

2024 Report on Annual Indicators

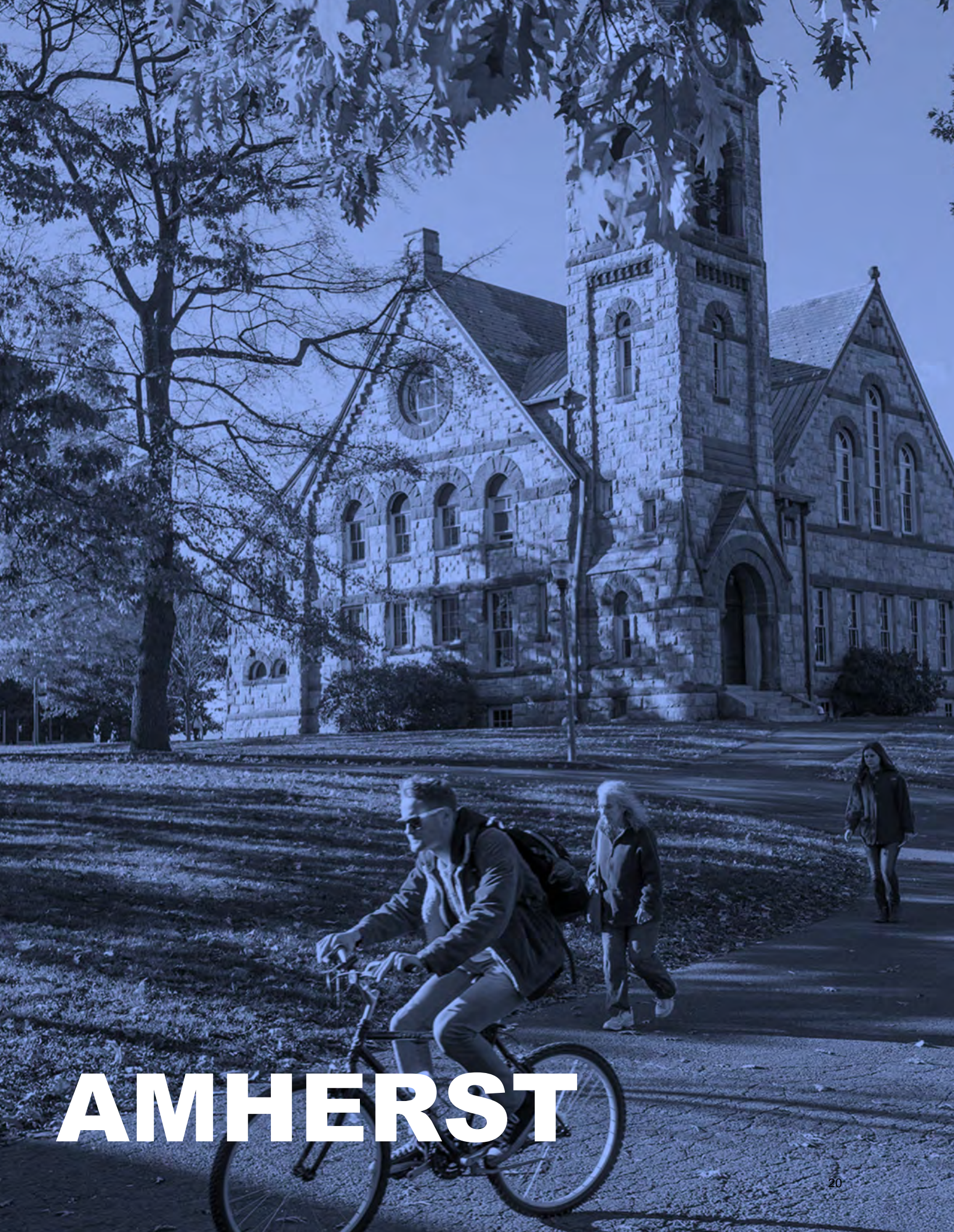
University Performance Measurement System

July 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law



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 System Faculty	\$241,164	• License Income	\$633,307
		• 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		

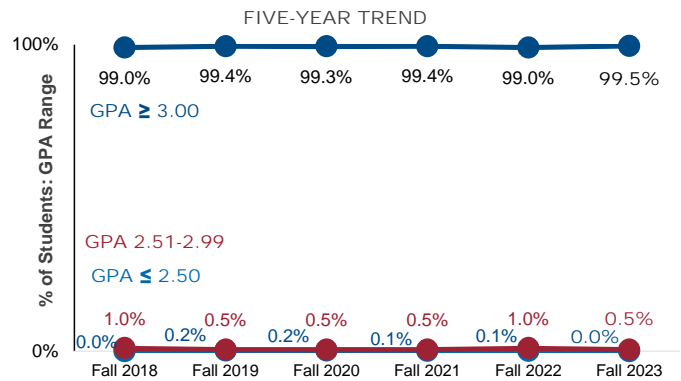
ACADEMIC QUALITY

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

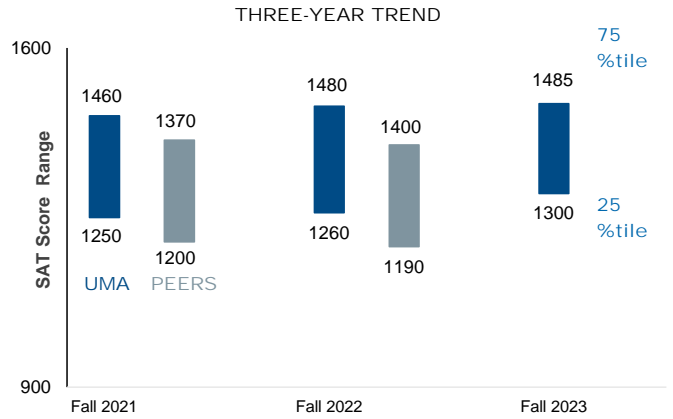
1485
SAT Scores of Freshmen
75th Percentile
in Fall 2023

▲ **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)

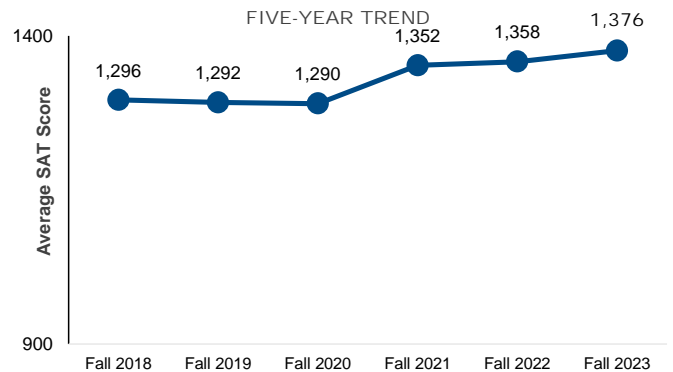
*Test scores became optional in Fall 2021.



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

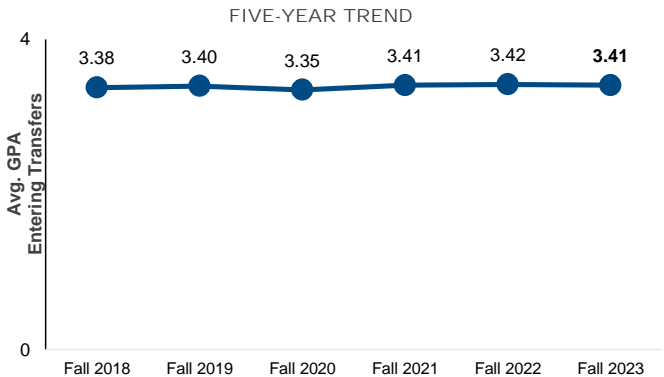
Average transfer GPA in Fall 2023

▼ 0.01

One-year nominal change (vs. Fall 2022)

▲ 0.03

Five-year nominal change (vs. Fall 2018)



STUDENT-FACULTY RATIO

18:1

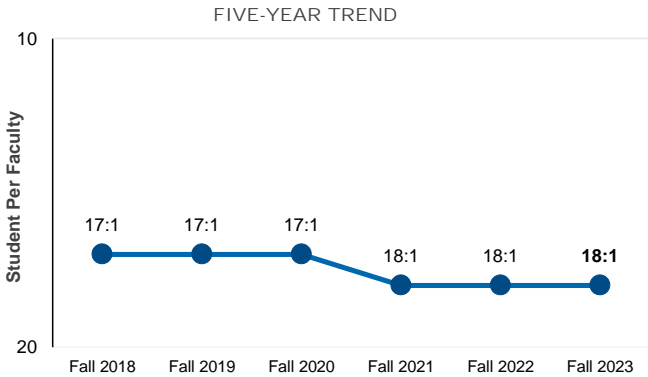
Student-Faculty Ratio in Fall 2023

• 0

One-year nominal change (vs. Fall 2022)

▼ 1

Five-year nominal change (vs. Fall 2018)



TECHNOLOGY-ENHANCED CLASSROOMS

380

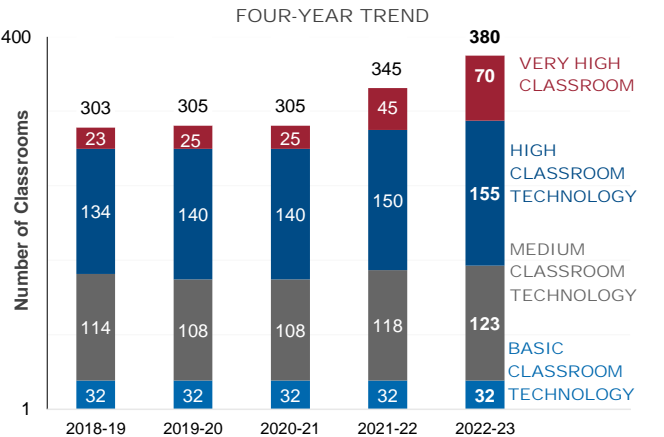
Total Technology Enhanced Classrooms in 2022-23

▲ 10%

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

▲ 25%

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



ACADEMIC QUALITY

PERCENT TENURED/TENURE-TRACK FACULTY FTE

67%

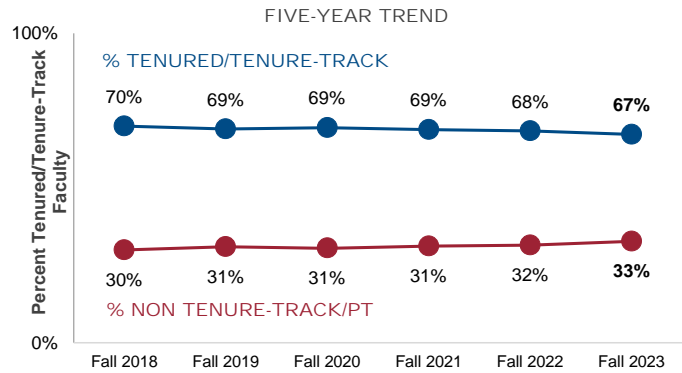
Percent Tenured/
Tenure-track Faculty
in Fall 2023

▼ **1**

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

▼ **3**

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



FACULTY FTE

1566

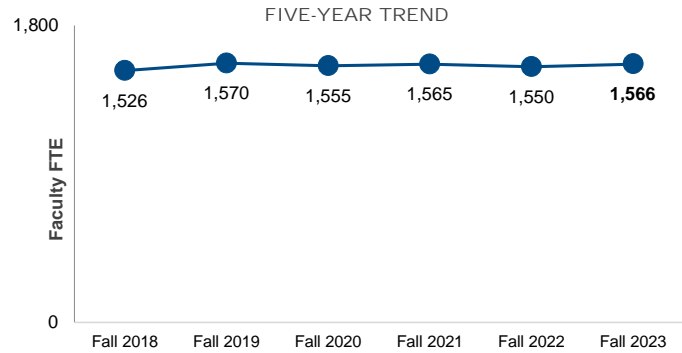
Faculty FTE
in Fall 2023

▲ **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%

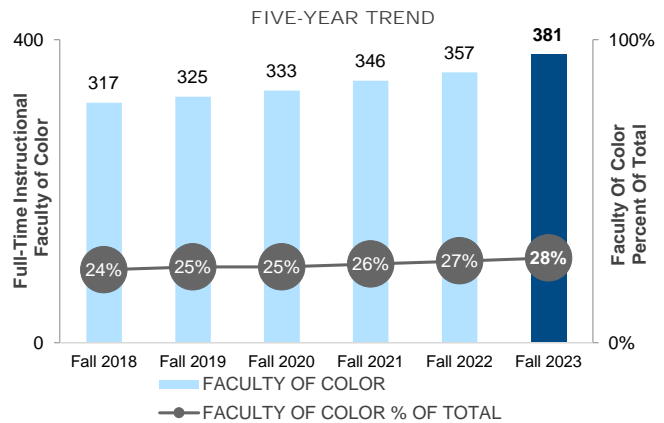
Percent of
Faculty Of Color
in Fall 2023

▲ **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%

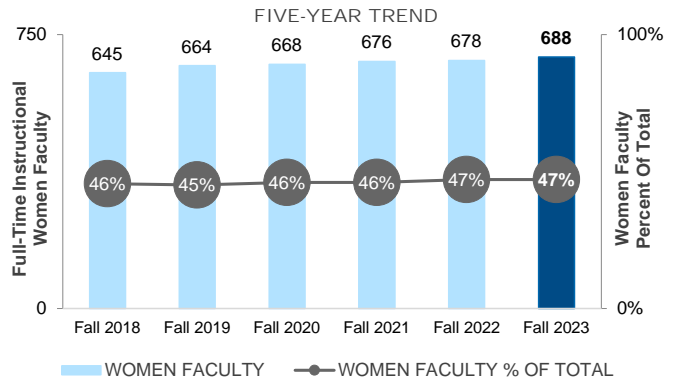
Percent of
Women Faculty
in Fall 2023

● 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%

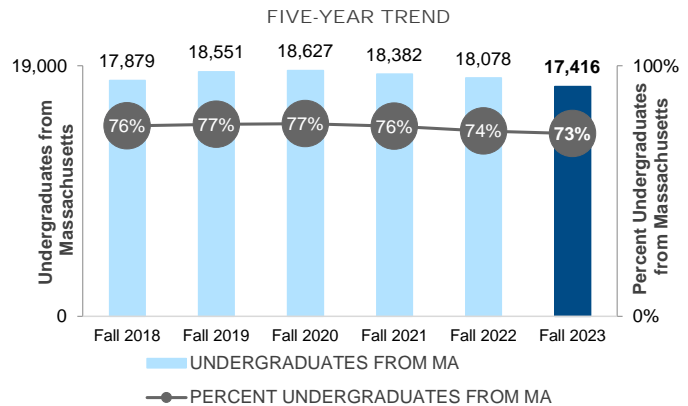
% Undergraduates
from Massachusetts
in Fall 2023

▼ 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%

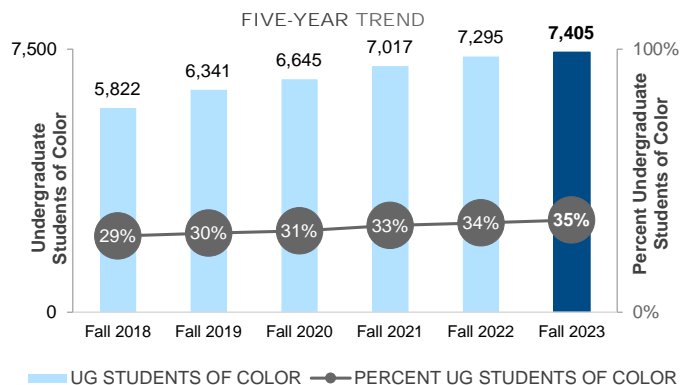
% Undergraduates
Students of Color
in Fall 2023

▲ 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

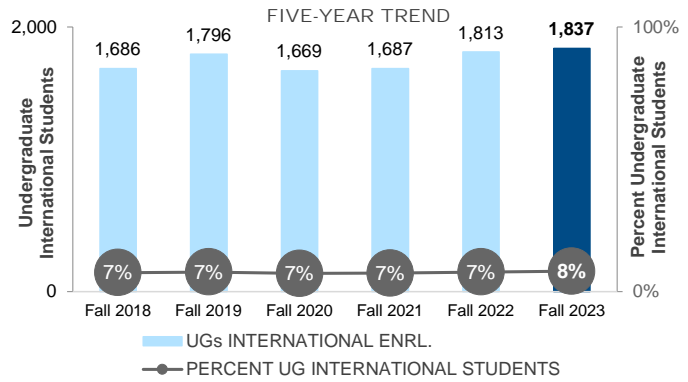
▲ **1%**
One-year % change (vs. Fall 2022)

▲ **9%**
Five-year % change (vs. Fall 2018)

8%
% International UG Enrollment in Fall 2023

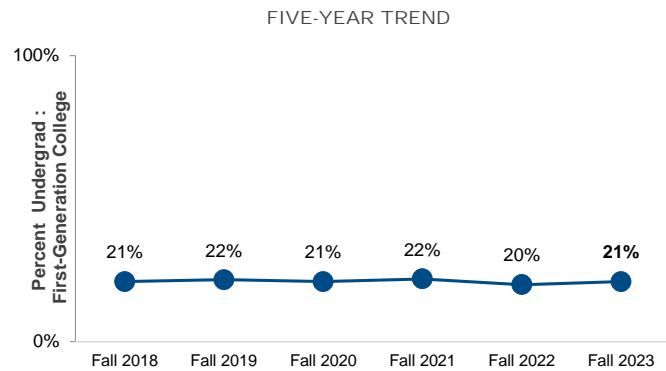
▲ **1**
One-year % point change (vs. Fall 2022)

▲ **1**
Five-year % point change (vs. Fall 2018)



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

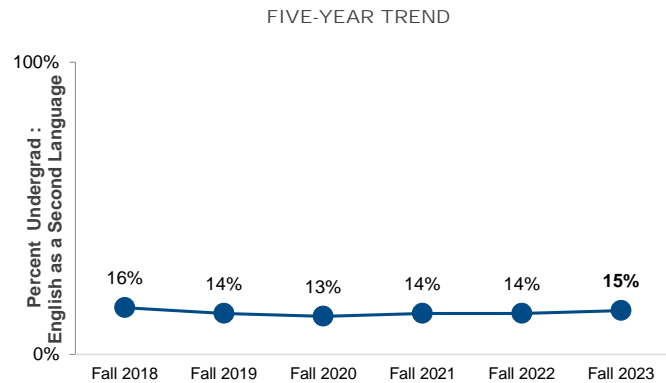
21%
Percent first-time Undergraduates who are First-Generation College in Fall 2023



*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



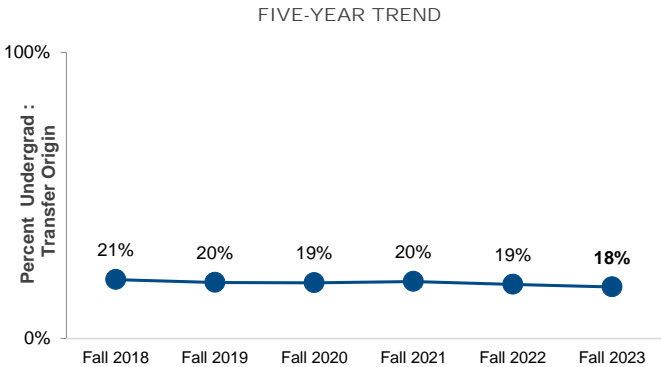
*The data source prior to 2018 is based on survey responses, 2018 to present is based on Common Application responses.

ACCESS AND AFFORDABILITY

PERCENT UNDERGRADUATES WHO ARE OF TRANSFER ORIGIN

18%

Percent Undergraduates who are of Transfer-Origin in Fall 2023



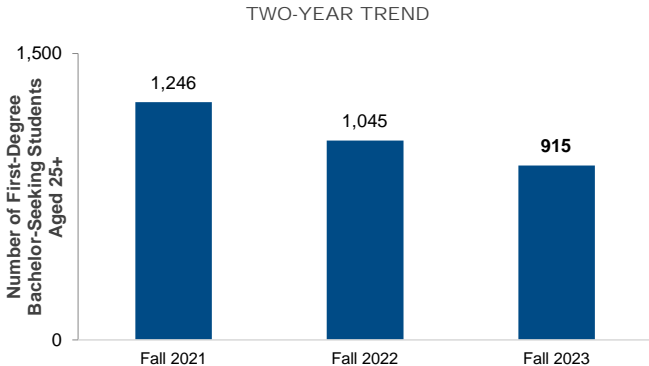
NUMBER OF FIRST-DEGREE BACHELOR-SEEKING STUDENTS AGED 25+

915

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

▼ 130

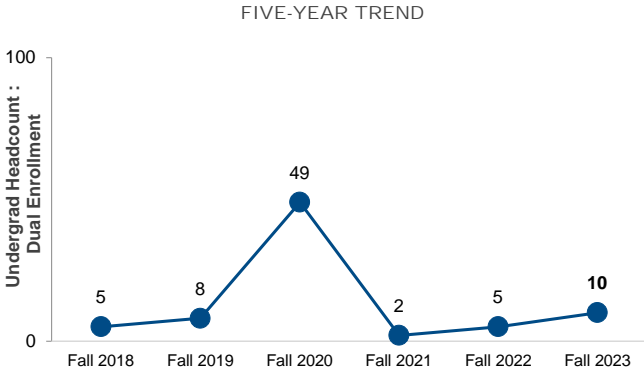
One-year nominal change vs. Fall 2023



DUAL ENROLLMENT STUDENTS (HEADCOUNT)

10

Dual Enrolled Students in Fall 2023



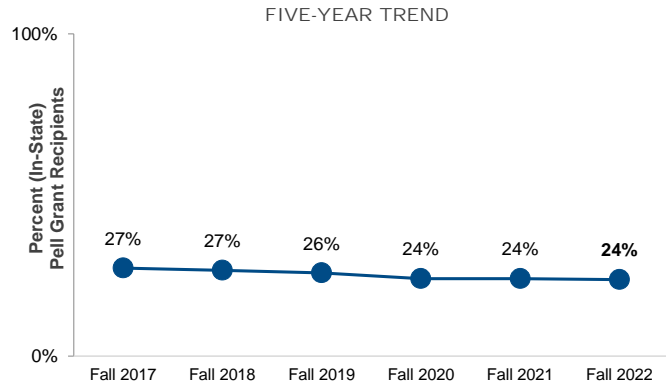
ACCESS AND AFFORDABILITY

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)

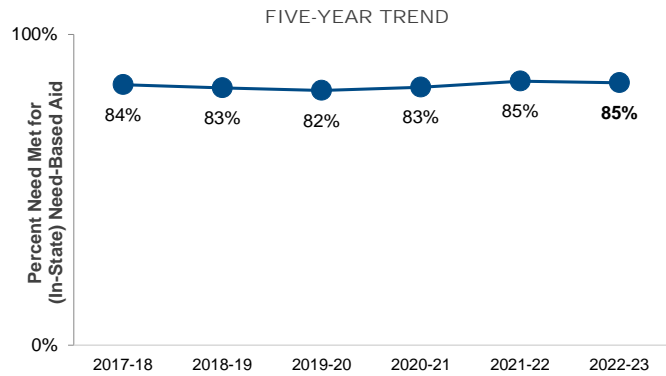


PERCENT NEED MET FOR IN-STATE STUDENTS AWARDED NEED-BASED AID

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

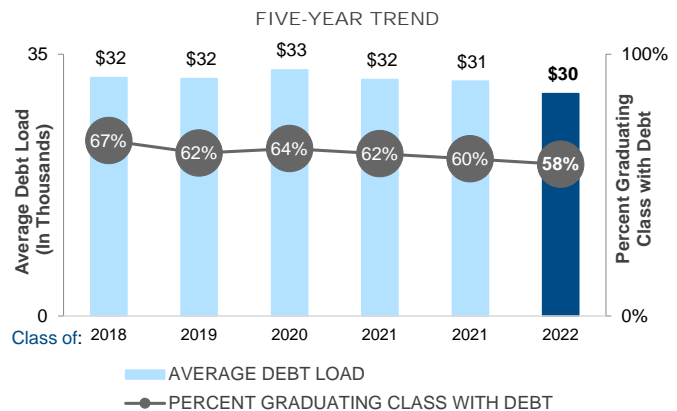
▼ 5%
One-year % change (vs. 2021)

▼ 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

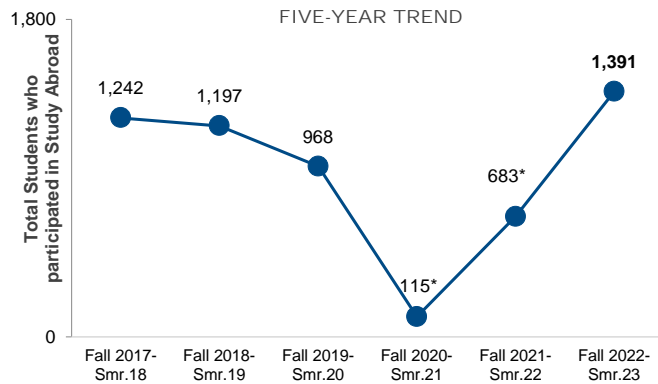
TOTAL STUDENTS WHO PARTICIPATED IN A STUDY ABROAD PROGRAM

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.



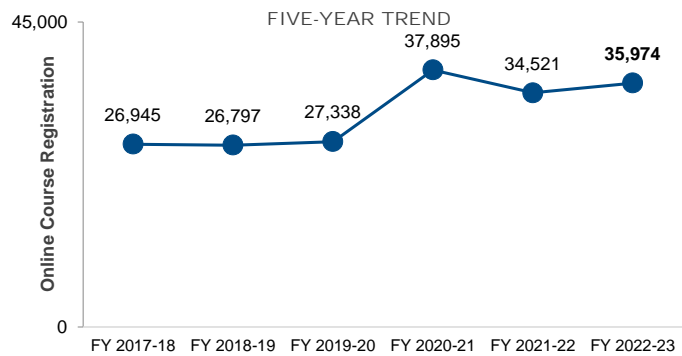
TOTAL ONLINE COURSE REGISTRATIONS

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)

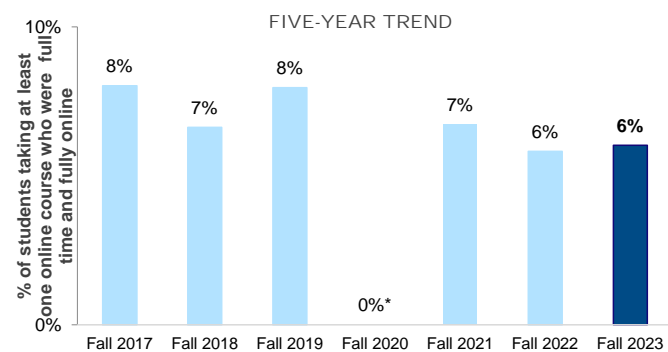
*Terms affected by pandemic



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

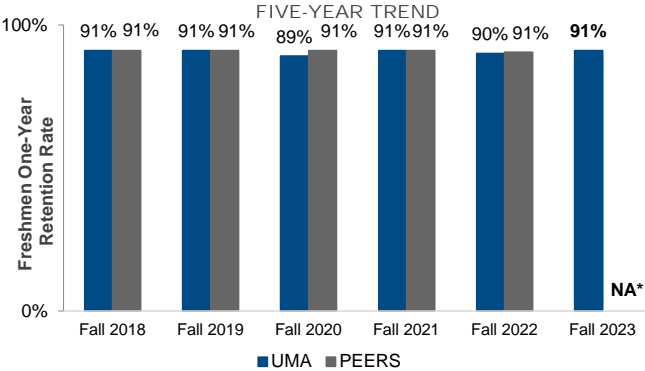
FRESHMEN ONE-YEAR RETENTION RATE

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.

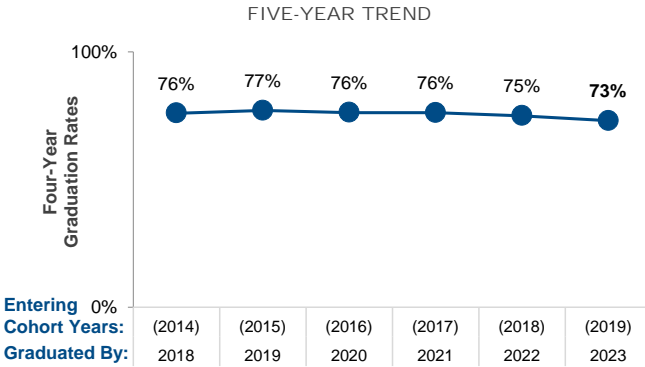


FRESHMEN FOUR-YEAR GRADUATION RATES

73%
Freshmen Four-Year Graduation Rates in 2023

▼ 2
One-year % point change (vs. 2022)

▼ 3
Five-year % point change (vs. 2018)



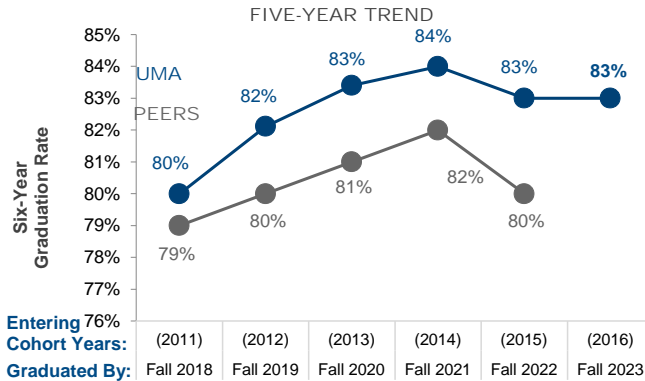
FRESHMEN SIX-YEAR GRADUATION RATE

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

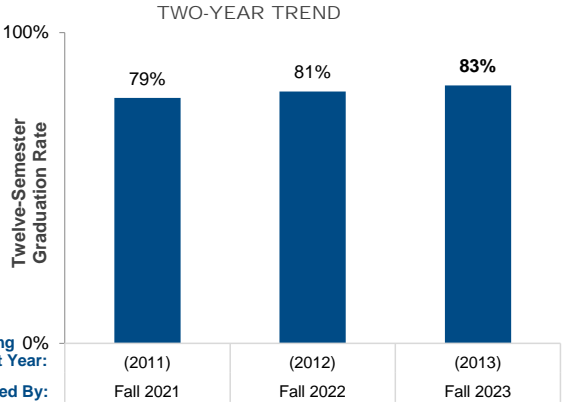
FRESHMEN TWELVE-SEMESTER GRADUATION RATE

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%

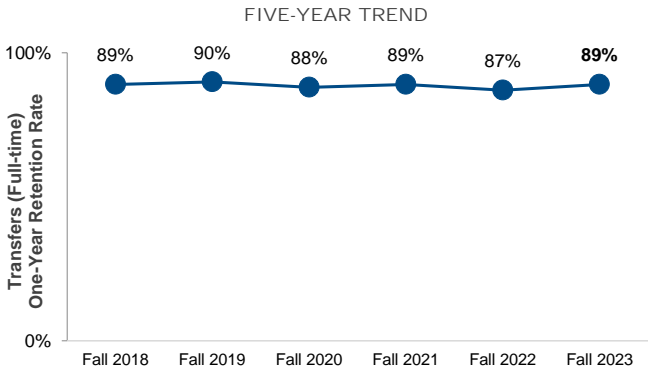
Transfers (Full-time)
One-Year
Retention Rate
in Fall 2023

▲ 2

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

● 0

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



TRANSFER (UPPER DIVISION) FOUR-YEAR GRADUATION RATE

85%

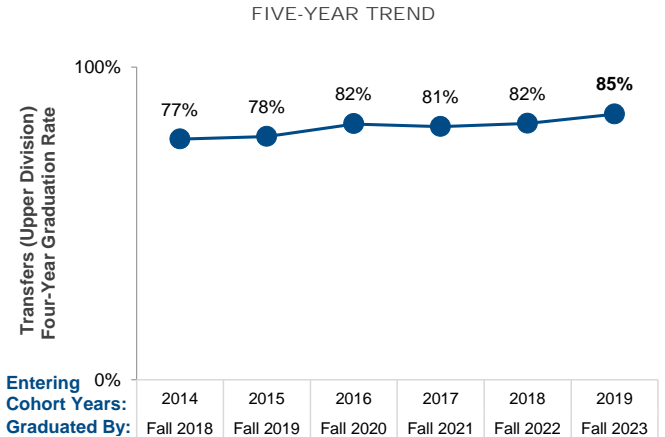
Transfers (Upper
Division) Four-Year
Graduation Rates
in Fall 2023

▲ 3

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

▲ 8

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



STUDENT SUCCESS AND SATISFACTION

STUDENT ACHIEVEMENT MEASURE

Cohort starting in : 2017-18

80%

Bachelor's Degree
Within 4 Yrs. from
any institution

76%

Bachelor's Degree
Within 4 Yrs. from
UMass Amherst

89%

Bachelor's Degree
Within 5 Yrs. From
any institution

82%

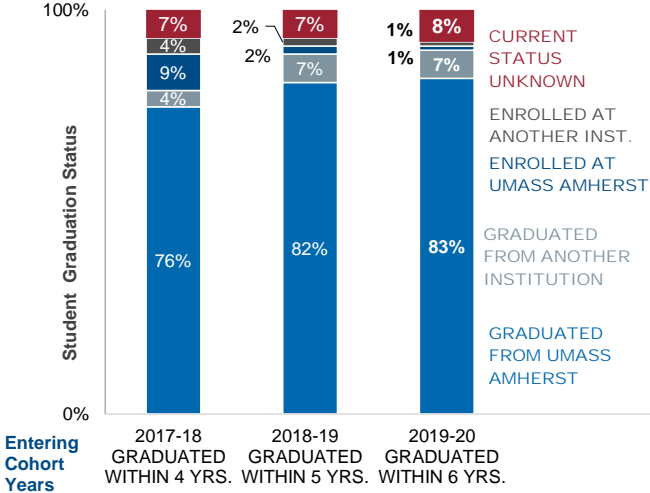
Bachelor's Degree
Within 5 Yrs. From
UMass Amherst

90%

Bachelor's Degree
Within 6 Yrs. From
any institution

83%

Bachelor's Degree
Within 6 Yrs. From
UMass Amherst



Source : Student Achievement Measure (SAM)

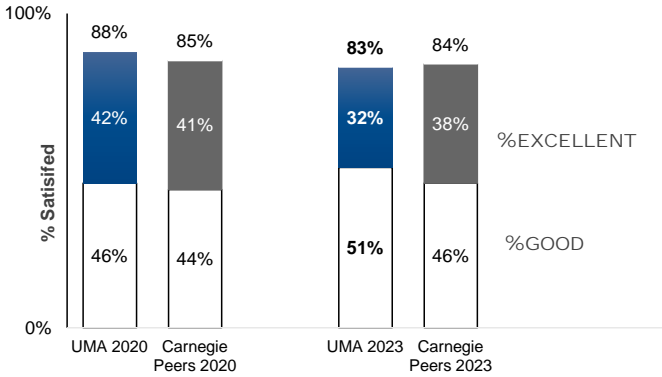
STUDENT SATISFACTION WITH EDUCATIONAL EXPERIENCE

83%

Student Satisfaction
as Good or Excellent
in UMA 2023

▼ 5

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



ALUMNI PARTICIPATION RATE

5%

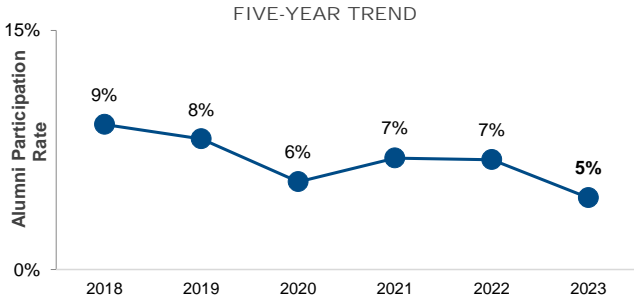
Alumni Participation
Rate
in 2023

▼ 2

One-year
% point change
(vs. 2022)

▼ 4

Five-year
% point change
(vs. 2018)



SERVICE TO THE COMMONWEALTH

DEGREE COMPLETIONS

9,251

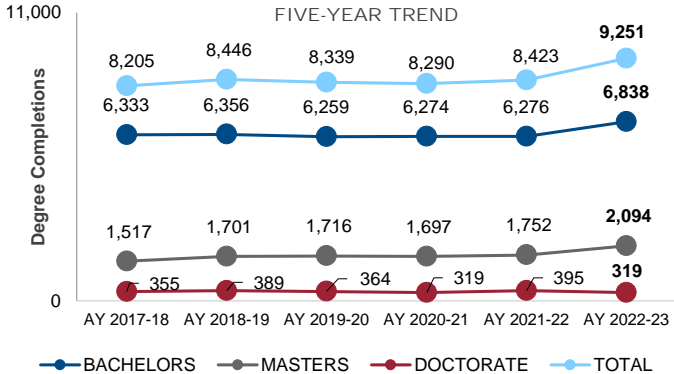
Total degree completions AY 2022-23

▲ 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

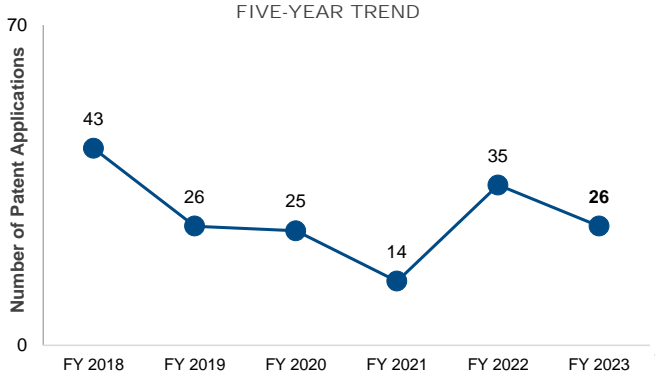
Patent Applications in FY 2023

▼ 9

One-year nominal change (vs. FY 2022)

▼ 17

Five-year nominal change (vs. FY 2018)



TOTAL R&D EXPENDITURES

\$268.7

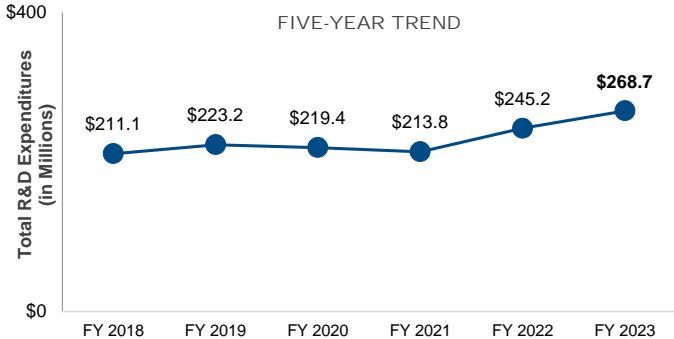
Total R&D (Millions) N in FY 2023

▲ 10%

One-year % change (vs. FY 2022)

▲ 30%

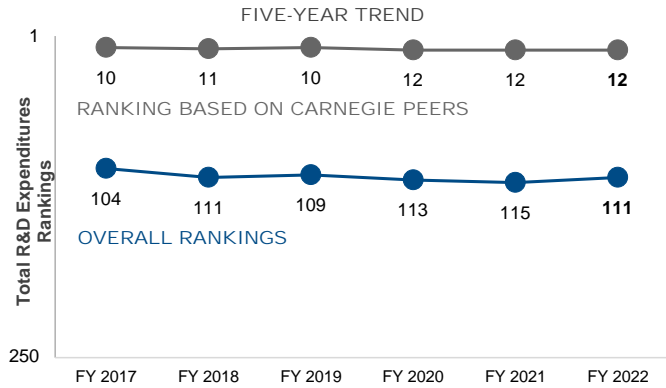
Five-year % change (vs. FY 2018)



SERVICE TO THE COMMONWEALTH

TOTAL R&D EXPENDITURES RANKINGS

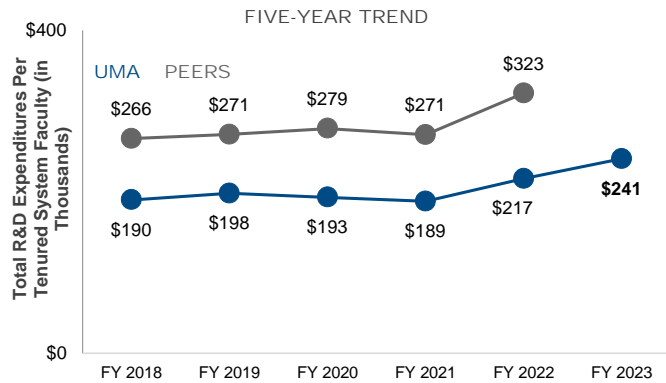
111 Total R&D Expenditures Overall Rankings in FY 2022	▲ 4 One-year nominal change (vs. FY 2021)	▼ 7 Five-year nominal change (vs. FY 2017)
12 Rankings based on Carnegie Peers in FY 2022	● 0 One-year nominal change (vs. FY 2021)	▼ 2 Five-year nominal change (vs. FY 2017)



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

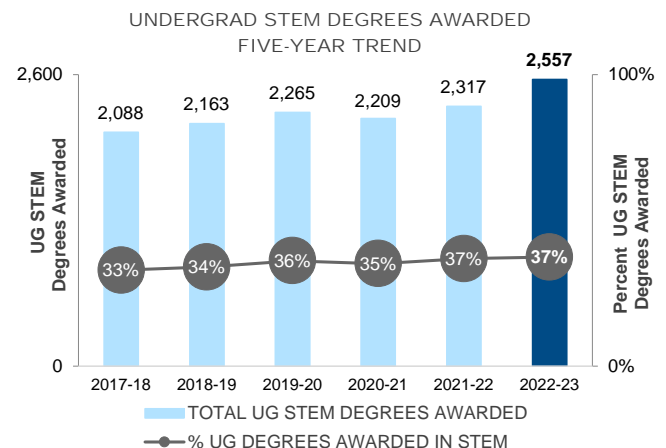
\$241k Total R&D Expenditure Per Tenured System Faculty in FY 2023	▲ 11% One-year % change (vs. FY 2022)	▲ 27% Five-year % change (vs. FY 2018)
---	---	--



* 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

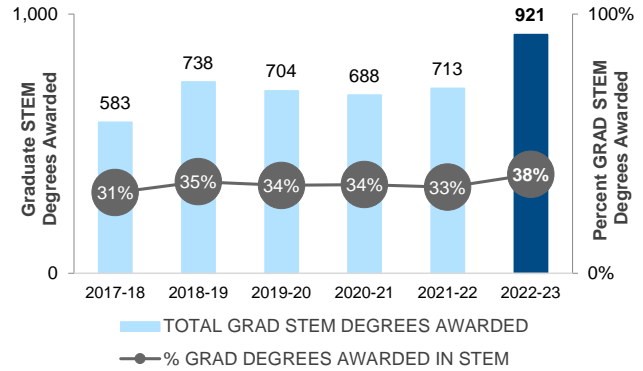
DEGREES AWARDED IN STEM FIELDS

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.

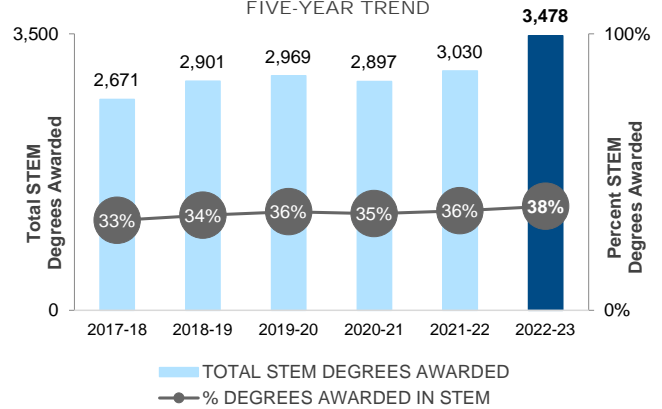
GRAD STEM DEGREES AWARDED FIVE-YEAR TREND



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

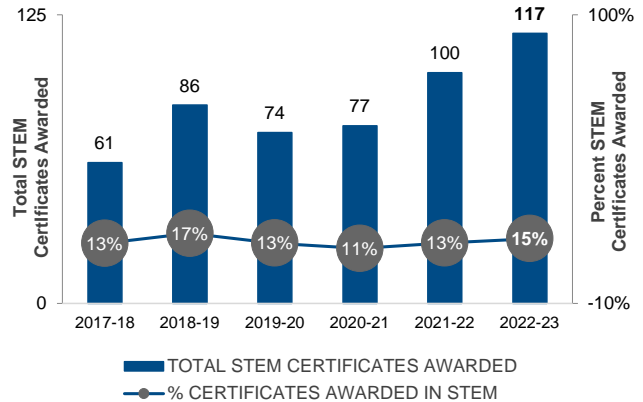


CERTIFICATES AWARDED IN STEM FIELDS

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



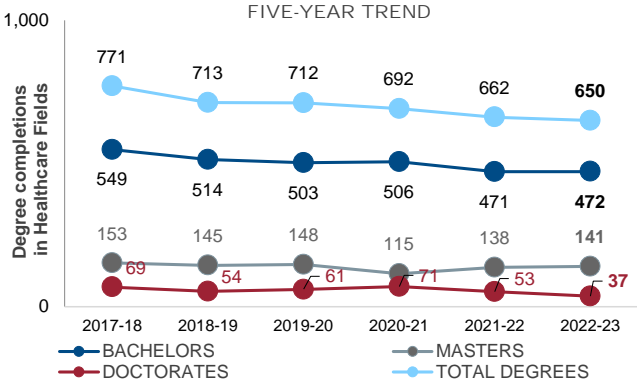
SERVICE TO THE COMMONWEALTH

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)

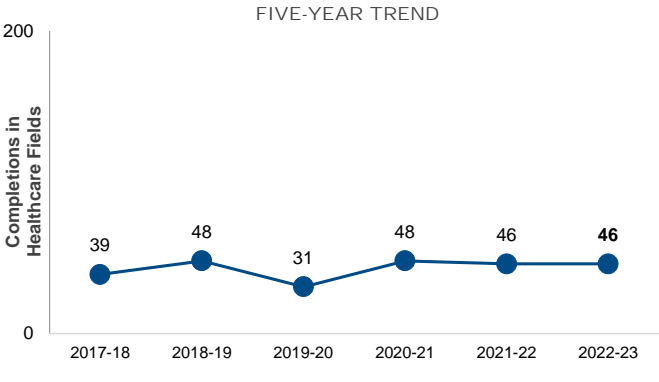


CERTIFICATES AWARDED IN HEALTHCARE FIELDS

46
 Total Certificates awarded in HealthCare fields in 2022-23

● **0%**
 One-year % change (vs. 2021-22)

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

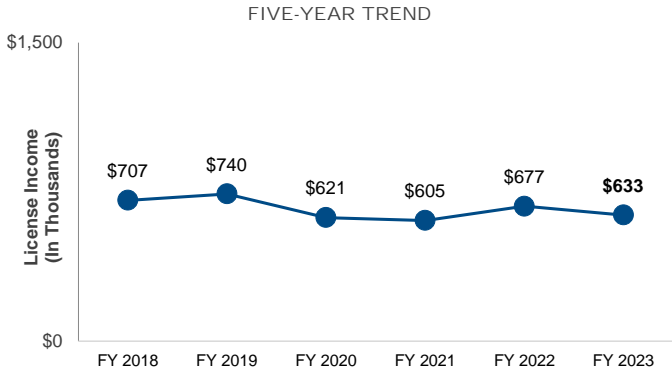


LICENSE INCOME

\$633.3k
 License Income in FY 2023

▼ **6%**
 One-year % change (vs. FY 2022)

▼ **10%**
 Five-year % change (vs. FY 2018)



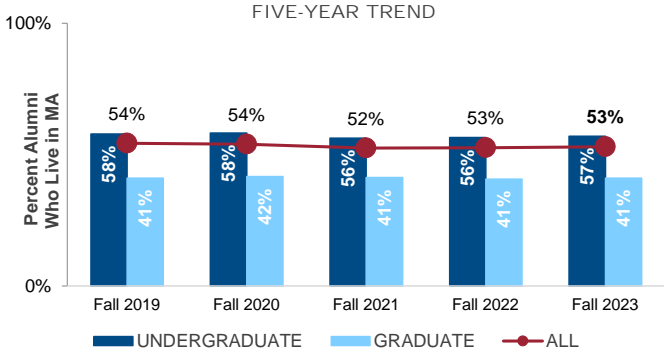
SERVICE TO THE COMMONWEALTH

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)



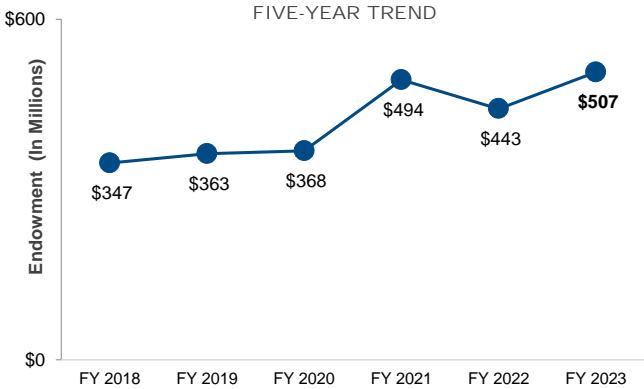
FINANCIAL HEALTH

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)

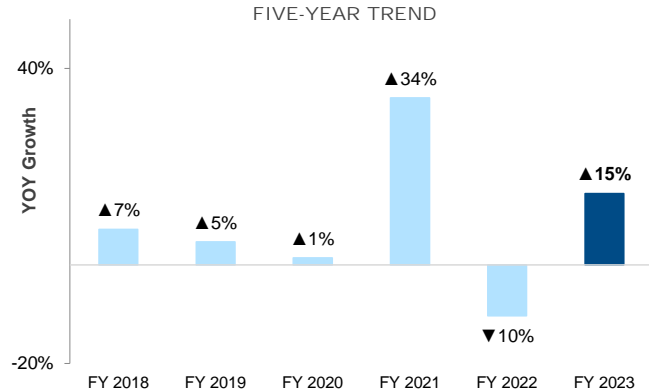


ENDOWMENT ASSETS AND ANNUAL GROWTH IN ENDOWMENT

15%
Annual Growth in FY 2023

▲ 25
One-year % point change (vs. FY 2022)

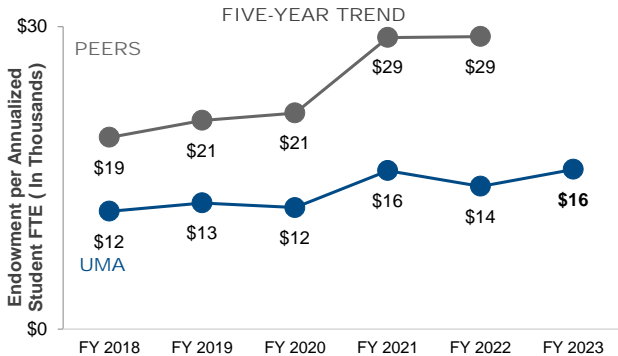
▲ 7
Five-year % point change (vs. FY 2018)



FINANCIAL HEALTH

ENDOWMENT PER ANNUALIZED STUDENT FTE

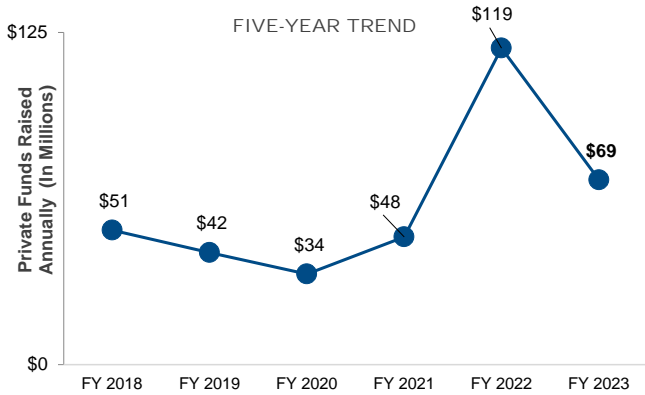
\$15.8k ▲ **12%** ▲ **35%**
 Endowment per Annualized Student FTE in FY 2023
 One-year % change (vs. FY 2022)
 Five-year % change (vs. FY 2018)



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

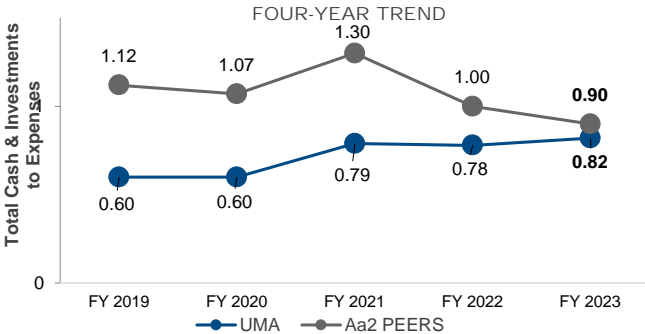
PRIVATE FUNDS RAISED ANNUALLY

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

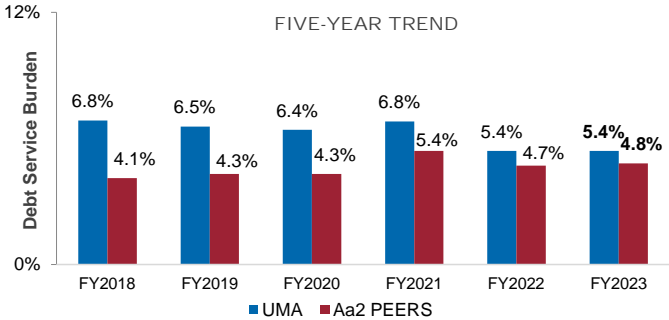
Debt Service Burden in FY2023

• 0.0

One-year % Point change (vs. FY2022)

▼ 1.4

Five-year % Point change (vs. FY2018)



OPERATING MARGIN (%)

6.9%

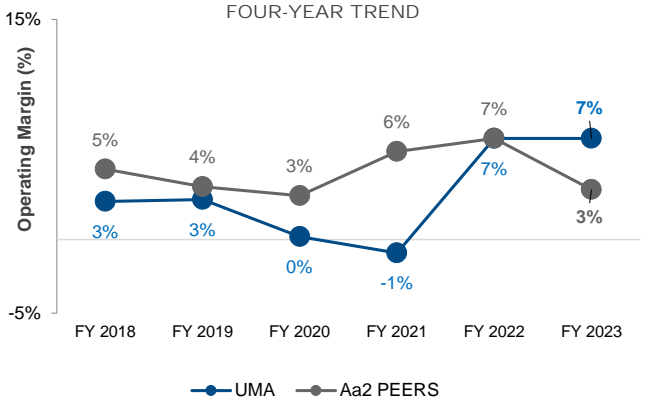
Operating Margin (%) in FY 2023

• 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).

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

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.

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.