



University of Massachusetts
Boston
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Boston, MA 02125-3393

University Governance
Faculty Council

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

Monday, February 7, 2022

1:00-3:00

Zoom Webinar

Minutes for February 7, 2022

Members present: Kui Du (CM); Joel Fish (CSM); Sommer Forrester (CLA); Rafael Jean (CLA); Maria John (CLA); Werner Kunz (CM); Sharon Lamb (CEHD); Lusa Lo (CEHD); Kibibi Mack-Shelton (CLA); Jeffrey Melnick (CLA); Pamela Nadash (MGS); Dimity Peter (CEHD); Neil Reilly (CSM); Heike Schotten (CLA); Eduardo Siqueira (HONORS); Eve Sorum (CLA); Betsy Sweet (CLA); Michael Tlusty (SFE); Phil Troped (CNHS); Kiran Verma (CM); Roberta Wollons (CLA); Kevin Wozniak (CLA); Kai Zou (CNHS)

Members absent: Matthew Bell (CSM); Priscilla Gazarian (CNHS); Margaret Hart (CLA)

Representatives present: Marlene Kim (Representative to the BoT); Michael Mahan (PSU); Chidimma Ozor Commer (GEO)

Representatives absent: Steve Striffler (CLA); Undergraduate Student Government (TBD); Graduate Student Assembly (TBD); CSU (TBD); DCU (TBD)

I. Approval of the Agenda

- The FC chair moved to add a motion from the Executive Committee to the agenda as item number six.

Vote on amending the agenda: Zoom poll

19 in favor; 0 opposed; 1 abstention. Agenda amended.

Vote to approve the agenda: Voice vote

Approved unanimously.

II. Motion to approve the December minutes

- The Board of Trustees (BoT) Representative requested to add language to the December minutes concerning the Cypher Resolution and the friendly amendment that was accepted by the motion's sponsors. It was noted that the December minutes would be updated.

VOTE: Voice vote

Minutes approved unanimously, with noted changes.

III. Chair's Comments

- The Chair gave some logistical explanations for Zoom Webinars and reminded the FC that meetings will now take place at from 1:00pm-3:00pm. She also explained that an FC member stepped down in CLA and informed the FC that Neil Reilly graciously stepped up to run the elections at the end of the semester and encouraged FC members to volunteer to help.

IV. Reports – 10 mins each (maximum)

a. Chancellor – Marcelo Suárez-Orozco

- The Chancellor began his remarks by sending well wishes to all during the progression of the omicron variant during this pandemic.
- He reminded the FC that it is Black History month and that the University will be hosting a number of events that support the campus community and particularly the campus members of color.
- He gave an update on the pandemic and explained that University policies follow all guidelines from the CDC and Commonwealth. He stated that the virus will remain with us for the foreseeable future and that the University will continue to put the health and safety of the community first. He also noted that case numbers are no longer the most significant measure of the disease, and instead they will need to monitor serious illness and hospitalizations while prioritizing the mental health of the student community. He explained that all safety measures are in place and it is the shared responsibility of the campus community to offer the best learning and research opportunities for students. He reminded everyone that all employees are required to have a booster shot and that free antigen tests will be available for pickup at locations across campus.
- He provided an enrollment update for the FC. Since add/drop is over, they will release official numbers to the campus community soon. He noted that the number of new undergraduate students and masters students increased by 18% and continuing students declined by just over 2%. Overall, total university enrollment is down by 1.8%. Admissions for fall 2022 is well underway and the University is up 18% for completed applications for students.
- The budget for FY23 was set by Governor Baker and would likely be similar to the previous year, but without the previous year's mental health budget. The campus plans for a balanced budget this year and will submit their budget to the Board of Trustees at the beginning of April.

DISCUSSION:

An FC member asked for clarity and whether informing the Governor's office of the recent suicides at another MA university would reframe their thinking in terms of providing a budget for mental health. The Chancellor responded he has advocated for mental health support and made the case for the extraordinary importance concerning mental health

support with every opportunity he was given. Another FC member echoed the concern of the mental health struggles that are going on and asked if there was a way to address this in a more immediate way, such as possibly bringing in colleagues from the Department of Psychology to assist with this crisis. The Chancellor thanked health services for all the work they have done and stated he will take the recommendation and meet with the Provost to see what can be done. He also noted this is an issue in higher education across the county, not just UMass Boston.

b. Provost and Vice Chancellor for Academic Affairs – Joseph Berger

- The Provost began his remarks by acknowledging Black History month and echoed how crucial it is to our campus community.
- He responded to the recommendation by the FC member about contacting colleagues in the Psychology Department to address mental health amongst the campus community.
- He thanked the faculty for working with the staff to get the semester started and acknowledged the difficulty in doing it. He also discussed the evaluations committee and that he is grateful to Apurva Mehta and IT for their help with evaluations. He informed the FC that if there is anything that they can do to further support faculty with this, to contact the Provost's Office and IT.
- He congratulated the FSU for ratifying their bargaining agreement and wanted to discuss two specific items: to have a committee to work together about assigning credit to theses and dissertation directing and reading, as well as determining guidelines for NTT participation in department meetings and voting.
- He discussed concerns from the faculty about how the Dean's searches have gone and explained the process for Dean Searches, as well as what he hoped to do moving forward so that there could be further shared governance. He noted that Dean searches have abided by all guidelines from HR and they have launched rigorous national searches. The Provost wanted to clarify what he is looking for in these searches and explained that he looks for candidates that align with the campus mission.

DISCUSSION:

The BoT Rep. asked about computer replacements since many faculty have not received them yet and requested further information about how it would be decided who will be on the committee for NTTs and what they will be charged to do. She expressed her gratitude and support for NTTs. The Provost responded that he would check with IT about computer replacement and that the committee will look at how shared governance fits into department constitutions and how this can happen. They will make recommendations to the Provost's Office.

An FC member thanked the Provost for explaining the Dean search but noted that faculty have already given feedback at numerous levels and wanted to know how faculty concerns would be taken into account moving forward in a different way. The Provost responded that he wants to offer transparency so that all can understand how decisions are made. He also wants to give an opportunity to engage in more dialogue so that it will help improve decision-making across the board to find ways to work together for a greater sense of trust and confidence.

An FC Rep. asked for an update on the alternative scheduling and the Provost responded that they will do a trial in the fall semester to make sure it works for everyone.

Another FC member asked a follow up question about Dean searches and encouraged the Provost to make the data that he gathers more public to faculty so that all can understand the decisions made. The Provost stated he would take this under advisement.

An FC member asked for an update on the Africana Studies searches and the Provost responded that those are currently underway.

Another FC member noted the email that went out today for the CEHD Dean search and was interested in hearing more about why the CLA Dean was chosen as Chair. The Provost explained that he has trust in the committee and that it is a strong committee. The member reiterated his question since the Provost is discussing transparency about why choices are made and asked for more information about this decision based on the fact that there was a good deal of controversy surrounding the CLA Dean's appointment. The Provost explained that Dean search committees are chaired by a Dean and that we need to allow those hired to do their job and that it will be positive and constructive for all involved.

SEE APPENDIX FOR COMPLETE TRANSCRIPT OF PROVOST REPORT AND PROVOST Q&A

c. Faculty Representative to the Board of Trustees – Marlene Kim

- SEE APPENDIX.

d. Representative from the Faculty Staff Union – Steve Striffler

- Not Present.

e. Representative from the Graduate Employee Organization—Chidimma Ozor Commer

- The Rep. began by asking for a moment of silence for the lost life of Trayvon Martin.
- SEE APPENDIX.

DISCUSSION:

An FC member asked for more clarity on how faculty could support the GEO with a letter to support students to help bring to the administration to bargaining. The Rep. explained further how the letter could explain the value of the work and support that graduate students provide. Another FC member thanked the Rep. and echoed that he is working with the leaders from GEO and FSU on the letter. The Rep. explained that supporting graduate students in conversations can help as well. An FC member and Rep. also spoke about how the budget can support graduate students and an anti-racist campus.

V. Motion from the Graduate Studies Committee

Motion #1

From: CLA (Critical Ethnic and Community Studies)

Request for a new course CECS 719 Queer of Color Critique

Rationale: This course fills an important gap in the CECS curriculum by drawing connections, conflicts, and overlaps between the fields of critical ethnic studies and queer and transgender studies. Queer of Color Critique expands the CECS department's pool of available electives and will be one of the few electives with the CECS designation (most electives are currently taken outside the department). The course will be the first CECS elective with a queer studies focus. Queer studies is a common area of interest for CECS graduate students, but thus far there have not been courses specifically dedicated to this topic. The goals of the course are to 1) demonstrate how queer of color critique responds to the whiteness of mainstream queer theory and the persistent heterosexism in ethnic studies, and 2) provide conceptual and practical tools to analyze queer and trans of color cultural production (art, music, film, etc).

Proposal is on Curriculog.

VOTE: Voice vote

Approved unanimously.

VI. Motion from the Executive Committee

Moved: the Faculty Council shall constitute an ad hoc committee charged with reviewing and recommending revisions to the by-laws in order to (1) harmonize them with the newly-amended Constitution and (2) bring them up to date with existing practices.

Proposed Committee Members* (all have agreed to serve):

- Sharon Lamb, CEHD (Counseling & School Psychology)
- Shoshanna Ehrlich, CLA (Women's, Gender, & Sexuality Studies)
- Phil Troped, CNHS (Exercise & Health Sciences)
- Caroline Coscia, CLA (Political Science)
- Joel Fish, CSM (Mathematics)
- Wei Zhang, CM (Management, Science and Information Systems)

*the FC EC continues to search for representatives from the McCormack Graduate School and the School for the Environment, and reserves the right to add one or more members from these units to this committee should a volunteer become available.

Vote: Zoom poll

22 IN FAVOR; 0 OPPOSED; 1 ABSTENTION; MOTION CARRIES.

VII. OER task force formation announcement and solicitation of opinions/ideas/feedback (Andrew Perumal + Apurva Mehta)

- SEE APPENDIX.

DISCUSSION:

A number of faculty members thanked the motion sponsors. Some FC members asked if there were grants involved within this or if there were incentives such as the one that UMass Amherst has. Another FC member asked about whether this includes the library resources, and the motion sponsor explained the connection.

VIII. BLRP policy recommendation re: ethical vendors (Alice Carter and Sharon Lamb)

This motion was postponed to the March FC meeting.

IX. New Business

No new business.

X. Meeting Adjourned

Approved unanimously.

Faculty Council Transcript
Provost's Report and Discussion
Faculty Council Meeting on 2/7/2022

REPORT:

Provost: I also want to take a moment to pause and respond to you know the concerns that I have increasingly become aware of through letter from the from executive council in collaboration with college senates and um college and school senates and other discussions that I have had regarding the dean searches in particular, but also broader issues of communication and transparency and understandings of shared governance. This is important. It is important for all of us, and it is certainly important to me that in reality and perception that we find better ways to work together on these issues and if we are going to improve that starts with me. And, um it will take us working together but I also recognize that where there are concerns, we need to put some approaches and vehicles in place to address them. Ya, as of this morning we have launched four dean searches this year in addition to doing the CLA dean search last spring. In every case I have worked with HR to ensure we are engaging in procedures and processes that are consistent across all top-level searches here at UMass Boston. These are rigorous national searches that require integrity of process. But that also includes being responsive to the two searches that we have already had actively going of a large amount of feedback and input that I have received from the campus and where dean searches are concerned, particularly the faculty. Um, I hear your concerns and again I want to reiterate I want to be appropriately responsive. You know, having a clear process right, that begins with the formation of committees that includes names that are gathered from the different senates and colleges, nominations from the student government bodies from FSU to construct committees that are broadly representative in many ways of not just the unit for which the search is being conducted but also have a broader campus perspective. And then, to um take seriously the recommendations of the finalists that all, each of the committees recommends all as being worthy of being finalists on campus and then to receive as I say quite a bit of feedback in the searches conducted so far, uh, I will say there have been some diversions in feedback and I need to work through all of that. But it has raised some questions about what I am looking for in the search, I think. So I just want to clarify that across any of the Dean searches, what am I looking for. And I'm looking for individuals whose values align with our commitments as a public urban research university as an ambitious and practical vision for the type of university we are and can be, is forward looking with experience in strategic planning and implementation, has the ability, the demonstrated ability to prioritize equity, diversity and inclusion in teaching and learning. Which then requires that we provide that kind of support for our faculty, for our students, for our staff, has demonstrated the ability to utilize and engage in data informed decision making, not data driven but data informed, um and I think that is an important distinction. You know, brings new ideas and how to build and sustain infrastructure that better supports teaching and learning. So, that for example faculty have more bandwidth to focus on core faculty responsibilities such as teaching and research.

TIME LIMIT MUSIC PLAYS. (REPORTS GIVEN ARE ALLOWED TEN MINUTES)

Provost: Heike, do you mind if I take two more minutes please?

FC Chair: I tried to get your attention, but I, ya, wrap it up, yep, wrap it up.

Provost: But, also, um, you know bring new insights on how to better facilitate, cultivate and manage the resources that can help us accomplish these things and support the people in our colleges and on campus, our champions of community engagement and develop specific ideas on how to simultaneously be champions for their unit and stewards of the broader campus. I'm not looking for someone who does one or two of these things well, but really a synthesis, um, of these things. Clearly there is concerns about how these decisions are being made by me, and as I said before, improvements in communication and understanding about how we work together in shared governance starts with me. So, in order to be more responsive I do need to um be able to interact and dialogue in meaningful ways so I am launching a series of meetings where I will meet with each senate leadership group and then all department chairs in small groups so there can really be dialogue and understanding, same with the GPDS, one of the things we have agreed to in principle with the dept chair union is a monthly meeting with them uh, just as I have with FSU and I have found those meetings to be incredibly, um, helpful. Uh, build on some of the meetings we have already have with FC committees and make sure we get around to meeting with all of them over time but also creating some monthly drop ins where different faculty members and other members of our community have the opportunity to meet directly with so that we start having these discussions, um, in real time and more proactively. Oh and I forgot an also the centers and institutes, directors, although I've started to work with the centers and institutes council since I've been provost. And then to create mechanisms, by which I come back and meet, perhaps even more frequently with the faculty council on the executive committee or others, I'm open to your ideas to make sure that we're, uh, improving our understandings as we go through lots of changes in very turbulent times, um how we're thinking and working and making decisions together. Um, thank, thank you very much.

DISCUSSION:

FC Chair: Okay, great, ya um. Thanks. Anyone have any questions? For the Provost?

FC Rep (Marlene Kim): I have questions if no one else does.

FC Rep: You guys there?

FC Chair: Go ahead, Marlene.

Provost: Yes, please Marlene.

FC Rep.: Okay, I have two questions. I'm wondering about computer replacements, some of us needed these and haven't gotten them and we're told we were going to get them. Our computers are dying. And, two um, I'm wondering about the second committee on enhancing NTTs in governance and if this committee is advisory, making recommendations ,looking at best

practices, what exactly is the committee doing? Because I agree that NTTs are really valuable uh and um the University wouldn't work without them, but how departments decide how to evaluate teaching, uh departments through their constitutions decide who participates in voting in departments, so is this committee going to, I'm wondering what the nexus is between the departments making these decisions and this committee making this decision or advising or what.

Provost: Ya, great thanks Marlene. Um to great questions. So computer replace, you know that is something for a number of years that the University has been trying to keep up with. There were some this year, that budget is in IT. We're just starting to, essentially the budget season looking ahead to FY23 and I agree that you know, we've last early summer did an inventory to get a better handle on where we were with computer replace and that is a high priority, right to get more computers, um

FC Rep.: But some of us we're supposed to get it this year.

Provost: Okay, I will follow up with, with IT um to see where that's at.

FC Rep.: Okay, great.

Provost: Yep, you know in terms of the second committee, um, one of the reasons I felt it was important that we create a committee like this, um it had been proposed that perhaps this would go in the collective bargaining agreement, is because I do believe that uh, when you look at existing departmental constitutions in practice that that's an important part of shared governance that we need to honor and respect. That being said, I think that we need to do an examination to provide some guidance in asking questions because some of the constitutions have remained unexamined for a long time. So this gives us an opportunity to really as a larger community to talk about what are the appropriate ways to more fully involve NTTs in the governance of the um campus at all levels and to recognize their contributions. But we do have to respect, right, that there are departmental differences in how this is handled and that there are certain levels of autonomy that if we are going to address how that works, then we need to do so, um, together. This is an advisory committee that will make recommendations that will come to me, um I expect that uh, this is the type of work that should be done very transparently as we work with the departments, um and that there is going to be a lot to work through together because I think there are some real differences in different parts of the campus in terms of what different departments feel is appropriate. Um, but I think it is a really important question to be asking and to be purposeful and intentional about how we can improve this particular part of our governance.

FC Rep.: Thank you.

Provost: Heike

FC Member (Heike Schotten): Hi, ya, thanks Joe. And thanks for addressing um the uh, the question of the dean searches and shared governance. And I appreciate there are going to be, sounds like a lot more forums or meetings or opportunities or sites for faculty feedback on, in future dean searches. But, it um, also strikes me that that already happened with the two dean searches that already happened on this campus. At least in CLA, in my college, the Chairs did give their feedback, the CLA senate did give their feedback, the CLA faculty did give their feedback, um, so I'm wondering why having meetings akin to the kind that have already happened are going to lead to any kind of difference in how faculty feedback is weighed or taken into consideration when making decisions about Deans.

Provost: Ya, thanks Heike. So, one, these meetings are more than about Dean searches, right. Because I think that really having better lines of communication at a more personal level in addition to the formal channel it is sort of all of the above, right so that we understand each other better not just when a particular decision comes up. I think that is partly what is needed on this campus and as I have really been reflecting about what I've been hearing from folks, that can be really helpful to all of us including me because I do benefit every time I meet with folks and talk with them. You know, and as we've had some other discussions, yes, I took the feedback very seriously that I go from the faculty and from the others, and there was, um, well there were strong preferences with some, there has been divergent feedback that I have received and uh, I have made the absolute best decision that I felt given those criteria for each of the searches and in the upcoming searches but I do also think that more communication when there are concerns, um and me being open, right so that we all learn, right so we learn together and to all of us being open to hearing each other and advancing, I do take faculty input incredibly seriously I think some of these are difficult decisions, that's one of things about being in the hot seat, as the Provost um but I also think that every opportunity that we have to engage in more dialogue about things will improve, um, my decision making and others. Um, so I think we need to continue to find ways to work together to have more trust and confidence that even when we don't agree on decisions we may make in different venues, decisions I may make as provost the decisions some one else may make in their role, that we have better understandings of where we're coming from and how and why we're making those decisions. Ya, Michael.

FC Rep. (Michael Mahan): I apologize if I missed this at the December meeting but could you give us a really brief update as to the discussions regarding the class schedule. I know we had talked about this prior to COVID and there were some tabled in terms of rather than the MWF 50 minutes, I think there was some discussion of leveling it and having a 75 minute schedule MW TuTh, where does that stand are we still moving forward with that scheduling with the academic calendar.

Provost: Yes, Michael, yes, we are and we shared some information late last semester about this, that a hybrid block schedule is we're piloting next year. WE actually have folks working on implementing that right now. And, um, you know we've working with in my Office and Andrew Perumal, whose been leading that and working with, we've looked at a heat map to see where courses are, working with scheduling to um put that in effect. But again we're doing that as a

pilot in response to all the great work that was done previously to make sure that as we implement this in ways that it works for everybody involved. Kevin.

FC Member (Kevin Wozniak): Hi Joe. To follow up on the question of the process about Dean Searches. Thank you proposing additional meetings. I think it will be a very valuable step, um, I think many things we have all learned over the last year, year and a half, we can all do much better in terms of facilitating the lines of communication across all levels of the faculty governance infrastructure so I think that is a really good first step. An additional recommendation I would encourage you to consider ways that you could um, make additional changes is thinking about ways to make the data process more open and transparent. In most of the Dean searches, faculty are given the opportunity to provide our feedback through surveys, which is excellent and very appropriate, but that creates data, right. And I always think as scholars one of the primary maxims is that data should be public and transparent so that everyone can double check the numbers ourselves. Um, I, I think we all recognize that there are always going to be a diversity of opinions amongst the faculty, that like complete, one hundred percent unanimity is almost never going to be the case. But even your reference to diversity of opinions, that's kind of an unquantified and precise term, um a minority of opinions is still a diversity of opinions but generally the standard within democratic systems but generally the standard in democratic systems is the majority preference kind of dictates the day, right. And I definitely, I would see major qualitative differences between like 60% of faculty weigh in on one direction and 40% weigh in another, versus like an 80/20 split or a 90/10 split, right. Anyone could still say there is a diversity of perspective there but the overall balance of sentiments would be quite different under those different scenarios and I think a lot of us would appreciate having more transparent reporting of what the faculty are communicating to you and in terms of overall numbers. So, I encourage you to think about additional ways to make the data you receive public for consumption and analysis by the faculty.

Provost: So, thanks, Kevin. I will take that under serious consideration. You know, one of the things we are looking at for Deans level searches, vice chancellor level searches, chancellor level searches what are some consistent ways as I work with HR and campus leadership to be consistent there, I think some of it there is not quite easily quantifiable in the way you are talking about on the other hand, you know in terms of, you know like one of the things that's important to me as I meet with the search committee about the finalists, is for them to provide me with information about why all these people are qualified and then the interview process really matters. And then from there, as we discussed previously, there is a lot of feedback to consider from the different parts of the campus community. A lot of it qualitative, a lot of it is not rankings or you know pure yes or no. But I will absolutely take that under advisement and consideration and that can be something that we talk about prior, you know in the immediate future as we go into these other dean searches. Thanks. And, Kibibi.

FC Member (Kibibi V. Mack-Shelton): Yes, hi. My question is not connected to the Dean Search but is connected to the Africana Studies search. I know February a lot of times, schools tend to use that time when they interview candidates, they also can speak on their topics, which is connected to their studies, but I'm confused because I know that the Africana Studies search,

the semi-finalist list, has been submitted to your office since December and I guess I reached out to find out whether or not they were going to have campus talks based on those semi-finalist or finalists, I don't even know where they were because I'm not on the search committee anymore, but I would like to know if there is any reason why your office has not approved the semi-finalist list that has been sent there since December from the Dean's Office.

Provost: Ya, thanks Kibibi. Those searches are proceeding. Um, so yes. Ya, I'm sorry. Jeff.

FC Member (Jeff Melnick): Thanks, um I really appreciate your comments and I want to give you an opportunity to be more transparent that is currently unfolding which is that I noticed you just named the search committee for the Ed. School Dean, uh position, and the Chair of that search is the current CLA Dean which is a matter of some controversy in terms of CLA faculty and what kind of input you got from CLA faculty, so I'm just wondering if given that the Dean of CLA is fairly new on campus and hasn't really had a chance to build good will, uh, with um, the faculty, I'm just wondering if you could speak to what your process was on that.

Provost: Ya, thanks Jeff. So first, let me say, I am confident in all of our Deans. It is typically a Dean who chairs those searches. Um, it is also a good way for a Dean to get to know others across campus. Um, and, we have many dean searches, and we're trying to distribute you know who is providing leadership for the different searches. And I think that uh, we all have to work together right, as new people come into our community. It is not up to any one person to generate good will. Certainly all Deans have the responsibility to bring faculty along with them, um, but um, I have confidence that the, again it is chaired by a Dean but all of the committee contributes and that this will be a very strong committee. I mean clearly, CEHD is very near and dear to my heart and I want to make sure it is a successful search and I am confident that it will be.

FC Member: But, I guess that is exactly my question, that is given your own investments in CEHD, how do you bring in a brand new Dean who came in under some fairly intense and I'll just say it, you know, stressful circumstances, I guess, how are we, how do you want us to receive that as faculty in terms of that fact that we haven't really worked out the feelings about that last search.

Provost: So, I think that it is very important, right, and I'm concerned that we make it difficult for any new person coming in, faculty, Dean or otherwise, um, if we don't allow them to fully fulfill their roles. And, um, you know, and so I believe that, right, that this is a way that the, uh Tyson can fully fulfill his role and again working with an entire committee, that this can be very positive and constructive for everybody involved.

FC Chair: Okay, any other questions or comments for the Provost? Okay, thank you, Joe.

Provost: Thank you very much. I really appreciate it.



Board of Trustees

Marlene Kim, Faculty Representative to the Board of Trustees



Administration and Finance (A and F)

- ▶ December 13, 2021
- ▶ Approval of funding of Amherst North Village Apartments and Housing expansion (vote 3 in the process)



Capital projects approved

- ▶ 3rd vote to approve borrowed funding of
- ▶ Engineering Building at Umass Amherst : \$80 million
- ▶ Computer and Information Sciences Building, Umass Amherst: \$30 million
- ▶ Housing Expansion, Umass Amherst: \$210 million
- ▶ North Village apartments: \$47.5 million



Board of Trustees Meeting December 15, 2021

- ▶ Approved A and F projects for debt
- ▶ 5 year projects

Boston Projects

Traditional Projects			
Project	Adjusted Cost (\$)	Project Phase	Sta
Demolish Substructure, Science Center, and Pool (SDQD)	137,139,950	7 - Construction	Approv
Total	137,139,950		

Alternative Finance & Delivery Projects	
Project	Adjusted Cost (\$)
Calf Pasture Pump House	-
Total	-

President Projects			
Project	Adjusted Cost (\$)	Project Phase	Sta
Wheatley Hall Façade Repairs	6,041,000	1 - Conceptual	Author
Utility Plant: Add 3,200 Tons of Cooling Tower Capacity	9,000,000	1 - Conceptual	Author
Quinn Administration and Service & Supply Buildings Fire Protection	3,025,000	1 - Conceptual	Author
Healey Library Transformer Replacement	2,166,750	1 - Conceptual	Author
Healey Library Building Fire Protection	8,110,000	1 - Conceptual	Author
Upgrade Building Controls Campus-Wide	2,140,000	4 - Study / Schematic Design	Author
McCormack Hall: Roof Replacement and Building Envelope Repairs Phase 2	3,000,000	4 - Study / Schematic Design	Author
S&S Loading Dock Concrete Repairs	2,437,000	4 - Study / Schematic Design	Author
Utility Plant Improvements	9,900,000	4 - Study / Schematic Design	Author
Network Refresh Edge Switches	3,529,619	4 - Study / Schematic Design	Author
Healey Ductwork Repair & Air Handling Unit Replacement	2,430,000	5 - Design	Approv
Repairs to Falling Sections of Harborwalk	3,210,000	5 - Design	Approv
Quinn Administration and Service & Supply Buildings Roof Replacement/Repair	3,165,022	7 - Construction	Approv
McCormack Hall: Roof Replacement and Building Envelope Repairs	6,500,000	7 - Construction	Approv
Total	64,654,391		

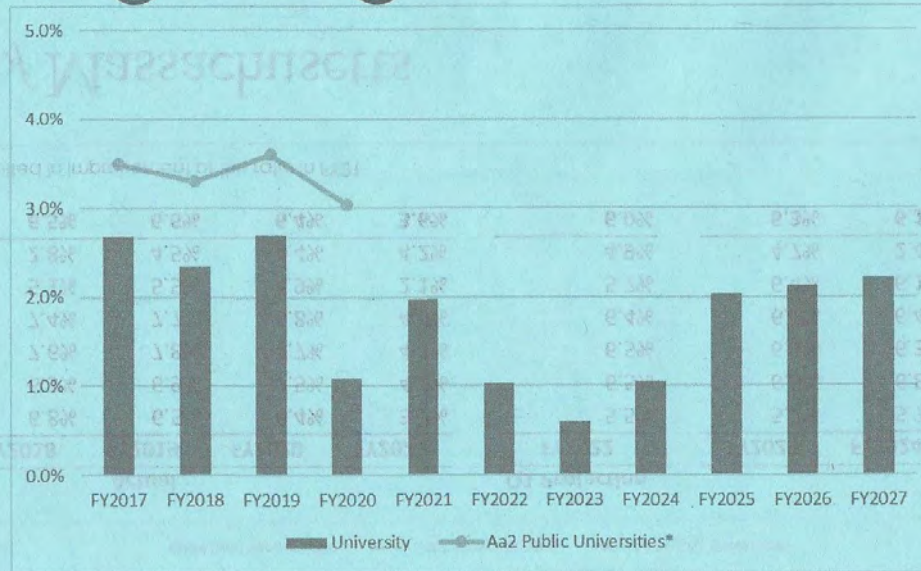
University of Massachusetts

Project
Key

Authorized

Approved

Operating Margin



*Moody's OM calculation which uses normalized investment income

	Actual					Q1 Projection	Forecast				
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Amherst	3.0%	2.6%	2.7%	0.2%	-0.9%	1.7%	0.0%	0.5%	2.0%	2.0%	2.0%
Boston	-0.7%	0.6%	0.9%	1.1%	5.8%	0.0%	0.0%	1.0%	2.0%	2.8%	3.4%
Dartmouth	3.4%	1.1%	1.4%	0.0%	0.7%	0.0%	0.0%	0.1%	2.0%	2.0%	2.0%
Lowell	2.2%	1.5%	1.3%	-0.6%	2.9%	-1.7%	0.0%	1.0%	2.0%	2.0%	2.0%
Chan Medical	3.2%	2.2%	3.5%	3.0%	2.8%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Central	6.4%	10.4%	8.9%	4.1%	9.9%	3.3%	2.1%	2.1%	2.1%	2.1%	2.2%
University	2.7%	2.3%	2.7%	1.1%	2.0%	1.0%	0.6%	1.1%	2.0%	2.1%	2.2%

Excludes impact of GASB 68 & 75

University of Massachusetts

Revenue: by Campus

\$ In Thousands	Actual					Budget	Q1 Projection	Forecast			
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026
Amherst	1,216,054	1,276,643	1,341,052	1,328,911	1,242,326	1,416,076	1,489,533	1,481,522	1,530,577	1,585,606	1,637,368
Amherst Growth	3.5%	5.0%	5.0%	-0.9%	-6.5%	14.0%	19.9%	-0.5%	3.3%	3.6%	3.3%
Boston	423,334	426,589	436,467	443,615	468,123	480,622	480,418	464,327	478,413	491,255	503,842
Boston Growth	4.2%	0.8%	2.3%	1.6%	5.5%	2.7%	2.6%	-3.3%	3.0%	2.7%	2.6%
Dartmouth	248,385	250,628	256,592	251,446	241,240	264,661	263,643	260,491	261,421	271,635	282,138
Dartmouth Growth	2.9%	0.9%	2.4%	-2.0%	-4.1%	9.7%	9.3%	-1.2%	0.4%	3.9%	3.9%
Lowell	439,843	459,042	484,770	480,120	474,927	511,316	523,616	521,905	548,453	568,803	587,490
Lowell Growth	5.1%	4.4%	5.6%	-1.0%	-1.1%	7.7%	10.3%	-0.3%	5.1%	3.7%	3.3%
President's Office	117,659	119,219	124,478	115,679	99,273	105,066	103,144	105,263	108,218	111,300	114,358
President's Office Growth	9.3%	1.3%	4.4%	-7.1%	-14.2%	5.8%	3.9%	2.1%	2.8%	2.8%	2.7%
Chan Medical School	991,957	965,654	903,377	921,572	991,322	982,332	958,784	995,199	1,051,240	1,111,318	1,147,270
Medical School Growth	2.9%	-2.7%	-6.4%	2.0%	7.6%	-0.9%	-3.3%	3.8%	5.6%	5.7%	3.2%
University	3,437,232	3,497,775	3,546,736	3,541,343	3,517,211	3,760,073	3,737,481	3,745,417	3,893,366	4,053,261	4,184,079
University Growth	3.6%	1.7%	1.4%	-0.2%	-0.7%	6.9%	6.3%	0.2%	3.8%	3.9%	3.1%

Includes unrealized gains

University of Massachusetts

Expenses: by Campus

\$ in Thousands	Actual					Budget	Q1 Projection	Forecast			
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026
Amherst	1,173,095	1,241,490	1,296,841	1,329,105	1,265,323	1,400,661	1,458,822	1,475,251	1,516,957	1,548,835	1,599,858
<i>Amherst Growth</i>	3.9%	5.8%	4.5%	2.5%	-4.8%	10.7%	15.3%	1.1%	2.8%	2.1%	3.3%
Boston	424,463	424,202	430,967	438,957	442,992	474,138	480,418	464,327	473,831	481,430	489,574
<i>Boston Growth</i>	3.0%	-0.1%	1.6%	1.9%	0.9%	7.0%	8.4%	-3.3%	2.0%	1.6%	1.7%
Dartmouth	238,763	250,270	255,118	251,450	240,186	264,661	263,643	260,471	261,140	266,123	276,442
<i>Dartmouth Growth</i>	1.1%	4.8%	1.9%	-1.4%	-4.5%	10.2%	9.8%	-1.2%	0.3%	1.9%	3.9%
Lowell	428,306	451,552	476,652	483,244	463,883	520,147	532,432	521,833	543,159	557,703	576,011
<i>Lowell Growth</i>	2.5%	5.4%	5.6%	1.4%	-4.0%	12.1%	14.8%	-2.0%	4.1%	2.7%	3.3%
President's Office	108,938	106,776	111,963	112,583	91,806	101,641	99,718	103,090	105,948	108,989	111,983
<i>President's Office Growth</i>	4.0%	-2.0%	4.9%	0.6%	-18.5%	10.7%	8.6%	3.4%	2.8%	2.9%	2.7%
Chan Medical School	942,132	943,144	867,033	891,942	967,724	960,489	937,690	973,040	1,028,201	1,086,745	1,121,545
<i>Medical School Growth</i>	-4.6%	0.1%	-8.1%	2.9%	8.5%	-0.7%	-3.1%	3.8%	5.7%	5.7%	3.2%
University	3,237,351	3,336,260	3,356,916	3,424,616	3,391,718	3,640,079	3,691,067	3,714,722	3,844,280	3,963,169	4,087,025
<i>University Growth</i>	0.8%	3.1%	0.6%	2.0%	-1.0%	7.3%	8.8%	0.6%	3.5%	3.1%	3.1%

University of Massachusetts

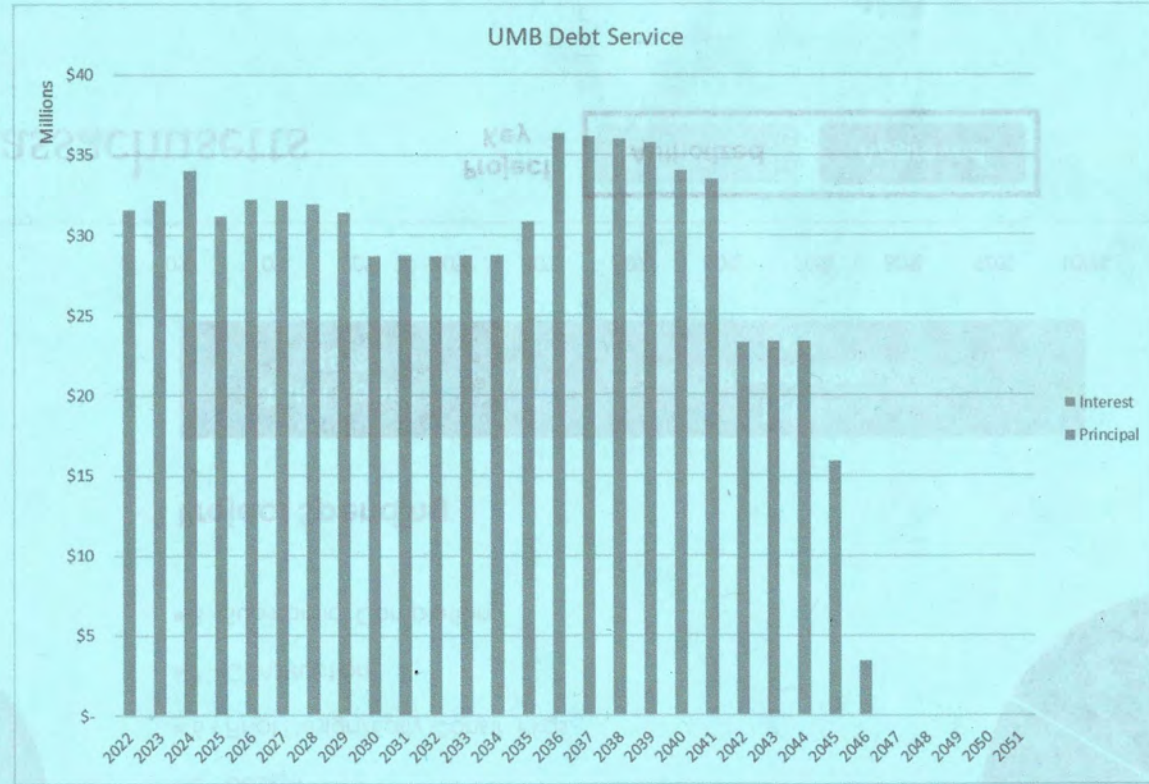
Global: Revenue & Expenses Trend

(\$ in Thousands)

Revenues	Budget	Q1 Projection	Forecast					% Change FY23-27	
	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027	Cumulative	Avg. Annual
Net Tuition & Fees	127,060	113,438	140,196	159,071	180,987	205,489	234,504	67.3%	15.7%
Other Operating	500	1,167	500	500	500	500	500	0.0%	-11.4%
Total Revenues	127,560	114,605	140,696	159,571	181,487	205,989	235,004	67.0%	15.5%
% Growth			22.8%	13.4%	13.7%	13.5%	14.1%		
Expenses									
Salaries & Fringe	70,551	66,358	84,596	93,704	104,181	115,763	129,515	53.1%	14.5%
Non-Personnel	58,799	55,304	54,982	55,406	55,867	59,606	65,851	19.8%	3.6%
Depreciation	2,798	2,180	4,199	4,199	4,199	4,199	4,199	0.0%	18.5%
Interest	1,186	1,271	1,237	1,086	824	453	111	-91.0%	-31.9%
Total Expenses	133,334	125,113	145,014	154,395	165,071	180,021	199,676	37.7%	9.9%
% Growth			15.9%	6.5%	6.9%	9.1%	10.9%		
Operating Margin									
Surplus / (Deficit)	(5,774)	(10,508)	(4,318)	5,176	16,416	25,968	35,328		
UMass OM Calc	-4.5%	-9.2%	-3.1%	3.2%	9.0%	12.6%	15.0%		
April 2020 Proforma OM									
Surplus / (Deficit)	(15,170)		(8,037)	(1,797)	3,079	15,016	24,966		
UMass OM Calc	-10.8%		-5.0%	-1.0%	1.5%	6.4%	9.5%		
Enrollment									
Enrollment		6,699	10,217	11,758	13,562	15,612	18,001		
Enrollment (% Change)		N/A	52.5%	15.1%	15.3%	15.1%	15.3%		

University of Massachusetts

Note: FY22 Q1 projection reflects 10 months of activity based on Septe transaction close; forecast reflects full year activity.



Key Ratio	Actual					Budget	Q1 Projection	For	
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024
Debt Service Burden (%)	5.9%	6.3%	6.9%	7.5%	4.2%	6.7%	6.5%	6.5%	6.8%
Debt Service Coverage (x)	1.1	1.4	1.6	1.7	4.0	3.0	1.8	1.7	1.8
Financial Leverage (x)	0.12	0.12	0.16	0.19	0.31	0.18	0.26	0.48	0.50
Total Debt (\$ in thousands)	622,941	611,819	616,132	606,847	611,943	606,847	661,953	535,312	519,747

University of Massachusetts

2
2

5

12

51,025

\$ in thousands

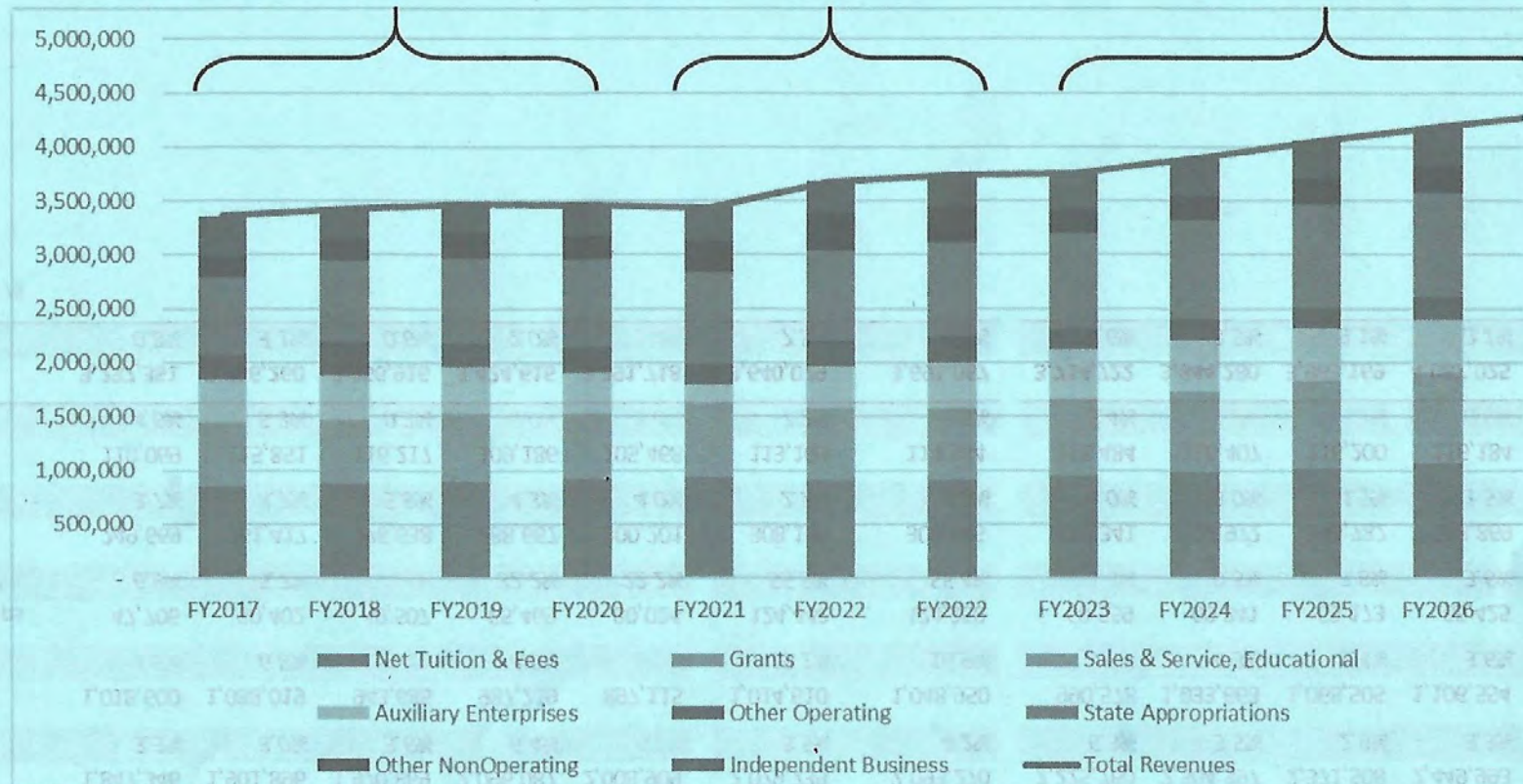
Campus	BOT Authorized		President Authorized		Total A
	Projects	Project Cost	Projects	Project Cost	
UMA	17	862,443	28	153,050	45
UMB	2	137,140	14	64,654	16
UMD	2	63,000	0	-	2
UML	5	129,746	12	51,025	17
UMMS	6	479,340	14	72,700	20
University	32	\$1,671,669	68	\$341,429	100

University Revenue: Diverse Sources

Average Annual Growth FY17-20
\$55.9 million or 1.7%

Average Annual Growth FY21-22
\$138.9 million or 4.0%

Average Annual Growth FY23-26
\$126.3 million or 2.9%



Includes unrealized gains

University of Massachusetts

Enrollment

Lav
Schc
0.5%

CE &
Online
Only
13%

<u>AAGR</u>	<u>Total</u>	<u>Undergraduate</u>	<u>Graduate</u>
FY17-20:	1.0	1.3	0.4
FY21-22:	-0.9	-2.8	-0.7
FY23-27:	1.3	1.2	1.7

Students FTEs	Actual		Forecast					Average C	
	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027	FY17-20	FY21-
Amherst	29,693	29,802	30,164	30,173	30,699	31,361	31,700		
% Change	-0.4%	0.4%	1.2%	0.0%	1.7%	2.2%	1.1%	1.9%	-0.
Boston	13,571	12,943	13,308	13,434	13,518	13,598	13,647		
% Change	2.5%	-4.6%	2.8%	0.9%	0.6%	0.6%	0.4%	0.1%	-1.
Dartmouth	6,709	6,459	6,408	6,465	6,631	6,894	7,070		
% Change	-3.8%	-3.7%	-0.8%	0.9%	2.6%	4.0%	2.5%	-2.6%	-3.
Lowell	14,855	14,318	14,483	14,704	14,928	15,102	15,279		
% Change	0.4%	-3.6%	1.2%	1.5%	1.5%	1.2%	1.2%	2.1%	-1.
Chan Medical School	1,242	1,246	1,248	1,279	1,327	1,384	1,434		
% Change	3.9%	0.3%	0.1%	2.5%	3.8%	4.3%	3.6%	3.2%	2.
University	66,070	64,768	65,611	66,055	67,103	68,340	69,129		
% Change	0.1%	-2.0%	1.3%	0.7%	1.6%	1.8%	1.2%	1.0%	-0.

University of Massachusetts

University: Enrollment Trend

Students (FTEs)	Actual					Budget	Actual	Forecast		
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025
Undergraduate	47,720	48,298	49,356	50,014	49,262	48,796	47,278	47,715	47,849	48,587
% Change	0.4%	1.2%	2.2%	1.3%	-1.5%	-1.1%	-4.2%	0.9%	0.3%	1.5%
Graduate	8,962	9,076	9,036	9,000	8,973	8,988	8,878	9,092	9,233	9,376
% Change	1.1%	1.3%	-0.4%	-0.4%	-0.3%	-0.5%	-1.7%	2.4%	1.6%	1.5%
Continuing Ed	2,371	2,160	1,808	1,286	1,170	979	774	779	784	788
Online Only	4,768	4,812	4,949	5,460	6,337	6,518	7,511	7,700	7,864	8,027
% Change	5.3%	-2.3%	-3.1%	-0.2%	11.3%	11.0%	22.6%	2.3%	2.0%	1.9%
Law School	157	184	199	246	328	327	326	325	325	325
% Change	-7.6%	16.7%	8.4%	23.6%	33.2%	64.3%	63.8%	-0.3%	0.0%	0.0%
University	63,978	64,530	65,348	66,005	66,070	65,609	64,768	65,611	66,055	67,107
% Change	1.0%	0.9%	1.3%	1.0%	0.1%	0.4%	-0.9%	1.3%	0.7%	1.6%

Source: Actuals from student profile.

University of Massachusetts

Undergraduate

AAGR
 FY17-20: 1.3
 FY21-22: -2.8
 FY23-27: 1.2

Students FTEs	Actual		Forecast					Average	
	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027	FY17-20	FY21-27
Amherst	23,430	23,291	23,557	23,485	23,933	24,517	24,776		
<i>% Change</i>	-1.1%	-0.6%	1.1%	-0.3%	1.9%	2.4%	1.1%	1.7%	
Boston	10,342	9,798	9,997	10,091	10,160	10,230	10,273		
<i>% Change</i>	0.6%	-5.3%	2.0%	0.9%	0.7%	0.7%	0.4%	1.6%	
Dartmouth	4,993	4,635	4,512	4,479	4,551	4,735	4,869		
<i>% Change</i>	-5.1%	-7.2%	-2.7%	-0.7%	1.6%	4.0%	2.8%	-3.8%	
Lowell	10,497	9,554	9,649	9,794	9,943	10,041	10,141		
<i>% Change</i>	-2.7%	-9.0%	1.0%	1.5%	1.5%	1.0%	1.0%	3.1%	
University	49,262	47,278	47,715	47,849	48,587	49,523	50,059		
	-1.5%	-4.0%	0.9%	0.3%	1.5%	1.9%	1.1%	1.3%	

Graduate

AAGR

FY17-20: 0.4

FY21-22: -0.7

FY23-27: 1.7

Students <i>FTEs</i>	Actual		Forecast					Average	
	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027	FY17-20	FY21
Amherst	3,648	3,734	3,774	3,804	3,829	3,854	3,879		
% Change	-2.4%	2.4%	1.1%	0.8%	0.7%	0.7%	0.6%	2.3%	
Boston	1,783	1,554	1,662	1,675	1,678	1,678	1,678		
% Change	0.7%	-12.8%	6.9%	0.8%	0.2%	0.0%	0.0%	-1.4%	
Dartmouth	579	566	595	625	655	685	685		
% Change	8.1%	-2.3%	5.1%	5.0%	4.8%	4.6%	0.0%	-8.0%	
Lowell	1,721	1,779	1,814	1,851	1,888	1,925	1,964		
% Change	-2.3%	3.4%	2.0%	2.0%	2.0%	2.0%	2.0%	0.1%	
Chan Medical School	1,242	1,246	1,248	1,279	1,327	1,384	1,434		
% Change	3.9%	0.3%	0.1%	2.5%	3.8%	4.3%	3.6%	3.2%	
University	8,973	8,878	9,092	9,233	9,376	9,525	9,639		
	-0.3%	-1.1%	2.4%	1.6%	1.5%	1.6%	1.2%	0.4%	

University of Massachusetts

Boston: Enrollment Trend

<u>AAGR:</u>	<u>Total:</u>	<u>Undergraduate:</u>	<u>Graduate:</u>	<u>Online</u>
FY17-20:	0.1	1.6	-1.4	0.
FY21-22:	-1.1	-2.3	-6.1	-1.
FY23-27:	1.1	1.0	1.6	1.

Students (FTEs)	Actual					Budget	Actual	Forecast		
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025
Undergraduate	9,529	9,835	10,256	10,280	10,342	10,447	9,798	9,997	10,091	10,160
% Change	-1.3%	3.2%	4.3%	0.2%	0.6%	1.0%	-5.3%	2.0%	0.9%	0.7%
Graduate	1,816	1,802	1,714	1,771	1,783	1,783	1,554	1,662	1,675	1,678
% Change	-3.2%	-0.8%	-4.9%	3.3%	0.7%	0.0%	-12.8%	6.9%	0.8%	0.2%
Continuing Ed	939	697	715	419	599	392	283	296	301	305
Online Only	818	703	528	769	847	865	1,308	1,354	1,367	1,375
% Change	5.7%	-20.3%	-11.2%	-4.4%	21.6%	-13.1%	10.0%	3.7%	1.2%	0.7%
Total	13,101	13,036	13,213	13,241	13,571	13,486	12,943	13,308	13,434	13,518
% Change	-0.7%	-0.5%	1.4%	0.2%	2.5%	-0.6%	-4.6%	2.8%	0.9%	0.6%

Source: Actuals from student profile.

University of Massachusetts

Boston: Enrollment by New v Continuing

Undergraduate (FTEs)	Actual					Budget	Actual	Forecast		
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025
New	2,612	2,995	3,344	3,244	3,076	3,104	3,001	3,172	3,188	3,204
% Change	-3.1%	14.7%	11.6%	-3.0%	-5.2%	0.9%	-2.4%	5.7%	0.5%	0.5%
Continuing	6,917	6,838	6,912	7,036	7,266	7,343	6,797	6,825	6,902	6,907
% Change	-0.6%	-1.1%	1.1%	1.8%	3.3%	1.1%	-6.5%	0.4%	1.1%	0.0%
Undergraduate Total	9,529	9,834	10,256	10,280	10,342	10,447	9,798	9,997	10,091	10,111
% Change	-1.3%	3.2%	4.3%	0.2%	0.6%	1.0%	-5.3%	2.0%	0.9%	0.2%

Source: Actuals from student profile.

University of Massachusetts

Boston: Revenue & Expenses Trend

(\$ in Thousands)

Revenues	Actual					Budget	Q1 Projection	Forecast				
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Gross Tuition & Fees	240,235	243,760	245,734	252,603	256,240	254,142	244,643	261,122	270,080	278,043	286,258	293,611
Tuition Discounts	(53,820)	(57,790)	(64,836)	(69,973)	(74,079)	(79,050)	(77,201)	(79,222)	(81,168)	(83,174)	(85,258)	(87,400)
<i>Discount Rate</i>	22.4%	23.7%	26.4%	27.7%	28.9%	31.1%	31.6%	30.3%	30.1%	29.9%	29.8%	29.8%
Net Tuition & Fees	186,415	185,970	180,898	182,630	182,161	175,092	167,442	181,900	188,912	194,868	201,000	206,211
Grants	58,201	56,212	53,536	54,732	58,185	57,823	58,706	60,536	61,747	62,982	64,241	65,511
Sales & Service, Educational	3,979	4,072	4,312	1,744	1,262	2,100	2,100	2,100	2,100	2,100	2,100	2,100
Auxiliary Enterprises	6,167	5,199	12,315	10,381	3,230	13,419	13,625	13,719	13,815	13,913	14,013	14,113
Other Operating	1,818	1,758	2,218	3,138	2,586	2,531	3,138	3,500	3,500	3,500	3,500	3,500
State Appropriations	130,157	135,605	140,659	146,284	152,833	152,222	157,030	161,128	165,564	170,103	174,748	179,511
Other NonOperating	36,597	37,773	42,529	44,706	67,866	77,434	78,376	41,445	42,775	43,789	44,240	44,171
Total Revenues	423,334	426,589	436,467	443,615	468,123	480,622	480,418	464,327	478,413	491,255	503,842	515,111
% Growth	4.2%	0.8%	2.3%	1.6%	5.5%	2.7%	2.6%	-3.3%	3.0%	2.7%	2.6%	2.1%
Expenses												
Salaries & Fringe	275,330	269,465	269,723	269,734	270,486	272,268	276,381	287,496	294,761	299,499	307,049	314,781
Non-Personnel	98,250	98,972	98,428	96,680	90,822	111,181	113,615	106,739	107,951	111,187	112,451	113,741
Scholarships and Fellowships	16,161	17,180	17,983	20,771	30,189	37,405	37,993	18,994	18,994	18,994	18,994	18,994
Depreciation	22,246	24,433	28,010	32,460	32,765	34,178	33,617	35,604	37,030	37,030	36,873	36,491
Interest	12,476	14,152	16,823	19,312	18,730	19,106	18,813	15,495	15,096	14,721	14,207	13,691
Total Expenses	424,463	424,202	430,967	438,957	442,992	474,138	480,418	464,327	473,831	481,430	489,574	497,711
% Growth	3.0%	-0.1%	1.6%	1.9%	0.9%	7.0%	8.4%	-3.3%	2.0%	1.6%	1.7%	1.7%
Operating Margin												
Surplus / (Deficit)	(3,001)	2,387	3,896	5,057	27,035	6,484	(0)	(0)	4,581	9,825	14,268	17,422
UMass OM Calc	-0.7%	0.6%	0.9%	1.1%	5.8%	1.3%	0.0%	0.0%	1.0%	2.0%	2.8%	3.4%

*Q1 Projection development in progress.

University of Massachusetts

Boston: Overview

- Operating Margin:** meets 2% by FY25; includes strategies ranging from \$10-16 million annually, including targeted enrollment increases, workforce reductions, continued non-personnel savings, and reduction of debt service with Bayside proceeds
- Capital:** no planned borrowing; use of Bayside to fund remaining SDQD project needs

Revenue:

<u>FY22 Projection:</u>	
Total: \$480.4M	

Expenses:

<u>FY22 Projection:</u>	
Total: \$480.4M	

Key Ratio	Forecast		
	FY2023	FY2024	FY2025
Operating Margin (%)	0.0%	1.0%	
Operating Margin (\$)	(0)	4,581	
Enrollment	13,308	13,434	13,560
Enrollment (% Change)	2.8%	0.9%	

University of Massachusetts

Boston: Staffing

Faculty & staff of 1,910 declines on average 1% over the forecast period.

General Operations: 92% of total employees; faculty & staff that support general university operations

<u>FY22</u>	<u>Total</u>	<u>Faculty</u>
	1,759	49%
FY17-20:	-1.1	0.1
FY21-22:	-1.2	-0.1
FY23-27:	-0.8	-0.7

Auxiliary / Independent Business Lines: 2% of total employees

<u>FY22</u>	<u>Total</u>	<u>Faculty</u>
	29	0%
FY17-20:	-30.9	0.0
FY21-22:	12.1	0.0
FY23-27:	0.0	0.0

Restricted: 6% of total employees; faculty & staff funded by grant & endowed funds

<u>FY22</u>	<u>Total</u>	<u>Faculty</u>
	123	5%
FY17-20:	-7.4	-11.2
FY21-22:	-7.2	-22.3
FY23-27:	3.2	0.0

University of Massachusetts

Boston: Staffing

Employee FTEs	Actual				Budget	Actual	Forecast				
	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Restricted											
Faculty	13	12	10	7	12	6	6	6	6	6	6
Staff	153	135	132	126	146	116	136	136	136	136	136
Total Restricted	166	147	142	133	158	123	142	142	142	142	142
# Change		(19)	(5)	(9)	25	(36)	20	-	-	-	-
% Change		-13%	-4%	-7%	16%	-29%	14%	0%	0%	0%	0%
Unrestricted General University Ops											
Faculty	862	873	864	843	828	861	830	830	830	830	830
Staff	983	931	941	869	892	898	883	883	861	861	861
Executive/Admin/Managerial	93	89	83	85	-	85	-	-	-	-	-
Professional Nonfaculty	590	559	574	540	-	572	-	-	-	-	-
Secretarial/Clerical	167	152	150	133	-	132	-	-	-	-	-
Technical/Paraprofessional	105	105	106	88	-	87	-	-	-	-	-
Skilled Crafts	12	11	11	9	-	10	-	-	-	-	-
Service Maintenance Workers	16	14	15	13	-	12	-	-	-	-	-
Unspecified											
Total General University Ops	1,845	1,804	1,805	1,712	1,720	1,759	1,713	1,713	1,691	1,691	1,691
# Change		(41)	1	(93)	8	39	(46)	-	(22)	-	-
% Change		-2%	0%	-5%	0%	2%	-3%	0%	-1%	0%	0%
Unrestricted Aux./Independent Business											
Faculty	-	-	-	-	-	-	-	-	-	-	-
Staff	56	40	27	19	22	29	29	29	29	29	29
Total Aux./Independent Business	56	40	27	19	22	29	29	29	29	29	29
# Change		(16)	(13)	(8)	3	7	-	-	-	-	-
% Change		-41%	-49%	-44%	15%	24%	0%	0%	0%	0%	0%
Total Faculty & Staff	2,067	1,991	1,974	1,863	1,900	1,910	1,884	1,884	1,862	1,862	1,862
# Change		(76)	(17)	(111)	36	11	(26)	-	(22)	-	-
% Change		-4%	-1%	-6%	2%	1%	-1%	0%	-1%	0%	0%

FY22 budget staffing reflects average staffing as of 9/30 which includes filling some vacant positions

University of Massachusetts

Boston: Staffing Ratios

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

University of Massachusetts

Boston: Key Ratios

Key Ratio	Actual					Budget	Q1 Projection	Forecast		
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025
Operating Margin (%)	-0.7%	0.6%	0.9%	1.1%	5.8%	1.3%	0.0%	0.0%	1.0%	2.0%
Operating Margin (\$)	(3,001)	2,387	3,896	5,057	27,035	6,484	(0)	(0)	4,581	9,800
Operating Cash Flow Margin (%)	7.1%	9.0%	11.2%	13.3%	17.3%	20.0%	12.4%	11.7%	12.8%	13.0%
Operating Cash Flow Margin (\$)	28,684	36,282	46,650	56,042	75,716	96,084	55,438	52,047	58,869	64,000
Debt Service Burden (%)	5.9%	6.3%	6.9%	7.5%	4.2%	6.7%	6.5%	6.5%	6.8%	6.8%
Debt Service Coverage (x)	1.1	1.4	1.6	1.7	4.0	3.0	1.8	1.7	1.8	1.8
Financial Leverage (x)	0.12	0.12	0.16	0.19	0.31	0.18	0.26	0.48	0.50	0.50
Total Debt (\$ in thousands)	622,941	611,819	616,132	606,847	611,943	606,847	659,138	535,857	520,247	501,000
Total Cash & Investments to Op Expenses (x)	0.43	0.42	0.42	0.44	0.59	0.37	0.50	0.69	0.69	0.69
Enrollment	13,101	13,036	13,213	13,241	13,571	13,486	12,943	13,308	13,434	13,500
Enrollment (% Change)	-0.7%	-0.5%	1.4%	0.2%	2.5%	-0.6%	-4.6%	2.8%	0.9%	0.0%

*Both Financial leverage and total cash and investments include \$87M for Bayside sale

University of Massachusetts

President's Office: Revenue & Expenses

(\$ in Thousands)

Revenues	Actual					Budget	Q1 Projection	Forecast				
	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Net Tuition & Fees	6,461	6,144	6,802	6,202	6,193	6,636	6,636	6,759	6,884	7,012	7,142	7,271
Grants	18,644	20,651	20,019	21,664	9,320	110	110	-	-	-	-	-
Sales & Service, Educational	2,192	2,154	3,255	26	-	-	-	-	-	-	-	-
Other Operating	80,649	83,159	80,662	83,339	76,826	91,826	89,438	90,864	93,065	95,316	97,616	100,916
State Appropriations	704	160	636	362	400	-	-	-	-	-	-	-
Other NonOperating	9,009	6,951	13,104	4,086	6,534	6,494	6,960	7,640	8,269	8,972	9,600	10,219
Total Revenues	117,659	119,219	124,478	115,679	99,273	105,066	103,144	105,263	108,218	111,300	114,358	118,405
% Growth	9.3%	1.3%	4.4%	-7.1%	-14.2%	5.8%	3.9%	2.1%	2.8%	2.8%	2.7%	3.6%
Expenses	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Salaries & Fringe	60,838	60,023	60,409	65,444	58,074	58,292	60,199	61,980	63,705	65,499	67,198	68,916
Non-Personnel	34,936	40,025	45,385	41,612	30,042	38,974	35,014	36,704	37,875	39,187	40,606	42,816
Depreciation	9,439	3,719	3,008	2,566	1,933	1,739	1,854	1,848	1,848	1,848	1,809	1,770
Interest	3,700	3,009	3,161	2,961	1,757	2,635	2,651	2,558	2,520	2,455	2,370	2,331
Total Expenses	108,938	106,776	111,963	112,583	91,806	101,641	99,718	103,090	105,948	108,989	111,983	115,932
% Growth	4.0%	-2.0%	4.9%	0.6%	-18.5%	10.7%	8.6%	3.4%	2.8%	2.9%	2.7%	3.5%
Operating Margin						FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Surplus / (Deficit)	7,470	12,443	10,878	4,792	10,037	3,426	3,426	2,173	2,270	2,311	2,375	2,555
UMass OM Calc	6.4%	10.4%	8.9%	4.1%	9.9%	3.3%	3.3%	2.1%	2.1%	2.1%	2.1%	2.1%

University of Massachusetts

President's Office: Staffing

Employee FTEs	Actual				Budget Actuals		Forecast				
	FY2018	FY2019	FY2020	FY2021	FY2022	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027
Restricted											
Faculty	-	-	-	-	-	-	-	-	-	-	-
Staff	69	73	88	-	-	-	-	-	-	-	-
Total Restricted	69	73	88	-	-	-	-	-	-	-	-
# change		4	15	(88)	-	-	-	-	-	-	-
% change		5.8%	20.5%	-100.0%							
Unrestricted General University Ops											
Faculty	-	-	-	-	-	-	-	-	-	-	-
Staff	323	311	297	296	332	304	336	339	342	344	346
Executive/Admin/Managerial	68	71	77	80	80	83	81	81	81	81	81
Professional Nonfaculty	214	205	195	179	215	182	218	221	224	226	228
Secretarial/Clerical	28	25	22	35	35	37	35	35	35	35	35
Technical/Paraprofessional	13	11	4	2	2	2	2	2	2	2	2
Skilled Crafts	-	-	-	-	-	-	-	-	-	-	-
Service Maintenance Workers	-	-	-	-	-	-	-	-	-	-	-
Unspecified	-	-	-	-	-	-	-	-	-	-	-
Total General University Ops	323	311	297	296	332	304	336	339	342	344	346
# change		(12)	(14)	(1)	36	(28)	32	3	3	2	2
% change		-3.6%	-4.5%	-0.4%	12.2%	-8.4%	10.5%	0.9%	0.9%	0.6%	0.6%
Unrestricted Aux./Independent Business											
Faculty	-	-	-	-	-	-	-	-	-	-	-
Staff	-	-	-	-	-	-	-	-	-	-	-
Total Aux./Independent Business	-	-	-	-	-	-	-	-	-	-	-
Total Faculty & Staff	392	384	385	296	332	304	336	339	342	344	346
# Change		(8)	1	(89)	36	8	32	3	3	2	2
% change		-1.9%	0.2%	-23.2%	12.2%	2.7%	10.5%	0.9%	0.9%	0.6%	0.6%

FY22 budget staffing includes 26.5 vacant positions and 12 new positions

University of Massachusetts

President's Office: Key Ratios

2. System-Wide Statistics 2018-2020

System-wide Crime Offenses

OFFENSE	YEAR	ON CAMPUS	NON-CAMPUS	PUBLIC PROPERTY	TOTAL	RESIDENTIAL FACILITIES ¹
Murder	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Negligent Manslaughter	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Rape	2020	8	0	0	8	8
	2019	31	5	0	36	24
	2018	39	4	0	43	29
Fondling	2020	6	1	0	7	5
	2019	21	1	0	22	15
	2018	13	0	0	13	5
Incest	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Statutory Rape	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Robbery	2020	1	0	1	2	0
	2019	4	0	2	6	4
	2018	1	2	1	4	0
Aggravated Assault	2020	7	0	2	9	1
	2019	13	1	1	15	5
	2018	13	2	0	15	4
Burglary	2020	9	1	0	10	4
	2019	24	0	0	24	8
	2018	22	4	0	26	16
Motor Vehicle Theft	2020	3	0	0	3	0
	2019	3	2	0	5	0
	2018	2	1	0	3	0
Arson	2020	1	0	0	1	1
	2019	3	0	0	3	3
	2018	3	0	0	3	2

4. UMass Boston Statistics 2018-2020

UMass Boston Crime Offenses (Boston Campus)

OFFENSE	YEAR	ON CAMPUS	NON-CAMPUS	PUBLIC PROPERTY	TOTAL	RESIDENTIAL FACILITIES ⁵
Murder	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Negligent Manslaughter	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Rape	2020	3	0	0	3	3
	2019	1	0	0	1	0
	2018	1	0	0	1	1
Fondling	2020	0	0	0	0	0
	2019	2	0	0	2	1
	2018	1	0	0	1	0
Incest	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Statutory Rape	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Robbery	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Aggravated Assault	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Burglary	2020	0	0	0	0	0
	2019	3	0	0	3	0
	2018	1	0	0	1	0
Motor Vehicle Theft	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0
Arson	2020	0	0	0	0	0
	2019	0	0	0	0	0
	2018	0	0	0	0	0

GEO REEPORT

Let's take a moment to think of those we have lost, I was reminded this morning of Trayvon Martin who was murdered at age 17, he would have been 27 today. Most recently Amir Locke. Thank you.

We continue to show up to the bargaining table in good faith. Management's recent offer was not acceptable. We will continue to show up. We met with the Chancellor in December 2021 and he said he wants to keep the lines of communication open. Members are growing weary with this process, yet they are also showing up and are energizing us to continue the work. In terms of collaboration, we are watching what is happening in other unions and are appreciative of your continued support.

Specifically, what is a tangible way for you all to provide support? Perhaps a letter from faculty in support of GEO. We know that graduate students need faculty support, especially considering most of us are faculty apprentices/in training and because we're essential team members. I'm fairly confident you all remember grad school. The data supports that UMB graduate students are currently being paid the lowest rates which is unacceptable.

As a clinical social worker and therapist, I am encouraged that we are discussing mental health today. Especially in light of two high profile young, Black, celebrities who have recently died by suicide recently. If they, with support and resources most accessible to those with means, or those that are non-BIPOC/POC/PGM, imagine the need that exists within our own graduate student population for mental health support and resources.

Let's take a moment to reconnect. Close your eyes and think back to your experience in grad school. Think about support you received back then, both financial and emotional support. Take a moment to consider what your greatest cheerleaders did that was demonstrative of their support for you. You may open your eyes. Now consider that it is harder for us now than it was for y'all then. We are in the third academic year of a global pandemic, we have experienced or have witnessed anti-(fill in the blank as far as marginalized/othered people - Black, Asian/APIDA/AAPI, LGBTQ+, Semitic). Essentially this is a prime example of the proverbial walking to school and home...both ways uphill...in the snow...with a heavy, weighted bag...with our babies and elders in tow. We cannot afford to continue on this path. Especially as a purported institution that is focused on being anti-racist, health-promotion, and dedicated to equity, diversity, and inclusion.

O E R

Open Education Resources @ UMass Boston

A presentation to Faculty Council February 7th, 2022

https://www.umb.edu/elearning/open_education

Open Educational Resources

What we aim to cover today

- › What are OER
- › Benefits of OER
- › Our goal/charge
- › The Task Force
- › Plans for the coming months with a 'Go Live' date of Fall 2022
- › OER Resources

Open Education Resources - Definition

“OER are teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.”

The William and Flora Hewlett Foundation



Open Education Resources - what are OER

O → Open – Openly Accessible / public domain

E → Educational – Teaching, Learning, and Research resources

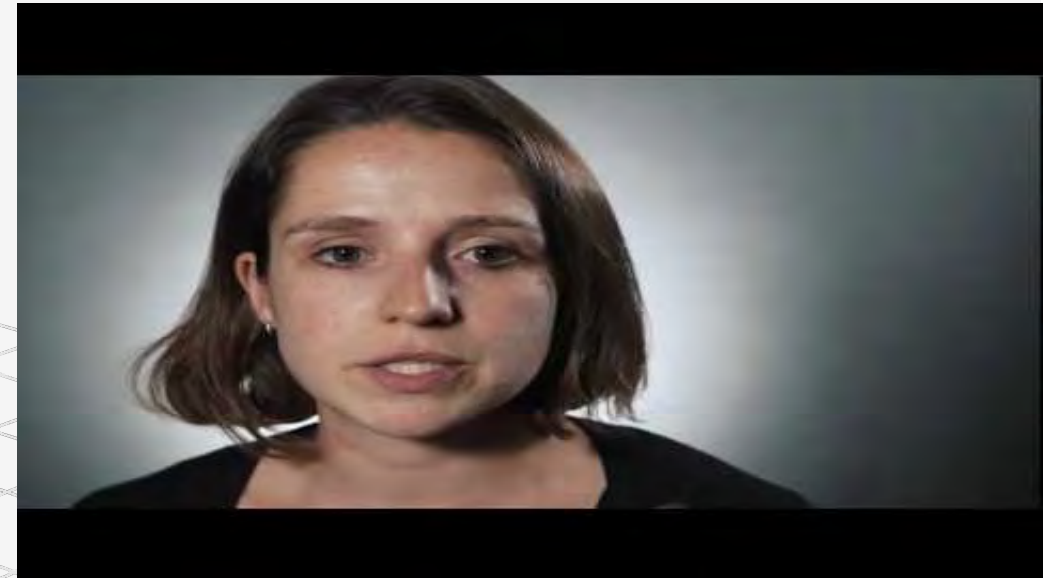
R → Resources – Content to support access to knowledge.

Think Five R's

- Reuse - use freely for own purpose
- Redistribute - share with others
- Revise - adapt, modify, change
- Remix - combine / transform
- Retain: download and save



[What are OER - A 90 second video by Lumen Learning](#)



Open Education Resources – Types of OER's



Open Education Resources – Benefits & Challenges

Benefits

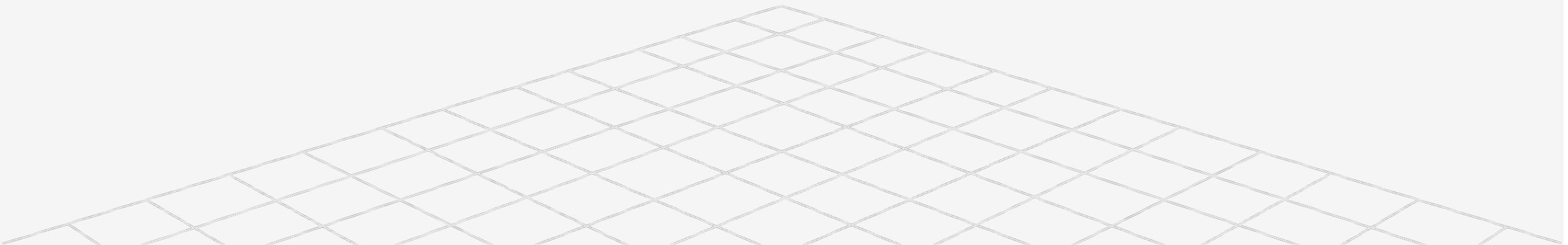
1. Reduce Cost of Education / textbook costs
2. Support student success & retention
3. Equal Access – All students have access to the textbook on day 1
4. Accessibility – as it is born digital
5. A platform for faculty to create/edit/revise OER

Challenges

1. Quality – OER repositories include peer review and rating systems
2. Time – adopting OER will take time
3. Lack of ancillary content – however this is changing

Open Education Resources – Our Goal

To build a program that promotes textbook affordability for students by supporting and facilitating the adoption of open, low-cost, high-quality materials, called Open Educational Resources, or OER.



Open Education Resources – Team

Bringing together Faculty, Students, MASSPIRG, Library & IT with support from the Provost office.

Names	Names
Prof. Serra Acar (CEHD)	Ellen Foust – IT/eLearning & Instructional Design
Prof. Steve Ackerman (Honors)	Danny Rojas – Research Fellow (Provost’s Office)
Prof. Xiaolu Xu (CM)	Kush Patel – Chancellor’s Office
Joshua (Jake) Bates – USG	<i>Open Position – Graduate Student</i>
Lucas Hall – Library	Andrew Perumal – Associate Provost
Brianna Blastick – MASSPIRG	Apurva Mehta – IT
AlexieLudgie Goin – MASSPIRG	

Open Education Resources – How Do We Get There?

Project Activity	Status
Develop the Baseline – against which we can evaluate progress	Ongoing
- Review course syllabi, library reserves, survey faculty	
Increase Awareness among faculty on the benefits of adopting OER	Planning
- Host Events - example: March 7 – 11 th is OER Week	
Offer professional development opportunities to our faculty on adopting/using and developing OER content.	March/April
Work with the registrar office to flag courses in WISER that use OER /Low-Cost material	Ongoing
Request funding for incentive program	March/April
Build the Incentive program	April
Call for proposals from faculty, review proposals, announce winners, etc.	April
Implement program - Librarians and Instructional Designers work with Faculty	May/June
Recognize faculty for adopting OER, document cost savings, update OER Website	December

Open Education Resources – Resources

[Find OER - https://www.umb.edu/elearning/open_education/find_oer](https://www.umb.edu/elearning/open_education/find_oer)
[Library Databases/Resources](#) & [LinkedIn Learning](#)

[State of Massachusetts OER Initiative](#)

[Metafinder @ George Mason](#)
[OER Commons](#)
[Merlot](#)

[OpenStax](#)
[OTN \(Open Textbook Network\)](#) – Univ. of Minnesota

[Lumen Learning](#) – Low-cost open courseware -\$25 per student

Open Education Resources – Questions

Visit: [OPEN.UMB.EDU](https://open.umb.edu) → OER Adoption Program

Email: open@umb.edu

The team is happy to help and look forward to working with you!

