiscal year as reported in the UMass Annual

BOT report, and the percent change from the previous year. Comparative data are from IPEDS, financial statements, and the NACUBO survey.

DEFINITIONS AND SOURCES

FINANCIAL HEALTH INDICATORS

Endowment per Annualized Student (FTE). Total endowment (includes true and quasi-endowments) per annualized FTE student, where FTE of peer institutions is standardized to UMass formulae. Peer data are for comparative peers from financial statements (current year) and IPEDS (prior years).

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

Debt Service Burden. Compares the relative cost of borrowing to overall expenditures. Debt service (P&I) / Total expenses

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

Spendable Cash & Investments to Operating Expenses. Measures the extent to which the University can rely on wealth that can be accessed over time or for a specific purpose to operate.

(Cash & investments – debt service reserve funds + permanently restricted pledges receivable – permanently restricted Net Assets)/Total expenses

PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

ARIZONA	MU OHIO	PUERTO RICO
ARKANSAS	MU SOUTH CAROLINA	SUNY DOWNSTATE
BUFFALO	MARSHALL - EDWARDS	SUNY UPSTATE
CINCINNATI	MASSACHUSETTS	SOUTH ALABAMA
COLORADO	MICHIGAN STATE	SOUTH CAROLINA
EAST CAROLINA - BRODY	MINNESOTA TWIN CITIES	SOUTH DAKOTA
EAST TENNESSEE - QUILLEN	MISSISSIPPI	SOUTH FLORIDA
EASTERN VIRGINIA	MISSOURI COLUMBIA	SOUTHERN ILLINOIS
FLORIDA STATE	MISSOURI KANSAS CITY	STONY BROOK
GEORGIA	NEBRASKA	TENNESSEE
HAWAII - BURNS	NEVADA	TEXAS A & M
ILLINOIS	NEW MEXICO	TEXAS TECH
KANSAS	NORTH DAKOTA	U WASHINGTON
KENTUCKY	NORTHEASTERN OHIO	UC IRVINE
LSU NEW ORLEANS	OKLAHOMA	UC SAN DIEGO
LSU SHREVEPORT	OREGON	UC SAN FRANCISCO
LOUISVILLE	PENN STATE	UCLA - GEFFEN

DEFINITIONS AND SOURCES

PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

UMDNJ - RW JOHNSON	WRIGHT STATE - BOONSHOFT	NORTH CAROLINA
UMDNJ NEW JERSEY	WRIGHT STATE	OHIO STATE
UT GALVESTON	ALABAMA	UC DAVIS
UT HOUSTON	CONNECTICUT	UT SOUTHWESTERN
UT SAN ANTONIO	FLORIDA	VIRGINIA
UTAH	INDIANA	WAYNE STATE
VERMONT	IOWA - CARVER	WISCONSIN
VIRGINIA COMMONWEALTH	MARYLAND	
WEST VIRGINIA	MICHIGAN	

SELECTED PEER INSTITUTIONS

Regional/Competitor:

Harvard University
 Boston University
 Tufts University
 Dartmouth College
 University of Vermont
 Brown University
 State University of New York, Stonybrook
 University of Maryland - Baltimore

Private Aspirant:

Washington University in St. Louis
 Johns Hopkins University
 Yale University
 University of Pennsylvania
 University of Pittsburgh – Pittsburgh

Public Aspirant:

University of Texas, SW
 University of Iowa
 University of North Carolina at Chapel Hill
 University of Alabama, Birmingham
 University of Michigan - Ann Arbor
 University of Washington - Seattle
 University of California, San Francisco

DEFINITIONS AND SOURCES

PUBLIC MEDICAL SCHOOL PEER INSTITUTIONS

Moody's Aa2 Peers	Texas State University System, TX
Alamo Community College District, TX	University of Alabama at Birmingham, AL
Arizona State University, AZ	University of Alabama, AL
Auburn University, AL	University of Arizona, AZ
Board of Regents of The University System of Georgia, GA	University of Arkansas, AR
California State University, CA	University of California, CA
City University of New York, NY	University of Florida, FL
Clemson University, SC	University of Georgia, GA
Cuyahoga Community College District, OH	University of Hawaii, HI
Florida State University, FL	University of Houston System, TX
Houston Community College System, TX	University of Kansas, KS
Iowa State University of Science & Technology, IA	University of Kentucky, KY
Michigan State University, MI	University of Massachusetts, MA
Mississippi Institutions of Higher Learning, MS	University of North Texas System, TX
Nevada System of Higher Education, NV	University of Oregon, OR
State University of New York, NY	University of South Carolina, SC
State University System of Florida, FL	University of Wyoming, WY

UMass Amherst - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	24,391	14,189	24,231	13,378	24,233	1,161	24,209	14,107	23,515	13,551
GRADUATE STUDENTS	7,838	42	7,814	12	7,409	6	7,141	95	7,078	92

Calendar Year					
OFFENSE	2022	2021	2020	2019	2018
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	14	19	3	23	23
FONDLING	10	16	4	11	9
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	2	0	2	3
AGGRAVATED ASSAULT	4	3	1	2	4
BURGLARY	11	2	6	8	12
MOTOR VEHICLE THEFT	0	1	0	0	2
ARSON	0	2	0	3	2
DOMESTIC VIOLENCE***	2	3	5	4	9
DATING VIOLENCE***	0	0	0	0	0
STALKING***	2	3	1	3	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>	1	1	1	1	4
LIQUOR LAW ARRESTS**	59	106	31	180	137
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	92	226	57	208	211
DRUG LAW ARRESTS**	1	0	4	7	4
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	2	0	1	1
ILLEGAL WEAPONS POSSESSION ARRESTS	0	1	1	5	1
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0

Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.

*Forcible Sex Offenses include those reported to UMPD and those reported to other Campus agencies.

**UMPD arrests involving both drug law and liquor law violations are counted only as a drug law violation, which is the more serious offense.

UMass Boston - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	12,871	1,039	12,269	1,079	12,871	292	12,595	1,078	12,714	1,067
GRADUATE STUDENTS	3,388	N/A	3,368	N/A	3,388	N/A	3,394	N/A	3,450	N/A

Calendar Year

OFFENSE	2022	2021	2020	2019	2018
MURDER / NON NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	0	0	3	1	1
FONDLING	0	0	0	2	1
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	0	0	0
AGGRAVATED ASSAULT	0	0	0	0	0
BURGLARY	0	1	1	3	1
MOTOR VEHICLE THEFT	0	1	0	0	0
ARSON	0	0	0	0	0
DOMESTIC VIOLENCE*	0	0	0	0	0
DATING VIOLENCE*	1	1	1	1	1
STALKING*	5	3	2	8	8
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	0	1	0	0	0
LIQUOR LAW ARRESTS	0	0	0	3	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	40	36	12	85	40
DRUG LAW ARRESTS	1	4	0	8	3
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	13	0	0	1	0
ILLEGAL WEAPONS POSSESSION ARRESTS	0	2	1	0	2
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	1	0	0	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. UMB campus does not have residence halls.

UMass Dartmouth - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	5,517	2,581	5,833	2,541	6,027	669	6,405	3,136	6,841	3,535
GRADUATE STUDENTS	1,940	141	1,884	70	1,842	20	1,749	77	1,672	72

Calendar Year

OFFENSE	2022	2021	2020	2019	2018
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	4	6	2	3	7
FONDLING	6	0	0	2	0
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	0	2	0
AGGRAVATED ASSAULT	4	2	0	3	7
BURGLARY	5	2	3	12	11
MOTOR VEHICLE THEFT	1	0	1	1	0
ARSON	3	0	0	0	1
DOMESTIC VIOLENCE*	3	2	1	9	0
DATING VIOLENCE*	0	1	0	1	11
STALKING*	0	1	3	2	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	0	0
LIQUOR LAW ARRESTS	0	0	0	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	26	90	11	194	126
DRUG LAW ARRESTS	0	0	0	0	1
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	2	0	0	1	4
ILLEGAL WEAPONS POSSESSION ARRESTS	1	0	0	1	2
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	3	0	0	3	0

Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.

UMass Lowell - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	12,391	3,714	12,885	3,709	13,815	710	14,155	4,494	14,005	4,379
GRADUATE STUDENTS	4,944	28	4,978	41	4,554	23	4,183	35	4,239	65

Calendar Year					
OFFENSE	2022	2021	2020	2019	2018
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	1	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	6	9	0	9	12
FONDLING	3	2	2	6	1
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	1	2	1
AGGRAVATED ASSAULT	0	4	3	3	2
BURGLARY	3	3	0	1	1
MOTOR VEHICLE THEFT	1	0	0	2	1
ARSON	0	0	1	0	0
DOMESTIC VIOLENCE*	3	2	3	7	6
DATING VIOLENCE*	0	1	0	0	0
STALKING*	3	2	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	0	0
LIQUOR LAW ARRESTS	0	2	1	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	83	97	32	78	150
DRUG LAW ARRESTS	0	1	1	0	8
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	2	0	0	2	0
ILLEGAL WEAPONS POSSESSION ARRESTS	0	2	5	1	0
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	2	1	0	5	0

Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus.

UMass Chan Medical School - Clery Act Crime Statistics

ENROLLMENTS/NUMBER OF RESIDENTS	Fall 2022		Fall 2021		Fall 2020		Fall 2019		Fall 2018	
	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus	Total Enrollment	# Living on Campus
UNDERGRADUATE STUDENTS	0	0	0	0	0	0	0	0	0	0
GRADUATE STUDENTS	1,352	0	1,292	0	1,292	0	1,234	0	1,185	0

Calendar Year

OFFENSE	2022	2021	2020	2019	2018
MURDER / NON-NEGLIGENT MANSLAUGHTER	0	0	0	0	0
NEGLIGENT MANSLAUGHTER	0	0	0	0	0
RAPE	0	0	0	0	0
FONDLING	1	0	1	0	2
INCEST	0	0	0	0	0
STATUTORY RAPE	0	0	0	0	0
ROBBERY	0	0	1	0	0
AGGRAVATED ASSAULT	16	1	5	9	3
BURGLARY	1	0	1	0	1
MOTOR VEHICLE THEFT	3	7	6	6	5
ARSON	0	0	0	0	0
DOMESTIC VIOLENCE*	0	5	3	4	7
DATING VIOLENCE*	0	0	0	0	0
STALKING*	0	0	0	0	4
HATE CRIMES <i>Any of the aforementioned offenses, and other crime involving bodily injury, that manifest evidence of prejudice based on race, religion, sexual orientation, gender, disability or ethnicity are also reported as hate crimes.</i>	0	0	0	0	0
LIQUOR LAW ARRESTS	0	2	0	0	0
LIQUOR LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0
DRUG LAW ARRESTS	3	3	2	4	11
DRUG LAW VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	2	0	0	0	0
ILLEGAL WEAPONS POSSESSION ARRESTS	1	0	0	2	1
ILLEGAL WEAPONS POSSESSION VIOLATIONS REFERRED FOR DISCIPLINARY ACTION	0	0	0	0	0

Note: Total count for each category includes crimes that occurred on campus, in or on a non-campus building or property, or on public property within or immediately adjacent to and accessible from the campus. UMW campus does not have residence halls.