



**Office of the Chancellor**

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**MEMORANDUM TO:** Lawrence M. Schall, President, New England Commission of Higher Education

**FROM:** Marcelo Suárez-Orozco, Chancellor, University of Massachusetts Boston

**SUBJECT:** Response to Visiting Team Report of 2025 Comprehensive Review of University of Massachusetts Boston

To begin, we would like to recognize and thank our visiting team, chaired by Dr. Anthonio Tillis, for their commitment to the NECHE reaccreditation process and the thorough and thoughtful nature of their review of UMass Boston. We genuinely appreciate the time we spent with the team in March during the site visit and deeply respect the findings detailed in their final report. We would also like to extend our gratitude to the NECHE staff who supported us throughout this process by offering timely workshops, answering questions as they arose, and providing ongoing guidance and support.

The visiting team's report affirms UMass Boston's accomplishments and positive trajectory, offers helpful suggestions for improvement, and motivates us to become the public research university that our students, communities, and society need and deserve. We are pleased that the team recognizes our overall strengths, which clearly reflect the hard work and dedication of our community members. We are encouraged by their acknowledgment and specific recognition of key areas of pride: Mission-Driven Strategic Planning and Institutional Alignment; Academic Excellence, Curricular Oversight, and Research Integration; Student Support, Wellness, and Community Engagement; Data-Driven Assessment and Institutional Effectiveness; and Institutional Capacity, Financial Health, and Infrastructure. That said, we remain committed to the ongoing work ahead as we continue advancing in all areas of the institution. Given the team's acknowledgment of our strengths and their specific suggestions for continuous improvement, we take this opportunity to respond to the five areas they identified:

1. Mission, Strategy, and Transparent Implementation
2. Data Quality, Assessment, and Learning Outcomes
3. Governance, Organizational Clarity, and Communication
4. Faculty, Staff, and Human Resources Infrastructure
5. Financial Planning, Resource Allocation, and Student-Centered Support

**Mission, Strategy, and Transparent Implementation**

We appreciate that the visiting team acknowledged the clarity of our mission, how faithfully we are

implementing it, and its clear articulation in our ‘For the Times’ strategic plan, which guides all our institutional efforts. Although UMB’s previous strategic plan, *\*Fulfilling the Promise: A Blueprint for UMass Boston\**, was intended to guide the university through 2025, by the fall of 2021, it was evident that the previous plan no longer suited the university and the dynamic environment we faced. With new permanent leadership in place, we promptly launched a comprehensive and inclusive strategic planning process. This effort resulted in both a new mission and a new strategic plan, aptly named *\*For the Times\**, which formally established key focus areas and university priorities more appropriate for the current era. Since then, guided by our mission, the visiting team has recognized significant progress across many areas and has actively shared these advances with the community and stakeholders. As recommended by the visiting team, we are continuously reevaluating our mission to ensure it remains aligned with our evolving strategic vision. We also see the importance of more transparent communication regarding the progress of our strategic plan’s implementation.

Following the priorities outlined in the strategic plan, we established general indicators to measure our success. Since adopting the new plan, we have consistently shared our progress in key strategic areas through quarterly campus updates and via a strategic planning website. However, we recognize that clearly articulating and disseminating more formal Key Performance Indicators (KPIs) is the next necessary step for our campus. As part of this ongoing effort, we are developing a KPI framework that will be publicly accessible on our website. This framework comprises three levels of KPIs for each of the five priorities outlined in our strategic plan, along with financial indicators that serve as a sixth category. The three levels consist of some Key Public Performance Indicators (KPPIs), which will be included in a soon-to-be-launched public dashboard; a second level of Key Performance Indicators (KPIs), which are more detailed and used by senior leadership to guide decision-making and actions; and a more comprehensive set of Performance Indicators (PIs) employed by specific teams and units to direct their work. The detailed levels of this framework ultimately inform the higher-level indicators. The annual reviews of specific units utilize appropriate KPIs and will serve as data for longer-term, cyclical assessments, such as the Academic Quality Assessment and Development (AQUAD) program reviews that occur every seven years for all academic programs and departments.

These efforts align with our dedicated plans to continue building on the significant initiatives launched over the past three years, as outlined in our mission-driven strategic plan.

### **Data Quality, Assessment, and Learning Outcomes**

We appreciate the visiting team’s recognition of the significant advances we are making in terms of the systematic quality, accessibility, and use of data to help us with institutional learning and informed decision-making. We are continually strengthening efforts to assess and document student learning outcomes, with clearer evidence of how assessment findings lead to changes in curriculum, teaching practices, and student support services.

Since 2021, we have invested significantly in building our data infrastructure, capacities, and alignments. Indeed, UMass Boston has achieved notable progress in refining its tools and frameworks for evaluating educational effectiveness. Through cultural and structural changes, the university is enhancing how data informs decision-making and fosters continuous improvement. A major advance is the creation of student success dashboards, launched in partnership with HelioCampus in 2023, which offer accessible, disaggregated data for use across academic units. These initiatives support enhancements to the AQUAD process, the UMass system’s formal mechanism for academic program

review. The Office of Institutional Research, Assessment and Planning (OIRAP) plays a pivotal role in supporting these data-informed efforts, collaborating with the Provost, Deans, Student Affairs, and other campus divisions. Assessment data also guides faculty development, graduate program coordination, and academic support services.

UMass Boston has re-launched the University Assessment Council (UAC) to advise the Provost and support academic and co-curricular programs in implementing and using learning outcomes assessment. The UAC facilitates cross-campus collaboration by coordinating assessment efforts, sharing findings, and fostering dialogue among key stakeholders. Operating on a sustainable multi-year cycle, the UAC helps units align assessment with program needs and institutional goals and supports the development of curricular, pedagogical, and policy improvements. An annual report summarizing its activities and findings is submitted to the Provost. This work will inform AQUAD reviews and will incorporate the work in student affairs as well to coordinate better and assess the holistic student experience.

### **Governance, Organizational Clarity, and Communication**

We agree with the visiting team that improving internal governance and communication—such as through regular climate surveys and clearly defined staff roles—will help promote greater alignment across the campus. Increasing transparency regarding academic and student affairs reorganizations, clarifying the functions of various offices and programs, and further developing the Office of Faculty Development website are key steps in building on the significant progress we are making as an institution.

Having completed major structural reorganizations since 2015, including installing permanent deans at the helm of all of our colleges (minus Honors), decommissioning the College of Professional Studies, transitioning the School for Global Inclusion and Social Development to the College of Education and Human Development and the McCormack Graduate School to College of Liberal Arts as well as completing a comprehensive redesign of the Student, Equity, Access, and Success (SEAS) unit and our Research Administration teams, we have continually engaged in participative processes. These efforts have set a strong foundation for the purposeful and strategic advancement of our mission and strategic priorities. These reorganizations have improved the focused use of resources. They are being further realized through the implementation of the multi-year faculty hiring plan, the development of new academic scheduling and resource management systems, the revision to our approach to allocating graduate assistantships, and the enhancement of our research space optimization efforts. These efforts will be further elucidated and advanced by the implementation of the Beacon Budget Model (BBM) and the launch of the strategic plan KPI dashboards. We also recognize that faculty governance bodies, such as Faculty Council, need to continue improving their coordination and communication, particularly regarding the utilization of their sub-committees.

### **Faculty, Staff, and Human Resources Infrastructure**

Along with the visiting team, we recognize the need to continue and expand efforts to support faculty and staff better. We agree that the three-year hiring plan has been a very productive step forward and that faculty development has made targeted progress. The three-year faculty hiring plan is informed by the campus strategic plan all approved hires are aligned with contributions to enrollment planning and the Grand Scholarly Challenges.

UMass Boston recognizes the need to expand and standardize climate surveys for faculty and staff. We recently achieved success with a campus racial climate survey for students, and we plan to build on this effort by conducting additional surveys. Faculty Council, following the NECHE site visit, has adopted a motion to carry out a campus-wide faculty climate survey, and the university is committed to doing the same for staff. Since “Enriching the Human Core” is a strategic priority, the Division of Human Relations has already started implementing several initiatives to strengthen this area and fulfill our ongoing commitment to continuous improvement. These include hiring a new professional to lead campus-wide professional development activities, upgrading the HR website, and implementing a fully online annual performance evaluation system for all staff. The latter aims to increase participation in staff evaluations. Furthermore, the campus recently transitioned to a Softdocs system, which will be used to create a more organized and up-to-date online repository of campus policies, including all HR policies.

Additionally, we are continuing to evaluate the university’s organizational structure and physical workspaces, as well as systematically tracking research outcomes, which will help foster a more effective and supportive campus environment. These efforts include ongoing assessment of the use of research start-up funds, research space optimization, and reinvestment of research trust funds into strategic research priorities. These efforts have become increasingly vital as UMass Boston, along with all of higher education in our country, navigates the new federal landscape.

Given the major realignments and initiatives, we have undertaken since the last comprehensive review to ensure the longstanding success of the university, we have put a number of systems and structures in place to not only provide continuity and stability, but build support and cohesion within our community.

### **Financial Planning, Resource Allocation, and Student-Centered Support**

UMass Boston wholeheartedly agrees that we should continue efforts to reduce student debt and diversify revenue sources across capable units as an ongoing institutional priority. We remain dedicated to ensuring that financial and resource planning is transparent and explicitly aligned with institutional goals and student needs. We are continuing to ensure that funding decisions clearly reflect and support the university’s evolving priorities and the needs of its learning community.

As noted in the self-study, since 2017, UMass Boston’s strong multi-year financial strategy, management, and controls have enabled the campus to generate a positive operating margin for the past seven fiscal years despite economic and demographic headwinds.

Additionally, since 2022, the university has been developing a new budget model, the Beacon Budget Model, specifically tailored for UMass Boston and driven by guiding principles which were developed in consultation with deans, faculty, and staff. BBM, to be fully implemented in FY27, will enable greater local decision making and accountability in setting unit priorities and understanding costs and benefits of planning that is balanced by central coordination and oversight while incentivizing new initiatives and growth to advance the instructional, research and community engagement efforts of our students, faculty, staff, and community partners.

UMass Boston is aligning its strategic priorities with resource planning and allocation. As such, we have developed the Beacon Budget Model to utilize strategic indicators for allocating resources to

academic units. For example, in addition to allocating tuition revenue directly to major academic units, the state appropriation is allocated using the following formula:

- Degrees Awarded: 45% allocated proportionately based on the percent of total degrees.
- 2-Year Retention: 40% allocated proportionately based on total headcount.
- Research: 15% allocated proportionately based on total grant and contract revenue.

Holistic student success is the top priority on our campus, and we are aligning our resources to support these efforts. In addition to BBM, we have also dedicated an annual pool of funds for strategic initiatives, with a primary emphasis on student success. We also recognize that maintaining and growing revenue is necessary during these challenging times, and we have reorganized and launched units such as the Office of Community & Executive Education to create new pathways and partnerships. We are also confident that other initiatives such as the Beacon Pledge, Future Beacons partnership with Bunker Hill Community College, the launch of Batson Academy as the region's first university-assisted hub school, and our early college programs will all contribute to increased diversified pathways to success for our students and communities.

## **Conclusion**

UMass Boston is grateful for the insightful assessments and guidance that flow from the thorough and thoughtful work of the NECHE visiting team. We are proud of the significant and remarkable progress our campus has made over the past few years, but we recognize that we have no laurels to rest on; our mission-driven work is too important, and external conditions are extremely challenging. Thus, while we appreciate the affirmation of our progress, we remain committed to utilizing the insights of the NECHE visiting team to continually improve, and we look forward to working with NECHE to ensure a better future for our university and its students.