

University of Massachusetts: Serving the Commonwealth Virtually and through Present and Future Satellite Centers

A Report Prepared for
Dr. Robert Caret, President
University of Massachusetts



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Acknowledgements

The goals of this report are to provide the President of the University with a comprehensive picture of the University of Massachusetts presence across the Commonwealth, and to identify potential opportunities for the expansion of existing Centers or the establishment of new Satellite Centers by the University. We wish to thank the many people who have contributed to the research necessary to paint this picture. The information provided by individuals' within the President's Office, across all five of our campuses, and in other states is comprehensive and invaluable.

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Executive Summary

The UMass Donahue Institute, at the request of Executive Vice President James Julian, undertook an initial analysis of the issues involved with the expansion of existing and/or creation of new satellite centers involving one or more UMass campuses in partnership with other higher education institutions around the Commonwealth. The analysis was conducted during the period of March-June 2012.

The analysis was undertaken in collaboration with Senior Vice President for Academic Affairs, Student Affairs, and International Relations Marcellette Williams, who engaged her staff and provided very helpful linkages with the provosts at each of the campuses. Meetings were held at each of the campuses with the provosts and/or the others they designated. In addition, a number of potential sites (e.g., Lynn, Springfield) were visited. Further, the experiences of other universities in Massachusetts (particularly Babson and Northeastern), and in Arizona and Maryland were reviewed including a site visit to the Universities at Shady Grove in Maryland. The research was supplemented with demographic and geographic data analysis.

UMass Covers the Commonwealth – UMass has 5 campuses geographically distributed throughout the state and currently operates a variety of programs with regular on-site staff at over 75 other locations (and many others locations that do not house regular on-site staff). These programs focus on education, economic development, health, the environment, arts and culture, and public policy. This presence is complemented by the very successful UMassOnline. In addition, 9 State Colleges/Universities and 15 Community Colleges offer programs throughout Massachusetts.

Concentration of Private Higher Education – The Commonwealth is home to the nation's greatest concentration of private higher education institutions offering associate degrees or above. Totaling more than 100 in number, these private higher education institutions have their own satellite centers and online programs. This unique diversity of public and private higher education institutions has significant implications for the satellite center model for UMass.

Trends with Satellite Centers – The nature of satellite centers appear to be changing as some universities, such as Northeastern, are closing centers in Massachusetts and opening new ones in more promising markets, such as Charlotte and Seattle. Some are developing highly targeted centers (e.g., a Babson center for entrepreneurship and Northeastern MBA program are offered in Boston's Financial District), and many are exploring international centers. With the rapid growth in online and for-profit higher education, many satellites are functioning as portals to on-site, online, and on-campus courses.

Potential Model for UMass – In addition to academic programs provided by UMass Campuses and/or other higher education institutions, some sites may provide space for and links to other University initiatives and services (e.g., a business assistance center, a K-12 support program). There may also be opportunities for developing programs in collaboration with other partners (e.g., non-profits, government, and corporate partners).

Critical Success Factors – Based on the Massachusetts experience and that of other states, key success factors include: leadership commitment; carefully identified and developed markets for educational programs; substantial capital outlays and operating funds; incentives for faculty engagement and institutional partners; and adherence to accrediting requirements.

One essential success factor is clarity regarding resource expectations. Successful satellite centers serve as catalysts for resource aggregation, providing a basis for state and local governments, community organizations, business and industry, and students and other fee-paying clients to invest. Typically, they require supported for capital improvements and annual operating revenue, although specific programs or external revenue centers may be located there. In many cases, satellite centers generate net revenue for sponsoring institutions.

Potential Sites – Based on this initial analysis, the most promising sites appear to be those where UMass has an existing satellite center or presence (e.g., Fall River, Fairhaven, New Bedford, Plymouth, Springfield, West Barnstable), new sites where there are existing relationships (e.g., with Northern Essex CC in Haverhill, and with North Shore CC in Lynn) or a totally new site where there may be a strong market demand and minimal higher education presence (e.g., Marlborough or Waltham, between 495 and 128, Mass Pike, and Route 2).

Moving Forward – As the University moves forward with a decision to further invest in satellite centers, it needs to engage in a thoughtful and transparent process in selecting site(s). Campuses should be encouraged to continue and/or expand their existing satellite centers and many off-campus activities. If a system-wide investment is planned, the process should be overseen by a steering committee that is well-staffed and headed by strong academic leadership (including online) from across our campuses. Key criteria should include: a well-developed business plan; proven markets; financial feasibility (capital and operating); leadership support; site attributes (e.g., facilities, access, safety), and accreditation standards.

Concluding Observation – It is evident from this analysis that UMass already engages in many satellite-type activities. What is not as clear, however, is whether the institution receives full recognition or value from these efforts. It may be that a self-conscious evaluation of these many activities should be undertaken with an eye toward more clearly articulating the value to local communities. UMass is everywhere: our many local activities should be thought of as “UMass at Everywhere.”

Technical Report

Study Approach

The UMass Donahue Institute, at the request of Executive Vice President James Julian, undertook an initial analysis of the issues involved with the expansion of existing and/or creation of new satellite centers¹ involving one or more UMass campuses in partnership with other higher education institutions around the Commonwealth. The analysis was conducted during the period of March-June 2012.

The analysis was undertaken in collaboration with Senior Vice President for Academic Affairs, Student Affairs, and International Relations Marcellette Williams, who engaged her staff and provided very helpful linkages with the provosts at each of the campuses. Meetings were held at each of the campuses with the provosts and/or others they designated. In addition, a number of potential sites (e.g., Lynn, Springfield) were visited. Further, the experiences of other universities in Massachusetts (particularly Babson and Northeastern), and in Arizona and Maryland were reviewed including a site visit to Shady Grove in Maryland. The research was supplemented with demographic and geographic data analysis.

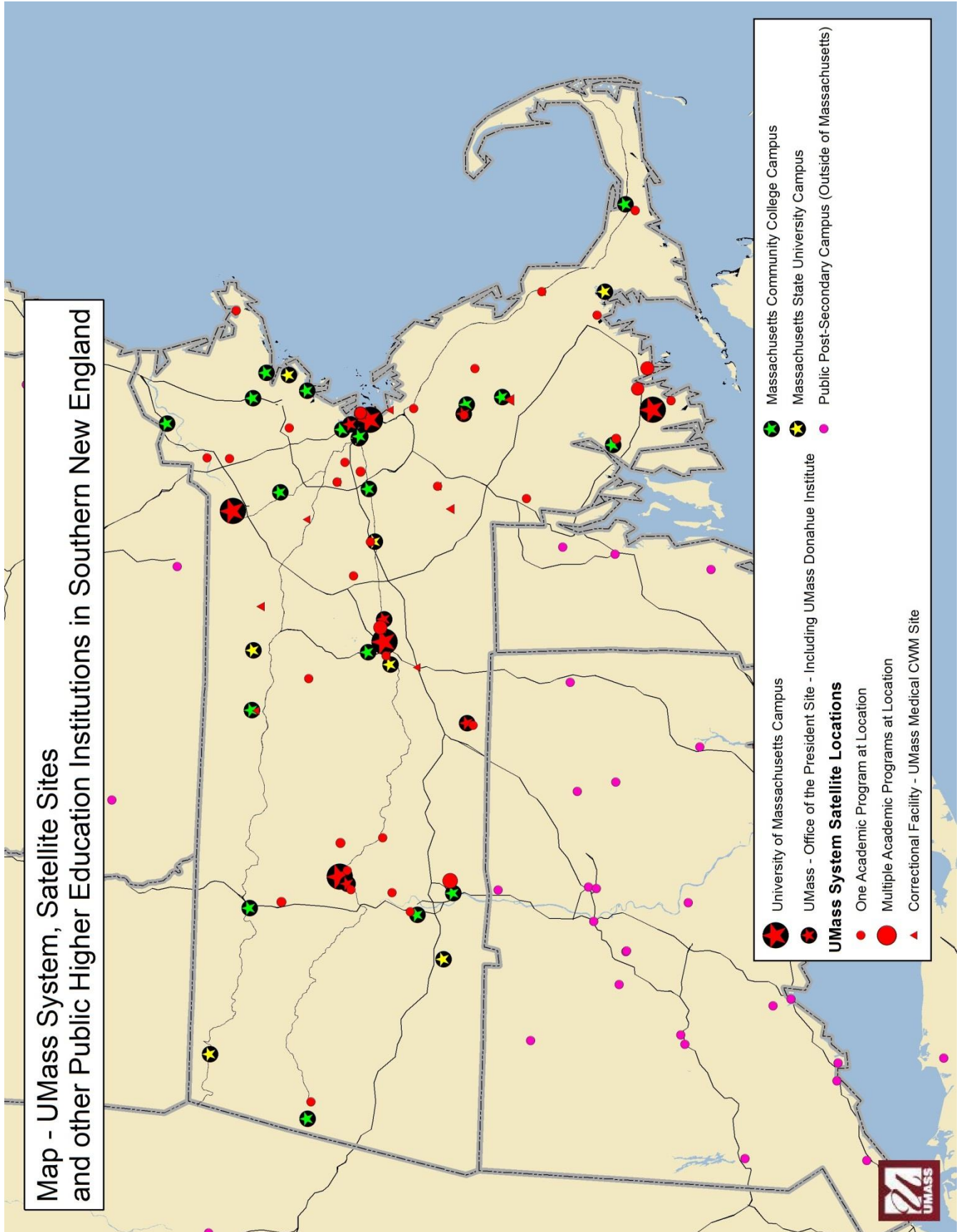
UMass Presence in the Commonwealth

The University of Massachusetts 5-campus system presently covers the entire Commonwealth, placing the University in every corner of the state. The University's physical presence includes our five campuses, the President's Office and over 75 additional locations that house regular on-site staff (and many other sites that do not house regular on-site staff) where we offer academic courses/programs and training, conduct research and place interns. These are complemented by the highly successful UMassOnline. These programs focus on education, economic development, health, the environment, arts and culture, and public policy. In recognition of this, all 5 UMass campuses are classified by the Carnegie Foundation for the Advancement of Teaching as "Engaged Institutions" in the areas of "Curricular Engagement & Outreach and Partnerships." UMass campuses have also established a presence in other states and internationally, and have serious interest in furthering these opportunities.

The 5 UMass campuses are part of the 29 public higher education institutions that include 9 State Colleges/Universities, 15 Community Colleges and their numerous off-campus sites and online education. Collectively they provide significant access to public higher education across the state. A map showing the University of Massachusetts campuses, off-campus sites, as well as the main campuses of the State Colleges/Universities and the Community Colleges follows. Appendix I.A includes a list of all of the Public Institutions in the Commonwealth. Lists of the additional UMass Sites are presented by campus in Appendix II.

¹*Definition of a satellite center*

For the purpose of this report the definition of a Satellite Center is a physical location within a region of a state where one or more public higher education institutions with possible public or private higher education partners offer certificates, associates, bachelors, and/or graduate degrees and/or other programs linked to regional employers and economic needs of the region. The degrees may be completed on-site and/or augmented by on-campus and/or online courses. The site houses regular full-time and part-time administrative staff and student and academic support staff; has a mix of regular and adjunct faculty and/or programmatic staff; and may house other non-credit programs and services offered by the higher education institutions, state and/or local government, associations and/or the non-profit/for-profit sector. The academic programs at the Satellite Center have met all program and regional accreditation standard.



Private Higher Education Institutions in Massachusetts

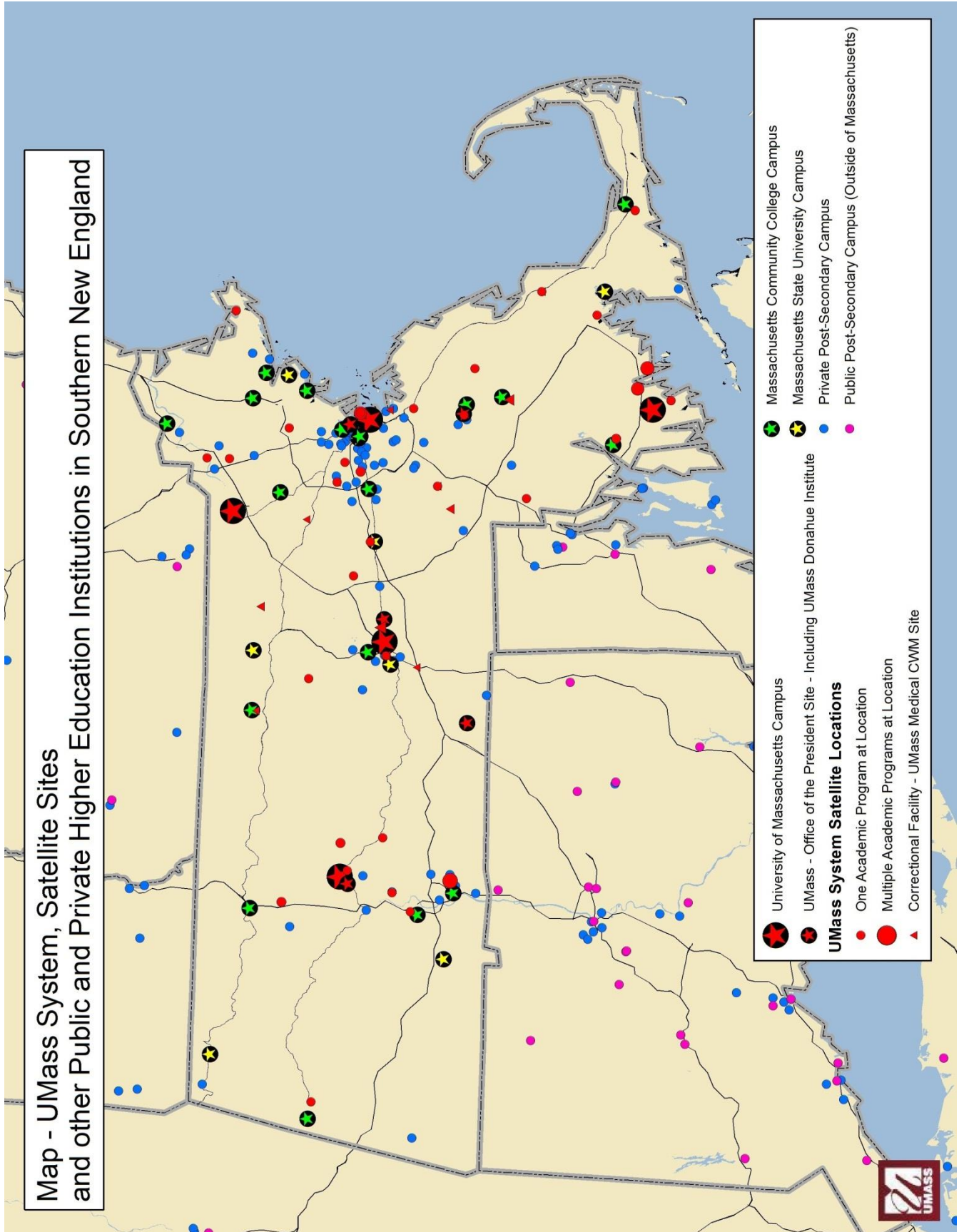
Massachusetts is home to more higher education institutions than any other state in the United States, having a wealth of public, private and for-profit institutions. Totalling more than 100 in number, many private higher education institutions have their own satellite centers and online programs. This unique density of higher education institutions has significant implications for the satellite center model for UMass.

Many of these institutions, such as Babson and Northeastern University, maintain fewer satellite centers in Massachusetts but they are strategically placed to serve “niche” or expanding populations (both have centers in Boston’s Financial District offering an entrepreneurial and MBA programs; Northeastern also has satellite centers in Dedham and Woburn). However, these institutions have reduced the number of in-state locations as they invested in out-of-state centers (i.e., Babson has a center in San Francisco and Northeastern has established centers in Charlotte, NC; and Seattle, WA, and is considering centers in Austin, TX; Minneapolis, MN; and Silicon Valley, CA). Massachusetts private higher education institutions are also expanding internationally.

The private higher education institutions in Massachusetts have also embraced online education. The most recent announced as a joint venture of Harvard and MIT, (edX) will provide free interactive classes to anyone in the world with an Internet (<http://www.edxonline.org/>).

The following map indicates the distribution of all public and private higher education institutions, present off-campus UMass sites, and public and private higher education institutions in neighboring states. Appendix I.B includes a list of all of the private higher education institutions in Massachusetts and all public and private higher education institutions in the neighboring states of Connecticut, New Hampshire, Rhode Island and Vermont (See map on following page).

Map - UMass System, Satellite Sites and other Public and Private Higher Education Institutions in Southern New England



Existing UMass Satellite Centers in Massachusetts

UMass campuses have established satellite centers in various parts of the state. Some of these are in Gateway Cities or smaller communities. In addition, UMass Worcester's including Commonwealth Medicine has numerous project and administrative sites across the Commonwealth in Gateway cities and other locations. Appendices II.A through II.F provide individual overviews of each campus's off-campus programs, a map of the regions around each of our campuses and the System Office, as well as a list of their present off-campus sites.

Potential Expansion Opportunities for UMass Satellite Centers

Our present efforts offer potential opportunities for the University of Massachusetts to strengthen its presence through the expansion of existing sites managed by campuses.

The existing communities in which UMass campuses have a satellite center or a similar presence are listed below along with their current partners. Campus leaders expressed a continuing commitment to maintaining offices with regular staff in these locations and in continuing their existing engagement with other higher education institutions:

- Barnstable/Hyannis (UMass Dartmouth and Cape Cod Community College)
- Boston – separate locations (UMass Boston, UMass Worcester, UMass System)
- Fall River (UMass Dartmouth and Bristol Community College)
- New Bedford (UMass Dartmouth and Bristol Community College)
- Plymouth (UMass Boston and Quincy College)
- Springfield (UMass Amherst and Springfield Technical Community College)

Two additional locations, also Gateway Cities, have been identified by campuses as potential sites. Each includes initial potential partners.

- Haverhill (UMass Lowell and Northern Essex Community College)
- Lynn (UMass Lowell, UMass Boston, and North Shore Community College)

At least one area of Massachusetts represents a growing population center with only modest higher education presence, and may provide an opportunity for a larger satellite center:

- MetroWest Area located between Routes 495, 128/95, Mass Pike, and Route 2 (Possible locations include Waltham or Westborough/Marlborough)

Two other Gateway Cities are presented because UMass has some presence in these locations.

- Brockton (UMass Donahue Institute with some collaboration with Massasoit Community College, and Bridgewater State University)
- Pittsfield (UMass Amherst offered MBA courses in Pittsfield up until 2012)

Appendices III.A through III.K include a general overview of each of the locations listed above including a brief description of the UMass current engagement or interest in that community.

Demographic, income, educational attainment and crime rate information about the area are presented for a 10 and 20 mile radius of the region. A map indicates the location of surrounding higher education institutions. The matrix below indicates the level of presence and/or interest by our campuses in the sites identified on the previous page.

UMass Campus by Presence and/or interest in Existing and Potential Satellite Center Locations

(Not including cities where main campuses are located except for Boston)

UMass Campus/President's Office

<i>Existing/ Potential Satellite Locations</i>	Amherst	Boston	Dartmouth	Lowell	Worcester	President's Office
Barnstable			p/I			
Boston	p/I	P/I			P/I	P/I
Brockton	p					P/I
Fall River	p		P/I			
Haverhill				I		
Lynn		i		i		i
New Bedford			P/I			
Pittsfield	p				p	
Plymouth		P/I				
Springfield	P/I					
Metro West	P/i				p/i	P/I

key
P = Significant Presence
p = some presence
I = Strong Interest
i = some interest

Models for Meeting Emerging Demand for Higher Education

A review of higher education trends reveal four models for expansion to meet defined, emerging demand. These models are presented in the table on the next page. Examples are presented below.

Campus Creation. The historical model is to build additional campuses. Before the recent economic downturn, states with increasing populations like California (University of California at Merced <http://www.ucmerced.edu/about-uc-merced>) have taken this approach. This requires enormous state investment and is not under consideration for Massachusetts at this time.

Institutional Realignment. A second model is to expand an existing campus into various locations, often in the same metropolitan area of a state. This has been done by shifting or expanding core programs (i.e., colleges, departments, and cross-discipline programs) into those locations. This is one of the aspects of what Michael Crow, President of Arizona State, refers to as *The New American University* <http://newamericanuniversity.asu.edu/#1>.

During the past several years, **Arizona State University** has expanded from its original campus in Tempe to four additional sites in the Greater Phoenix area. The new locations include: ASU at the Downtown Campus; ASU at the Polytechnic Campus (near the Phoenix Airport); ASU at the West Campus; and SkySong, Scottsdale Innovation Center. Beginning with Phoenix's 2004 Strategic Plan (<http://phoenix.gov/econdev/reinvest/focus/index.html>), the city invested over \$200 Million to bring Arizona State downtown. That campus is now home to the Phoenix Biomedical Campus, and ASU Colleges of Health Solutions; Nursing and Health Innovation; Public Programs; and Journalism.

Institutional Extension. The third option is to extend the strengths and programs of several institution(s) to meet identified needs in a local area. This is the model chosen by **Maryland**. http://mlis.state.md.us/other/Funding_Higher_Ed/2008June10_Overview_Higher_Ed_Centers.pdf
The Universities at Shady Grove (<http://shadygrove.umd.edu/>), a collaboration of 9 higher education institutions with University of Maryland College Park as the "lead" campus, is located in Rockville Maryland, Montgomery County. The area has the second highest income level in Maryland, 9 federal offices and research labs; more than 300 life sciences companies; and several Fortune 500 corporations. While several higher education institutions offered programs in individual locations, up until fall 2000 there was no upper-division undergraduate or graduate level higher education institution in the county.

The Universities at **Shady Grove** campus now has three buildings representing \$85 Million in state and University capital investment and is constructing a 4th building (by comparison the HEAT Center in Harford Maryland required \$1.75 M in state capital improvements). The annual state operating funds for Maryland's higher education centers reflect a combination of base operating funds and FTE incentive. (For example, in 2008 Universities at Shady Grove received over \$7 Million in operating funds; while the HEAT in Harford received a little over \$100 K.) Other annual income is derived from rent and fees for common services from participating institutions. A full Overview of Maryland's Higher Education Centers can be seen in Appendix IV.

Online Programs. The fourth model is to create a robust online education program that complements physical presence. This has been part of the UMass model since the creation of UMassOnline.

Massachusetts is not considering construction of new campuses, and UMass already has a leadership position in online education. This analysis focuses on institutional realignment and institutional extension, two often overlapping approaches that fit the definition of a “satellite center.” We examined practices in several states, with special emphasis on Maryland and Arizona.

Models for Meeting Emerging Demand for Higher Education

	Campus Creation Model	Institutional Realignment Model	Institutional Extension Model	Online Model
Examples	University of California, Merced UMass Boston	Arizona State University	Maryland including Universities at Shady Grove	UMass Online
Investment Strategy	State: Major investment in capital and operating expenses. Institutional: Not applicable.	State: Variable. Potentially major capital investment; some operating investment possible. Institutional: Regular operating revenues.	State: Variable. Potentially significant capital investment, typically no investment in operating revenues. Institutional: Development of revenue centers, but typically no transfer of resources from existing programs.	State: Typically no investment required. Institutional: Seed money to start programs that eventually become self-supporting or integrated into general offerings.
Planning Approach	Identification of long-term broadly based educational need. Development of consensus among policy makers to make permanent, major resource commitment.	Identification of significant educational needs or opportunities capable of attracting substantial resources over time. Development of partnership with policy makers to launch effort.	Identification of specified educational needs or opportunities that may be limited in scope or duration. Development of business plan lending confidence that programs can be self-supporting and capable of securing necessary initial state or local investment.	Identification of specific needs and opportunities, often at the course and program level, with strong potential return on investment. Development of business plan lending confidence that programs can be supported.

Elements of Successful Satellite Centers

In the states we examined, key elements of successful satellite centers are evident:

- Committed leadership at the top levels of higher education systems and institutions (Chancellors/Presidents)
- State level leadership and political will of local elected officials and community leaders
- Growing or transitioning populations often with corporate and government needs that are often not well met by existing higher education programs
- Rigorous planning based on research about employers, workforce and educational needs to guide selection of sites and programs
- Dynamic, well-connected and respected center CEOs
- Significant capital outlay and ongoing operating funds provided by the state, regional and local governments, and institutions
- Realistic and risk-limiting business plans to ensure financial sustainability
- Clear and effective incentives to gain support from deans and faculty (i.e., revenue sharing, stipends for course and program development and delivery)
- Initial and ongoing incentives to partners (i.e., rent forgiveness)
- Adherence to accreditation standards

Trends in Higher Education Affecting Development of Satellite Centers

While some institutions have expanded their physical footprint, trends in higher education have changed the siting and nature of their investments and programs.

- Some institutions, while shrinking their physical footprint, have invested in online education. As reflected in University's experience with UMassOnline, online courses meet the flexible scheduling requirements of today's professional employees, as well as augmenting on-campus student needs to complete programs and attend to work and family needs.
- International satellite centers are again on the rise, especially those located in countries of increasing economic growth and influence or those previously not open to U.S. higher education institutions (i.e., China, Abu Dhabi, Singapore). Institutions are exploring various international models. (For example, UMass Lowell is growing in this arena by using a professor-led model.)
- The growth of for-profit higher education is seen as a threat to both public and private non-profit higher education institutions considering satellite centers, especially in the undergraduate market. Store-front locations have been established in both cities and remote areas, but scrutiny regarding student loans, poor completion rates and program quality may limit or reverse growth.
- Increased satellite activity has attracted increased scrutiny from regional accreditors and disciplinary accreditors, such as the Association to Advance Collegiate Schools of Business (AACSB). The issues range from academic credentials to the number of full-time regular faculty.

Challenges to be Addressed in Satellite Center Planning

The trends cited above, as well as experience in other states, suggest several challenges to be overcome in planning satellite centers. Jay A. Halfond, Dean of Metropolitan College and Extended Education at Boston University, sums up some of these challenges in a recent article (“The Vanishing Neighborhood Campus,” *The New England Journal of Higher Education*, May 14, 2012). “Will locals continue to support the presence of outsiders? Will a critical mass of students opt for these programs? Will on-campus faculty provide the teaching and quality control necessary to ensure comparability, and will those at the remote site feel part of the home institution? The new operating principle should be: the further away the site, the tighter the tether to the university itself. The barriers, risks and costs are now too high for aspiring, reputation-conscious research universities to casually compete for local students in far-off settings—unless they choose to do so through distance learning. With the expansionist dreams of some universities comes the responsibility and headaches of the realities they will inevitably confront.” (<http://www.nebhe.org/thejournal/the-vanishing-neighborhood-campus/>)

In moving forward, it will be important to anticipate and manage risks in several areas:

- Growing competition from online education, including the institutions own efforts
- Competition from storefronts where a for-profit higher education institution offers programs but minimal counseling and enrollment support
- Insufficient enrollment to support full degree programs
- Competition for resources with the main campus (especially in lean years)
- Tightening accreditation standards

Moving Forward

Given the Commonwealth’s uniqueness, UMass will need to develop a model reflecting our special situation. Large stand-alone comprehensive centers with a wide range of degree offerings may prove to be financially challenging versus a model of flexible course offers through smaller, multi-purpose centers engaging with a wide variety of educational, social service and economic partners.

A Mix of Partners. A mixture of partners could help strengthen our offerings with other services and opportunities, as well as assist in the financial support a Satellite Center. The partners may include:

- UMass campuses (both a lead campus and partner campuses) offering academic degrees/courses, certificates, non-credit courses, and other programs
- Other public/private higher education institutions offering academic degrees/courses, non-credit courses, and other programs
- UMass portal services that provide access to on-campus programs and UMassOnline
- University programs/projects (often externally funded) that are require to be located or would benefit from being located at a specific site
- University incubator and research facilities that support academic, corporate and other partners located at or near the site
- Complementary non-profit and for-profit service providers
- Local, regional, and state government offices and services
- Corporate partners that would benefit from co-location

A Mix of Programs. Sustainable demand may be less for full-service degree programs and more for “niche” markets, such as degree completion, pipeline and feeder programs to campuses, or educational enhancements such as certificate or continuing professional education. Centers may need to be fluid, responding to local conditions and changing needs and less focused on establishing a long-term, physical presence organized around a fixed set of programs.

Recommended Criteria for Considering Investment in a UMass Satellite Center

The decision to invest in strengthening and/or establishing a satellite center should be based on a careful assessment of the conditions associated with success. One essential success factor is clarity regarding resource expectations. Successful satellite centers serve as catalysts for resource aggregation, providing a basis for state and local governments, community organizations, business and industry, and students and other fee-paying clients to invest. Typically, they require supported for capital improvements and annual operating revenue, although specific programs or external revenue centers may be located there. In many cases, satellite centers generate net revenue for sponsoring institutions.

Recognizing the nature of satellite centers as financial catalysts is important for several reasons. It helps to:

- Promote clarity in developing and evaluating business plans
- Focus attention on the specific costs and benefits to prospective partners, and thereby aids in framing constructive conversations with investors
- Reinforce the idea that, just as a community can benefit from the presence of a satellite center, it also plays a role in developing the resource base for it
- Overcome a potentially fatal obstacle to participation on the part of campuses that might fear an open-ended drain on already scarce general operating funds.

Therefore, as a first principle, the satellite center discussion should be framed around the recognition that the endeavor must make financial sense for all participants, including the sponsoring higher education institutions. As a practical matter, this suggests that the development of a basic business plan from the perspective of the institution should be the first step, so that it can inform conversations with state and community leaders and other stakeholders.

The **5-year Business Plan** should describe the purpose and goals of the Center and address the following:

- **Committed leadership**, interest and support at the campus level and among state and local political leaders
- **Lead Campus and partners** interested in co-location, including additional academic partner(s) and state and local government offices, associations, and non-profit and for-profit corporations
- **Diverse Advisory Board** with representation from the Lead Campus and President’s Office; partner institutions; and state and community members from education, economic, cultural, government and business sectors
- **Market research** that includes: local and regional employers; “real-time” employment data including jobs, necessary skills and educational requirements for high demand jobs; career ladders and education requirements; employer support for education programs; competition

(could be complimentary partners); demand for specific degrees/programs; time of offerings; mix of delivery modes (on-site, main campus, online, mixed), etc.; desired site characteristics (i.e., access via transportation modalities, hours of operations, safety, parking, etc.) and other appropriate research as needed.

- **Programs/courses and mock schedule** of offerings by UMass and other partners over a 3-5 year period; a plan regarding degree completion (at the site, on-campus, or online); and a description of services that allow students to access on-campus and online opportunities
- **Faculty and staff** who will offer courses (while some adjunct faculty can be woven into programs, it is important to achieve the correct balance with regular faculty for continued accreditation); and staff levels for administration, student services, academic advisement, etc.
- **Site/facility** including the location, suitability for academic programs, computer labs, library/reference room(s), offices, and potential research facilities; availability of space suitable for partners programs and offices; safety of facility and surrounding area for hours of operation (6:00 AM to 10:00 PM); availability of public transportation including intermodal centers and highways; proximity to other facilities; and other site criteria
- **Financial Plan** including revenue and expenses; sources of revenue including required financial support of initial and potential long-term capital investment and requested/required amount of initial and annual external funding; break-even annual operating budget (fixed and variable costs); financial arrangements with participating institutions (especially as it relates to subleases/rent, tuition/fees and financial return/costs to/from participating institutions and the center); initial financial incentives to faculty (e.g. above average stipends and travel support) and participating institutions (e.g., rent forgiveness); timeline; etc.
- **Plan to meet Standards of Accreditation** “consistent with the educational objectives of the institution; maintain the same academic standards as courses and programs offered on campus; receive sufficient support for instructional and other needs; and have reasonable access to appropriate learning resources. The institution maintains direct and sole responsibility for the academic quality of all aspects of all programs and assures adequate resources to maintain quality. On-campus faculty have a substantive role in the design and implementation of off-campus programs. In conformity with federal regulations, this policy is applicable to those instructional sites where 50% or more of an academic program is offered or where a degree may be completed either at a Branch Campus or an Additional Instructional Location.”
(http://cihe.neasc.org/downloads/POLICIES/Pp27_Policy_on_the_Review_of_Off_Campus_Programming.pdf)
- **Performance measurement plan** using relevant quantitative and qualitative data to determine progress toward the established goals of the center as they relate to the elements of the business plan.

Next Steps

In addition to the myriad of technical and financial issues to be addressed, the success of a center is likely to depend on a successful siting process. Many interests will be in competition, and the University moves forward with a decision to further invest in satellite centers, it needs to engage in a thoughtful and transparent process in selecting site(s). Campuses should be encouraged to continue and/or expand their existing satellite centers and many off-campus activities. If a system-wide investment is planned, the process should be well staffed and overseen by a steering committee with strong academic leadership (including online) from across our campuses.

The Steering Committee should be charged with the following:

- Confirm or revise the criteria for the establishment of a UMass Satellite Center
- Engage campuses in exploring programs and locations that meet the criteria
- Touch base with stakeholders (e.g., State and local political leadership; BHE, Massachusetts Community Colleges, Massachusetts State Colleges and private higher education institutions; other key state agencies – EOHED (re. Gateway Cities); community leadership; corporate leadership (i.e., Mass Competitiveness Partnership, Mass Business Roundtable, Chambers, etc.)
- Examine initial and long-term funding strategies to determine feasibility of moving forward.
- Determine location of Satellite Center(s) and timetable for implementation

Concluding Observation: It is evident from this analysis that UMass already engages in many of these activities. What is not as clear, however, is whether the institution receives full recognition or value from these efforts. It may be that a self-conscious evaluation of these many activities should be undertaken with an eye toward more clearly articulating the value to local communities. UMass is everywhere: our many local activities should be thought of as “**UMass at Everywhere.**”

APPENDIX I

SYSTEM OVERVIEW

- A. List of all public higher education institutions in MA
- B. List of all private higher education institutions in MA and all public and private higher education institutions in the neighboring states of CT, NH RI, and VT

APPENDIX I.A
List of all public higher education institutions in MA

Massachusetts Public Post-Secondary Higher Education Institutions			
NAME	CITY	WEBSITE	CATEGORY
Berkshire Community College	Pittsfield	www.berkshirecc.edu	Community College
Bridgewater State University	Bridgewater	www.bridgew.edu	State University
Bristol Community College	Fall River	www.bristolcc.edu	Community College
Bunker Hill Community College	Boston	www.bhcc.mass.edu	Community College
Cape Cod Community College	West Barnstable	www.capecod.edu	Community College
Fitchburg State University	Fitchburg	www.fitchburgstate.edu	State University
Framingham State University	Framingham	www.framingham.edu	State University
Greenfield Community College	Greenfield	www.gcc.mass.edu	Community College
Holyoke Community College	Holyoke	www.hcc.edu	Community College
Massachusetts Bay Community College	Wellesley Hills	www.massbay.edu	Community College
Massachusetts College of Art and Design	Boston	www.massart.edu	State College
Massachusetts College of Liberal Arts	North Adams	www.mcla.edu	State College
Massachusetts Maritime Academy	Buzzards Bay	www.maritime.edu	State College
Massasoit Community College	Brockton	www.massasoit.mass.edu	Community College
Middlesex Community College	Bedford	www.middlesex.mass.edu	Community College
Mount Wachusett Community College	Gardner	www.mwcc.edu	Community College
North Shore Community College	Danvers	www.northshore.edu	Community College
Northern Essex Community College	Haverhill	www.necc.mass.edu	Community College
Quinsigamond Community College	Worcester	www.qcc.edu	Community College
Roxbury Community College	Roxbury Crossing	www.rcc.mass.edu	Community College
Salem State University	Salem	www.salemstate.edu	State University
Springfield Technical Community College	Springfield	www.stcc.edu	Community College
University of Massachusetts Amherst	Amherst	www.umass.edu	University of Massachusetts System
University of Massachusetts Medical School Worcester	Worcester	www.umassmed.edu	University of Massachusetts System
University of Massachusetts-Boston	Boston	www.umb.edu	University of Massachusetts System
University of Massachusetts-Dartmouth	North Dartmouth	www.umassd.edu	University of Massachusetts System
University of Massachusetts-Lowell	Lowell	www.uml.edu	University of Massachusetts System
Westfield State University	Westfield	www.westfield.ma.edu	State University
Worcester State University	Worcester	www.worcester.edu	State University

APPENDIX I.B

List of all private higher education institutions in MA and all public and private higher education institutions in the neighboring states of CT, NH, RI, and VT

Massachusetts Private Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
American International College	Springfield	www.aic.edu
Amherst College	Amherst	www.amherst.edu
Anna Maria College	Paxton	www.annamaria.edu
Assumption College	Worcester	www.assumption.edu
Babson College	Wellseley	www.babson.edu
Bard College at Simon's Rock	Great Barrington	www.simons-rock.edu/
Bay Path College	Longmeadow	www.baypath.edu
Bay State College	Boston	www.baystate.edu
Bay State School of Technology	Canton	www.baystatetech.org
Becker College	Worcester	www.becker.edu
Benjamin Franklin Institute of Technology	Boston	www.bfit.edu/
Bentley University	Waltham	www.bentley.edu
Berklee College of Music	Boston	www.berklee.edu
Boston Architectural College	Boston	www.the-bac.edu
Boston Baptist College	Boston	Boston.edu
Boston College	Chestnut Hill	www.bc.edu
Boston Graduate School of Psychoanalysis Inc	Brookline	www.bgsp.edu
Boston University	Boston	www.bu.edu
Brandeis University	Waltham	www.brandeis.edu
Cambridge College	Cambridge	www.cambridgecollege.edu
Clark University	Worcester	www.clarku.edu
College of Our Lady of the Elms	Chicopee	www.elms.edu
College of the Holy Cross	Worcester	www.holycross.edu
Conway School of Landscape Design	Conway	www.csld.edu
Curry College	Milton	www.curry.edu
Dean College	Franklin	www.dean.edu
Eastern Nazarene College	Quincy	www.enc.edu
Emerson College	Boston	www.emerson.edu
Emmanuel College	Boston	www.emmanuel.edu
Endicott College	Beverly	www.endicott.edu
Fisher College	Boston	www.fisher.edu
Franklin W. Olin College of Engineering	Needham	www.olin.edu
Gordon College	Wenham	www.gordon.edu
Hampshire College	Amherst	www.hampshire.edu
Harvard University	Cambridge	www.harvard.edu/
Hebrew College	Newton Centre	www.hebrewcollege.edu
Hellenic College-Holy Cross Greek Orthodox School of Theology	Brookline	hchc.edu
ITT Technical Institute-Norwood	Norwood	www.itt-tech.edu
ITT Technical Institute-Wilmington	Wilmington	www.itt-tech.edu
Laboure College	Boston	www.caritaschristi.org/laboure
Lasell College	Newton	www.lasell.edu/
Lawrence Memorial Hospital School of Nursing	Medford	www.lmregisnurse.org
Le Cordon Bleu College of Culinary Arts-Cambridge	Cambridge	www.chefs.edu/boston
Lesley University	Cambridge	www.lesley.edu
Lincoln Technical Institute-Brockton	Brockton	www.lincolntech.com
Lincoln Technical Institute-Lowell	Lowell	www.lincolntech.com
Lincoln Technical Institute-Somerville	Somerville	www.lincolntech.com
Longy School of Music	Cambridge	www.longy.edu
Marian Court College	Swampscott	www.mariancourt.edu
Massachusetts College of Pharmacy and Health Sciences	Boston	www.mcphs.edu
Massachusetts General Hospital Dietetic Internship	Boston	N/A

Massachusetts Private Post-Secondary Higher Education Institutions (continued)		
NAME	CITY	WEBSITE
Massachusetts Institute of Technology	Cambridge	web.mit.edu/student/
Massachusetts School of Law	Andover	www.mslaw.edu
Massachusetts School of Professional Psychology	Boston	www.mspp.edu
Medical Professional Institute	Malden	www.mpi.edu
Merrimack College	North Andover	www.merrimack.edu
MGH Institute of Health Professions	Boston	www.mghihp.edu
Montserrat College of Art	Beverly	www.montserrat.edu/
Mount Holyoke College	South Hadley	www.mtholyoke.edu
Mount Ida College	Newton	www.mountida.edu
National Graduate School of Quality Management	Falmouth	www.ngs.edu
New England College of Business and Finance	Boston	www.necb.edu/
New England College of Optometry	Boston	www.neco.edu
New England School of Law	Boston	www.nesl.edu
New England School of Photography	Boston	www.NESOP.com
Newbury College-Brookline	Brookline	www.newbury.edu
Nichols College	Dudley	www.nichols.edu
North Bennet Street School	Boston	www.nbss.edu
Northeastern University	Boston	www.northeastern.edu
Pine Manor College	Chestnut Hill	www.pmc.edu
Quincy College *two-year, municipally affiliated college	Quincy	www.quincycollege.edu
Regis College	Weston	www.regiscollege.edu
Salter College-Chicopee	Chicopee	schooliya.com/peg/chicopee/index.html
Salter College-West Boylston	West Boylston	www.salterschool.com
Sanford-Brown College-Boston	Boston	sanfordbrown.studentaidcalculator.com
School of the Museum of Fine Arts-Boston	Boston	www.smfa.edu
Signature Healthcare Brockton Hospital School of Nursing	Brockton	www.signature-healthcare.org
Simmons College	Boston	www.simmons.edu
Smith College	Northampton	www.smith.edu
Springfield College	Springfield	www.spfldcol.edu
Springfield College-School of Human Services	Springfield	www.spfldcol.edu/homepage/dept.nsf/shs
Stonehill College	Easton	www.stonehill.edu
Suffolk University	Boston	www.suffolk.edu
Sullivan and Cogliano Training Center	Brockton	www.sctrain.com
The Art Institute of Boston at Lesley University	Boston	http://web.lesley.edu/aib/default.asp
The Boston Conservatory	Boston	www.bostonconservatory.edu
The New England Conservatory of Music	Boston	necmusic.edu
The New England Institute of Art	Brookline	www.artinstitutes.edu/boston
Tufts University	Medford	www.tufts.edu
Universal Technical Institute of Massachusetts Inc	Norwood	www.uti.edu/
University of Phoenix-Boston Campus	Braintree	www.phoenix.edu
University of Phoenix-Central Massachusetts Campus	Westborough	www.phoenix.edu
Urban College of Boston	Boston	www.urbancollege.edu
Wellesley College	Wellesley	www.wellesley.edu
Wentworth Institute of Technology	Boston	www.wit.edu
Western New England University	Springfield	www.wne.edu
Wheaton College	Norton	www.wheatoncollege.edu
Wheelock College	Boston	www.wheelock.edu
Williams College	Williamstown	www.williams.edu
Worcester Polytechnic Institute	Worcester	www.wpi.edu
Zion Bible College	Haverhill	www.zbc.edu

Connecticut Public Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Asnuntuck Community College	Enfield	www.acc.commnet.edu
Capital Community College	Hartford	www.ccc.commnet.edu
Central Connecticut State University	New Britain	www.ccsu.edu
Charter Oak State College	New Britain	www.cosc.edu
Eastern Connecticut State University	Willimantic	www.easternct.edu/
Gateway Community College	New Haven	www.gwctc.commnet.edu
Housatonic Community College	Bridgeport	www.hcc.commnet.edu
Howell Cheney Technical High School	Manchester	www.cttech.org/cheney
Manchester Community College	Manchester	www.mcc.commnet.edu/
Middlesex Community College	Middletown	www.mxcc.commnet.edu
Naugatuck Valley Community College	Waterbury	www.nvcc.commnet.edu
Northwestern Connecticut Community College	Winstead	www.nwcc.commnet.edu
Norwalk Community College	Norwalk	www.ncc.commnet.edu
Quinebaug Valley Community College	Danielson	www.qvcc.commnet.edu
Southern Connecticut State University	New Haven	www.southernct.edu
Stratford School of Aviation Maintenance Technicians	Stratford	www.cttech.org/ssamt/index.htm
Three Rivers Community College	Norwich	www.trcc.commnet.edu
Tunxis Community College	Farmington	www.tunxis.commnet.edu
United States Coast Guard Academy	New London	www.uscga.edu
University of Connecticut	Storrs	www.uconn.edu
University of Connecticut-Avery Point	Groton	www.uconn.edu
University of Connecticut-Stamford	Stamford	www.uconn.edu
University of Connecticut-Tri-Campus	Waterbury	www.uconn.edu
Western Connecticut State University	Danbury	www.wcsu.edu
Connecticut Private Post-Secondary Higher Education Institutions		
Name	CITY	WEBSITE
Albertus Magnus College	New Haven	www.albertus.edu
Bais Binyomin Academy	Stamford	N/A
Connecticut College	New London	www.connecticutcollege.edu
Fairfield University	Fairfield	fairfield.edu/
Goodwin College	East Hartford	www.goodwin.edu
Hartford Seminary	Hartford	www.hartsem.edu
Holy Apostles College and Seminary	Cromwell	www.holyapostles.edu
Lyme Academy College of Fine Arts	Old Lyme	www.lymeacademy.edu
Mitchell College	New London	www.mitchell.edu
Quinnipiac University	Hamden	www.quinnipiac.edu
Rensselaer Hartford Graduate Center Inc	Hartford,	ewp.rpi.edu/index.html
Sacred Heart University	Fairfield	www.sacredheart.edu
Saint Joseph College	West Hartford	www.sjc.edu
St Vincent's College	Bridgeport	www.stvincentscollege.edu
Trinity College	Hartford,	www.Trincoll.edu
University of Bridgeport	Bridgeport	www.bridgeport.edu
University of Hartford	West Hartford	www.hartford.edu
University of New Haven	West Haven	www.newhaven.edu
Wesleyan University	Middletown	www.wesleyan.edu
Windham Memorial Hospital-Radiologic Technology Program	Willimantic	www.wcmh.org
Yale University	New Haven	www.yale.edu
Yale-New Haven Hospital Dietetic Internship	New Haven	www.ynhh.org

New Hampshire Public Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Granite State College	Concord	www.granite.edu
Great Bay Community College	Portsmouth	www.greatbay.edu
Keene State College	Keene	www.keene.edu
Lakes Region Community College	Laconia	www.lrcc.edu
Manchester Community College	Manchester	www.manchestercommunitycollege.edu
Nashua Community College	Nashua	www.nashuacc.edu
NHTI-Concord's Community College	Concord	www.nhti.edu
Plymouth State University	Plymouth	www.plymouth.edu
River Valley Community College	Claremont	www.rivervalley.edu
University of New Hampshire at Manchester	Manchester	www.unhm.unh.edu
University of New Hampshire-Main Campus	Durham	www.unh.edu
White Mountains Community College	Berlin	www.wmcc.edu
New Hampshire Private Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Antioch University-New England	Keene	www.antiochne.edu
Chester College of New England	Chester	www.chestercollege.edu
Colby-Sawyer College	New London	www.colby-sawyer.edu
College of St. Mary Magdalen	Warner	www.magdalen.edu
Dartmouth College	Hanover	www.dartmouth.edu
Franklin Pierce University	Rindge	www.franklinpierce.edu
Lebanon College	Lebanon	www.lebanoncollege.edu
New England College	Henniker	www.nec.edu/
New Hampshire Institute of Art	Manchester	www.nhia.edu
Rivier College	Nashua	www.rivier.edu
Saint Anselm College	Manchester	www.anselm.edu
Southern New Hampshire University	Manchester	www.snhu.edu
St Joseph School of Nursing	Nashua	www.sjhacademiccenter.org
Thomas More College of Liberal Arts	Merrimack	www.thomasmorecollege.edu
University of New Hampshire School of Law	Concord	law.unh.edu
Upper Valley Educators Institute	Lebanon	www.uvei.org

Rhode Island Public Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Community College of Rhode Island	Warwick	www.ccri.edu
Rhode Island College	Providence	www.ric.edu
University of Rhode Island	Kinston	www.uri.edu/
Rhode Island Private Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Brown University	Providence	www.brown.edu
Bryant University	Smithfield	www.bryant.edu
International Yacht Restoration School	Newport	www.iyrs.org
Johnson & Wales University-Providence	Providence	www.jwu.edu
New England Institute of Technology	Warwick	www.neit.edu
Providence College	Providence	www.providence.edu
Rhode Island School of Design	Providence	www.risd.edu
Roger Williams University	Bristol	www.rwu.edu
Roger Williams University School of Law	Bristol	law.rwu.edu/
Salve Regina University	Newport	www.salve.edu
St Joseph School of Nursing	Providence	www.nursingri.com
Vermont Public Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Castleton State College	Castleton	www.castleton.edu
Community College of Vermont	Montpelier	www.ccv.edu
Johnson State College	Johnson	www.jsc.edu
Lyndon State College	Lyndonville	www.lyndonstate.edu
University of Vermont	Burlington	www.uvm.edu
Vermont Technical College	Randolph Center	www.vtc.edu
Vermont Private Post-Secondary Higher Education Institutions		
NAME	CITY	WEBSITE
Bennington College	Bennington	www.bennington.edu
Burlington College	Burlington	www.burlington.edu
Champlain College	Burlington	www.champlain.edu
College of St Joseph	Rutland	www.csj.edu
Goddard College	Plainfield	www.goddard.edu
Green Mountain College	Poultney	www.greenmtn.edu
Landmark College	Putney	www.landmark.edu
Marlboro College	Marlboro	www.marlboro.edu
Marlboro College Graduate School	Brattleboro	gradschool.marlboro.edu/
Middlebury College	Middlebury	www.middlebury.edu
New England Culinary Institute	Montpelier	www.neci.edu
Norwich University	Northfield	www.norwich.edu
Saint Michael's College	Colchester	www.smcvt.edu
School for International Training	Brattleboro	www.sit.edu
Southern Vermont College	Bennington	www.svc.edu
Sterling College	Craftsbury Common	www.sterlingcollege.edu
Vermont College of Fine Arts	Montpelier	www.vermontcollege.edu/
Vermont Law School	Royalton	www.vermontlaw.edu

APPENDIX II

UMASS CAMPUS' PRESENT SATELLITE CENTERS

- A. AMHERST
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map
- B. BOSTON
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map
- C. DARTMOUTH
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map
- D. LOWELL
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map
- E. WORCESTER
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map
- F. UMASS SYSTEM OFFICE
 - i. Overview
 - ii. List of Satellites/Programs/Projects
 - iii. Map

NOTE: The lists of current UMass locations and activities are by definition a work in progress. The information contained in this report should be viewed as a starting point, not a definitive inventory. If the decision is made to undertake a more formal identification and articulation of the UMass presence in the Commonwealth, then a mechanism should be developed to gather and manage this kind of information on a routine basis.

APPENDIX II.A.i

UMass Amherst: Overview

UMass Amherst lies in the middle of the Pioneer Valley, just off of the Route 91 “Knowledge Corridor.” The campus provides extensive education and programs throughout the Pioneer Valley at off-campus locations with regular, full-time staff – 7 programs in Springfield and 6 at other locations in the Valley. The campus also has 5 other locations within the Pioneer Valley that do not house regular staff.

UMass Amherst offers off-campus programs outside of the Valley, as well – 14 locations with regular full-time staff, and 3 that do not house regular staff. Many of these sites are part of the UMass Extension Program. Two are associated with degree programs. Appendix II.A.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.A.iii is a map of the area surrounding the campus.

Separate from these sites, UMass Amherst houses the Massachusetts Small Business Development Center with 5 regional sites, including Boston, Pittsfield, Salem, Springfield, and Worcester. This program offers regularly scheduled services in many Chamber of Commerce offices across the state. In Interviews with identified campus representatives, the following potential sites were discussed:

- **Boston** – The Isenberg School of Management is already planning to offer MBA courses at the UMass Club. This very popular online program enables adults with work experience to complete the degree in a pure online or mixed delivery mode. The School of Public Health would like to enter the Boston market as well. (See Appendix III.B.i for an overview of the Boston Region.)
- **MetroWest Region** – The Isenberg School of Management would like to move the classes presently offered in Shrewsbury to a more convenient and professional site along I-495. One potential site identified for this purpose is the former Verizon Learning Center building, which also houses the UMass Boston-affiliated Massachusetts International Academy. (See Appendices III.K.i and III.K.iii for an overview of the MetroWest Region, including Westborough/Marlborough.)

The MetroWest Region also includes Waltham, where UMass Amherst owns significant acreage donated to the Stockbridge School to advance its mission. While the buildings have suffered deterioration, the land is sited in a prime location south of Rt. 128, adjacent to the former Fernald state property. The Fernald site presently houses the program staff of the EK Shriver Center, managed by the Medical School. Both properties are close to Bentley College. Over the years, there have been several discussions concerning the use of this property, and those discussions continue. (See Appendix III.K.ii for an overview of the Waltham Region and further discussion.)

- **Springfield/Holyoke** – UMass Amherst already houses several programs in different sites in Springfield described below:

The Design Center provides a physical presence for UMass Amherst in downtown Springfield and promotes collaboration between the city and the university.

MA Small Business Development Center – A federal-state partnership providing one-to-one free comprehensive and confidential services focusing on business growth and strategies, financing and loan assistance and strategic analysis.

Pioneer Valley Life Sciences Institute – This partnership was created by the University of Massachusetts Amherst and Baystate Medical Center, the western campus of the Tufts University School of Medicine, to provide a novel translational research environment for interdisciplinary teams of life scientists, physical scientists, engineers, and physicians.

STCC/UMass Partnership – The mission of the Scibelli Enterprise Center is job and wealth creation in the city and surrounding region. It advances this mission by providing comprehensive support services, resources, and a stable environment to early stage and young businesses that want to grow in Western Massachusetts.

Western MA Public Health Training Center, Springfield – U.S. Department of Health and Human Services (HHS) Health Resources and Services Administration (HRSA) project to create a Public Health Training Center in Western Massachusetts.

WFCR – In exploring new locations for New England Public Radio, it became apparent that moving a large part of the station to downtown Springfield would reap many benefits for all involved.

At present, the campus is exploring the co-location and expansion of some of these programs and services to a potential site(s) in Court Square. Court Square is the intended site of the new WFCR station.

Massachusetts Green High Performance Computing Center (MGHPCC) in Holyoke is described in the UMass System Overview (Appendix II.F.i),

(See Appendix III.J.i for an overview of the Springfield/Holyoke Region.)

- **Pittsfield** – In the past, the Isenberg School of Management has offered MBA courses in Pittsfield. However, since 2011 they have not had sufficient enrollment to allow them to offer a course.

APPENDIX II.A.ii

Amherst: List of Satellites/Programs/Projects

UMass Amherst Off- Campus Programs and Administrative Locations		
Name	Notes	City
Massachusetts Locations with Full-time Staff		
College of Natural Sciences - Design Center	The center provides a physical presence for UMass Amherst in downtown Springfield and promotes real collaboration between the city and the university.	SPRINGFIELD
MA Small Business Development Center	A federal-state partnership providing one to one free comprehensive and confidential services focusing on business growth and strategies, financing and loan assistance and strategic analysis.	SPRINGFIELD
Pioneer Valley Life Sciences Institute	The Pioneer Valley Life Sciences Institute was created by the University of Massachusetts Amherst, and Baystate Medical Center, the western campus of the Tufts University School of Medicine, to provide a novel translational research environment for interdisciplinary teams of life scientists, physical scientists, engineers, and physicians.	SPRINGFIELD
STCC/UMass Partnership	The mission of the Scibelli Enterprise Center is job and wealth creation in the city and surrounding region. It advances this mission by providing comprehensive support services, resources, and a stable environment to early stage and young businesses that want to grow in Western Massachusetts.	SPRINGFIELD
Western MA Public Health Training Center - Springfield	U.S. Department of Health and Human Services' Health Resources and Services Administration (HRSA) to create a Public Health Training Center in Western Massachusetts.	SPRINGFIELD
WFCR	In exploring new locations for New England Public Radio, it became apparent that moving a large part of the station to downtown Springfield would reap many benefits for all involved.	SPRINGFIELD
UMass Amherst Extension Programs		
Cape Cod Cooperative Extension	Providing educational outreach in Barnstable County, <i>county-funded unit in partnership with UMass Amherst.</i>	BARNSTABLE
Cold Spring Orchard Research & Education Center	Conducts research and educational outreach to professional fruit growers. 215 acres.	BELCHERTOWN
Crops and Animal Research and Education Farm	Conducts research and serves undergraduate classes in plant and animal sciences. 358 acres.	DEERFIELD
Joseph Troll Turf Research Center	Conducts research on sustainable methods of turf production and maintenance. 20 acres.	DEERFIELD
Large Pelagics Research Center	Research center to promote sustainable fisheries and economic development, in collaboration with Mass. Div. of Marine Fisheries.	GLOUCESTER
Plymouth County Cooperative Extension Office	Providing educational support to adult volunteers leading 4-H clubs and other efforts in Plymouth County, <i>county-funded unit in partnership with UMass Amherst.</i>	HANSON
UMass Cranberry Station	Providing research and educational outreach to professional cranberry growers. 11 acres.	WAREHAM
UMass Extension 4-H Youth Development Program Office	Providing educational support to adult volunteers leading 4-H clubs and other efforts in Berkshire County.	PITTSFIELD
UMass Extension 4-H Youth Development Program Office	Providing educational support to adult volunteers leading 4-H clubs and other efforts in Norfolk County.	WALPOLE
UMass Extension Central Region Office	Providing nutrition education for low-income individuals and families, educational support to adult volunteers leading 4-H clubs and other efforts in Worcester County and educational support to land-use planning organizations.	WORCESTER
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in Holyoke-Chicopee area and parts of north Quabbin region.	SOUTH HADLEY
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in Springfield.	SPRINGFIELD
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in Fall River/New Bedford region.	FALL RIVER
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in Brockton region.	BROCKTON
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in greater Boston.	BOSTON
UMass Extension Nutrition Education Program Office	Providing nutrition education to low-income individuals and families in Lawrence-Lowell region.	LAWRENCE
UMass Extension Waltham Center	Providing educational support to adult volunteers leading 4-H clubs and other efforts in Middlesex County.	WALTHAM

Other Massachusetts Locations with Occasional Staff Present		
Name	Notes	City
Adams Brook Forest	50-acre forest used for research and graduate and undergraduate education. Limited public access. NO FULL-TIME EMPLOYEES.	AMHERST
Cadwell Memorial Forest	1,200-acre forest used for research and graduate and undergraduate education. Limited public access. NO FULL-TIME EMPLOYEES.	PELHAM
Holyoke Community College - MBA Program	Providing a range of MBA courses complimented by Online and on-campus program.	HOLYOKE
Knight-Sabin Forest	50-acre forest used for research and graduate and undergraduate education. Restricted access. NO FULL-TIME EMPLOYEES.	PELHAM
Mount Toby Forest	755-acre forest used for research and graduate and undergraduate education. Limited public access. NO FULL-TIME EMPLOYEES.	SUNDERLAND
Pittsfield - MBA Program	Provided a range of MBA courses complimented by Online and on-campus program - no classes since 2011.	PITTSFIELD
Shrewsbury - MBA Program	Providing a range of MBA courses complimented by Online and on-campus program.	SHREWSBURY
Savage Hill Forest	234-acre forest used for research and graduate and undergraduate education. Limited public access. NO FULL-TIME EMPLOYEES.	PRINCETON

APPENDIX II.A.iii Amherst Map



APPENDIX II.B.i

UMass Boston: Overview

UMass Boston is an integral part of the higher education sector of the City of Boston. Situated on Columbia Point, the campus provides extensive education and programs at off-campus locations throughout Boston, south and west of the city, and in other New England states. Three locations have regular, full-time staff – Boston downtown (Snowden International School); Plymouth (Cordage Commerce Center); and Marlborough (Massachusetts International Academy).

UMass Boston offers off-campus programs beyond these three sites – 15 locations within Massachusetts, where they offer courses on-site and/or blended with online education telecommunications. These additional locations include: Andover, Attleboro, Boston, Braintree, Dartmouth, Dorchester (3), Framingham, Nantucket, Newton (2), Wakefield, Watertown, and Waltham. In addition, UMass Boston offers off-campus programs at 6 sites throughout New England (Connecticut, Maine, New Hampshire, and Rhode Island (3)). These 21 off-campus sites do not have regular full-time or part-time staff.

UMass Boston houses the Boston Regional Office and Minority Business Center of the Massachusetts Small Business Development Center. Appendix II.B.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.B.iii is a map of the area surrounding the campus.

During interviews with identified campus representatives, the following potential sites were discussed:

- **Boston**, Snowden International School (Copley Square area, downtown Boston) – This is the largest UMass Boston off-campus site, essentially replacing the 250 Stuart Street building, which was formerly part of UMass Boston. While many of the offices (including the UMass President’s Office) at this former site are now housed either on campus or at other office sites in Boston, the Snowden site allows UMass Boston the opportunity to offer more than 30 undergraduate classes in accounting, liberal arts, science, and math each semester during the fall and spring, with approximately 1200 enrollments.

UMass Boston is interested in other opportunities and has specifically mentioned other downtown Boston areas, such as Chinatown, and has actively looked for a Cambridge site.

(See Appendix III.B.i for an overview of the Boston area.)

- **Lynn** – UMass Boston receives transfer students from North Shore Community College (NSCC), and had representatives attend the recent fieldtrip to Lynn hosted by Wayne Burton, President of NSCC.

(See Appendix III.F.i for an overview of the Lynn area.)

- **MetroWest - Marlborough**, Massachusetts International Academy – UMass Boston presently offers non-credit, intensive ESL and University preparation classes, as well as undergraduate classes to Chinese students throughout the year, generating approximately 500 enrollments. Other UMass campuses are planning to join this collaboration, offering participants an option of attending any one of our undergraduate campuses.

As the former site of the Verizon Learning Center, this location is well equipped to provide classroom and office space to other UMass programs.

(See Appendix III.K.iii for an overview of the MetroWest Region including Westborough/Marlborough.)

- **Plymouth**, Cordage Commerce Center – UMass Boston is planning to rehab the facility and engage a new approach, utilizing it for on-site courses and as a portal for online degree completion, including Interactive TV. Their vision includes providing on-site course registration, financial aid services, and a mini-computer/technology center. They describe the portal as similar to that of the University of Phoenix center on Route 495. This plan has been informed by a recent market research study. (See Appendix II.B.i for an overview of the UMass Boston Region.)

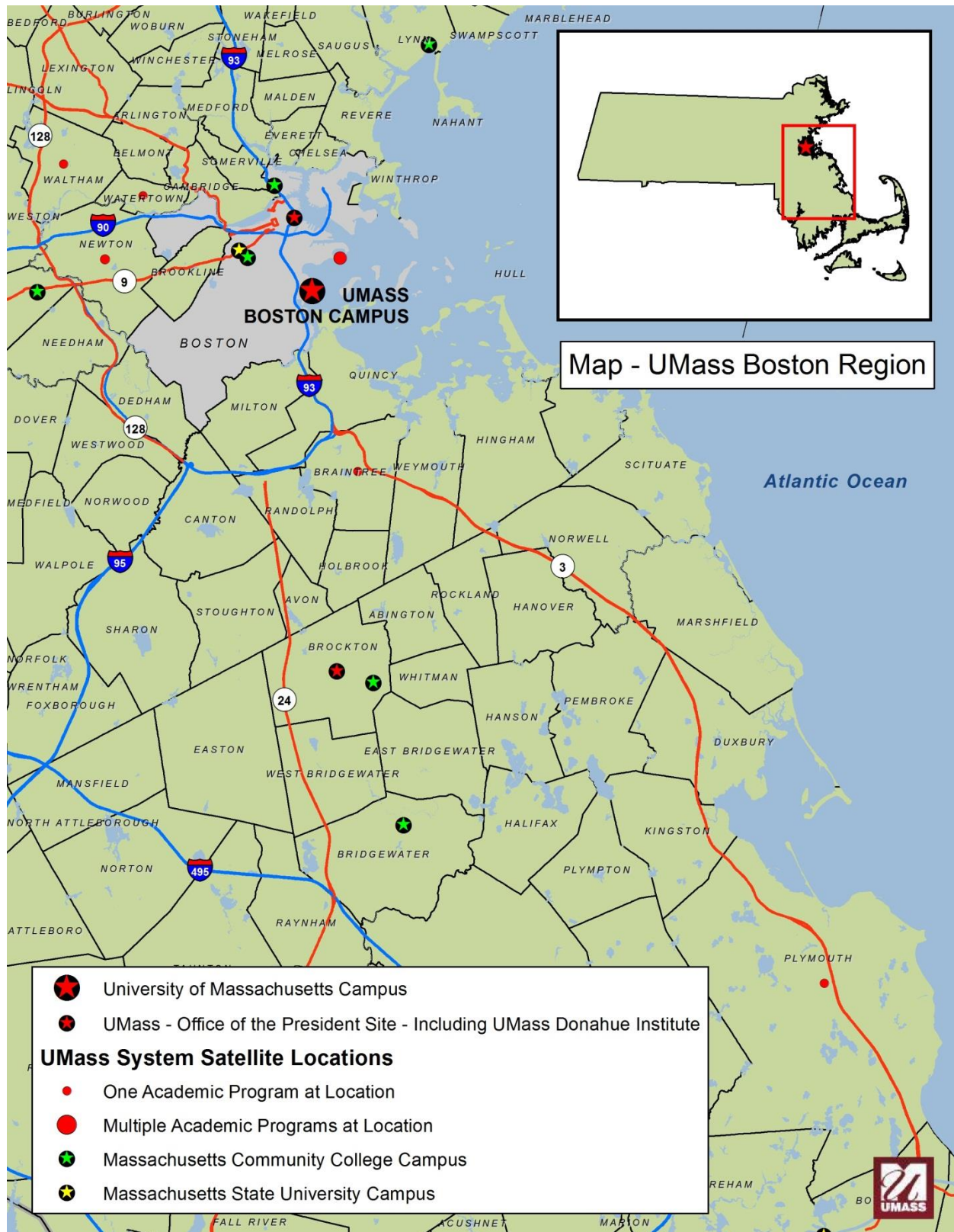
The site already houses some non-credit classes, undergraduate technical education, and classes for mature learners, offered through the Osher Lifelong Learning Institute, UMass Boston's University College partners with Quincy College at the site, offering undergraduate classes in nursing and liberal arts. Quincy College has expressed interest in offering additional courses at the site. The facility also houses an unemployment office.

APPENDIX II.B.ii
Boston: List of Satellites/Programs/Projects

UMass Boston Off-Campus Programs and Administrative Locations		
Name	Notes	City
Massachusetts Locations with Full-time Staff		
Cordage Commerce Center	Non-credit addictions counseling education classes, undergraduate technical education classes, and through the Osher Lifelong Learning Institute, classes for mature learners on a variety of topics. University College partners with Quincy College and offers undergraduate classes in nursing and liberal arts. Classes are offered during the fall and spring semesters, with approximately 300 enrollments.	PLYMOUTH
Massachusetts International Academy	Non-credit intensive ESL and University preparation classes as well as undergraduate classes to Chinese students throughout the year, generating approximately 500 enrollments.	MARLBORO
Snowden International School	The largest off-campus site, offering 30 undergraduate classes in accounting, liberal arts, science, and math each semester during the fall and spring, with approximately 1200 enrollments.	BOSTON
Other Massachusetts Locations with Occasional Staff Present		
Amego, Inc.	A five-course graduate certificate in Applied Behavioral Analysis via interactive videoconferencing, generating approximately 60 enrollments.	ATTLEBORO
Bentley University	Two summer programs in Mandarin language and Chinese culture—one for K-12 students and one for teachers of Mandarin, generating approximately 30 enrollments.	WALTHAM
Braintree High School	Three classes in biology, history, and sociology during the fall and spring semesters, with approximately 100 enrollments.	BRAINTREE
Carroll Center for the Blind	Graduate courses for vision teachers and other vision professionals during the fall and spring semesters.	NEWTON
Durant-Kenrick House	A summer field school in archeology, sponsored by the anthropology department, generating approximately 20 enrollments.	NEWTON
Dorchester Academy	Graduate classes sponsored by the College of Education and Human Development as part of the Teach Next Year and Boston Teacher Residency partnerships.	DORCHESTER
Lee School	A graduate education class in the fall and spring semesters, generating approximately 10 enrollments.	DORCHESTER
Mass Bay Community College	Non-credit addictions counseling education classes each semester during the fall and spring, with approximately 70 enrollments.	FRAMINGHAM
Melmark, New England	A five-course graduate certificate in Applied Behavioral Analysis via interactive videoconferencing, generating approximately 40 enrollments.	ANDOVER
Murphy School	A graduate education class in the fall and spring semesters, generating approximately 10 enrollments.	DORCHESTER
Nantucket Field Station	Two biology classes, an environmental, earth and ocean science class, and a Plein Air painting class (art department.) These classes are offered summers only, generating approximately 60 enrollments.	NANTUCKET
Northeast Metropolitan Regional Vocation High School	Three undergraduate technical education classes each semester during the fall, spring, and summer, generating approximately 30 enrollments.	WAKEFIELD
Perkins School for the Blind	Graduate courses for vision teachers and other vision professionals during the fall and spring semesters.	WATERTOWN
Tech Boston Academy	Two graduate education classes in the fall and spring semesters, generating approximately 10 enrollments.	BOSTON
UMass Dartmouth	Three summer programs - an undergraduate Latin course, two graduate courses in counseling and two graduate courses in instructional design, generating approximately 110 enrollments.	DARTMOUTH

Other New England Programs with Occasional Staff		
Eastern Pequot Reservation	A summer field school in archeology sponsored by the anthropology department, generating approximately 10 enrollments.	CT
Groden Center	A five-course graduate certificate in Applied Behavioral Analysis via interactive videoconferencing, generating approximately 30 enrollments.	PROVIDENCE, RI
Insight	A graduate courses for vision teachers and other vision professionals during the fall and spring semesters, generating approximately 10 enrollments.	WARWICK, RI
Iris Network	A graduate courses for vision teachers and other vision professionals during the fall and spring semesters, generating approximately 10 enrollments.	PORTLAND, ME
NH Association for the Blind	Graduate courses for vision teachers and other vision professionals during the fall and spring semesters, generating approximately 10 enrollments.	CONCORD, NH
Whitehall Museum House	A summer field school in archeology sponsored by the anthropology department, generating approximately 10 enrollments.	MIDDLETON, RI

APPENDIX II.B.iii Boston Map



APPENDIX II.C.i

UMass Dartmouth: Overview

UMass Dartmouth sits in the middle of the South Coast region and is one of the major keystones to the economic growth and development of the region. UMass Dartmouth has three significant satellite centers/areas: two located in the gateway cities of Fall River and New Bedford, and a third in Fairhaven. They are currently expanding onto Cape Cod in West Barnstable, and in 2011 added the Law School in North Dartmouth.

Appendix II.C.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.C.ii is a map of the area surrounding the campus.

Fairhaven– UMass Dartmouth has several programs housed in the AT&T building in Fairhaven (across the estuary from New Bedford). These include:

- South Coast Education Compact is an education partnership between business leaders, area school superintendents, UMass Dartmouth, and Bristol Community College. The Compact members collectively address the level of educational attainment in the South Coast region. Founded in 1997, the Compact serves 12 cities and towns with a total population of 345,610.
- CUSP (Center for University, School and Community Partnerships) focuses on improving student learning in the South Coast region by providing high quality, inter-district professional development opportunities to K-12 educators to strengthen their content knowledge, curricula, instruction, and leadership skills.
- Kaput Center for Research and Innovation in STEM Education provides a focus and support for the investigation of STEM education.
- Center for Marketing Research facilitates the economic development of the region by providing an affordable, high-quality economic alternative to meeting business needs for research, training, and consulting in any and all aspects of Marketing. This work is primarily conducted by graduate and undergraduate marketing students.
- School for Marine Science and Technology (SMAST 2) has located their administrative offices at this site.

(See Appendix III.G.i for an overview of the New Bedford region which includes Fairhaven.)

Fall River– UMass Dartmouth has two primary locations in Fall River.

- Advanced Technology and Manufacturing Center provides advanced technology and manufacturing solutions to meet current and future business needs through industry and university partnerships.

- Fall River Center for Professional & Continuing Education is located in a former department store that has been renovated and converted into classrooms, offices, and a learning center for professionals, night students, and other students. Located right off of I-195, there is convenient parking nearby, a bus station across the street and food available on-site. Through this site and two others, UMass Dartmouth offers over 200 graduate and undergraduate courses.

Bridgewater State University, Bristol Community College, and Boston University offer or have offered credit and non-credit courses at the same site. The location also includes offices and services such as the Coastal Career Center and the Massachusetts Office of International Trade. Although co-located, each organization provides its own administrative, student, and other services.

(See Appendix III.D.i for an overview of the Fall River region.)

New Bedford – UMass Dartmouth has four primary locations in New Bedford, three of which are in close proximity to each other in the downtown area. The campus programs and offices in this area have played a major role in the revitalization of this seaport’s downtown area.

- Star Store is the primary location for the College of Visual and Performing Arts. The placement of this College has provided a serious economic boost to this area of downtown New Bedford. It should be noted that locating an entire College/Department at a site other than the main campus is the model used in the expansion of Arizona State University.
- New Bedford Center for Professional & Continuing Education, along with other sites, offers graduate and undergraduate courses.
- The Quest Center offers a unique combination of entrepreneurial training, hands-on management expertise, and access to technical and business expertise. Support services include financing assistance through state and federal funding procedures and access to angel/venture funding or loans.
- School for Marine Science and Technology (SMAST I) is the marine campus of the UMass Dartmouth and represents a model similar to that of Arizona State University

(See Appendix III.G.i for an overview of the New Bedford region.)

North Dartmouth – This is the location of the newly acquired UMass Law School

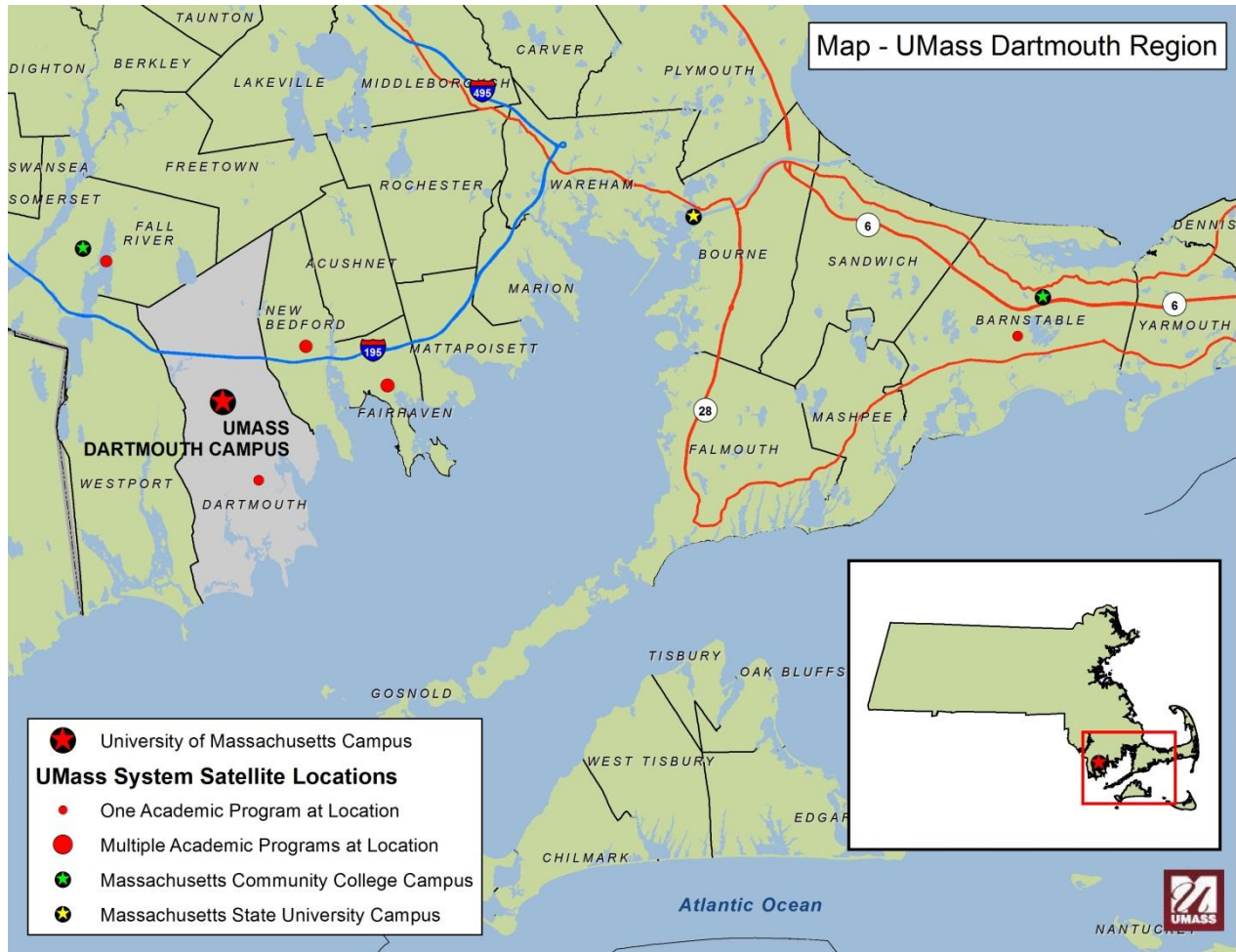
West Barnstable – Cape Cod Center for Professional & Continuing Education is located at Cape Cod Community College. Along with other sites, it offers access to graduate and undergraduate courses.

(See Appendix III.A.i for an overview of the Barnstable area.)

APPENDIX II.C.ii
Dartmouth: List of Satellites/Programs/Projects

UMass Dartmouth Off-Campus Programs and Administrative Locations		
Massachusetts Locations with Full-time Staff		
Name	Notes	City
Advanced Technology and Manufacturing Center	Provides advanced technology and manufacturing solutions, through industry and university partnerships, to meet current and future business needs.	FALL RIVER
Cape Cod Professional & Continuing Education	Combination of more than 200 graduate and undergraduate courses with other Professional & Continuing Education sites in Fall River and New Bedford.	WEST BARNSTABLE
Center for Marketing Research	To facilitate the economic development of the region by providing an affordable, high-quality economic alternative to meeting business needs for research, training, and consulting in any and all aspects of Marketing. This work is primarily conducted by graduate and undergraduate marketing students.	FAIRHAVEN
CUSP (Center for University, School and Community Partnerships)	Its mission is to improve student learning in the SouthCoast region by providing high quality inter-district professional development opportunities to K-12 educators that strengthen their content knowledge, curricula, instruction and leadership skills. We also provide alternative licensure programs to those who want to become teachers.	FAIRHAVEN
Fall River Center - Professional & Continuing Education	Combination of more than 200 graduate and undergraduate courses with other Professional & Continuing Education sites in New Bedford and Barnstable.	FALL RIVER
Kaput Center for Research and Innovation in STEM Education	Provides a focus and support for sustained investigation of foundational issues in the fields of Science, Technology, Engineering and Mathematics (STEM) education, issues that will be chosen to enhance and deepen ongoing research by its members and associates.	FAIRHAVEN
New Bedford Center - Professional & Continuing Education	Combination of more than 200 graduate and undergraduate courses with other Professional & Continuing Education sites in Fall River and Barnstable.	NEW BEDFORD
The Quest Center	Offers a unique combination of entrepreneurial training, hands-on management expertise, and access to technical and business expertise. Support services include financing assistance through state and federal funding procedures and access to angel/venture funding or loans.	NEW BEDFORD
SMAST 1: (School for Marine Science and Technology)	The marine campus of the University of Massachusetts Dartmouth.	NEW BEDFORD
SMAST 2: (School for Marine Science and Technology)	Administrative offices in the AT&T building in Fairhaven.	FAIRHAVEN
Southcoast Education Compact	An education partnership between business leaders, area School Superintendents, the University of Massachusetts (UMass) Dartmouth and Bristol Community College to collectively address the level of educational attainment in the South Coast region.	FAIRHAVEN
Star Store	Campus for the College of Visual and Performing Arts.	NEW BEDFORD
UMass Law Program	Campus for the UMass Law School. UMass Dartmouth has full accreditation by the Commission on Institutions of Higher Education (CIHE) of the New England Association of Schools and Colleges (NEASC).	NORTH DARTMOUTH

APPENDIX II.C.iii Dartmouth Map



APPENDIX II.D.i

UMass Lowell: Overview

UMass Lowell is a major force in the urban landscape of one of Massachusetts' most well-known Gateway Cities, having increased its footprint significantly over the past 22 years in Lowell. Tying this to their curriculum, research and outreach, this commitment demonstrates how a university can play a major role in the successful revival of a city. This is particularly noteworthy in the context of this report, as it represents a major expansion of the University in an urban area.

One of the original national university leaders in online education, UMass Lowell continues its educational outreach by providing significant offerings through UMassOnline. At the same time the campus was making this investment, they cut back their off-site corporate and continuing education offerings. Off-site course offerings were further impacted by 9-11 and the implementation of policies that ban non-US citizens - a major part of their off-campus market - from military installations (i.e., Hanscom) and corporate buildings in which work is taking place under contract with the Departments of Defense and Homeland Security.

Appendix II.D.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.D.iii is a map of the area surrounding the campus.

The campus has recently begun discussions with Northern Essex Community College regarding establishing a Satellite Center in Haverhill, although these plans are just now being formulated. In addition, UMass Lowell is expanding to international markets with a faculty-led model that provides opportunities for joint faculty and student experiences in other parts of the world, as well as on the home campus.

Lowell – In addition to knitting the two original campuses (North and South) together and expand within Lowell, the campus has acquired several properties. These include the following:

- Wannalancit Mills, built in the 1830's, was adapted for reuse in the 1980's. In 1990, UMass Lowell purchased parts of the complex which are now home to the centers for: Family, Work and Community; Industrial Competitiveness; Atmospheric Research; the Submillimeter Wave Technology Lab; the Toxics Use Reduction Institute; the PeopleSoft project team; and the Office of Institutional Research.

The Mill also houses the Massachusetts Medical Device Development Center (M2D2). This is a joint initiative of UMass Lowell and UMassWorcester. The offices of Commercial Venture Development (a business incubator program) and Commercial Ventures and Intellectual Properties are located in the building. Wannalancit's Mill Conference Center and other large and flexible meeting spaces frequently host conferences and workshops.

- Tsongas Center, completed in 1998, is a 6,300-seat multi-purpose facility and home to several hockey teams. As one of the largest gathering spaces in the city of Lowell, the Tsongas Center is also the setting for a wide variety of concerts, family shows, public skating, festivals, trade

shows, and the University's Open House and Commencement. In a similar manner, the campus shares the city's baseball field with a Red Sox affiliated team.

- UMass Lowell Inn and Conference Center (former Doubletree Hotel), was purchased by the University in 2009. Located in the heart of historic downtown Lowell overlooking the canals of the city and the Concord River, it is both a residence hall for 500 students and a modern facility for business meetings, conventions and social events. Middlesex Community College, Lowell is across the canal from the ICC in a building purchased in 1990 from Wang Laboratories.
- University Crossing, the former St. Joseph's Hospital, was acquired by UMass Lowell in 2011. It will serve as a hub of student activity, with a large new bookstore, food court, and event spaces, as well as some administrative offices. University Crossing will provide an important connection between the University's now three campuses and the downtown business and cultural district, all located within walking distance. Renovations and construction of a new building at this site will be completed in 2014.
- **Haverhill** – UMass Lowell has held very preliminary conversations with Northern Essex Community College (NECC) regarding partnering in the development of a Satellite Center in downtown Haverhill. Like several community colleges, NECC's main campus is on the outskirts of the downtown area, and they are interested in expansion and contributing to economic development in the downtown area.

UMass Lowell has several 2+2 programs with NECC and is interested in strengthening the stream of transfers. Led by the Chancellor, a UMass Lowell team has visited Arizona State University and has indicated strong interest in their model of adding additional sites that may include placing and/or developing select college/departments at an alternative site.

Haverhill has immediate access to Route 495 on the New Hampshire border. It is adjacent to several cities and towns, such as North Andover, that are home to major corporations, such as Lucent Technologies and other smaller high tech innovation companies.

(See Appendix III.E.i for an overview of the Haverhill area.)

- **Lynn** – UMass Lowell has a strong relationship with North Shore Community College, with as many as 100 engineering students annually transferring to Lowell for the second two years of their bachelor's degree. Representatives from UMass Lowell attended the recent field trip to Lynn hosted by Wayne Burton, President of North Shore Community College.

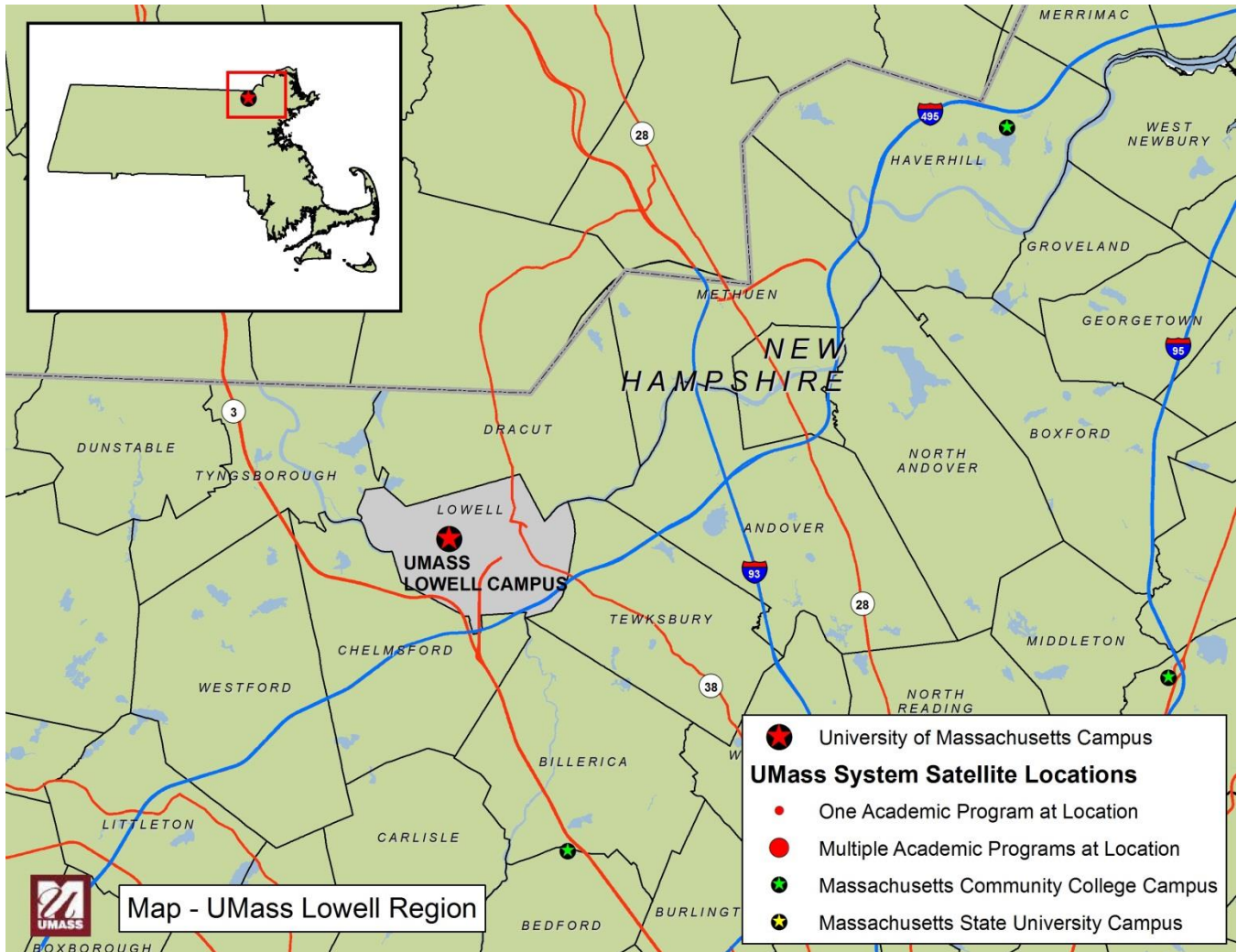
(See Appendix III.F.i for an overview of the Lynn area.)

APPENDIX II.D.ii
Lowell: List of Satellites/Programs/Projects

UMass Lowell Off-Campus Program and Administrative Locations		
Name	Notes	City
Massachusetts Locations with Full-time Staff		
Tsongas Center	Completed in 1998, the center is a 6,300-seat multi-purpose facility and home to several hockey teams. As one of the largest gathering spaces in the city of Lowell, the Tsongas Center is also the setting for a wide variety of concerts, family shows, public skating, festivals, trade shows, and the University's Open House and Commencement. In a similar manner, the campus shares the city's baseball field with a Red Sox affiliated team.	LOWELL
UMass Lowell Inn & Conference Center	8,000 square feet of function space, including various outdoor locations and one of the largest ballrooms in the area.	LOWELL
University Crossing	The former St. Joseph's Hospital, was acquired by UMass Lowell in 2011. It will serve as a hub of student activity, with a large new bookstore, food court, and event spaces, as well as some administrative offices. University Crossing will provide an important connection between the University's now three campuses and the downtown business and cultural district, all located within walking distance. Renovations and construction of a new building at this site will be completed in 2014.	LOWELL
Wannalancit Mills	Includes many UMass Lowell offices. (i.e., Offices of Research Administration, Institutional Compliance, CVIP, School Partnerships, etc.) Provides assistance to faculty and research staff in all aspects of obtaining and managing external research funding, ensuring compliance; turning research into innovative technologies, working with UMass Lowell's School Partnerships, etc).	LOWELL

APPENDIX II.D.iii

Lowell Map



APPENDIX II.E.i

UMass Worcester: Overview

UMass Worcester is the Commonwealth's public medical school, demonstrating its commitment to this designation through its expansive hospital affiliations, placement of interns, community presence, K-12 programs including STEM education, and Commonwealth Medicine's many grant/contract funded programs. UMass Medical School's main campus, located in Worcester adjacent to the Biotech Park, has research and program locations in Auburn, Boston (3), Charlestown, Quincy, Shrewsbury (2), and Waltham. Appendix II.E.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.E.iii is a map of the area surrounding the campus.

In addition to these locations, Commonwealth Medicine has several locations in correctional institutions in Massachusetts, including Boston, Bridgewater (3), Concord, Framingham (2), Gardner, Norfolk (3), Palmer, Plymouth, Shirley (2), and Walpole. [Note: These latter facilities are only open to programs that are related to corrections and are therefore not reviewed below.]

Sharing faculty and providing graduate student experiences with their partner, UMass Memorial Hospital, their affiliates are located in the Gateway cities of Chicopee, Fitchburg, Holyoke, Leominster, Pittsfield, Springfield, Worcester (6); and other locations including Boston, Burlington, Gardner, Putnam CT, and Southbridge. [These are also not reviewed below.]

- **Auburn** – This facility houses Disability Evaluation Services and administrative services of Commonwealth Medicine. Disability Services works with state agencies to develop a single point of entry into the state's disability system with a more coordinated and efficient process.
- **Boston–Jamaica Plain** – Massachusetts Biologics Boston (MBL) is the only publicly- owned, non-profit, FDA-licensed manufacturer of vaccines and other biologic products in the United States. The laboratory was established in 1894 by the Massachusetts Board of Health as the Massachusetts Biologics Laboratory to produce diphtheria antitoxin. Since that time, the focus at UMassBiologics has been to improve public health through applied research, development, and production of biologic products. In 1997, the Commonwealth of Massachusetts transferred MBL operations from the Department of Public Health to UMass Medical School to “maintain their public purpose, preserving their ability to compete in an increasingly competitive marketplace, and to maximize their value to the Commonwealth.” The New England Newborn Screening Program is also housed at this facility.
- **Boston--Mattapan** – MassBiologics Manufacturing & Filling Facility is the second facility of the labs. It was opened in 2010 as a research and development site for monoclonal antibodies and other therapeutic biologic products.
- **Boston--Chinatown** – Commonwealth Medicine maintains this Boston location as the Office of Massachusetts Client Relations, facilitating the relationship between Commonwealth Medicine (CWM) and its Massachusetts health and human service state agency clients

- **Charlestown** – Commonwealth Medicine houses the Center for Health Care Financing (CHCF); Center for Health Law & Economics (CHLE); and administrative services at this location. CHCF helps its clients make sense of the financing issues that have increased the complexity of operating Medicaid programs; and CHLE works in partnership with public agencies and foundations to improve health care system and health policy.
- **Quincy** – The Commonwealth’s Office of Clinical Affairs (OCA) is responsible for establishing and monitoring a pro-active system of clinical integrity and accountability, to assure the delivery and purchase of clinically effective, high quality, equitable and cost efficient healthcare for members enrolled in MassHealth. MassHealth is the Massachusetts Medicaid program administered by the Office of Medicaid within the Executive Office of Health and Human Services (EOHHS). This program is affiliated with the Center for Health Policy and Research within Commonwealth Medicine/University of Massachusetts Medical School (CWM/UMass).
- **Shrewsbury – South Street Campus** which houses the administration and other program offices of Commonwealth Medicine; the Medical School’s Graduate School of Nursing Graduate Entry Program; School Fiscal; Human Resources; Information Services; Office of Development; UMass President’s Office staff; and other tenants.
- **Shrewsbury--Maple Avenue Campus-** This site includes Hoagland-Pincus Conference Center and 4 other buildings housing the Office of Science Education, Office of Community Programs, Office of Technology Management, and various research programs.
- **Waltham** – The UMass Medical School assumed administration of the Eunice Kennedy Shriver Center in 2000. UMass Medical provides institutional support for many of the Shriver Center’s initiatives. In turn, the Shriver Center fortifies the Medical School’s capacity to meet the needs of individuals with developmental disabilities and their families. The Shriver Center houses Intellectual and Developmental Disabilities Research Center (IDDRC); University Center of Excellence in Developmental Disabilities (UCEDD); Leadership Education in Neurodevelopmental (LEND); and other related disabilities. Because of the condition of the facilities in Waltham, UMass Medical has moved the research facilities to the Worcester campus. Upon completion of the Sherman Building, they are considering moving other functions of the Shriver Center to the Worcester Campus.

During interviews at UMass Medical, including Commonwealth Medicine, key officials expressed interest in exploring the Waltham site owned by the UMass Amherst Campus for the development of program and administrative space.

APPENDIX II.E.ii
Worcester: List of Satellites/Programs/Projects

UMass Worcester Off-Campus Program and Administrative Locations		
UMass Medical CWM Sites		
Name	Notes	City
Massachusetts Locations with Full-time Staff (not including correctional facilities and affiliates)		
Center for Health Care Financing; Center for Health Law & Economics	Administrative. Located at the Schrafft Center.	CHARLESTOWN
Disability Evaluation Services	Administrative	AUBURN
MassBiologics Manufacturing and Filling - MassBiologics	MassBiologics Laboratory, MassBiologics Manufacturing and Filling and Newborn Screening	BOSTON
Office of Clinical Affairs	Administrative	QUINCY
Office of Mass Client Relations	Administrative	BOSTON
Shriver Center	IDDRC - Intellectual and Developmental Disabilities Research Center; UCEDD - University Center of Excellence in Developmental Disabilities; LEND - Leadership Education in Neurodevelopmental and Other Related Disabilities - Shriver Center	WALTHAM
Shrewsbury Campus	Commonwealth Medicine, Graduate School of Nursing, Development, School Fiscal, Human Resources, Facilities, Information Services, President's Office; Other Tenant	SHREWSBURY
Maple Street Campus	NESCSO, Conference Center - Hoagland Pincus, and other buildings housing laboratories, other programs and administrative offices	SHREWSBURY
Correctional Institution Programs		
Bay State Correctional Center (BSCC)	MA Department of Corrections Facility - Clinical Care	NORFOLK
Boston Pre-Release Center (BRPC)	MA Department of Corrections Facility - Clinical Care	BOSTON
Bridgewater State Hospital	MA Department of Corrections Facility - Clinical Care	BRIDGEWATER
MA Addiction & Substance Abuse Center (MASAC)	MA Department of Corrections Facility - Clinical Care	BRIDGEWATER
MA Treatment Center (MTC)	MA Department of Corrections Facility - Clinical Care	BRIDGEWATER
MCI Cedar Junction	MA Department of Corrections Facility - Clinical Care	WALPOLE
MCI Framingham	MA Department of Corrections Facility - Clinical Care	FRAMINGHAM
MCI Norfolk	MA Department of Corrections Facility - Clinical Care	NORFOLK
MCI Plymouth	MA Department of Corrections Facility - Clinical Care	PLYMOUTH
MCI Shirley	MA Department of Corrections Facility - Clinical Care	SHIRLEY
MMCI Concord - Northeastern Correctional Center	MA Department of Corrections Facility - Clinical Care	CONCORD
North Central Correctional Institution - Gardner (NCCI)	MA Department of Corrections Facility - Clinical Care	GARDNER
Old Colony Correctional Center (OCCC)	MA Department of Corrections Facility - Clinical Care	BRIDGEWATER
Pondville Correctional Center (PCC)	MA Department of Corrections Facility - Clinical Care	NORFOLK
South Middlesex Correctional Center	MA Department of Corrections Facility - Clinical Care	FRAMINGHAM
Souza-Baranowski Correctional Center	MA Department of Corrections Facility - Clinical Care	SHIRLEY

UMass Medical Affiliations		
Name	Notes	City
Baystate	Affiliation agreements permit us to send our medical students there for clinical education.	SPRINGFIELD
Berkshire	Affiliation agreements permit us to send our medical students there for clinical education.	PITTSFIELD
Community Health Connections	Affiliation agreements permit us to send our medical students there for clinical education.	FITCHBURG
Community Health Link	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
Day Kimball	Affiliation agreements permit us to send our medical students there for clinical education.	PUTNAM, CT
E M Kennedy	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
Family Health	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
Harrington Memorial	Affiliation agreements permit us to send our medical students there for clinical education.	SOUTHBURGE
HealthAlliance	Affiliation agreements permit us to send our medical students there for clinical education.	LEOMINSTER
Heywood	Affiliation agreements permit us to send our medical students there for clinical education.	GARDNER
Lahey	Affiliation agreements permit us to send our medical students there for clinical education.	BURLINGTON
Mercy	Affiliation agreements permit us to send our medical students there for clinical education.	SPRINGFIELD
Providence Behavioral	Affiliation agreements permit us to send our medical students there for clinical education.	HOLYOKE
Reliant	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
RiverBend	Affiliation agreements permit us to send our medical students there for clinical education.	CHICOPEE
Saint Vincent	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
Steward St. Elizabeth	Affiliation agreements permit us to send our medical students there for clinical education.	BOSTON
UMass Memorial	Affiliation agreements permit us to send our medical students there for clinical education.	WORCESTER
Wing	Affiliation agreements permit us to send our medical students there for clinical education.	PALMER

APPENDIX II.E.iii Worcester Map



APPENDIX II.F.i

UMass System Office: Overview

The UMass System Office includes the Office of the President, UMassOnline, Commercial Ventures and Intellectual Property (CVIP), and the UMass Donahue Institute (UMDI). The UMass Foundation and the UMass Building Authority are directly affiliated with the University. The Shrewsbury facility owned and managed by UMass Worcester houses additional President's Office staff, CVIP, and some of the UMass Donahue Institute business units. In addition, the UMass Donahue Institute has program and administrative locations in Boston (2), Brockton and Hadley.

Appendix II.F.ii includes a list of each site, a description of the programs offered at that site, and the community in which the site is located. Appendix II.F.iii is a map of the area surrounding the campus.

- **Boston** – The downtown location for the System includes the offices of the President; Executive Vice President; Senior Vice President for Academic Affairs, Student Affairs, and International Relations (AASAIR); Office of the General Council; Vice Presidents for Legal Affairs, Administration and Finance, Information Technology Services, and Economic Development; the Foundation; and the Building Authority and their immediate staff.

Head Start Training and Technical Assistance for New England is a UMDI project co-located with the U.S. Administration for Children and Families in the JFK Building. The project provides training and technical assistance to all Head Start and Early Head Start programs throughout New England. Other staff of this program are housed in home offices throughout New England.

Veterans Administration Health Curriculum Development project is housed at the VA facilities in Jamaica Plains.

- **Brockton** – The Brockton Career Center is a UMDI project funded by the Workforce Investment Act and other sources. The Center works with unemployed, underemployed and employers seeking employees.
- **Hadley** – This site houses UMDI central administrative services and several business units, including the Civic Initiative; Economic and Public Policy Research; and Applied Research and Program Evaluation.
- **Holyoke** – UMass and higher education partners – Boston University, Harvard University, the Massachusetts Institute of Technology, and Northeastern University -- in partnership with EMC, Cisco and the Patrick-Murray administration, will open this state-of-the-art high performance computing center in 2012.
- **Shrewsbury** – This location houses the expanded functions supporting the Presidents and the Vice Presidents. UMassOnline, presently headed by the Vice President for Academic Affairs and Interim CEO for UMassOnline, is housed in Shrewsbury, as are CVIP and some of the office of the UMass Donahue Institute.

UMassOnline delivers accredited, online programs from UMass Amherst, Boston, Dartmouth, Lowell, and UMass Medical School. The division, launched in 2001, enables the University to provide wider access to its educational programs via the Internet while increasing revenues to support its campuses.

CVIP was formed in 1995. Working with all 5 UMass Campuses, it has created collaborations with several hundred companies engaged in commercializing products and services. The technologies, which originated at the University's five campuses, have drawn from agriculture, biotechnology, medical devices, polymers and plastics, software, educational products, communications, materials, energy, marine science, and other fields.

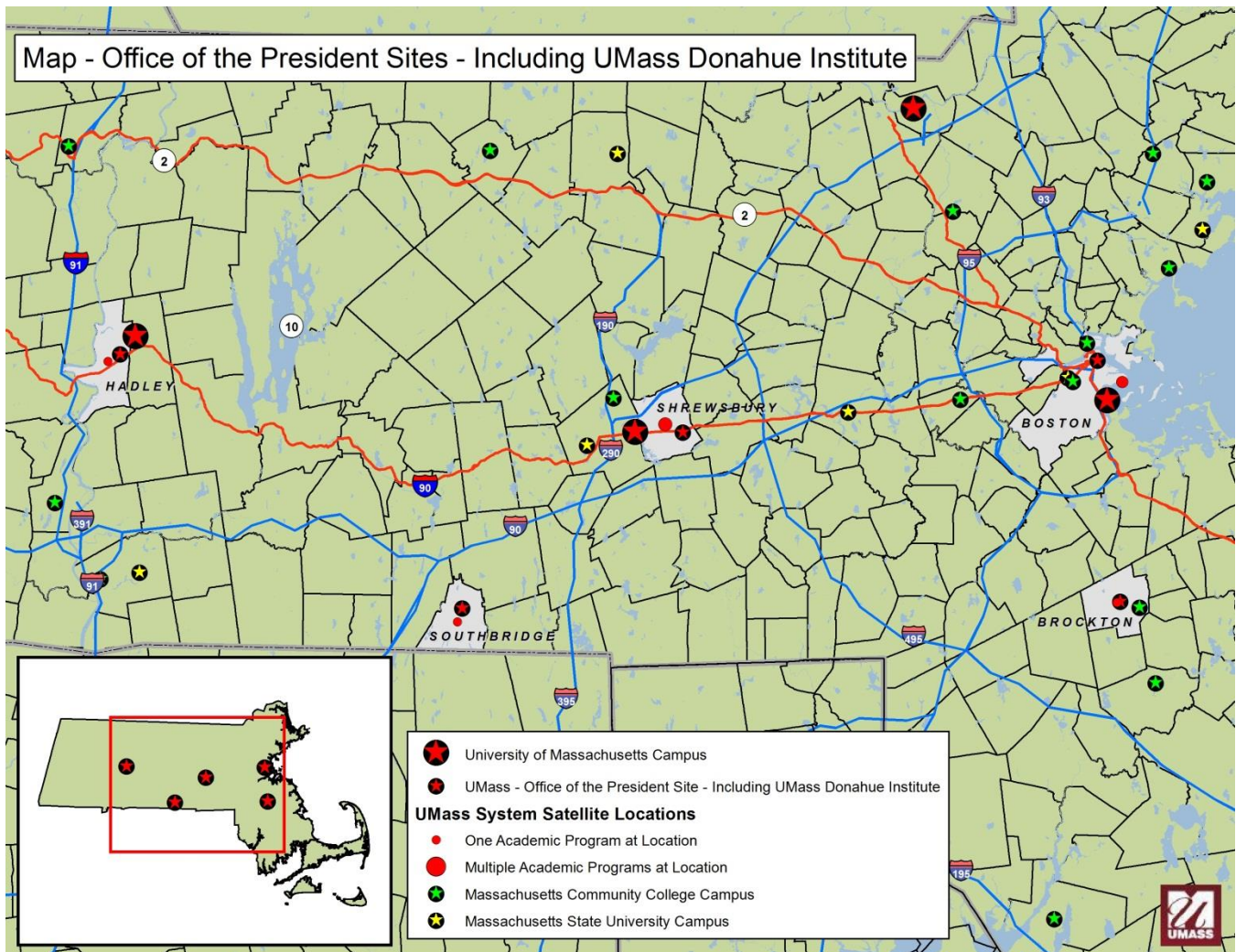
UMDI houses the main office of its Organizational Development and Learning Solutions unit at this location. They also house staff from other business units, including Head Start Training and Technical Assistance, Applied Research and Program Evaluation including STEM, Economic and Public Policy Research, and Central Administrative Services.

- **Southbridge** –U.S. Department of Defense Financial Management, Education and Training is a UMDI project providing education and training for civilian financial management employees across all of DOD.

APPENDIX II.F.ii
UMass System Office:
List of Satellites/Programs/Projects

UMass System Office Off-Campus Program and Administrative Locations		
Name	Notes	City
Massachusetts Locations with Full-time Staff		
President's Office	Houses President, Vice Presidents and other administrative staff.	BOSTON
President's Office	Houses various administrative services, UMassOnline, and some UMass Donahue Institute Projects (see below).	SHREWSBURY
Brockton Career Center	UMDI Project Specific: funded by Workforce Investment Act and other sources related to unemployed, underemployed, and employers seeking employees.	BROCKTON
Head Start Training and Technical Assistance for New England	UMDI Project Specific: Boston (JFK Building) – Head Start Training and Technical Assistance for New England. Also includes 11 other staff with home offices from ME to CT. U.S. HHS – Administration for Children and Families. Boston (Jamaica Plains) Assistance grant funding curriculum development for the VA.	BOSTON
Massachusetts Green High Performance Computing Center	UMass Amherst and its higher education partners -- Boston University, Harvard University, the Massachusetts Institute of Technology, and Northeastern University -- in partnership with EMC, Cisco and the Patrick-Murray administration, are constructing this state-of-the-art high performance computing center.	HOLYOKE
U.S. Department of Defense	UMDI Project Specific: Financial Management, Education and Training for civilian financial management employees across all of DOD.	SOUTHBRIDGE
UMDI Shrewsbury Office	UMDI Multiple Project and Central Administrative Services Unit: Houses main office of Organizational Development and Learning Solutions Unit; also houses staff from Head Start Training and Technical Assistance, Research and Evaluation including STEM, Economic and Public Policy Research, and Central Administrative Services.	SHREWSBURY
UMDI Hadley Office	UMDI Multiple Project and Central Administrative Services Unit: houses main office of the following units: Civics Initiative, Economic and Public Policy Research, Research and Evaluation. In addition houses staff from Organizational Development and Learning Solutions, and Central Administrative Services.	HADLEY
Veterans Administration	UMDI Curriculum Development in Health for the Veterans Administration.	BOSTON

APPENDIX II.F.iii UMass System Office Map



APPENDIX III

SITES

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 - ii. Location Map
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 - i. Overview
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- e. Haverhill Region
 - i. Overview
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- f. Lynn Region
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Appendix III.A.i Barnstable Region: Overview

Barnstable constitutes the largest community, both in land area and population, on Cape Cod. The town contains seven villages (including one named Barnstable and another named West Barnstable) within its boundaries. Its largest village, Hyannis, is the central business district of the county and home to Barnstable Municipal Airport, the airline hub of Cape Cod and both the islands of Martha's Vineyard and Nantucket. Barnstable Village is a half mile from Route 132 and is located on Route 6. UMass Dartmouth has established a partnership with Cape Cod Community College (CCCC) and presently houses a small regular staff from Professional and Continuing Education on their West Barnstable campus. UMass Dartmouth is interested in expanding this Satellite Center to other locations in the community.

Public and private higher education institutions in and around Barnstable include:

- Cape Cod Community College
- Walden University (online)

Based on Census 2010 data, the total population **within a 20 mile radius of Barnstable** is 242,307 and predominantly white at 92.7% (including white Hispanics). The rest of the population is Black, American Indian, Asian or some other race. 81.6% of the population is 18 or older, while 23.3% of the population is 65 or older.

As of Census 2010, the total population **within a 10 mile radius** of Barnstable was 105,596. The population is 91.7% White. The rest of the population is Black, American Indian, Asian or some other race. 81.7% of the population is 18 or older; 23.4% of the population is 65 or older.

Census 2010 data shows that within the Barnstable area the number of **potential college-bound age students'** breakout as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15 – 19	5,983 (5.8%)	13,777 (5.8%)
Age 20 – 24	4,576 (4.4%)	10,956 (4.6%)
Age 25 – 29	4,749 (4.6%)	10,153 (4.3%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Barnstable area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	4,439 (4.3%)	9,892 (4.2%)
Age 35-39	4,993 (4.8%)	11,641 (4.9%)
Age 40-44	4,993 (4.8%)	14,883 (6.3%)

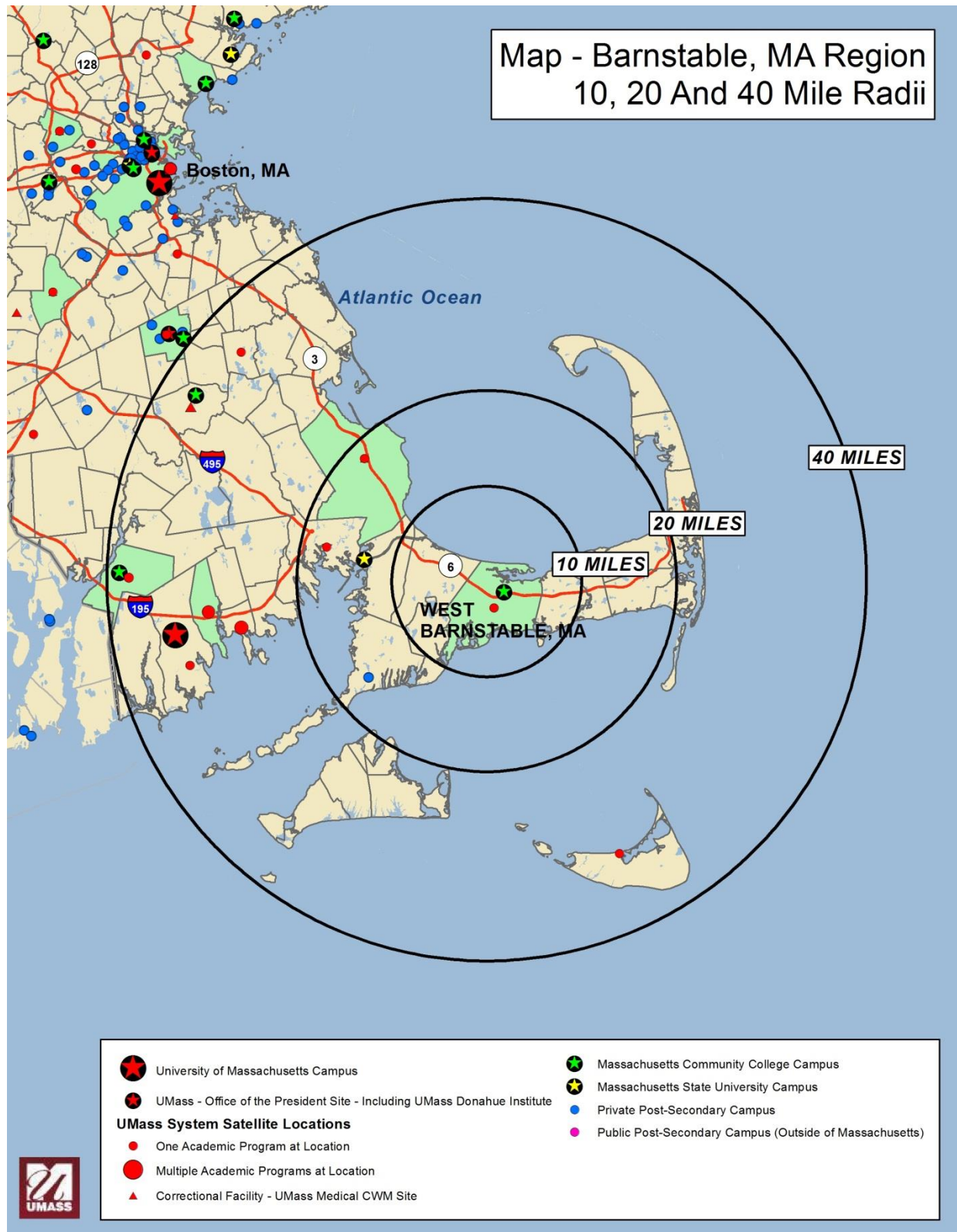
Census 2010 data shows **income detail** for Barnstable area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$62,183	\$64,064
Average Household	\$76,964	\$79,848
Median Family	\$74,406	\$76,249
Average Family	\$87,282	\$89,094

Of the population in the city of Barnstable age 25 or older, 25.8% have a high school diploma or equivalent as their highest level of **educational attainment**, and 37% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Barnstable County age 25 or older, 25.2% have a high school diploma or equivalent as their highest level of educational attainment, and 40.5 % have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** shows there are some heavy crime areas in the town of Barnstable; however it is a mainly low crime area. As one travels more inland, there are certain concentrations of crime in larger population areas.

Appendix III.A.ii Barnstable Region Location Map



Appendix III.B.i

Boston Region: Overview

Boston, the capitol of Massachusetts, is situated in the eastern part of the state and is home to an abundance of world-renowned colleges and universities and several smaller private higher education institutions.

UMass Boston is nationally recognized as a model of excellence for urban public universities. UMass Boston University College extends the University's reach through off-campus, weekend, summer and winter classes, online learning, degree and certificate programs, international programs, and corporate and professional training, including the Snowden International School in downtown Boston.

In addition to the UMass System Office, UMass Worcester's Commonwealth Medicine has offices in both downtown Boston (Chinatown) and Charlestown. MassBiologics, also part of UMass Worcester, has major locations in Boston (Jamaica Plains and Methuen). Although not in Boston, UMass Worcester also maintains offices in Quincy for the Commonwealth's Office of Clinical Affairs (OCA). UMass Amherst's Isenberg School of Management is already planning to offer MBA courses at the UMass Club, and the School of Public Health would like to enter the Boston market as well. In addition to UMass Boston, there are several other public higher education intuitions in the Boston area:

- Roxbury Community College
- Bunker Hill Community College
- Massachusetts College of Art and Design

There are also many private institutions of higher education within a 20 mile radius of Boston including:

- Bentley University
- Boston University
- Brandeis University
- Emerson College
- Emmanuel College
- Harvard University
- Massachusetts Institute of Technology
- Northeastern University
- Simmons College
- Suffolk University
- Tufts University
- Wellesley College
- Wheaton College

Based on Census 2010 data, the total population **within a 20 mile radius of Boston** is 2,866,342 and predominantly white at 73.8% (including white Hispanics). Blacks follow at 10.1%, Asians at 7.9%, some other race at 5.0%, two or more races at 2.9%, American Indians at 0.3% and Pacific Islanders at 0.0%. Hispanics of all races comprise 9.8% of the population.

The total population **within a 10 mile radius of Boston** is 1,717,176 and predominantly White at 66.8% (including white Hispanics), followed by Blacks at 13.1%, Asians at 9.9%, some other race at 6.5%, two or more races at 3.4%, American Indians at 0.3% and Pacific Islanders at 0.0%. Hispanics of all races comprise 13.3% of the population.

Census 2010 data shows that within the Boston area, the number of potential **college-bound/aged students'** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	116,045 (6.8%)	194,309 (6.8%)
Age 20-24	176,514 (10.3%)	238,243 (8.3%)
Age 25-29	179,039 (10.4%)	237,386 (8.3%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Boston area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	142,451 (8.3%)	203,022 (7.1%)
Age 35-39	118,804 (6.9%)	189,784 (6.6%)
Age 40-44	112,424 (6.5%)	198,821 (6.9%)

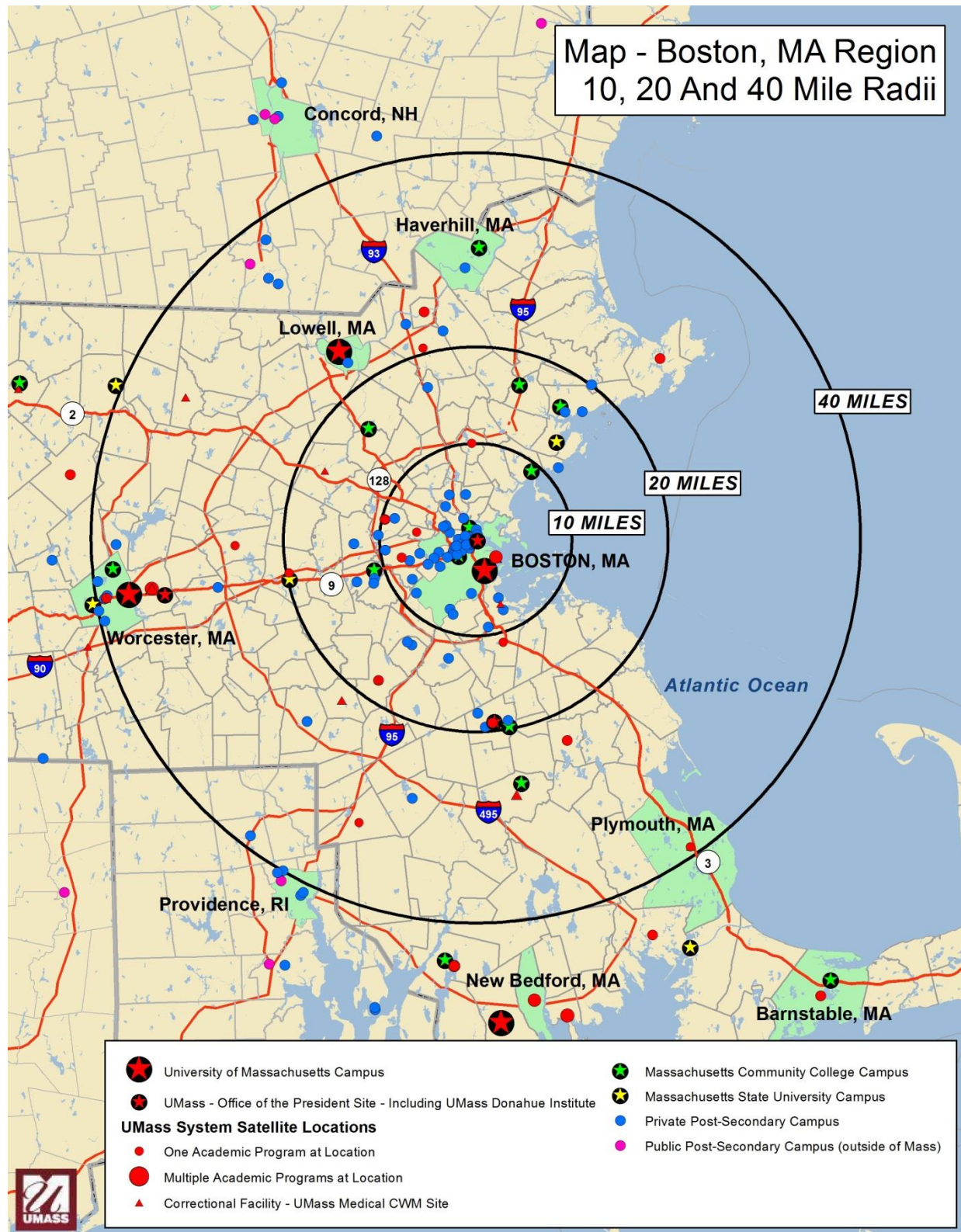
Census 2010 data shows **income detail** for Boston area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$65,700	\$74,142
Average Household	\$90,458	\$98,856
Median Family	\$78,988	\$89,526
Average Family	\$101,709	\$111,863

Of the population in the city of Boston age 25 or older, 23.6% have a high school diploma or equivalent as their highest level of **educational attainment**, and 42.5% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Suffolk County age 25 or older, 25.4% have a high school diploma or equivalent as their highest level of educational attainment, and 38.9% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** shows high crime levels in and around the immediate vicinity of Boston. Within the 10-20 mile radius, crime levels lessen considerably in comparison to Boston proper.

Appendix III.B.ii Boston Region Location Map



Appendix III.C.i Brockton Region: Overview

Brockton is a Gateway City located south of Boston. UMass Boston is 15 miles north; UMass Dartmouth is 35 miles to the Southwest. The city is easily accessible by commuter rail, an intermodal transportation center, and Route 24. There is a continued effort to revitalize the downtown with an old mill converted into condos, Chamber of Commerce offices and the Brockton Career Center, which is managed by the UMass Donahue Institute.

While there have been recent attempts to form a collaboration between UMass Boston and other public higher education institutions, they have only been marginally successful.

The public higher education institutions in the region include:

- Massasoit Community College
- Bridgewater State University

Private higher education institutions include:

- Stonehill College

There are other technical training programs offering an associate's degree or above.

Based on Census 2010 data the total population **within a 20 mile radius of Brockton** is 1,857,054 and while predominantly white (74.0%); other races include Black at 12.4%, Asian at 6.8%, and other races at 3.8%. Hispanics of any race comprise 27.3% of the population.

The total population **within a 10 mile radius of Brockton** is 439,170 and while predominantly white (76.9%); other races include Black at 12.2%, Asian at 3.7%, and other races at 3.9%. Hispanics of any race comprise 26.4% of the population.

Census 2010 data shows that within the Brockton area the number of **potential college-bound/age students'** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	31,384 (7.1%)	111,237 (6.0%)
Age 20-24	26,904 (6.1%)	135,393 (7.3%)
Age 25-29	24,403 (5.6%)	162,327 (8.7%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Brockton area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	24,797 (5.6%)	142,674 (7.7%)
Age 35-39	28,007 (6.4%)	120,923 (6.5%)
Age 40-44	33,552 (7.6%)	119,495 (6.4%)

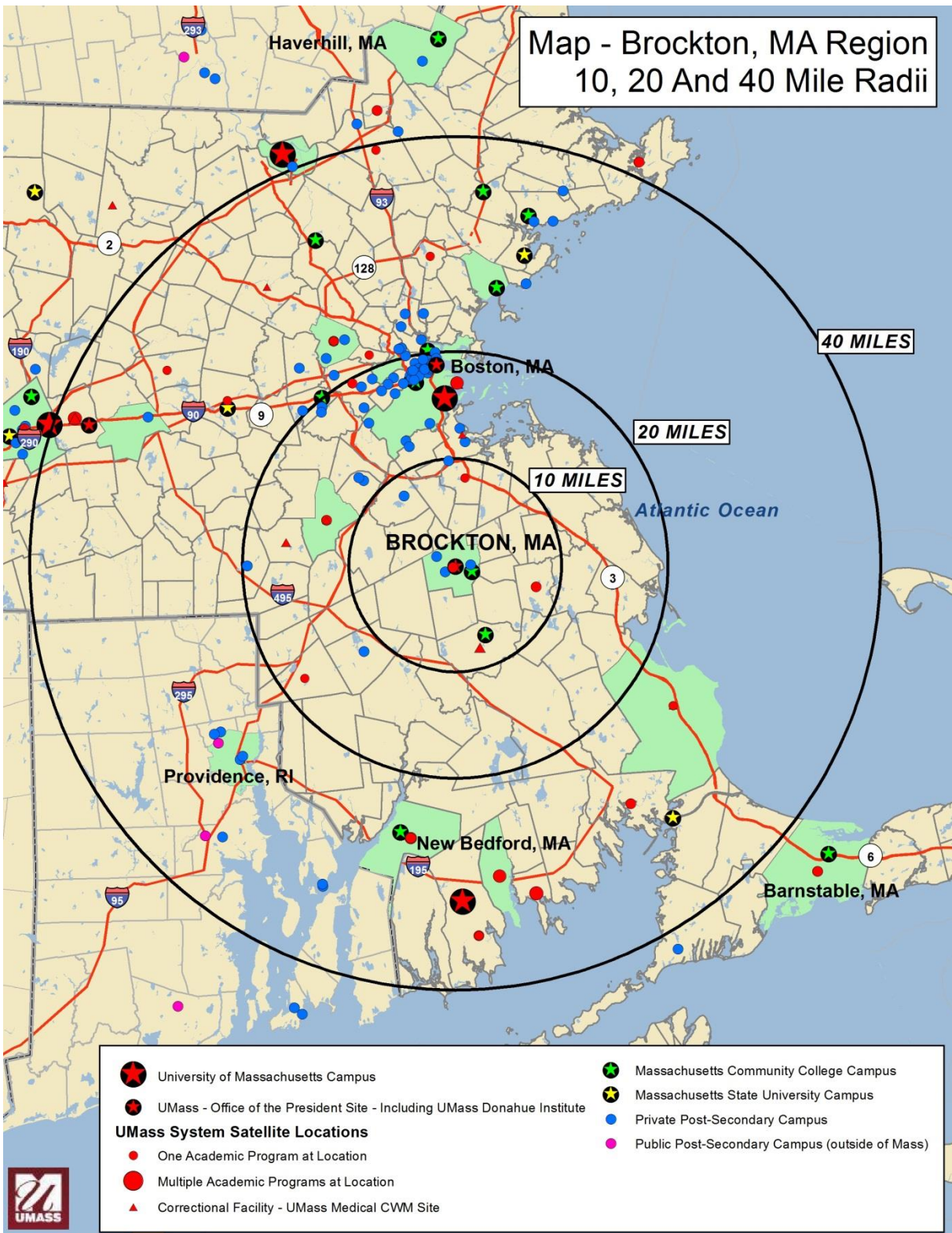
Census 2010 data shows income detail for the Brockton area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$76,382	\$72,019
Average Household	\$90,601	\$93,575
Median Family	\$88,468	\$85,657
Average Family	\$100,576	\$104,985

Of the population in the city of Brockton age 25 or older, 35.4% have a high school diploma or equivalent as their highest level of educational attainment, and 17.5% have a bachelor's degree or above as their highest level of **educational attainment**. Of the population in Plymouth County age 25 or older, 30.9% have a high school diploma or equivalent as their highest level of educational attainment, and 32.5% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** indicates higher crime levels in the immediate vicinity of the center of Brockton with lower crime levels shown in most outlying areas.

Appendix III.C.ii Brockton Region Location Map



Appendix III.D.i Fall River Region: Overview

Fall River is located in the southeast region of Massachusetts within close proximity to the UMass Dartmouth campus. UMass Dartmouth has strong ties to Fall River and the surrounding areas, including the Advanced Technology and Manufacturing Center and the Fall River Professional & Continuing Education Satellite Center.

Other **public institutions of higher education** located within a 20 mile radius of Fall River include:

- Bristol Community College, Fall River
- Massachusetts Maritime Academy, Buzzards Bay

There are a small number of private higher education institutions in Rhode Island that fall within this radius.

Based on Census 2010 data, the total population **within a 20 mile radius of Fall River** is 1,226,733 and predominantly white at 81.3% (including white Hispanics). Some other race follows at 6.3%, Blacks at 5.8%, two or more races at 3.4%, Asians at 2.6%, American Indians at 0.5% and Pacific Islanders at 0.1%. Hispanics of all races comprise 12.2% of the population.

The total population **within a 10 mile radius of Fall River** is 239,938 with Whites at 92.5% (including white Hispanics), Blacks at 2.2%, two or more races at 1.9%, some other races at 1.6%, Asians at 1.6%, American Indians at 0.2% and Pacific Islanders at 0.0%. Hispanics of all races comprise 3.8% of the population.

Census 2010 data shows that within the Fall River area the number of potential **college-bound/aged students** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	17,601 (7.3%)	89,329 (7.3%)
Age 20-24	17,731 (7.4%)	92,484 (7.5%)
Age 25-29	13,783 (5.7%)	79,833 (6.5%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Fall River area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	12,988 (5.4%)	74,918 (6.1%)
Age 35-39	14,840 (6.2%)	77,773 (6.3%)
Age 40-44	17,319 (7.2%)	86,699 (7.1%)

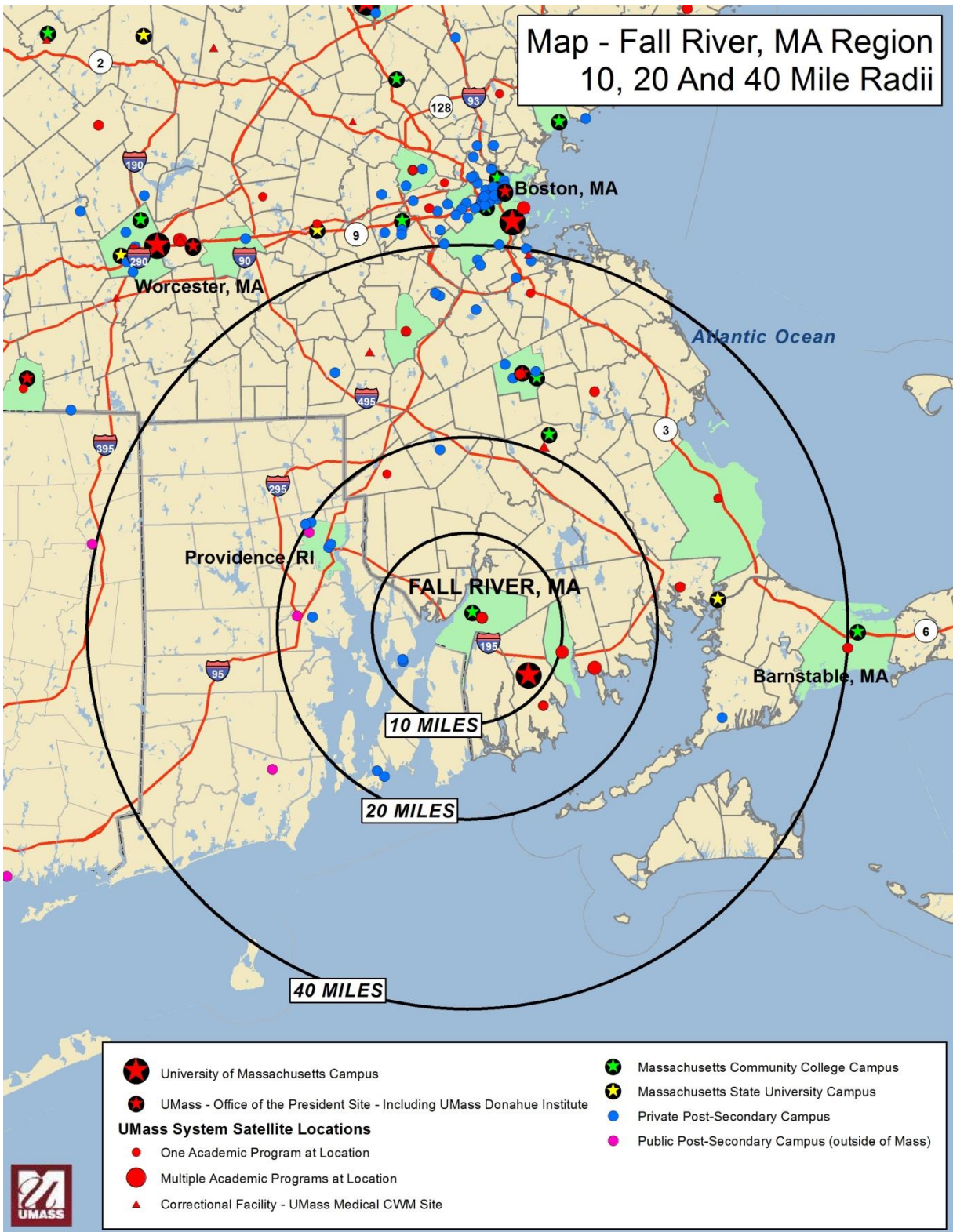
Census 2010 data shows **income detail** for Fall River area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$55,826	\$52,352
Average Household	\$67,506	\$64,709
Median Family	\$67,378	\$64,587
Average Family	\$79,517	\$75,874

Of the population in the city of Fall River age 25 or older, 30.3% have a high school diploma or equivalent as their highest level of **educational attainment**, and 14.1% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Bristol County age 25 or older, 30.3% have a high school diploma or equivalent as their highest level of educational attainment, and 24.7% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** indicates high crime levels in and around the immediate vicinity of Fall River. Crime levels outside of Fall River vary from light to heavy within a 20 mile radius.

Appendix III.D.ii Fall River Region Location Map



Appendix III.E.i Haverhill Region: Overview

Haverhill is situated in the Merrimack Valley on Rt. 495 and within close proximity to Routes 93 & 95. It is located due north of Boston by approximately 35 miles.

The UMass Lowell campus is southwest of Haverhill by less than 20 miles. The Lowell campus has close ties and good articulation with nearby Northern Essex Community College (NECC) including a regular number of graduates from NECC who transfer to UMass Lowell.

UMass has expressed interest in a partnership with NECC in downtown Haverhill. A recent article in the *Eagle Tribune* (July 5, 2012) specifically mentioned nursing as a focus for the Satellite Center. (<http://www.eagletribune.com/haverhill/x1395117392/Nursing-is-focus-of-downtown-UMass-campus>).

In that article, Chancellor Meehan observed that “bringing UMass Lowell to Haverhill depends on a number of things, including finding a suitable building, determining what renovations would be needed and how to pay for them, coming up with a business plan showing that such a campus would make money and finding a way to fund its creation.”

"We don't have any satellite campuses, but we have been looking into satellite concepts around the country and we think they can work," Meehan said. "It's always great for any urban downtown to have the presence of students. Getting a university to have a presence in downtown areas has a positive impact on economic development."

UMass Lowell is exploring the Arizona State University satellite system for its versatility and may be interested in modeling it at the Haverhill location.

UMass Lowell has a robust online program offering an extensive array of certificates and undergraduate and graduate degree programs.

In addition to the UMass Lowell campus, other **public institutions of higher education** within a 20 mile radius of Haverhill include:

- Northern Essex Community College
- North Shore Community College
- Middlesex Community College
- Salem State University

Private higher education institutions include Zion Bible College, having acquired the former Bradford College site in Haverhill and Merrimack College in North Andover.

Based on Census 2010 data the total population **within a 20 mile radius of Haverhill** is 1,183,524 and predominantly white at 85.8% (including white Hispanics). Other races follow at 4.8%, Asians at 4.7%, Blacks at 2.3%, two or more races at 2.1%, American Indians at 0.3%. Hispanics of all races comprise 10.2% of the population.

The total population **within a 10 mile radius of Haverhill** is 356,126 and reveals a lower number of whites, though still predominant at 80.0% (including white Hispanics); other races at 11.0%; Blacks at 3.0%; two or more races at 2.8%; Asians at 2.7%; American Indians at 0.4% and Pacific Islanders at 0.0%. Hispanics of all races comprise 22.1% of the population.

Census 2010 data shows that within the Haverhill area the number of potential **college-bound/aged students'** breakout as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	26,024 (7.3%)	82,840 (7.0%)
Age 20-24	21,237 (6.0%)	69,223 (5.8%)
Age 25-29	20,035 (5.6%)	66,647 (5.6%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Haverhill area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	19,985 (5.6%)	66,175 (5.6%)
Age 35-39	22,902 (6.4%)	75,979 (6.4%)
Age 40-44	27,522 (7.7%)	91,594 (7.7%)

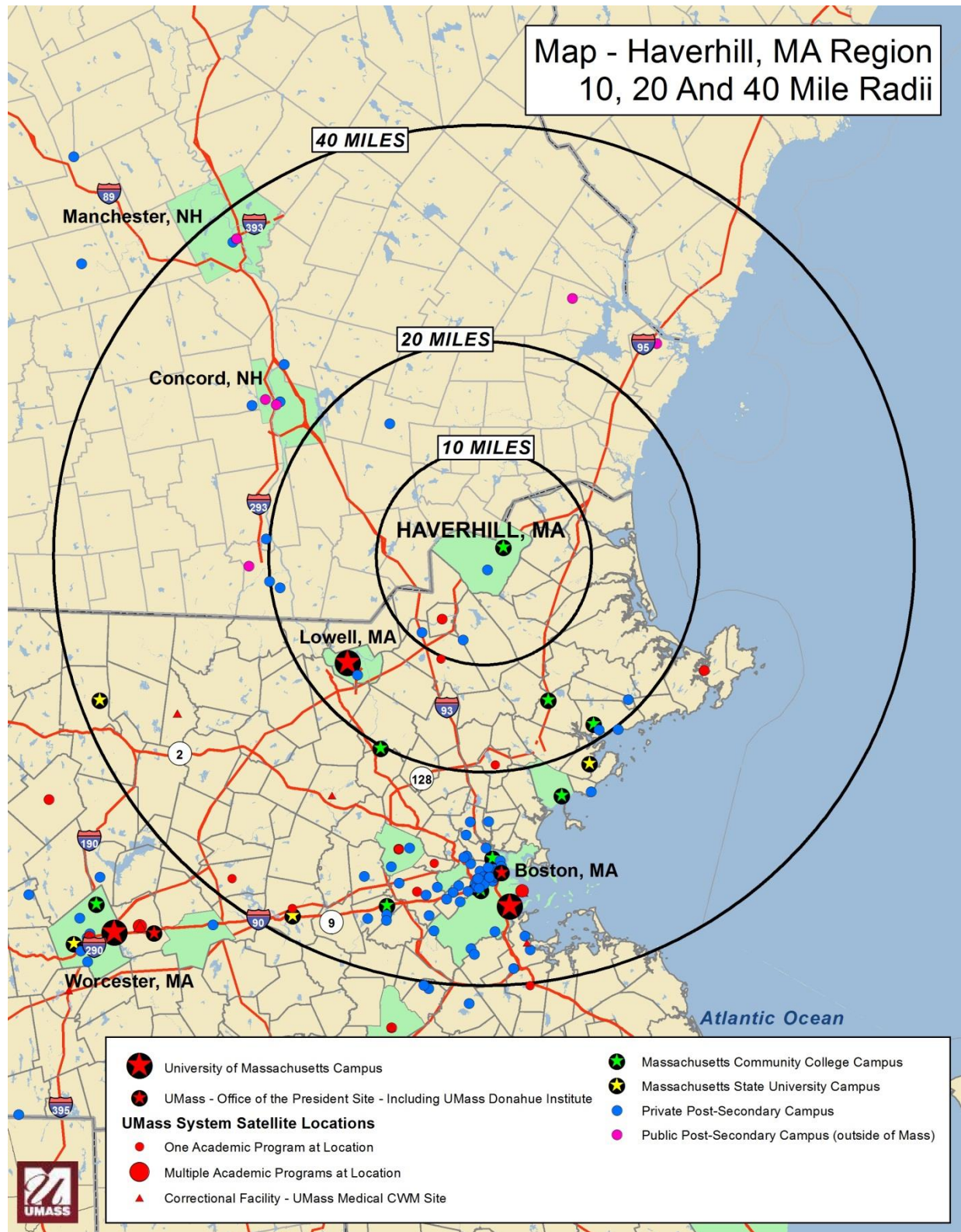
Census 2010 data shows **income detail** for Haverhill area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$69,518	\$75,244
Average Household	\$87,578	\$91,790
Median Family	\$82,385	\$86,795
Average Family	\$96,036	\$100,892

Of the population in the city of Haverhill age 25 or older, 29.3% have a high school diploma or equivalent as their highest level of **educational attainment**, and 29.7% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Essex County age 25 or older, 26.8% have a high school diploma or equivalent as their highest level of educational attainment, and 36.1% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** is provided in the appendices; however, it indicates higher crime levels in the immediate vicinity of the center of Haverhill with lower crime levels shown in outlying areas.

Appendix III.E.ii Haverhill Region Location Map



Appendix III.F.i Lynn Region: Overview

Lynn is located on the north shore of the coast of Massachusetts within close proximity to Boston and Cambridge. The UMass Boston campus is southwest of Lynn by less than 10 miles, and the UMass Lowell campus is northwest by approximately 25 miles.

At the urging of UMass President Caret and President Wayne Burton of North Shore Community College, members of the UMass System Office, UMass Boston and UMass Lowell visited NSCC-Lynn and a former General Electric site in Lynn. Both campuses have existing relationships with NSCC, with a significant number of students transferring to either campus to complete their bachelor's degree. UMass Lowell in particular receives as many as 100 students a year through transfers in Engineering.

President Burton would like UMass to consider a joint venture to create a Satellite Center in Lynn, either adjacent to or on the NSCC-Lynn campus. Salem State University has already located some offices and programs in a building across the street. The campus is next to a T-station and parking facility, providing major access to the campus.

The specific GE site in Lynn, which is about 1 ½ miles from the NSCC campus, is being sold by GE, and the town hopes that the property will become a part in the revitalization of that portion of the city.

In addition to the UMass Boston and Lowell campuses, there are an abundance of **private institutions of higher education** within a 20 mile radius of Lynn, including a number of world-renowned institutions such as Harvard University and MIT. Other public institutions within this range include:

- North Shore Community College -- Beverly
- Salem State University

Based on Census 2010 data, the total population **within a 20 mile radius of Lynn** is 2,543,054 and predominantly white at 73.6% (including white Hispanics). Blacks follow at 9.7%, Asians at 8.2%, some other race at 5.4% two or more races at 2.9%, American Indians at 0.3% and Pacific Islanders at 0.0%. Hispanics of all races comprise 11.1% of the population.

The total population **within a 10 mile radius of Lynn** is 909,685 and reveals a slightly higher number of whites at 77.0% (including white Hispanics), other races at 7.4%, Asians at 6.3%, Blacks at 6.1%, two or more races at 2.9%, American Indians at 0.3% and Pacific Islanders at 0.0%. Hispanics of all races comprise 14.6% of the population.

Census 2010 data shows that within the Lynn area, the number of potential **college-bound/aged students** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	54,698 (6.0%)	172,457 (6.8%)
Age 20-24	68,934 (7.6%)	221,242 (8.7%)
Age 25-29	84,250 (9.3%)	220,740 (8.7%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Lynn area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	72,249 (7.9%)	184,984 (7.3%)
Age 35-39	64,270 (7.1%)	169,118 (6.7%)
Age 40-44	64,420 (7.1%)	173,903 (6.8%)

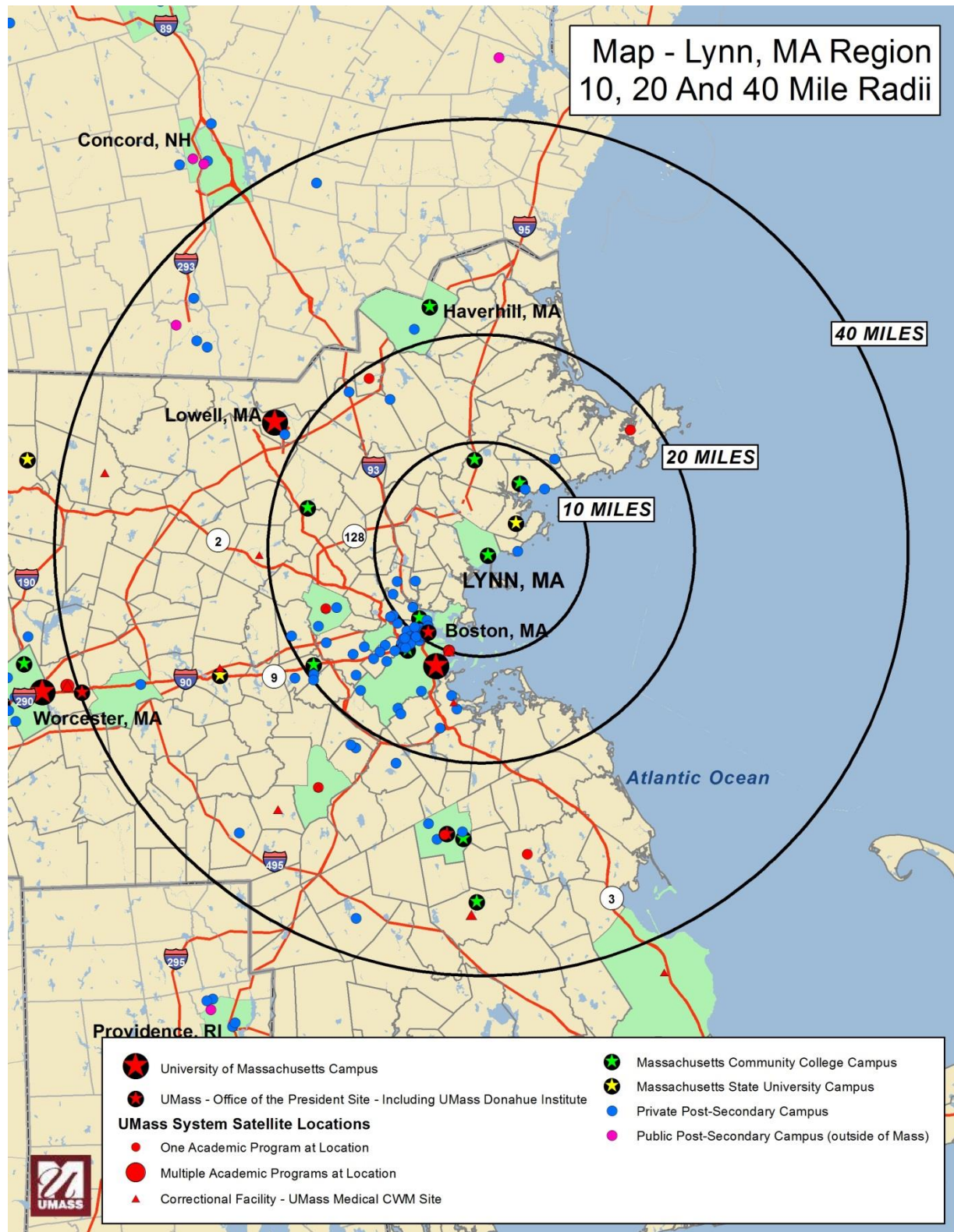
Census 2010 data shows **income detail** for Lynn area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$66,412	\$71,834
Average Household	\$84,855	\$95,938
Median Family	\$81,014	\$87,083
Average Family	\$95,589	\$108,080

Of the population in the city of Lynn age 25 or older, 35.7% have a high school diploma or equivalent as their highest level of **educational attainment**, and 18% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Essex County age 25 or older, 26.8% have a high school diploma or equivalent as their highest level of educational attainment, and 36.1% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** shows high crime levels in and around Lynn, stretching southward toward Boston. Within a 10 mile radius, crime levels lessen somewhat. Within a 20 mile radius, crime levels lessen considerably.

Appendix III.F.ii Lynn Region Location Map



Appendix III.G.i New Bedford Region: Overview

New Bedford is located on the southeast coast of Massachusetts, within close proximity to the UMass Dartmouth campus. UMass Dartmouth has strong ties to the city and the surrounding areas, including projects such as the SMAST 1 School for Marine Science & Technology, the Quest Center (a business incubator and education center) and the New Bedford Professional & Continuing Education Satellite Center.

Other **public and private institutions of higher education** present within a 20 mile radius of New Bedford include:

- Middlesex Community College, Bedford
- Bristol Community College, Fall River
- Massachusetts Maritime Academy, Buzzards Bay
- several small colleges in Rhode Island

Based on Census 2010 data, the total population **within a 20 mile radius of New Bedford** is 541,745 and predominantly white at 89.4% (including white Hispanics). Some other race follows at 3.3%, Blacks at 2.9%, two or more races at 2.7%, Asians at 1.2%, American Indians at 0.4% and Pacific Islanders at 0.0%. Hispanics of all races comprise 5.4% of the population.

The total population **within a 10 mile radius of New Bedford** is 184,434 with Whites at 96.40% (including white Hispanics), some other races at 6.3%, Blacks at 4.0%, two or more races at 3.6%, Asians at 1.0%, American Indians at 0.7% and Pacific Islanders at 0.0%. Hispanics of all races comprise 9.4% of the population.

Census 2010 data shows that within the New Bedford area the number of potential **college-bound/aged students'** breakout as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	13,361 (7.2%)	37,149 (6.9%)
Age 20-24	13,964 (7.6%)	35,605 (6.6%)
Age 25-29	10,914 (5.9%)	30,715 (5.7%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the New Bedford area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	10,718 (5.8%)	29,804 (5.5%)
Age 35-39	11,343 (6.2%)	33,250 (6.1%)
Age 40-44	12,725 (6.9%)	38,310 (7.1%)

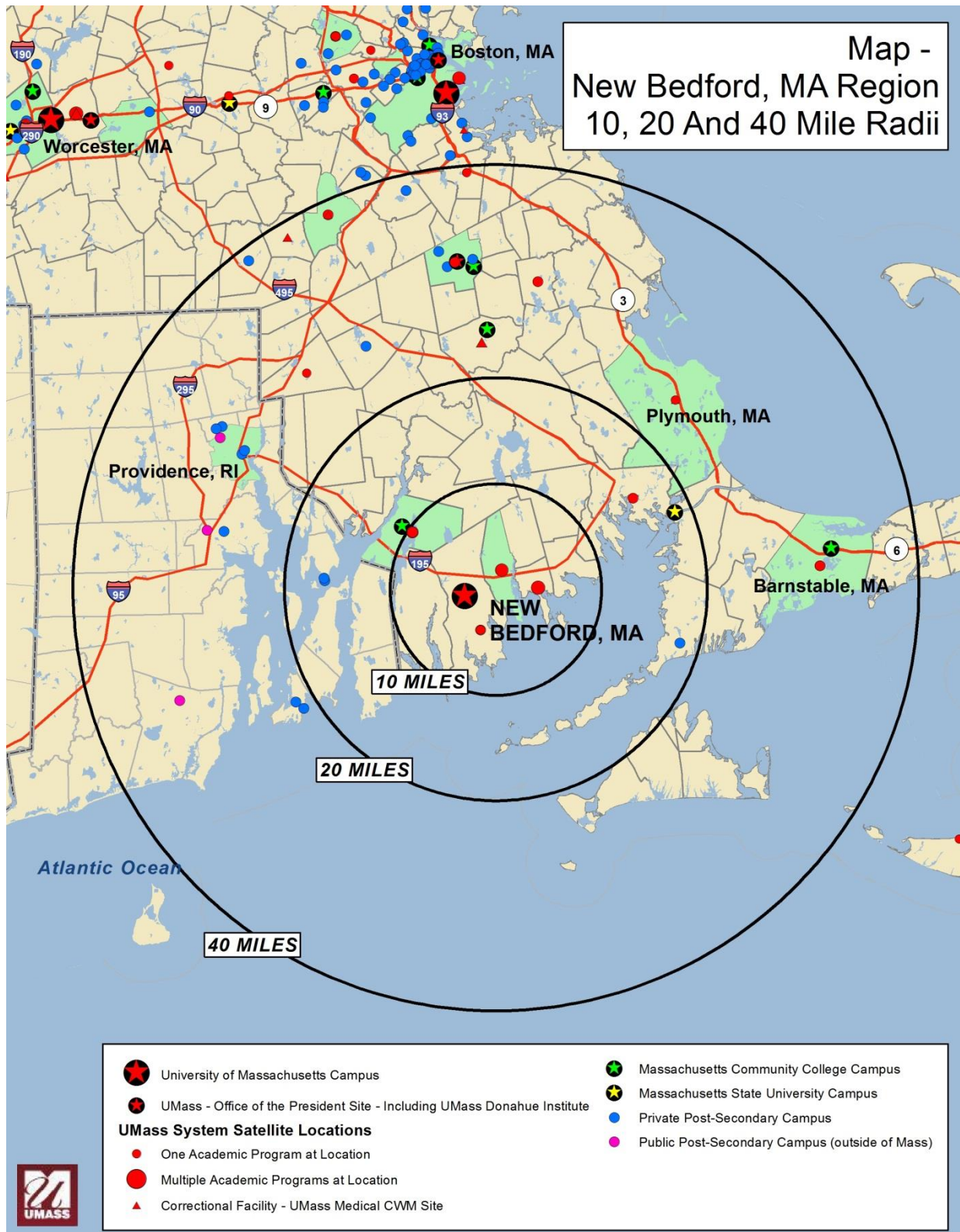
Census 2010 data shows **income detail** for New Bedford area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$49,386	\$55,713
Average Household	\$61,248	\$67,840
Median Family	\$60,913	\$67,093
Average Family	\$71,015	\$78,049

Of the population in the city of New Bedford age 25 or older, 31.9% have a high school diploma or equivalent as their highest level of **educational attainment**, and 13.7% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Bristol County age 25 or older, 30.3% have a high school diploma or equivalent as their highest level of educational attainment, and 14.1% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** indicates high crime levels in and around the immediate vicinity of New Bedford.

Appendix III.G.ii New Bedford Region Location Map



Appendix III.H.i Pittsfield Region: Overview

Pittsfield is the largest city in the Berkshires and central to the rest of the county. Route 9, which runs east-west across the state, terminates in the city at Route 7. The Mass Pike is located about 10 miles south in Lee.

UMass Extension has a 4-H Youth Development Program office in Pittsfield, which offers educational support to adult volunteers. Up until this year, UMass Amherst has offered MBA courses in Pittsfield, but has not had sufficient enrollments to continue those courses since 2011.

Public and Private Institutions of Higher Education

Pittsfield is the home to the main campus of Berkshire Community College. The nearest state college is the Massachusetts College of Liberal Arts in North Adams. UMass Amherst has academic links to both of these public institutions; the nearest private colleges are Williams College in Williamstown and Bard College at Simon's Rock in Great Barrington.

Based on Census 2010 data, the total population within a 20 mile radius of Pittsfield is 141,532, and is predominately white at 93% (including white Hispanics). Blacks and Asians comprise 3.6% and 1.1% respectively. Hispanics of all races comprise 3.2% of the population.

According to Census 2010 data, the total population of Pittsfield within a **10 mile radius** is 73,970, and is predominately white at 91% (including white Hispanics). Blacks and Asians comprise 3.6% and 1.1% respectively. Hispanics of all races comprise 3.8% of the population.

The number of potential traditional college age students is:

Age	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
15 - 19	4,740 (6.4%)	10,839 (7.1%)
20 - 24	3,876 (5.2%)	9,314 (6.1%)
25 - 29	4,014 (5.4%)	7,690 (5.1%)

The number of potential nontraditional students eligible for higher education is as follows:

Age	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
30 - 34	3,650 (4.9%)	7,182 (4.7%)
35 - 39	4,061 (5.5%)	8,129 (5.3%)
40 - 44	4,909 (6.6%)	9,929 (6.5%)

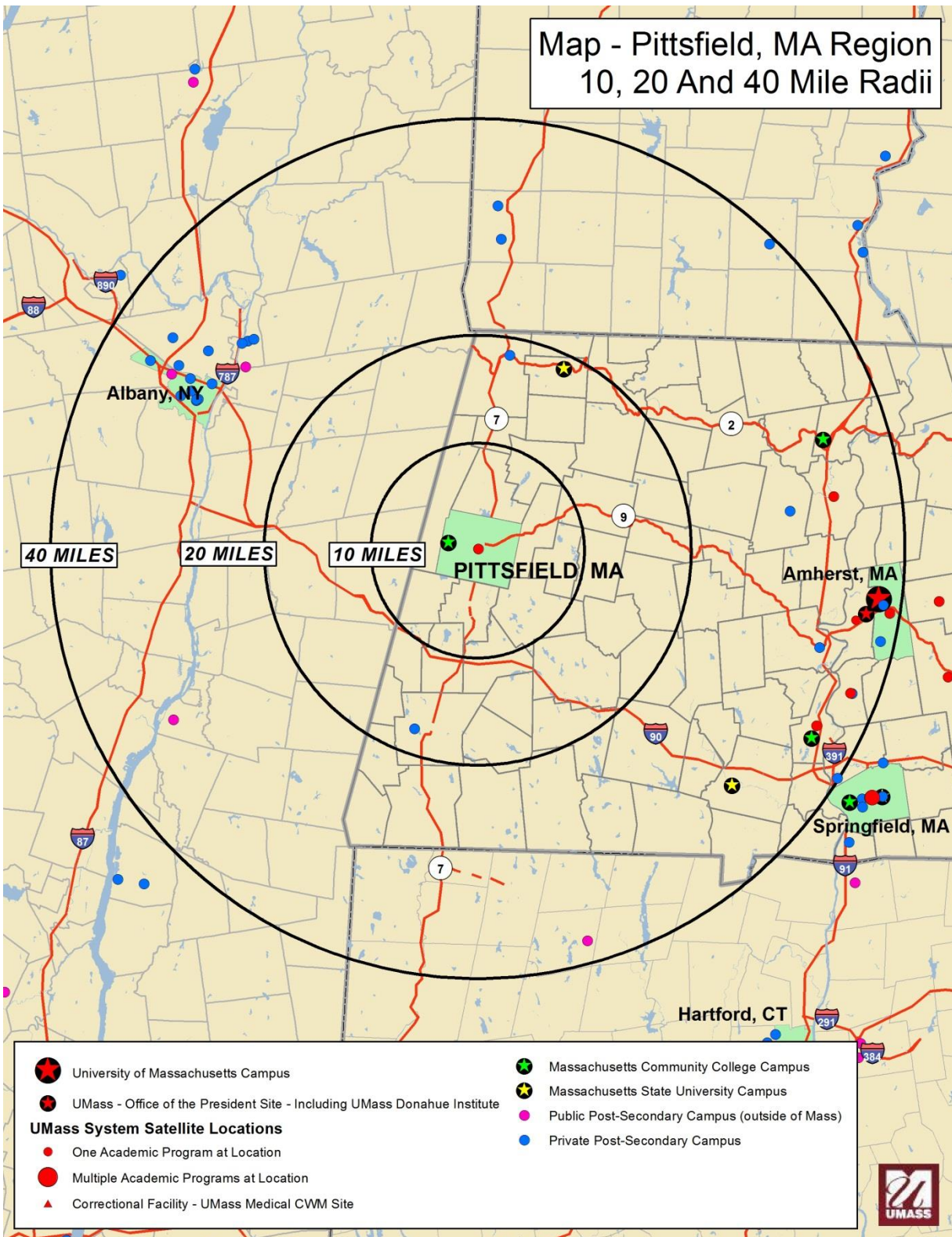
The **household and family income** for the Pittsfield area breaks down as follows:

Income type	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household Income	\$51,128	\$50,899
Average Household Income	\$63,439	\$64,379
Median Family Income	\$64,714	\$63,931
Average Family Income	\$76,622	\$77,081

Of the population in the city of Pittsfield age 25 or older, 34.4% have a high school diploma or equivalent as their highest level of **educational attainment**, and 25.6% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Berkshire County 25 or older, 33.3% have a high school diploma or equivalent as their highest level of educational attainment, and 29.6% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** shows low crime levels in Pittsfield and the surrounding area.

Appendix III.H.ii Pittsfield Region Location Map



Appendix III.I.i. Plymouth Region: Overview

Plymouth is the largest municipality in Massachusetts by area, located approximately 40 miles south of Boston in the South Shore region. The town of Plymouth is one of two county seats of Plymouth County, the other being Brockton.

UMass Boston established a Satellite Center at the Cordage Commerce Center, which is near the waterfront in downtown Plymouth. UMass Boston is planning to rehab the facility and engage a new approach, utilizing it for on-site courses and as a portal for online degree completion, including Interactive TV. Their vision includes providing on-site course registration, financial aid services and a mini-computer/technology center. They describe the portal as similar to that of the University of Phoenix center on Route 495. This plan has been informed by a recent market research study.

The site already houses some non-credit classes, undergraduate technical education and classes for mature learners, offered through the Osher Lifelong Learning Institute. UMass Boston's University College partners with Quincy College at the site, offering undergraduate classes in nursing and liberal arts. Quincy College has expressed interest in offering additional courses at the site. The facility also houses an unemployment office.

Public and private institutions of higher education near Plymouth include:

- Massachusetts Maritime Academy
- Bridgewater State College
- Massasoit Community College
- Walden University

According to Census 2010 data, the population within a **20 mile radius** is 410,896, of which 94.1% are White (including white Hispanics), 1.9% are Black, 1.7% report as two or more races, 1.2% report as some other race, 0.9% as Asians, 0.2% as American Indian and 0.0% as Pacific Islander. Hispanics of all races comprise 1.7% of the population.

Within a **10 mile radius**, 94.8% of the population is White (including white Hispanics), 1.5% is Black, 1.5% report as two or more races, 1.0% report as some other race, Asians are 0.8%, American Indian are 0.3%, Pacific Islanders report as 0.0%. The other 5.2% of the population consists of American Indian, Asian and Black.

According to Census 2010 data, 28 people, or less than 1% of the population is Pacific Islander. Hispanics of all races comprise 1.6% of the population.

Census 2010 data shows that within the Plymouth area, the number of potential **college-bound/aged students'** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	6,744 (6.6%)	28,797 (7.9%)
Age 20-24	4,878 (4.7%)	22,290 (5.4%)
Age 25-29	4,904 (4.8%)	18,844 (4.6%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Plymouth area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	5,089 (4.9%)	19,243 (4.7%)
Age 35-39	6,637 (6.5%)	25,313 (6.2%)
Age 40-44	8,234 (8.0%)	32,497 (7.9%)

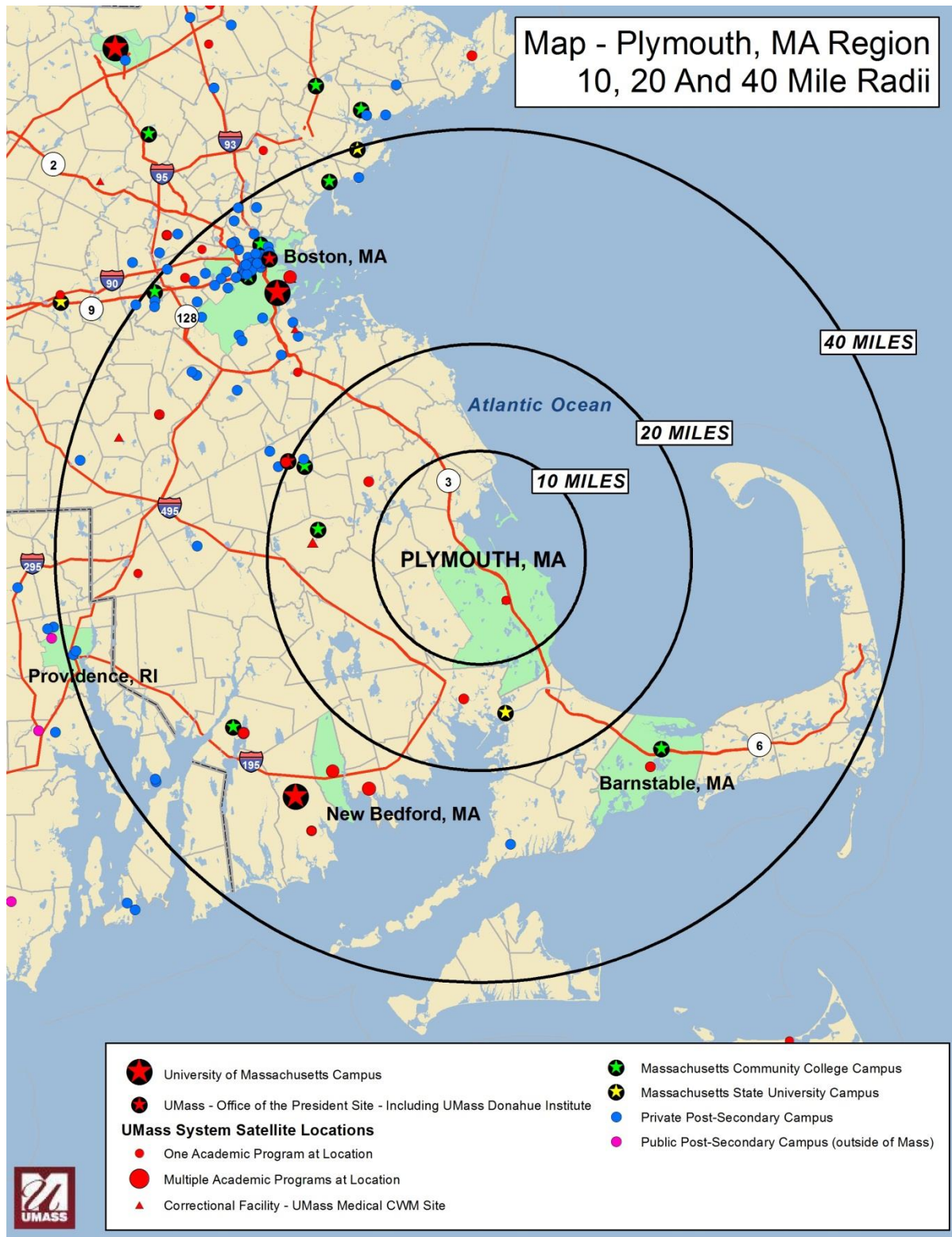
Current Census data (2010) shows **income detail** for Plymouth area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$78,362	\$78,638
Average Household	\$92,725	\$92,855
Median Family	\$91,135	\$89,358
Average Family	\$100,630	\$100,104

Of the population in the town of Plymouth age 25 or older, 28.7% have a high school diploma or equivalent as their highest level of **educational attainment**, and 32.6% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Plymouth County 25 or older, 30.9% have a high school diploma or equivalent as their highest level of educational attainment, and 32.5% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** is very low in the town of Plymouth and within a 10 mile radius. As one goes further out from the town proper, the crime rate rises, however, by very little.

Appendix III.I.ii. Plymouth Region Location Map



Appendix III.J.i. Springfield/Holyoke Region: Overview

Springfield and Holyoke lie adjacent to each other in the lower part of the Pioneer Valley in western Massachusetts; Springfield borders Connecticut to the south. Both are conveniently located on the Rt. 91 corridor and within easy access to the Massachusetts Turnpike (Rt. 90). The UMass Amherst campus is located 20-25 miles due north. UMass Amherst currently houses several programs in different sites in Springfield.

UMass Amherst projects in the Springfield/Holyoke area are numerous and represent several different schools/colleges/units, such as Commonwealth College, Education, Engineering, Management, Natural Sciences, Nursing, Public Health and Health Sciences, Social and Behavioral Sciences, and Extension, among others. Some of the more prominent staffed projects in the Springfield area include the Pioneer Valley Life Sciences Institute and the UMass Springfield Partnership. Also of strategic importance in downtown Springfield are the expansion of a public arts studio/storefront in the Lyman Warehouse District and the development of a Court Square site to house New England Public Radio (WFCR and WNNZ -- regional affiliates of National Public Radio that presently reside on the UMass Amherst campus).

At the same time, downtown Holyoke is home to the soon-to-open Massachusetts Green High Performance Computing Center (MGHPCC), which has drawn other higher education and several corporate partners to invest in this asset, which will be critical to research and innovation. Both cities have very energetic mayors who are garnering significant political support at the state and federal levels. (See Appendix II.A for an overview of UMass Amherst's many off-campus sites in Springfield, Holyoke and the rest of the Commonwealth.)

In addition to UMass Amherst, there are several **public and private institutions of higher education** within a 20 mile radius of Springfield. See Map Appendix III.J.ii for more graphic detail about the area. These include:

- Springfield Technical Community College
- Holyoke Community College
- Asnuntuck Community College (Enfield, CT)
- Westfield State University
- American International College
- Springfield College
- Elms College
- Bay Path College
- Western New England University
- Mt. Holyoke College
- Smith College
- Hampshire College
- Amherst College

Based on Census 2010 data, the total population **within a 20 mile radius of Springfield** is 832,561, and is predominantly white at 80.1%, (including white Hispanics). Blacks and Asians comprise 8.3% and 2.7% respectively. Hispanics of all races comprise 13.9% of the population.

The total population **within a 10 mile radius of Springfield** is 481,025. Whites (including white Hispanics) comprise 75.9% of the population, Blacks 9.4%, and Asians 2.1%. Hispanics of all races comprise 20.8% of the population.

Census 2010 data shows that within the Springfield/Holyoke area, the number of potential **college-bound/aged students** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	36,607 (7.6%)	65,345 (7.8%)
Age 20-24	33,536 (7.0%)	61,249 (7.4%)
Age 25-29	30,690 (6.4%)	49,459 (5.9%)

In addition, there are a sizeable number of **non-traditional age students** who could potentially benefit from a satellite campus in downtown Springfield or Holyoke:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	28,212 (5.9%)	46,009 (5.5%)
Age 35-39	28,795 (6.0%)	49,131 (5.9%)
Age 40-44	32,588 (6.8%)	57,441 (6.9%)

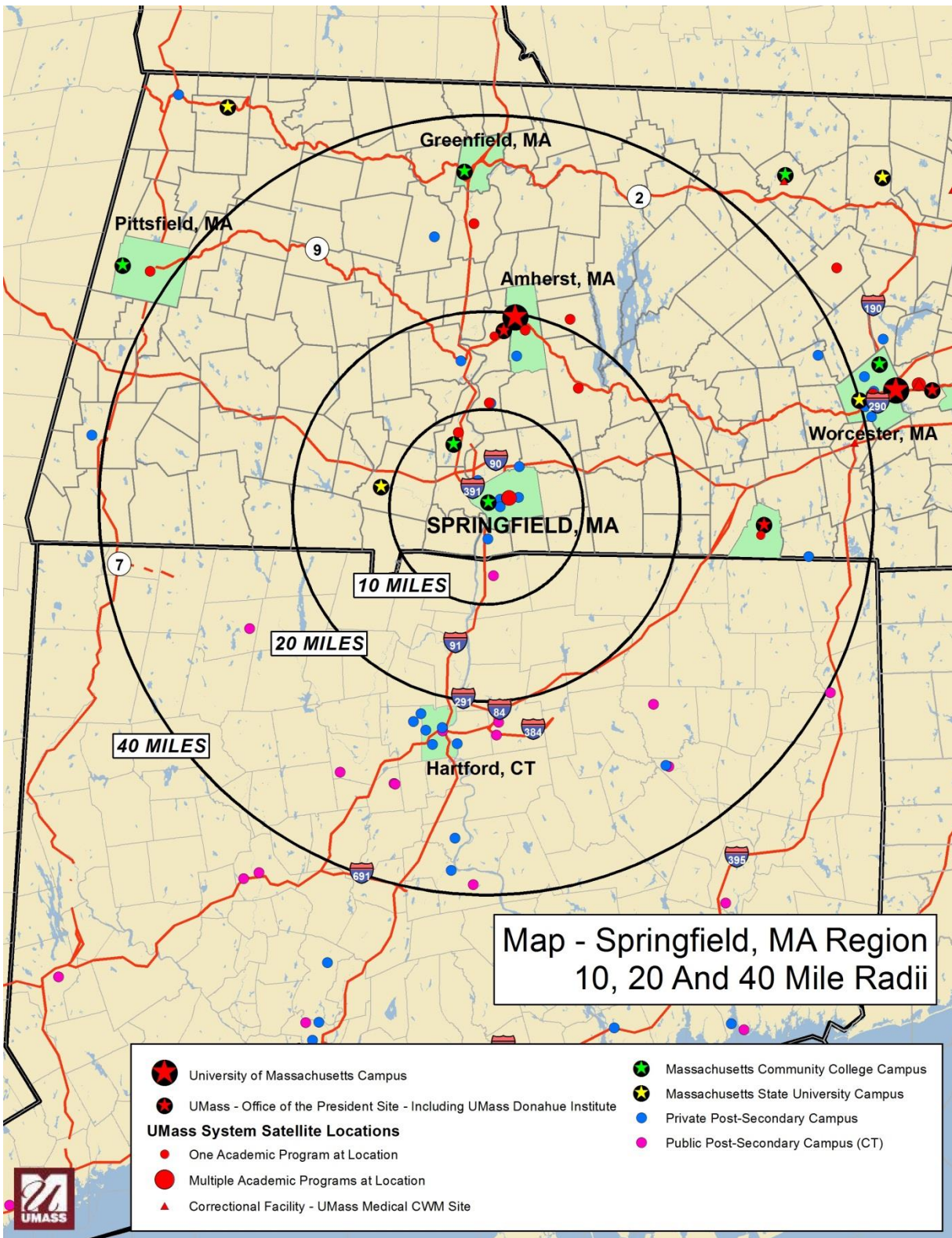
Income levels are projected to increase modestly by 2015. Current census data (2010) show **income detail** for Springfield area residents as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$51,710	\$60,533
Average Household	\$62,181	\$72,301
Median Family	\$63,347	\$71,961
Average Family	\$71,632	\$82,129

Of the population in the city of Springfield 25 or older, 33.9% have a high school diploma or equivalent as their highest level of **educational attainment**, and 16.9% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Hampden County 25 or older, 32.8% have a high school diploma or equivalent as their highest level of educational attainment, and 23.8% have a bachelor's degree or above as their highest level of educational attainment.

Total **crime indices** by block groups and census tracts indicate significant crime levels in the immediate vicinity of downtown Springfield (particularly in the North End) and downtown Holyoke. For the most part, outlying areas (10-20 miles outside of downtown) show significantly lower levels of crime.

Appendix III.J.ii. Springfield/Holyoke Location Map



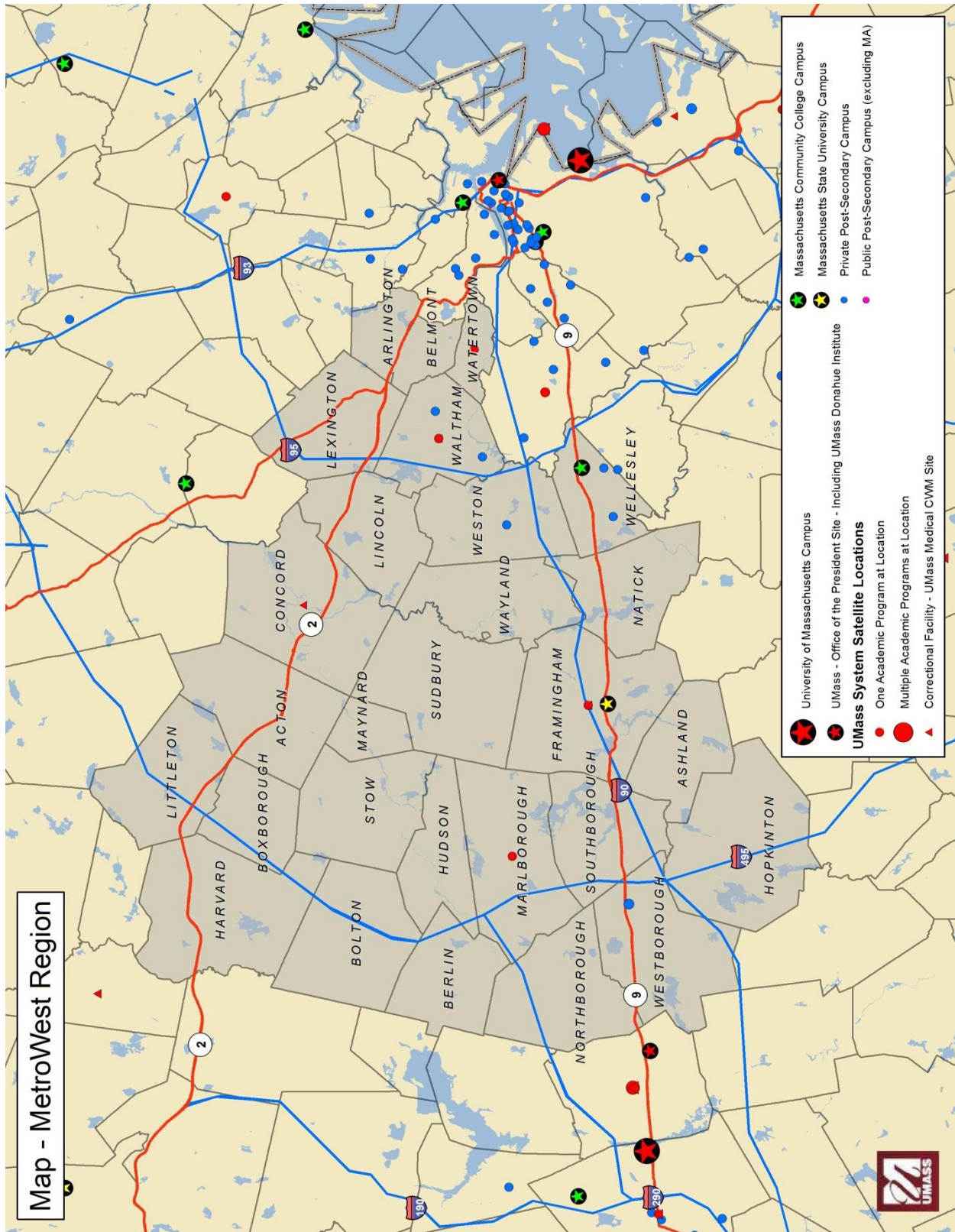
Appendix III.K.i.1
MetroWest Area, The Total Region: Overview

METROWEST REGION PROFILE

This MetroWest region has experienced continual growth as the suburbs have expanded their populations and corporations have moved westward toward Worcester. However, the region suffers from a dearth of both public and private higher education institutions. For this reason, this region of Massachusetts in particular warrants deeper exploration.

In order to advance this exploration, this report presents the region in two parts, focusing on the areas of Waltham and Westborough/Marlborough. Profiles and maps of these two areas are presented in Appendices III.K.ii and III.K.iii. An overall map of the total region appears as Appendix III.K.i.2.

Appendix III.K.i.2 MetroWest Area, The Total Region, Location Map



Appendix III.K.ii.1 MetroWest Area, Waltham Region: Overview

Waltham is situated about 10 miles northwest of Boston, with easy access to Route 128 and the Mass Turnpike. It is centrally located and is within less than 30-60 minute drives from UMass Boston, Lowell and Worcester. Waltham and the surrounding communities are at the heart of one of the Commonwealth's prime Life Sciences, Information Technology and Defense Industry corporate areas.

The UMass Amherst campus was gifted land in Waltham on which the UMass Extension Waltham Center is housed. This center presently provides educational support to adult volunteers leading 4-H clubs and other efforts in Middlesex County. However, the buildings on the property are in serious disrepair and need to be replaced. The property is adjacent to the Fernald School, a state-owned property that houses the program staff of the EK Shriver Center, managed by the Medical School.

In addition to the UMass Boston and Lowell campuses, there are a number of **public and institutions of higher education** within about a 20 mile radius of Waltham including:

- Bunker Hill Community College
- Roxbury Community College
- Mass Bay Community College
- Middlesex Community College (Lowell campus)
- Massachusetts College of Art and Design
- Salem State University

Bentley College and Brandeis College are also located in Waltham, and there are many other private higher education institutions closer to Boston within the 20 mile radius.

Based on Census 2010 data, the total population **within a 20 mile radius of Waltham** is 2,986,743. It is predominantly white, at 73.9% (including white Hispanics). Blacks follow at 9.2% and Asians at 8.8%. Hispanics of all races comprise 10.0% of the population.

The total population **within a 10 mile radius of Waltham** is 1,373,148. It includes a lower, though still predominant, number of whites at 70.5% (including white Hispanics), with Blacks at 11.4%, and Asians at 10.2%. Hispanics of all races comprise 9.5% of the population.

Census 2010 data shows that within the Waltham area, the number of potential **college-bound/aged students'** breakout as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	97,756 (7.1%)	202,569 (6.8%)
Age 20-24	147,406 (10.7%)	243,324 (8.1%)
Age 25-29	138,912 (10.1%)	244,695 (8.2%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Waltham area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	108,904 (7.9%)	211,078 (7.1%)
Age 35-39	90,919 (6.6%)	198,880 (6.7%)
Age 40-44	87,877 (6.4%)	210,137 (7.0%)

Census 2010 data shows **income detail** for Waltham area residents as follows:

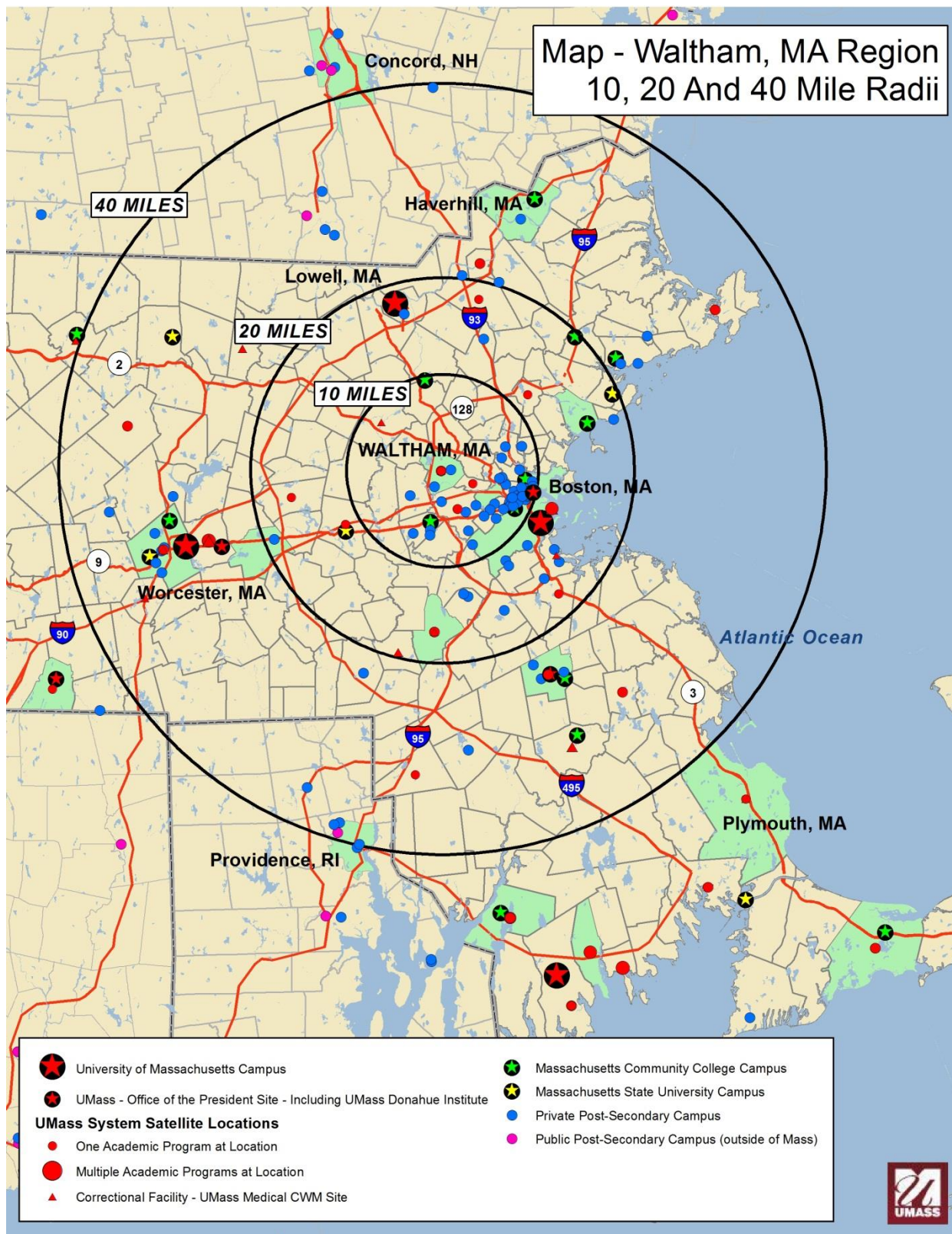
	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$74,923	\$75,942
Average Household	\$105,906	\$101,341
Median Family	\$91,581	\$91,705
Average Family	\$122,438	\$114,165

Of the population in the city of Waltham 25 or older, 25.7% have a high school diploma or equivalent as their highest level of **educational attainment**, and 44.7% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Middlesex County 25 or older, 22.6 % have a high school diploma or equivalent as their highest level of educational attainment, and 49.3% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** reveals lower crime levels within close proximity of Waltham and higher crime levels as one moves eastward toward communities closer to Boston and with higher concentrations of population.

Appendix III.K.ii.2

MetroWest Area, Waltham Region, Location Map



Appendix III.K.iii.1

MetroWest Area, Westborough/Marlborough Region: Overview

The Westborough/Marlborough area lies on Route 9, conveniently located at the crossroads of Routes 495 and the Massachusetts Turnpike. It is in very close proximity (within 5 miles) to the UMass Worcester campus and the UMass President's Office Shrewsbury site.

At the former Verizon Learning Center in Marlborough, UMass Boston is partnered with the Massachusetts International Academy. At that site, non-credit, intensive ESL and University preparation classes, as well as undergraduate classes are offered to Chinese students throughout the year, generating approximately 500 enrollments. Other UMass campuses are planning to join this collaboration, offering participants an option of attending any one of our undergraduate campuses.

The site is well equipped to provide classroom and office space to other UMass programs.

(See Appendix III.K.iii for Map of the MetroWest Region including Westborough/Marlborough.)

While there are several public and private institutions of higher education within close proximity to the Route 495 belt, the immediate region does not have undergraduate or graduate higher education institutions.

In addition to UMass Worcester, the public higher education institutions closest to the region are:

- Quinsigamond Community College
- Mass Bay Community College
- Framingham State University
- Worcester State University

The private higher education institutions closest to the region include:

- Clark University
- College of Holy Cross
- Worcester Polytechnic Institute

University of Phoenix has a central Massachusetts campus in Westborough that offers student services and a small amount of on-site classes.

About 15 years ago, the UMass President's Office established the "495 Center" at the Mass Technology Center location in Westborough. The initial program was the Professional MBA offered by UMass Amherst. Faculty from UMass Amherst, Boston, Dartmouth and Lowell taught as adjunct faculty in the program. Other attempted programs were unsuccessful. The MBA program is still taught at the UMass Shrewsbury site, although the Dean of the Isenberg School of Management has expressed interest in moving it closer to Route 495. This could include the Marlborough site presently housing the Massachusetts International Academy.

Based on Census 2010 data, the total population **within a 20 mile radius of Westborough** is 1,163,293. It is predominantly white at 97.6% (including white Hispanics). Asians follow at 5.7% and Blacks at 3.9%. Hispanics of all races comprise 7.9% of the population.

The total population **within a 10 mile radius of Westborough** is 351,301. It includes Whites at 81.6% (including white Hispanics), Asians at 6.9% and Blacks at 4.1%. Hispanics of all races comprise 8.1% of the population.

Census 2010 data shows that within the Westborough area the number of potential **college-bound/aged students** breaks out as follows:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 15-19	22,582 (6.4%)	84,041 (7.2%)
Age 20-24	18,254 (5.2%)	68,843 (5.9%)
Age 25-29	21,517 (6.1%)	63,066 (5.4%)

The number of **non-traditional age students** who could potentially benefit from a satellite campus in the Westborough area is:

	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Age 30-34	22,123 (6.3%)	65,223 (5.6%)
Age 35-39	24,629 (7.0%)	76,671 (6.6%)
Age 40-44	27,833 (7.9%)	89,951 (7.7%)

Census 2010 data shows **income detail** for Waltham area residents as follows:

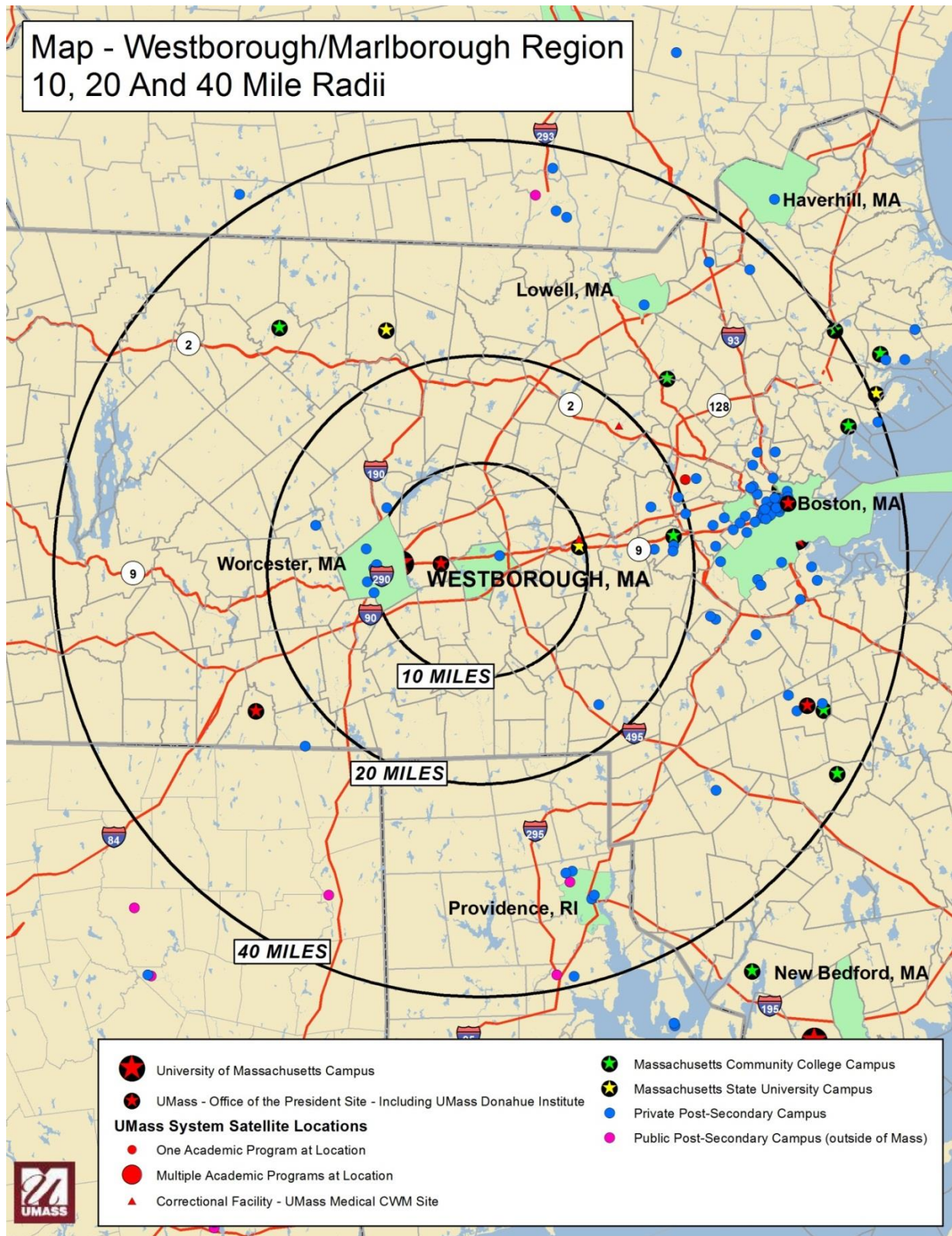
	<u>within 10 mile radius</u>	<u>within 20 mile radius</u>
Median Household	\$76,703	\$78,975
Average Household	\$98,200	\$107,277
Median Family	\$94,920	\$98,499
Average Family	\$112,337	\$122,388

Of the population in the town of Westborough 25 or older, 12.6% have a high school diploma or equivalent as their highest level of educational attainment, and 63.3% have a bachelor's degree or above as their highest level of **educational attainment**. Of the population in Worcester County 25 or older, 29.6% have a high school diploma or equivalent as their highest level of educational attainment, and 32.9% have a bachelor's degree or above as their highest level of educational attainment.

Of the population in the city of Marlborough 25 or older, 29% have a high school diploma or equivalent as their highest level of **educational attainment**, and 38.9% have a bachelor's degree or above as their highest level of educational attainment. Of the population in Middlesex County 25 or older, 22.6 % have a high school diploma or equivalent as their highest level of educational attainment, and 49.3% have a bachelor's degree or above as their highest level of educational attainment.

The **crime index** reveals lower crime levels within close proximity of Westborough and higher crime levels as one moves westward toward the vicinity of Worcester.

Appendix III.K.iii.2 Westborough/Marlborough Location Map



APPENDIX IV

OVERVIEW OF MARYLAND’S REGIONAL HIGHER EDUCATION CENTERS



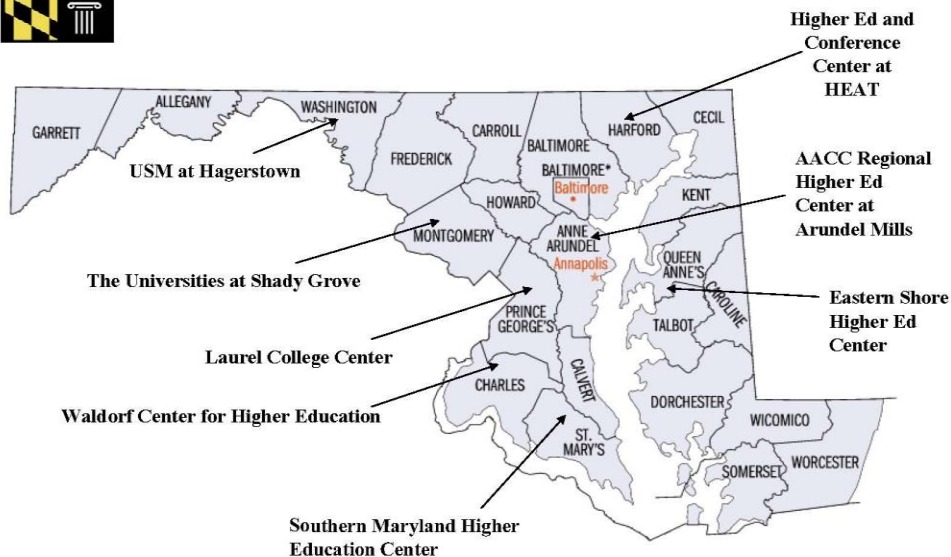
Overview of Maryland's Regional Higher Education Centers

Commission to Develop the Maryland Model for
Funding Higher Education

June 10, 2008



Regional higher education center locations by county *Serving underserved areas of the State*





Differing RHEC governance and organizational structures

Two centers governed by the University System of Maryland (USM) Board of Regents and operated by USM

- The Universities at Shady Grove
- USM at Hagerstown

Six centers with differing governing and organizational structures

- Anne Arundel Community College (AACC) Regional Higher Education Center at Arundel Mills
- Eastern Shore Higher Education Center
- Higher Education and Conference Center at the Higher Education and Applied Technology Center (HEAT)
- Laurel College Center
- Southern Maryland Higher Education Center
- Waldorf Center for Higher Education



Each non USM Center has a unique governing and organizational structure

Anne Arundel Community College Regional Higher Education Center at Arundel Mills

- Formed at the request of county executives in conjunction with AACC
- MOU establishes decision-making and fiscal authority between AACC and academic institutions offering programs at the center
- AACC handles fiscal matters and operates the center

Eastern Shore Higher Education Center

- Formed by UMES, Salisbury, Washington College & Chesapeake College. Washington College withdrew; an MOU now establishes decision-making and fiscal authority between remaining partners
- Governed by the Chesapeake College Board of Trustees
- Advised by a steering committee comprised of academic officers from each participating institution

Higher Education and Conference Center at HEAT

- Formed by Harford Community College, Harford County Government and the Maryland Transportation Authority (MTA) and bound by an MOU
- Harford Community College manages operations; Harford County owns the facility (in part established by State capital funding); The MTA owns the land
- Advised by a Board comprised of federal & county government representatives, local business leaders and the local higher education community



Each non USM Center has a unique governing and organizational structure (cont.)

Laurel College Center

- Formed/operated by Prince George's and Howard Community Colleges; equal authority and fiscal support
- No formal governing or advisory board specific to the center
- Vice Presidents and senior staff of PGCC and HCC make up the LCC Policy and Coordinating Council and determine policies for center

Southern Maryland Higher Education Center

- Established by State statute in 1994 as a higher education entity
- Governed by a Board appointed by the Governor
- Executive Director acts as Chief Operating and Fiscal Officer

Waldorf Center for Higher Education

- Formed/operated by the College of Southern Maryland (CSM) and the University of Maryland University College (UMUC) in accordance with an MOU
- MOU establishes decision making and fiscal authority and outlines class offerings
- No formal governing or advisory board specific to the center



RHEC operating and capital funding

Operating Budget

- The two USM centers are funded as two line items in the USM Office operating budget.
- The six other centers are funded by a grant through the MHEC operating budget. MHEC manages the budget process for these centers.

Capital Budget

- USM centers submit capital requests as part of USM's capital process.
- The six other centers' capital requests are handled on a case by case basis.



Timeline of legislative actions related to regional higher education funding policy

Year	Action
2000	The General Assembly enacted law revising the Maryland Charter for Higher Education to include regional higher education centers and charged MHEC with statewide coordinating responsibility
2001	MHEC in consultation with the higher education community developed Regional Higher Education Center Guidelines to guide policy, mission, strategic planning and operating and capital budgets for the centers
2004	The Joint Chairmen's Committee Report required MHEC in consultation with the higher education community to study and make recommendations regarding roles, access in underserved areas, barriers to program delivery and an equitable funding for the centers
2005	The General Assembly charged MHEC with developing an equitable, consistent, and ongoing funding strategy for regional higher education centers in consultation with the higher education community.
2007	MHEC approved revised guidelines that included a funding strategy for those centers that were not part of USM. The funding strategy was implemented for FY 2008 budget requests.



Funding strategy for non USM regional higher education centers

The funding strategy includes:

- *Base allocation* for each center (\$200,000)
- *Incentive funding* for Target FTES (2+2 lower division, upper division and graduate) tied to the inflation adjusted FY 2005 GF appropriations per FTES at the Universities at Shady Grove
- *Lease funding* for centers with leased space that have not received State capital funding support
- *Special funding* for one-time projects or start-up costs

The funding strategy was implemented for FY 2008 budget requests but has not been fully funded to date.



Operating budget General Funds for USM regional higher education centers - fiscal years 2000 – 2008

	FY 2000	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008 (Est. FTES)	Total
Universities at Shady Grove										
Operating: General Funds	\$1,227,000	\$2,327,000	\$2,327,000	\$2,331,000	\$2,331,000	\$2,331,000	\$2,843,380	\$2,991,958	\$7,307,834	\$26,017,172
Total FTES	997	936	1,085	1,231	1,126	1,191	1,192	1,227	1,640	10,624
General Fund Per FTES	\$1,231	\$2,486	\$2,145	\$1,894	\$2,070	\$1,957	\$2,386	\$2,439	\$4,456	\$2,449
USM at Hagerstown										
Operating: General Funds						\$1,000,000	\$2,000,000	\$2,000,000	\$2,040,497	\$7,040,497
Total FTES						78	184	190	232	685
General Fund Per FTES						\$12,821	\$10,870	\$10,510	\$8,788	\$10,286

Shaded areas indicate RHEC was not yet established.

Source: University System of Maryland Office.



Operating budget General Funds for non USM regional higher education centers – fiscal years 2000–2008

	FY 2000	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008 (Est. FTES)	Total 2000 -08
AACC RHEC at Arundel Mills										
Operating: General Funds					\$0	\$0	\$0	\$100,000	\$100,000	\$200,000
FTES					176	87	80	63	82	488
General Fund per FTES					\$0	\$0	\$0	\$1,589	\$1,220	\$410
Eastern Shore										
Operating: General Funds					\$0	\$0	\$0	\$100,000	\$100,000	\$300,000
FTES					4	22	35	15	19	142
General Fund per FTES					\$0	\$0	\$0	\$6,780	\$5,188	\$2,109
Higher Ed Ctr at HEAT										
Operating: General Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000	\$100,000	\$300,000
FTES	111	80	84	114	93	86	105	138	218	1028
General Fund per FTES	\$0	\$0	\$0	\$0	\$0	\$0	\$952	\$727	\$458	\$292
Laurel College Center (Classified as an RHEC in 2005)										
Operating: General Funds						\$0	\$100,000	\$100,000	\$100,000	\$300,000
FTES						25	20	32	110	187
General Fund per FTES						\$0	\$5,000	\$3,125	\$909	\$1,604
Southern Maryland										
Operating: General Funds	\$0	\$85,000	\$368,000	\$100,000	\$92,000	\$92,000	\$350,000	\$350,000	\$350,000	\$1,787,000
FTES	392	500	606	337	304	293	346	348	473	3599
General Fund per FTES	\$0	\$170	\$607	\$297	\$302	\$314	\$1,012	\$1,006	\$740	\$496
Waldorf Center										
Operating: General Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000	\$100,000	\$100,000	\$300,000
FTES	125	111	88	77	187	165	117	152	161	1182
General Fund per FTES	\$0	\$0	\$0	\$0	\$0	\$0	\$854	\$660	\$622	\$254

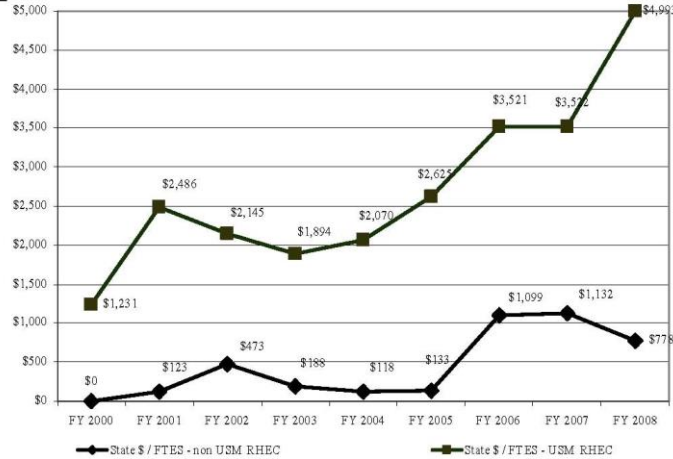
Shaded areas indicate RHEC was not yet established.

Source: RHEC budget requests, MHEC budget



Comparison between State operating funding per RHEC FTES: USM and non USM centers

Average State Appropriations per Bachelor and Graduate Degree Seeking FTES at Maryland Regional
Higher Education Centers (RHEC) USM and non USM Centers FY 2000 - 2008



Source: Regional Higher Education Centers, USMO



Capital Authorizations by the General Assembly: USM Regional Higher Education Centers

Amount				Source
The Universities at Shady Grove				
Bldg 1	1989	\$	3,500,000	General Funds
subtotal		\$	3,500,000	
Bldg 2	1992	\$	240,000	Md Consolidated Capital Bond
	1993		409,000	Md Consolidated Capital Bond
	1994		10,926,604	Md Consolidated Capital Bond
subtotal		\$	11,575,604	
Bldg 3	2000	\$	800,000	Md Consolidated Capital Bond
	2001		1,425,000	General Funds
	2002		1,000,000	Md Consolidated Capital Bond
	2005		50,065,000	USM Rev & Md Consolidated Cap Bonds
	2006		1,000,000	Md Consolidated Capital Bond
	2007		1,200,000	Md Consolidated Capital Bond
subtotal		\$	55,490,000	
USM at Hagerstown				
Bldg 1	1999	\$	150,000	General Funds
	2000		697,000	General Funds
	2001		870,000	General Funds
	2002		12,394,000	Md Consolidated Capital Bond
	2003		1,250,000	Md Consolidated Capital Bond
subtotal		\$	15,361,000	
TOTAL CAPITAL AUTHORIZATIONS USM RHEC			\$	85,926,604

Source: Department of Budget and Management Capital Improvements Authorized by the General Assembly
1984-1998 and 1998-2007

Source: DBM Capital Improvements Authorized by the General Assembly 1984-2007



Capital improvements authorized by the General Assembly: Non USM regional higher education centers

Amount				Source
Eastern Shore Higher Ed Ctr				
Bldg 1	2000	\$	525,000	Md. Consolidated Capital Bond
	2001		6,645,000	General Funds
	2002		600,000	Md. Consolidated Capital Bond
	subtotal	\$	7,770,000	
Higher Ed & Conf Ctr at HEAT				
Bldg 1	1990	\$	750,000	HCHEFL (Bond Bill)
	1996		1,000,000	Md. Consolidated Capital Bond
	subtotal	\$	1,750,000	
Southern Md Higher Ed Ctr				
Bldg 1	1990	\$	400,000	Md. Consolidated Capital Bond
	1992		262,500	Md. Consolidated Capital Bond
	1993		2,350,000	Md. Consolidated Capital Bond
	subtotal		3,012,500	
Bldg 2	1998		300,000	General Funds
	2000		5,177,000	Md. Consolidated Capital Bond
	2001		1,368,000	General Funds
	subtotal	\$	6,845,000	
TOTAL CAPITAL AUTHORIZATION NON USM RHECs				\$19,377,500

Note:

- 1) The Waldorf Higher Education Center leases a facility. Funds have been requested but were not authorized.
- 2) The Laurel College Center leases a facility. No funds have been requested to date.
- 3) The AACC Regional Higher Education Center at Arundel Mills leases a facility. No funds have been requested to date.

Source: DBM Capital Improvements Authorized by the General Assembly 1984-2007



Degree levels and sample of programs offered at the regional higher education centers

RHEC DEGREE LEVELS OFFERED	PROGRAMS OF STUDY
AACC Regional Higher Education Center at Arundel Mills <i>Associate's – Master's & graduate level certificates</i>	Business Administration & Management, Information Technologies, Education, Nursing, Human Resources
Eastern Shore Higher Education Center <i>Associate's – Doctorate</i>	Social Work, Elementary & Early Childhood Development Education, Public School Administration, Business Administration, Career and Technology Education, Criminal Justice
Higher Education & Conference Center at HEAT <i>Bachelor's – Doctoral & graduate level certificates</i>	Business Mgmt, Education (early childhood – higher education, including special education), Police Executive Leadership, Information Technology, Nursing, Engineering, Biotechnology, Computer Science, Environmental Science, Human Resources
Laurel College Center <i>Associate's – Master's</i>	Education, Business Admin, Information Technology, Criminal Justice
Southern Maryland Higher Education Center <i>Bachelor's – Doctorate & graduate level certificates</i>	Engineering, Technical Management, Education, Business Admin, Social Work, Nursing, Counseling, Human Resources, Systems Engineering, Info Technology, Criminal Justice, Interdisciplinary Studies, Engineering Technology
The Universities at Shady Grove <i>Bachelor's – Doctorates & certificate programs</i>	Biotechnology, Accounting, Business, Marketing, Human Resources, Communications, Computer Sci & Tech, Information Systems Mgmt, Construction Mgmt, Health Systems Mgmt, Emergency Mgmt, Homeland Security, Investigative Forensics, History, Psychology, Respiratory Therapy, Social Work, Early Childhood Education, Simulation & Digital Entertainment
USM at Hagerstown <i>Bachelor's – Master's & certificate programs</i>	Accounting, Business Administration, Information Systems, Early Childhood Education, Nursing, Criminal Justice, Investigative Forensics, Social Science, Sociology, Social Work, Liberal Studies, Engineering
Waldorf Higher Education Center <i>Associate's – Bachelor's degrees</i>	Accounting, Business Admin, Mgmt., Communication, Computer Science, Information Systems, Criminal Justice, Humanities, History, Social Science, Political Science, Environmental Science & Mgmt, Fire Science, Legal Studies