



# Fitchburg State University

## Board of Trustees Joint Meeting with the Fitchburg State University Foundation

Amended on January 23, 2019 at 8:47 AM EST

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### Date and Time

Tuesday January 29, 2019 at 8:00 AM EST

### Location

Fitchburg State Theater Block, 717 Main Street, Fitchburg, MA 01420

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Notice of a Meeting of the Fitchburg State University Board of Trustees  
Tuesday, January 29, 2019, at 8:00 a.m. at the Fitchburg State University ideaLab in the Theater Block, 717 Main Street, Fitchburg, MA 01420.

This meeting will be a joint meeting with the Fitchburg State University Foundation

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### Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>8:00 AM</b>
A. Record Attendance and Guests			1 m
B. Call the Meeting to Order		Anna Clementi	1 m
C. Public Comments			3 m
D. Approve Minutes from the Board of Trustees October 30, 2018 Meeting - VOTE (18-18/19)	Approve Minutes		2 m
Approve minutes for Board of Trustees on October 30, 2018			
E. Approve October 4, 2018 minutes from the Fitchburg State Foundation Meeting (FB-01-190129)	Vote		2 m
<b>II. Institutional Advancement</b>			<b>8:09 AM</b>
A. Presentation by Suzanne Battit	FYI		20 m
<b>III. Foundation Committee Reports</b>			<b>8:29 AM</b>
A. Audit Committee - 990 Tax Review - VOTE- (FB-02-190129)	FYI		5 m

<b>IV. Notifications</b>		<b>8:34 AM</b>
A. Personnel Actions (N04- 18/19)	FYI	2 m
B. Financial Statements	FYI	2 m
 <b>V. President's Report</b>		 <b>8:38 AM</b>
A. Collective Bargaining	FYI	5 m
B. Winter Commencement	FYI	2 m
C. Opening of the Spring Semester	FYI	5 m
D. Financial Audit Restate	FYI	3 m
E. ADA Audit Update	FYI	5 m
F. Urban Agenda Grant	FYI	3 m
G. NECHE Approval of AUAI International School	FYI	3 m
H. Beginning of Strategic Plan Process	FYI	5 m
I. News Articles	FYI	1 m
 <b>VI. Closing Items</b>		 <b>9:10 AM</b>
A. Adjourn Meeting	Vote	1 m

## Cover Sheet

### Approve Minutes from the Board of Trustees October 30, 2018 Meeting - VOTE (18-18/19)

**Section:** I. Opening Items  
**Item:** D. Approve Minutes from the Board of Trustees October 30, 2018 Meeting - VOTE (18-18/19)  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Board of Trustees on October 30, 2018 VOTE Minutes.pdf



# Fitchburg State University

## Minutes

### Board of Trustees

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#### **Date and Time**

Tuesday October 30, 2018 at 10:00 AM

#### **Location**

Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

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Notice of a meeting of the Fitchburg State University Board of Trustees on Tuesday, October 30, 2018 at 10:00 a.m. in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

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#### **Trustees Present**

A. Clementi, A. Ramos, Jr., D. Irving, D. Phillips, D. Tiernan, F. O'Donnell, L. Barrieau

#### **Trustees Absent**

C. Stimpson, C. Stover, D. Nieto

#### **Ex-Officio Members Present**

R. Lapidus

#### **Non Voting Members Present**

R. Lapidus

#### **Guests Present**

Alberto Cardelle, Aruna Krishnamurthy, Cathy Canney, G. Doiron, Jessica Murdoch, Mark Snyder, Mary Beth McKenzie, Matthew Noyes, Rala Diakate, S. Swartz, Samantha Beauchamp, Sarah Kielty, Yvonne Malcolm

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### **I. Opening Items**

#### **A. Record Attendance and Guests**

Jay Kaufman, Retired Audit Partner, Consultant, joined the meeting by telephone.

**B. Call the Meeting to Order**

D. Irving called a meeting of the board of trustees of Fitchburg State University to order on Tuesday Oct 30, 2018 @ 10:04 AM at Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420.

**C. Public Comments**

Dr. Aruna Krishnamurthy, MSCA Chapter President, read a prepared statement urging the Board and the administration to support the faculty contract.

**D. Approve Minutes from the September 11, 2018 meeting - VOTE (11-18/19)**

D. Phillips made a motion to approve minutes from the Board of Trustees on 09-11-18.

F. O'Donnell seconded the motion.

The board **VOTED** unanimously to approve the motion.

**II. Finance and Administration**

**A. Presentation by the auditors**

The auditors from Cohn Reznick were introduced.

Mr. Jay Kaufman, Retired Audit Partner - Consultant

Ms. Sarah Kielty, Audit Senior

Mr. Mark Snyder, Audit Senior Manager

Ms. Karen Smith, Audit Partner was scheduled to attend but her air travel was delayed.

J. Kaufman thanked the board for the opportunity to present the FY2018 audit. He presented and discussed the Financial Statements for the university. There were no findings. There was no formal management letter issued. All the Financial statements, are being issued with a clean, unmodified opinion. He thanked Jay Bry, Yvonne Malcolm, consultant Cathy Daggett for their hard work. The auditors reviewed a number of prepared PowerPoint slides. They touched on the statements of revenues, expenses and changes in net position; and the statements of cash flow. Mr. Kaufman briefly highlighted some of the footnotes and disclosures and assets. He commented that the university is very diligent in its fiscal management. A discussion ensued.

D. Phillips, Finance & Administration Chair, stated the committee met prior to the Board meeting that included representation from the Foundation Supporting Organization and the Foundation Audit Committee. They had an in-depth discussion and various questions were answered. It was a thorough presentation and the committee approved the audit.

President Lapidus thanked the auditors for their work and the detailed presentation. He next commended Mr. Jay Bry and Ms. Yvonne Malcolm as well as the staff in Financial Services for their day in and day out hard work. The complete set of financial documents can be found in the board packet for review.

**B. FY2018 Audit - VOTE (12-18/19)**

D. Phillips made a motion to accept the FY2018 audit as recommended by the Finance Committee.

A. Clementi seconded the motion.

The board **VOTED** unanimously to approve the motion.

**C. Intent to Renovate and Bond Issuance - Holmes Dining Dish Room Project - VOTE (13-18/19)**

President Lapidus explained the intent to renovate the dish room in Holmes Dining Hall. The area is deteriorating and the equipment has reached its useful life. Repairs are frequent and result in stress on dining operations. There would be a slight reconfiguration of the space as the plans are developed to accommodate the new equipment. There was a discussion.

D. Phillips made a motion to declare the official intent to renovate the Fitchburg State University Holmes Dining Dish Room. The dish room equipment and finishes in the Holmes Dining Hall have reached the end of their service life and need replacement. The total estimated project cost is \$1,500,000. It is requested that the Board of Trustees of Fitchburg State University authorize the MSCBA on behalf of Fitchburg State University to issue a bond in the amount of \$1,675,000 for the Holmes Dining Dish Room Project.

F. O'Donnell seconded the motion.

The board **VOTED** unanimously to approve the motion.

**D. Intent to Renovate and Bond Issuance - Recreation Center Roof Project - VOTE (14-18/19)**

President Lapidus discussed the need to replace the aging roof on the Recreation Center. There are currently locations that regularly leak.

D. Phillips made a motion to to declare the official intent to renovate the Fitchburg State University Recreation Center Roof. The Recreation Center was built in 2001 and its roofing systems are now past their expected useful life. The total estimated project cost is \$1,100,000. It is requested that the Board of Trustees of Fitchburg State University authorize the MSCBA on behalf of Fitchburg State University to issue a bond in the amount of \$1,230,000 for the Recreation Center Roof Project.

F. O'Donnell seconded the motion.

The board **VOTED** unanimously to approve the motion.

**E. Transfer from Reserve Funds - VOTE (15-18/19)**

President Lapidus stated that the University continues to proactively address deferred maintenance and be increasingly energy efficient. In support of this agenda, the university requests a transfer of funds to continue to cover these costs. The state has offered matching funds to assist with the University's. There was a discussion.

D. Phillips made a motion to approve the president's recommendation to transfer \$788,000 from reserves to the capital project fund (CPRO) as a match to Commonwealth deferred maintenance funds for the following projects: Recreation Center pathway improvements and Edgerly and Thompson window replacements, as well as to support continued progress on the theater block development project.

A. Clementi seconded the motion.

The board **VOTED** unanimously to approve the motion.

**III. Sabbatical Requests**

**A. Act on President's recommendation for faculty sabbatical requests - VOTE (16-18/19)**

The President presented sabbatical requests. He called attention to the summary of proposals in the packet. He emphasized that leaves are granted on the basis of academic quality of the proposal, as well as other criteria. Each request followed the specified sabbatical process which includes review by the department chairs and the provost prior to the presidents' support.

L. Barrieau made a motion to grant the faculty sabbatical leaves for the academic year 2019-2020.

D. Phillips seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **IV. AUIA International Summer School Partnership**

##### **A. Approve partnership with the AUIA International Summer School - VOTE (17-18/19)**

President Lapidus introduced a new program opportunity that includes a partnership with the AUIA International Summer School. This partnership requires approval from the accreditation authority, the New England Commission of Higher Education (NECHE).

Dr. Cardelle and Dr. Canney were introduced to explain the new program. A. Cardelle said it is a wonderful opportunity for students and faculty to have an international experience and to expose our university to the international world. C. Canney stated that assuming board approval; the campus would submit the required documents to NECHE for review and approval. The university has been exploring the partnership with the AUIA International Summer School for the last year. They recruit students who are already attending school in the United States and offer summer courses in China. Faculty are aware of the program and have expressed interest in participating. The campus has the infrastructure to support this program. While the program would generate a small revenue stream, the main purpose is to provide international learning opportunities for faculty and students. Scholarships are available for students. Vetting of other institutions already partnering with AUIA were positive. There was a discussion

A. Ramos, Jr. made a motion to approve Fitchburg State University partnering with AUIA International Summer School to offer courses in China.

F. O'Donnell seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **V. Notifications**

##### **A. Personnel Actions (N03-18/19)**

The personnel actions were submitted for informational purposes.

#### **VI. Chair's Report**

##### **A. Dashboard**

Chairman Irving updated the board using the financial dashboard. He noted the value in reviewing trend data. He discussed the current trends. He noted that the University is receiving less state appropriations and that student fees often are required to offset the increasing costs of running the institution. He noted that University ratios are good and commented on the positive balance in reserves.

#### **VII. President's Report**

##### **A. Collective Bargaining**

President Lapidus said the faculty contract process continues to move slowly and that there would be a hearing at the Department of Labor Relations. The contract

currently sits with the Board of Higher Education, so progress will be shared as it is released by the Board Higher Education Commissioner. The APA and AFSCME contracts have been settled and the campus is waiting for the state to fund the contracts. Once this happens, the University will be able to release retro pay to those in these two bargaining units.

**B. State Audit**

President Lapidus informed the board of the current state audit taking place. This group has been visiting campus approximately every three years and reviewing different areas. This year they are looking at ADA compliance. The auditors have been here for a couple of weeks and the University is not sure of the duration of the audit. They are primarily looking at academic accommodations and emergency evacuation plans. Recommendations for improvements will be shared as they become available. There was a discussion.

**C. Open House update**

President Lapidus stated that two new programs are working their way through the higher education review process. Both the Educational Studies program and Environmental Public Health program have moved through faculty governance, and external reviewers have provided feedback as well. Reviews have been positive. Once all documentation is in order, the proposals moves to the Board of Higher Education for review and final approval.

**D. Update on Educational Studies and Environmental Public Health Programs**

President Lapidus stated the new programs are working their way through the system now. The Education Studies and Environmental Public Health Programs both went through faculty governance, and we had reviews from external reviewers. They were impressed with what we were doing. Once the reviewers provide their report, we summarize that information that goes to the Board of Higher Education for review and final vote.

**E. Falcon Bazaar Ribbon Cutting**

President Lapidus informed the board of the Ribbon Cutting for the Falcon Bazaar food bank. There are identified food insecurity needs on campus and every effort will be made to address them as best we can. Many other universities are setting up similar food banks.

**F. Homecoming update**

A brief presentation was made on homecoming activities and participation.

**G. News Articles**

President Lapidus mentioned the collaboration with Worcester County District Attorney, Joseph Early on a grant that is tackling the opioid epidemic. The grant explores the effectiveness of diversion programs. Fitchburg State is pleased to be part of this important grant. The president updated the board on the Vice President for Institutional Advancement search and the Theater Block project. There was a discussion.

A. Ramos updated the Board on Student Government activities.

**VIII. Closing Items**



**A. Adjourn Meeting**

A. Ramos, Jr. made a motion to adjourn the meeting.

D. Phillips seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 11:04 AM.

Respectfully Submitted,

D. Phillips

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: January 29, 2019
FROM: The President	REQUEST NUMBER: 18-18/19
SUBJECT: October 30, 2018 Board Meeting Minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the October 30, 2018 Board Meeting

## Cover Sheet

### Approve October 4, 2018 minutes from the Fitchburg State Foundation Meeting (FB-01-190129)

**Section:** I. Opening Items  
**Item:** E. Approve October 4, 2018 minutes from the Fitchburg State Foundation Meeting (FB-01-190129)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 20190129 Board Action Request FB-01.pdf  
Foundation Minutes Oct. 4, 2018.pdf



160 Pearl Street  
Fitchburg, MA 01420-2697  
Tel 978.665.4555 ■ Fax 978.665.3376

**REQUEST FOR BOARD ACTION**

<b>TO:</b> Foundation Board of Directors	<b>DATE:</b> January 29, 2019
<b>FROM:</b> The President	<b>REQUEST NUMBER:</b> FB-01-190129
<b>SUBJECT:</b> Minutes	

It is requested that the Fitchburg State University Foundation, Inc. Board of Directors accept the minutes for the October 04, 2018 meeting.

## Meeting Minutes Foundation Board

Thursday, October 4, 2018  
Presidents' Hall, Aldo and Anna Mazzaferro Center

**Present:** President Richard Lapidus, Jay Bry, Alberto Cardelle, Cindy Carroll, Martin Connors, Nicholas DiNinno, Anthony Emerson, Scott Foster, Richard Healey, John Mahan, Anthony Mercadante, Nicholas Smith, Karen Spinelli

**Regrets:** Don Irving, John O'Brien

**Ex-Officio:** Christopher Hendry

**Also Attending:** Shane Franzen, Heather Mazzaferro, Henry Parkinson, Jasmine Yang

### Welcome and Opening Remarks

The meeting was called to order at 8:00 a.m. by President Richard Lapidus, who welcomed the board and reviewed the agenda. Two new members were introduced to the board: Nicholas Smith and Karen Spinelli.

### Approval of Minutes from June 21, 2018

President Lapidus requested a motion to accept the minutes for the June 21, 2018 Foundation Board Meeting.

Upon a motion made by President Lapidus and seconded by Anthony Mercadante, the directors voted unanimously (13-0) to approve the June 21, 2018 Foundation Board of Directors Meeting Minutes. (Request FB-01-100418)

### President's Goals FY19

President Lapidus presented his goals for FY19, similar to preceding years, but with one addition to oversee the campus branding exercise. Marketing is soliciting feedback on perceptions of Fitchburg State in order to stretch the brand and redesign the website.

### Food Insecurity Program

Hank Parkinson introduced the Food Insecurity Program. The committee for the program has approximately 30 members. Working with the Wisconsin Hope Lab, the student body was surveyed as part of a country-wide study. The survey questioned a student's personal concerns about food and housing. The incentive to respond to the survey was a chance at winning one of ten \$100 gift cards. Nonetheless, the number of responses received was low.

Shane Franzen introduced the Falcon Bazaar in the Hammond Campus Center G15. The Falcon Bazaar is a pantry area which stores food and hygiene necessities for students in need.

Heather Mazzaferro, the former manager of Ginny's Food Pantry, introduced the Green Bag Initiative. Reusable green bags are being distributed across campus for faculty and staff to donate food and hygiene necessities to stock the Falcon Bazaar.

Hank explained Swipe It Forward which gives a student the opportunity to donate one of their guest meals to someone in need. A total of 210 meals were donated and approximately 50 were given. One student was provided ten meals which would help her last until her financial aid posted and she would be refunded.

There are two groups, SNAP and Chartwells, which the committee is currently reaching out to, to get involved. Their future hopes are to increase fundraising efforts and eventually, tackle housing insecurity. Hank is reaching out to Alicia Cianciola in the Grants department for assistance.

## **Campus Updates**

### **Enrollment**

There are 1050 new undergraduates enrolled this year, replacing the 1075 graduates of last year. 33% of the new undergraduates are first generation students. 36% of the students identify as under-represented.

### **New Hires**

Fitchburg State welcomes a new Director of Housing and Residential Services, Christopher Medley, and Matt Burke, the Director of Athletics.

### **New Programs**

Fitchburg State received a grant from the DHE to work in partnership with community colleges around the area to give registered nurses the opportunity to get their Bachelor of Science degrees while continuing to work. RN to BS in Nursing is one of the university's fully online programs.

The Criminal Justice 4+1 Program had their first class graduate on September 13. Students who wish to be certified as a police officer can complete the program within 5 years. They receive their bachelor's, master's, and upon completion, their certification by the Municipal Police Training Committee. Currently, there are 250 students in the program.

Fitchburg State is collaborating with the Worcester District Attorney's office to champion a program against the opioid epidemic. Resources would be directed towards first time offenders and individuals suffering from substance abuse, by means of sending them to rehabilitation in an effort to prevent imprisonment and change of life.

### **Theater Block Update**

The Idea Lab is complete, but a decision is yet to come on a development company for the entirety of the Theater Block Campaign.

## **Advancement**

Chris Hendry presented the Golf tournament P & L, noting the drop in numbers caused by vendors the University is no longer doing business with. He continued by expressing his concern for the future of the annual golf tournaments. They are excellent for fundraising, as well as, friendraising, but they are labor intensive and the return is decreasing. There is an oversaturation of golf tournaments in the area.

## **Other Business**

President Lapidus bid farewell to Chris and thanked him for his 13 years of service.

## **Adjournment**

With no further business, President Lapidus requested a motion to adjourn the October 4, 2018 Foundation Board of Directors Meeting.

The directors voted unanimously (13-0) to adjourn the October 4, 2018 Foundation Board of Directors Meeting.

The meeting adjourned at 9:10 a.m.

*Respectfully submitted by Jasmine Yang.*

# Cover Sheet

## Audit Committee - 990 Tax Review - VOTE- (FB-02-190129)

**Section:** III. Foundation Committee Reports  
**Item:** A. Audit Committee - 990 Tax Review - VOTE- (FB-02-190129)  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** 20190129 Board Action Request FB-02.pdf  
Foundation 990's.pdf



160 Pearl Street  
Fitchburg, MA 01420-2697  
Tel 978.665.4555 ■ Fax 978.665.3376

**REQUEST FOR BOARD ACTION**

<b>TO:</b> Foundation Board of Directors	<b>DATE:</b> January 29, 2019
<b>FROM:</b> The President	<b>REQUEST NUMBER:</b> FB-02-190129
<b>SUBJECT:</b> Form 990	

It is requested that the Fitchburg State University Foundation, Inc. Board of Directors review and accept the 2017 report for FY18 Return of Organization Exempt from Income Tax Form 990.



Form **990**

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

**A** For the 2017 calendar year, or tax year beginning **July 1**, 2017, and ending **June 30**, 20 **18**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>Fitchburg State University Foundation, Inc.</b>		<b>D</b> Employer identification number <b>04-2661048</b>
	Doing business as		<b>E</b> Telephone number <b>978-665-3171</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>c/o Jay Bry, 160 Pearl Street</b>		<b>G</b> Gross receipts \$
City or town, state or province, country, and ZIP or foreign postal code <b>Fitchburg, MA 01420</b>		<b>F</b> Name and address of principal officer:	

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) ◀ (insert no.)  4947(a)(1) or  527

**J** Website: ▶ **H(a)** Is this a group return for subordinates?  Yes  No

**K** Form of organization:  Corporation  Trust  Association  Other ▶ **L** Year of formation: **M** State of legal domicile: **MA**

**H(b)** Are all subordinates included?  Yes  No  
If "No," attach a list. (see instructions)

**H(c)** Group exemption number ▶

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <u>To support the educational endeavors of Fitchburg State University</u>
	<b>2</b> Check this box <input checked="" type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) . . . . . <b>3</b> <b>15</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) . . . . . <b>4</b> <b>12</b>
	<b>5</b> Total number of individuals employed in calendar year 2017 (Part V, line 2a) . . . . . <b>5</b> <b>0</b>
	<b>6</b> Total number of volunteers (estimate if necessary) . . . . . <b>6</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 . . . . . <b>7a</b> <b>54,197</b>
	<b>b</b> Net unrelated business taxable income from Form 990-T, line 34 . . . . . <b>7b</b> <b>42,904</b>

		Prior Year	Current Year
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .	<b>1,099,467.00</b>	<b>984,797.00</b>
	<b>9</b> Program service revenue (Part VIII, line 2g) . . . . .	<b>262,454.00</b>	<b>104,839.00</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .	<b>668,564.00</b>	<b>1,284,142.00</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . . .	<b>(1,127.00)</b>	<b>(8,435.00)</b>
	<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>2,029,358.00</b>	<b>2,365,343.00</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3) . . . . .	<b>575,831.00</b>	<b>1,112,944.00</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .		
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)		
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .		
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶		
	<b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e) . . . . .	<b>822,679.00</b>	<b>368,073.00</b>
<b>18</b> Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) . . . . .	<b>1,398,510.00</b>	<b>1,481,017.00</b>	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12 . . . . .	<b>630,848.00</b>	<b>884,326.00</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16) . . . . .	<b>19,369,073.00</b>	<b>21,173,145.00</b>
	<b>21</b> Total liabilities (Part X, line 26) . . . . .	<b>619,210.00</b>	<b>818,294.00</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20 . . . . .	<b>18,749,863.00</b>	<b>20,354,851.00</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer	Date
	Type or print name and title	

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶	Firm's EIN ▶			
	Firm's address ▶	Phone no.			

May the IRS discuss this return with the preparer shown above? (see instructions) . . . . .  Yes  No

**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III

**1** Briefly describe the organization's mission:  
To support the educational endeavors of Fitchburg State University

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No  
If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No  
If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ 779,362.00 including grants of \$ 746,945.00) (Revenue \$ )

**4b** (Code: ) (Expenses \$ 405,390.00 including grants of \$ ) (Revenue \$ 6,352.00)

**4c** (Code: ) (Expenses \$ 63,980.00 including grants of \$ ) (Revenue \$ 44,293.00)

**4d** Other program services (Describe in Schedule O.)  
(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses **\$1,248,732.00**

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? . . . . .	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>c</b> Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>12 a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>14 a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV. . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV. . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions) . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II . . . . .</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III . . . . .</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>20 a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H . . . . .</i>		✓
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II . . . . .</i>	✓	
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III . . . . .</i>	✓	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J . . . . .</i>	✓	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .</i>		✓
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I . . . . .</i>		✓
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I . . . . .</i>		✓
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II . . . . .</i>		✓
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III . . . . .</i>		✓
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>		✓
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>		✓
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>		
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M . . . . .</i>	✓	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M . . . . .</i>		✓
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I . . . . .</i>		✓
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II . . . . .</i>		✓
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I . . . . .</i>		✓
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .</i>	✓	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .		✓
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2 . . . . .</i>		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2 . . . . .</i>	✓	
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI . . . . .</i>		✓
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	✓	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
<b>1b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
<b>1c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	✓	
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
<b>2b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?	✓	
<b>3b</b>	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	✓	
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		✓
<b>b</b>	If "Yes," enter the name of the foreign country: _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		✓
<b>5b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		✓
<b>5c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		✓
<b>6b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	✓	
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	✓	
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		✓
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year		
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		✓
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		✓
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the sponsoring organization make any taxable distributions under section 4966?		
<b>b</b>	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12	10a	N/A
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	N/A
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders	11a	N/A
<b>b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	N/A
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	N/A
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.	13a	
<b>b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	N/A
<b>c</b>	Enter the amount of reserves on hand	13c	N/A
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year?	14a	✓
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b	

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.  
 Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year . . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
<b>1b</b>	Enter the number of voting members included in line 1a, above, who are independent . . . . .		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .		<input checked="" type="checkbox"/>
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . . . . .		<input checked="" type="checkbox"/>
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		<input checked="" type="checkbox"/>
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .		<input checked="" type="checkbox"/>
<b>6</b>	Did the organization have members or stockholders? . . . . .		<input checked="" type="checkbox"/>
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .		<input checked="" type="checkbox"/>
<b>7b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .		<input checked="" type="checkbox"/>
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>8a</b>	The governing body? . . . . .	<input checked="" type="checkbox"/>	
<b>8b</b>	Each committee with authority to act on behalf of the governing body? . . . . .	<input checked="" type="checkbox"/>	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O . . . . .		<input checked="" type="checkbox"/>

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates? . . . . .		<input checked="" type="checkbox"/>
<b>10b</b>	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	<input checked="" type="checkbox"/>	
<b>11b</b>	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	<input checked="" type="checkbox"/>	
<b>12b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	<input checked="" type="checkbox"/>	
<b>12c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done . . . . .	<input checked="" type="checkbox"/>	
<b>13</b>	Did the organization have a written whistleblower policy? . . . . .	<input checked="" type="checkbox"/>	
<b>14</b>	Did the organization have a written document retention and destruction policy? . . . . .	<input checked="" type="checkbox"/>	
<b>15</b>	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>15a</b>	The organization's CEO, Executive Director, or top management official . . . . .		<input checked="" type="checkbox"/>
<b>15b</b>	Other officers or key employees of the organization . . . . .		<input checked="" type="checkbox"/>
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		<input checked="" type="checkbox"/>
<b>16b</b>	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed ► Massachusetts, New York
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website  Another's website  Upon request  Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records: ►  
 Jay Bry, 160 Pearl Street, Fitchburg, MA 01420 (978) 665-3171

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Cindy Carroll Director	0	✓					0	0	0	
(2) Martin Connors, Jr. Director	0	✓					0	0	0	
(3) Dr. Nicholas DiNinno, Jr. Director	0	✓					0	0	0	
(4) Anthony R. Emerson Director	0	✓					0	0	0	
(5) Scott W. Foster Director	0	✓					0	0	0	
(6) Richard H. Healey Director	0	✓					0	0	0	
(7) Donald R. Irving Director	0	✓					0	0	0	
(8) John Mahan Director	0	✓		✓			0	0	0	
(9) Anthony J. Mercadante Director	0	✓		✓			0	0	0	
(10) John J. O'Brien Director	0	✓					0	0	0	
(11) Nicholas D. Smith Director	0	✓					0	0	0	
(12) Karen J. Spinelli Director	0	✓					0	0	0	
(13) Richard Lapidus President	40	✓		✓	✓		0	239,843.00	24,125.00	
(14) Jay D. Bry V. P. Finance & Administration	40	✓			✓		0	154,749.00	7,731.00	

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)**

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) Alberto Cardelle V. P. Academic Affairs	40	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			0	173,552.00	18,125.00
(16) Christopher Hendry (former V. P. Advancement)	40				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	154,529.00	28,742.00
(17) Stephen Swartz Chief Information Officer	40					<input checked="" type="checkbox"/>		0	159,626.00	25,853.00
(18) Michael Greenwood Professor	40					<input checked="" type="checkbox"/>		0	152,984.00	14,187.00
(19) Charles Sides Professor	40					<input checked="" type="checkbox"/>		0	159,673.00	28,742.00
(20) Joseph McAloon Professor	40					<input checked="" type="checkbox"/>		0	147,921.00	7,731.00
(21)										
(22)										
(23)										
(24)										
(25)										
<b>1b Sub-total</b>								0	948,285.00	123,380.00
<b>c Total from continuation sheets to Part VII, Section A</b>								0	394,592.00	31,856.00
<b>d Total (add lines 1b and 1c)</b>								0	1,342,877.00	155,236.00

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0.00**

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		<input checked="" type="checkbox"/>
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	<input checked="" type="checkbox"/>	
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		<input checked="" type="checkbox"/>

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
None		

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization



Form 990 (2017)

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants and Other Similar Amounts	1a	Federated campaigns . . . . .	1a	2,114.00				
	b	Membership dues . . . . .	1b					
	c	Fundraising events . . . . .	1c	11,685.00				
	d	Related organizations . . . . .	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	970,998.00				
	g	Noncash contributions included in lines 1a-1f: \$		0.00				
	h	<b>Total.</b> Add lines 1a-1f . . . . . ▶		984,797.00				
Program Service Revenue				<b>Business Code</b>				
	2a	Commissions		524298	54,197.00	54,197.00		
	b	Alumni and Cultural Events		713990	44,290.00	44,290.00		
	c	Department programs		900099	6,352.00	6,352.00		
	d							
	e							
	f	All other program service revenue .						
	g	<b>Total.</b> Add lines 2a-2f . . . . . ▶		104,839.00				
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) . . . . . ▶		341,841.00			341,841.00	
	4	Income from investment of tax-exempt bond proceeds ▶						
	5	Royalties . . . . . ▶		0.00			0.00	
	6a	Gross rents . . . . .	(i) Real	(ii) Personal				
	b	Less: rental expenses						
	c	Rental income or (loss)						
	d	Net rental income or (loss) . . . . . ▶						
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	b	Less: cost or other basis and sales expenses . . . . .						
c	Gain or (loss) . . . . .							
d	Net gain or (loss) . . . . . ▶			942,301.00		942,301.00		
8a	Gross income from fundraising events (not including \$ <u>11,685.00</u> of contributions reported on line 1c). See Part IV, line 18 . . . . . a			26,460.00				
		b	Less: direct expenses . . . . . b	34,955.00				
		c	Net income or (loss) from fundraising events . ▶	(8,495.00)			(8,495.00)	
9a	Gross income from gaming activities. See Part IV, line 19 . . . . . a							
		b	Less: direct expenses . . . . . b					
		c	Net income or (loss) from gaming activities . . ▶					
10a	Gross sales of inventory, less returns and allowances . . . . . a							
		b	Less: cost of goods sold . . . . . b					
		c	Net income or (loss) from sales of inventory . . ▶					
Miscellaneous Revenue			<b>Business Code</b>					
11a				60.00		60.00		
b								
c								
d	All other revenue . . . . .							
e	<b>Total.</b> Add lines 11a-11d . . . . . ▶			60.00				
12	<b>Total revenue.</b> See instructions. . . . . ▶			2,365,343	50,642.00	54,197.00	1,275,707.00	

Form 990 (2017)

Form 990 (2017)

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .	685,292.00	685,292.00		
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .	327,652.00	327,652.00		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .				
4 Benefits paid to or for members . . . . .				
5 Compensation of current officers, directors, trustees, and key employees . . . . .				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .				
7 Other salaries and wages . . . . .				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits . . . . .				
10 Payroll taxes . . . . .				
11 Fees for services (non-employees):				
a Management . . . . .				
b Legal . . . . .				
c Accounting . . . . .	15,198.00		15,198.00	
d Lobbying . . . . .				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees . . . . .	107,210.00		107,210.00	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .				
12 Advertising and promotion . . . . .				
13 Office expenses . . . . .	42,823.00	32,257.00	8,811.00	1,755.00
14 Information technology . . . . .	30,300.00		30,300.00	
15 Royalties . . . . .				
16 Occupancy . . . . .				
17 Travel . . . . .	4,923.00	4,890.00		33.00
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings . . . . .	37,739.00	28,748.00	350.00	8,641.00
20 Interest . . . . .	16,410.00		16,410.00	
21 Payments to affiliates . . . . .				
22 Depreciation, depletion, and amortization . . . . .	107,807.00	96,537.00	11,270.00	
23 Insurance . . . . .	21,052.00		21,052.00	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Community Services	32,418.00	32,418.00		
b Speaker and Cultural Services	38,619.00	38,619.00		
c Outside Services	1,884.00	1,884.00		
d				
e All other expenses	11,690.00	435.00	10,159.00	1,096.00
25 <b>Total functional expenses.</b> Add lines 1 through 24e	1,481,017.00	1,248,732.00	220,760.00	11,525.00
26 <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A)		(B)
		Beginning of year		End of year
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	474.00	<b>1</b>	6,597.00
	<b>2</b> Savings and temporary cash investments . . . . .	1,343,180.00	<b>2</b>	1,240,126.00
	<b>3</b> Pledges and grants receivable, net . . . . .	76,185.00	<b>3</b>	46,469.00
	<b>4</b> Accounts receivable, net . . . . .	172,305.00	<b>4</b>	94,179.00
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L . . . . .		<b>6</b>	
	<b>7</b> Notes and loans receivable, net . . . . .		<b>7</b>	
	<b>8</b> Inventories for sale or use . . . . .		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges . . . . .	23,247.00	<b>9</b>	44,696.00
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	1,399,437.00		
	<b>b</b> Less: accumulated depreciation . . . . .	912,198.00	<b>10c</b>	487,239.00
	<b>11</b> Investments—publicly traded securities . . . . .	16,861,905.00	<b>11</b>	18,789,504.00
	<b>12</b> Investments—other securities. See Part IV, line 11 . . . . .		<b>12</b>	
	<b>13</b> Investments—program-related. See Part IV, line 11 . . . . .		<b>13</b>	
	<b>14</b> Intangible assets . . . . .		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 . . . . .	296,731.00	<b>15</b>	464,334.00
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	19,369,073.00	<b>16</b>	21,173,145.00	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	16,409.00	<b>17</b>	32,124.00
	<b>18</b> Grants payable . . . . .		<b>18</b>	
	<b>19</b> Deferred revenue . . . . .	17,200.00	<b>19</b>	43,475.00
	<b>20</b> Tax-exempt bond liabilities . . . . .		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .	385,211.00	<b>23</b>	542,278.00
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D . . . . .	200,390.00	<b>25</b>	200,417.00
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	619,210.00	<b>26</b>	818,294.00
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here ▶ and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets . . . . .	2,851,301.00	<b>27</b>	2,937,143.00
	<b>28</b> Temporarily restricted net assets . . . . .	6,121,756.00	<b>28</b>	7,214,742.00
	<b>29</b> Permanently restricted net assets . . . . .	9,776,806.00	<b>29</b>	10,202,966.00
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here ■ and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds . . . . .		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund . . . . .		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds . . . . .		<b>32</b>	
<b>33</b> Total net assets or fund balances . . . . .	18,749,863.00	<b>33</b>	20,354,851.00	
<b>34</b> Total liabilities and net assets/fund balances . . . . .	19,369,073.00	<b>34</b>	21,173,145.00	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	<b>2,365,343.00</b>
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	<b>1,481,017.00</b>
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	<b>884,326.00</b>
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	<b>18,749,863.00</b>
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	<b>720,662.00</b>
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	<b>20,354,851.00</b>

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? . . .  
 If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? . . . . .  
 If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . .  
 If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
<b>2a</b>		✓
<b>2b</b>	✓	
<b>2c</b>	✓	
<b>3a</b>		✓
<b>3b</b>		

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Name of the organization <b>Fitchburg State University Foundation, Inc.</b>	Employer identification number <b>04-2661048</b>
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**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives: (1) more than 33<sup>1</sup>/<sub>3</sub>% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33<sup>1</sup>/<sub>3</sub>% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations . . . . .
- g **Provide the following information about the supported organization(s).**

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .	766,695.00	887,599.00	593,450.00	1,099,467.00	984,797.00	4,342,008.00
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
3 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
4 <b>Total.</b> Add lines 1 through 3 . . . . .	766,695.00	887,599.00	593,450.00	1,099,467.00	984,797.00	4,342,008.00
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . .						179,467.00
6 <b>Public support.</b> Subtract line 5 from line 4						4,162,541.00

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
7 Amounts from line 4 . . . . .	766,695.00	887,599.00	593,450.00	1,099,467.00	984,797.00	4,342,008.00
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .	307,932.00	307,370.00	319,329.00	317,522.00	341,841.00	1,593,994.00
9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .	39,126.00	41,140.00	38,551.00	40,638.00	42,904.00	202,359.00
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
11 <b>Total support.</b> Add lines 7 through 10						6,138,361.00
12 Gross receipts from related activities, etc. (see instructions) . . . . .					12	1,114,849.00
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	67.8119 %
15 Public support percentage from 2016 Schedule A, Part II, line 14 . . . . .	15	63.4875 %
16a <b>33 1/3% support test—2017.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input checked="" type="checkbox"/>
<b>b 33 1/3% support test—2016.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
17a <b>10%-facts-and-circumstances test—2017.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 10%-facts-and-circumstances test—2016.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . .		<input type="checkbox"/>

**Schedule B**  
 (Form 990, 990-EZ,  
 or 990-PF)  
 Department of the Treasury  
 Internal Revenue Service

**Schedule of Contributors**

OMB No. 1545-0047

**2017**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
 ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

<b>Name of the organization</b> Fitchburg State University Foundation, Inc.	<b>Employer identification number</b> 04-2661048
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**Organization type** (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

- 501(c)( ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

<b>Name of organization</b> Fitchburg State University Foundation, Inc.	<b>Employer identification number</b> 04-2661048
--	---

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Richard P. Fisk 5159 N Highway A1A Apt 214 Fort Pierce, FL 34949-8204	\$ 161,451.79	Person Payroll Noncash ✓ (Complete Part II for noncash contributions.)
2	Community Foundation of North Central Massachusetts 649 John Fitch Highway Fitchburg, MA 01420	\$ 200,026.71	Person ✓ Payroll Noncash (Complete Part II for noncash contributions.)
3	Good Samaritan, Inc. 600 Center Mill Road Wilmington, Delaware, 19807	\$ 30,000.00	Person ✓ Payroll Noncash (Complete Part II for noncash contributions.)
4	Epsilon Beta Chapter of Sigma Theta Tau 154 N. Shore Drive Stow, MA 01775	\$ 36,000.00	Person ✓ Payroll Noncash (Complete Part II for noncash contributions.)
5	James Family Charitable Fund 615 W. Mount Pleasant Ave. Livingston, NJ 07039	\$ 90,000.00	Person ✓ Payroll Noncash (Complete Part II for noncash contributions.)
6	Murphy Family Foundation 31025 Carter St. Solon, OH 44139	\$ 20,000.00	Person ✓ Payroll Noncash (Complete Part II for noncash contributions.)



Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

<b>Name of organization</b> Fitchburg State University Foundation, Inc.	<b>Employer identification number</b> 04-2661048
--	---

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	The Donald and Karen Irving Charitable Fund  100 E. Pratt Street BA-0329  Baltimore, MD 21202	\$ 50,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	Pasqualone, Anthony M.  15 Epping Street  Arlington, MA 02474-2013	\$ 31,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	Barbara Wilson  479 Main Street  Amesbury, MA 01913-4208	\$ 20,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	----- ----- -----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	----- ----- -----	\$ -----	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	----- ----- -----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

<b>Name of organization</b> Fitchburg State University Foundation, Inc	<b>Employer identification number</b> 04-2661048
---	---

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
1	shares of publicly traded companies ----- ----- -----	\$ 161,451.79	9/15/2017
	----- ----- -----	\$ -----	-----
	----- ----- -----	\$ -----	-----
	----- ----- -----	\$ -----	-----
	----- ----- -----	\$ -----	-----
	----- ----- -----	\$ -----	-----
	----- ----- -----	\$ -----	-----

**SCHEDULE D  
(Form 990)**

**Supplemental Financial Statements**

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**

▶ **Attach to Form 990.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

<b>Name of the organization</b> Fitchburg State University Foundation, Inc.	<b>Employer identification number</b> 04-2661048
--	---

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year . . . . .		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year) . . . . .		
4 Aggregate value at end of year . . . . .		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No	

**Part II Conservation Easements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply). <input type="checkbox"/> Preservation of land for public use (e.g., recreation or education) <input type="checkbox"/> Preservation of a historically important land area <input type="checkbox"/> Protection of natural habitat <input type="checkbox"/> Preservation of a certified historic structure <input type="checkbox"/> Preservation of open space	
2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.	<b>Held at the End of the Tax Year</b>
a Total number of conservation easements . . . . .	2a
b Total acreage restricted by conservation easements . . . . .	2b
c Number of conservation easements on a certified historic structure included in (a) . . . . .	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register . . . . .	2d
3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶	
4 Number of states where property subject to conservation easement is located ▶	
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No	
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶	
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$	
8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No	
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.	

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.	
b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:	
(i) Revenue included on Form 990, Part VIII, line 1 . . . . .	▶ \$
(ii) Assets included in Form 990, Part X . . . . .	▶ \$ 39,025.00
2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:	
a Revenue included on Form 990, Part VIII, line 1 . . . . .	▶ \$
b Assets included in Form 990, Part X . . . . .	▶ \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange programs
  - e**  Other \_\_\_\_\_
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance             | <b>1c</b> |
| <b>d</b> Additions during the year     | <b>1d</b> |
| <b>e</b> Distributions during the year | <b>1e</b> |
| <b>f</b> Ending balance                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance	13,144,931.00	12,133,313.00	12,240,117.00	11,877,912.00	10,932,424.00
<b>b</b> Contributions	427,510.00	271,570.00	243,226.00	326,443.00	97,922.00
<b>c</b> Net investment earnings, gains, and losses	359,797.00	740,048.00	(349,360.00)	36,147.00	920,717.00
<b>d</b> Grants or scholarships					
<b>e</b> Other expenditures for facilities and programs					
<b>f</b> Administrative expenses	1,350.00	0.00	670.00	385.00	73,151.00
<b>g</b> End of year balance	13,930,888.00	13,144,931.00	12,133,313.00	12,240,117.00	11,877,912.00

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment \_\_\_\_\_%
  - b** Permanent endowment **▶ 100.00%**
  - c** Temporarily restricted endowment \_\_\_\_\_%
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes | No |
|---|-----|----|
| <b>(i)</b> unrelated organizations  |     | ✓  |
| <b>(ii)</b> related organizations   |     | ✓  |
| <b>b</b> If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? |     |    |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land		134,290.00		134,290.00
<b>b</b> Buildings		466,943.00	126,495.00	340,448.00
<b>c</b> Leasehold improvements				
<b>d</b> Equipment		798,204.00	785,703.00	12,501.00
<b>e</b> Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				487,239.00

**Part VII Investments—Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other		
(A) .....		
(B) .....		
(C) .....		
(D) .....		
(E) .....		
(F) .....		
(G) .....		
(H) .....		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments—Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) Due to related organization	200,417.00	
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	200,417.00	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements . . . . .		1	3,896,338.00
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments . . . . .	2a	984,797.00	
b	Donated services and use of facilities . . . . .	2b	143,991.00	
c	Recoveries of prior year grants . . . . .	2c		
d	Other (Describe in Part XIII.) . . . . .	2d	666,338.00	
e	Add lines 2a through 2d . . . . .	2e	1,795,126.00	
3	Subtract line 2e from line 1 . . . . .	3	2,101,212.00	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	4a		
b	Other (Describe in Part XIII.) . . . . .	4b		
c	Add lines 4a and 4b . . . . .	4c		
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) . . . . .	5	2,101,212.00	

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements . . . . .		1	2,923,030.00
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities . . . . .	2a	143,991.00	
b	Prior year adjustments . . . . .	2b		
c	Other losses . . . . .	2c		
d	Other (Describe in Part XIII.) . . . . .	2d	1,298,019.00	
e	Add lines 2a through 2d . . . . .	2e	1,442,010.00	
3	Subtract line 2e from line 1 . . . . .	3	1,481,020.00	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	4a		
b	Other (Describe in Part XIII.) . . . . .	4b		
c	Add lines 4a and 4b . . . . .	4c		
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) . . . . .	5	1,481,020.00	

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Part III, Line 4 - Art collection is on display at FSU for the enjoyment of students, faculty and staff and the general public.

Part V, Line 4 - the organization has approximately 100 donor restricted funds that are primarily for scholarships and cultural events.

Part IX, Line 2d - Revenue of affiliate included in consolidated financial statements, \$631,384. Golf tournament expenses reported in Part VIII.

Line 8b \$34,954.00

Part XIII, Line 2d - Expenses of affiliate included in consolidated financial statements \$1,263,065.00. Golf tournament expenses reported in

Part VIII, Line 8b. \$34,954.00







**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
		(event type)	(event type)	(total number)	(add col. (a) through col. (c))
Revenue	1	Gross receipts . . . . .	\$38,145.00		\$38,145.00
	2	Less: Contributions . . . . .	\$11,685.00		\$11,685.00
	3	Gross income (line 1 minus line 2) . . . . .	\$26,460.00		\$26,460.00
Direct Expenses	4	Cash prizes . . . . .			
	5	Noncash prizes . . . . .			
	6	Rent/facility costs . . . . .	\$11,183.00		\$11,183.00
	7	Food and beverages . . . . .	\$14,714.00		\$14,714.00
	8	Entertainment . . . . .			
	9	Other direct expenses . . . . .	\$9,057.00		\$9,057.00
	10	Direct expense summary. Add lines 4 through 9 in column (d) . . . . . ▶			
11	Net income summary. Subtract line 10 from line 3, column (d) . . . . . ▶				(\$8,494.00)

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
		Revenue	1	Gross revenue . . . . .	
Direct Expenses	2	Cash prizes . . . . .			
	3	Noncash prizes . . . . .			
	4	Rent/facility costs . . . . .			
	5	Other direct expenses . . . . .			
	6	Volunteer labor . . . . .	<input checked="" type="checkbox"/> Yes _____ %	<input checked="" type="checkbox"/> Yes _____ % <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> Yes _____ %
7	Direct expense summary. Add lines 2 through 5 in column (d) . . . . . ▶				
8	Net gaming income summary. Subtract line 7 from line 1, column (d) . . . . . ▶				

- 9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_
- a Is the organization licensed to conduct gaming activities in each of these states? . . . . .  Yes  No
- b If "No," explain: \_\_\_\_\_
- \_\_\_\_\_
- 10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? . . . . .  Yes  No
- b If "Yes," explain: \_\_\_\_\_
- \_\_\_\_\_



**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service  
Name of the organization

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**201**

**Open to Public  
Inspection**

Employer identification number

Fitchburg State University

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) Leominster High School 122 Granite Street, Leominster, MA	04-6006004		\$6,500				Language Studies
(2) Fitchburg State University 160 Pearl Street, Fitchburg, MA	04-3138437		\$110,643				Intern Incentive Program
(3) Fitchburg State University 160 Pearl Street, Fitchburg, MA	04-3138437		\$298,149				Student Programming
(4) Fitchburg State University 160 Pearl Street, Fitchburg, MA	04-3138437		\$266,000				Contribution
(5) -----							
(6) -----							
(7) -----							
(8) -----							
(9) -----							
(10) -----							
(11) -----							
(12) -----							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 2

3 Enter total number of other organizations listed in the line 1 table 0

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Cat. No. 50055P

Schedule I (Form 990) (2017)



**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23. Attach to Form 990.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization  
**Fitchburg State University Foundation, Inc.**

Employer identification number

**04-2661048**

**Part I Questions Regarding Compensation**

		Yes	No
<b>1a</b>	Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.		
<input type="checkbox"/>	First-class or charter travel		
<input type="checkbox"/>	Travel for companions		
<input type="checkbox"/>	Tax indemnification and gross-up payments		
<input type="checkbox"/>	Discretionary spending account		
<input type="checkbox"/>	Housing allowance or residence for personal use		
<input type="checkbox"/>	Payments for business use of personal residence		
<input type="checkbox"/>	Health or social club dues or initiation fees		
<input type="checkbox"/>	Personal services (such as, maid, chauffeur, chef)		
<b>b</b>	If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain . . . . .		
<b>2</b>	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? . . . . .		
<b>3</b>	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.		
<input type="checkbox"/>	Compensation committee		
<input type="checkbox"/>	Independent compensation consultant		
<input type="checkbox"/>	Form 990 of other organizations		
<input type="checkbox"/>	Written employment contract		
<input type="checkbox"/>	Compensation survey or study		
<input type="checkbox"/>	Approval by the board or compensation committee		
<b>4</b>	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
<b>a</b>	Receive a severance payment or change-of-control payment? . . . . .		✓
<b>b</b>	Participate in, or receive payment from, a supplemental nonqualified retirement plan? . . . . .		✓
<b>c</b>	Participate in, or receive payment from, an equity-based compensation arrangement? . . . . .		✓
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.		
<b>Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</b>			
<b>5</b>	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
<b>a</b>	The organization? . . . . .		✓
<b>b</b>	Any related organization? . . . . .		✓
	If "Yes" on line 5a or 5b, describe in Part III.		
<b>6</b>	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
<b>a</b>	The organization? . . . . .		✓
<b>b</b>	Any related organization? . . . . .		✓
	If "Yes" on line 6a or 6b, describe in Part III.		
<b>7</b>	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III . . . . .		✓
<b>8</b>	Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III . . . . .		✓
<b>9</b>	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? . . . . .		

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation				(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	(iv) Other reportable compensation				
Richard S. Lapidus, 1 President	(i) \$237,342.00 (ii)			2501.00		24,125.00	\$263,967.00	
Jay Bry 2 Vice President Finance & Admin	(i) \$154,749.00 (ii)					7,731.00	\$162,480.00	
Christopher Hendry 3 Former V. P. Advancement	(i) \$154,629.00 (ii)					28,742.00	\$183,371.00	
Alberto Cardelle 4 Vice President Academic Affairs	(i) \$172,948.00 (ii)			604.00		18,125.00	\$191,677.00	
Stephen Swartz 5 Assistant V.P. Chief Infor. officer	(i) \$159,626.00 (ii)					25,853.00	\$185,479.00	
Charles Sides 6 Professor	(i) \$159,673.00 (ii)					28,742.00	\$188,415.00	
Michael Greenwood 7 Professor	(i) \$152,984.00 (ii)					14,187.00	\$167,171.00	
Joseph McAloon 8 Associate Professor	(i) \$147,920.00 (ii)					\$7,731.00	\$155,651.00	
9	(i)							
10	(i)							
11	(i)							
12	(i)							
13	(i)							
14	(i)							
15	(i)							
16	(i)							

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Area with horizontal dashed lines for supplemental information.

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

- ▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
- ▶ Attach to Form 990.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

Name of the organization: **Fitchburg State University Foundation, Inc.** Employer identification number: **04-2661048**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art . . . . .				
2 Art—Historical treasures . . . . .				
3 Art—Fractional interests . . . . .				
4 Books and publications . . . . .				
5 Clothing and household goods . . . . .				
6 Cars and other vehicles . . . . .				
7 Boats and planes . . . . .				
8 Intellectual property . . . . .				
9 Securities—Publicly traded . . . . .	✓	1	161,452.00	Market value of securities
10 Securities—Closely held stock . . . . .				
11 Securities—Partnership, LLC, or trust interests . . . . .				
12 Securities—Miscellaneous . . . . .				
13 Qualified conservation contribution—Historic structures . . . . .				
14 Qualified conservation contribution—Other . . . . .				
15 Real estate—Residential . . . . .				
16 Real estate—Commercial . . . . .				
17 Real estate—Other . . . . .				
18 Collectibles . . . . .				
19 Food inventory . . . . .				
20 Drugs and medical supplies . . . . .				
21 Taxidermy . . . . .				
22 Historical artifacts . . . . .				
23 Scientific specimens . . . . .				
24 Archeological artifacts . . . . .				
25 Other ▶ ( . . . . . )				
26 Other ▶ ( . . . . . )				
27 Other ▶ ( . . . . . )				
28 Other ▶ ( . . . . . )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement . . . . . **29**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? . . . . .		✓
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? . . . . .	✓	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .	✓	
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		







OMB No. 1545-0047  
**201**  
**Open to Public Inspection**

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization: Fitchburg State University Foundation, Inc. Employer identification number: 04-2661048

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) -----					
(2) -----					
(3) -----					
(4) -----					
(5) -----					
(6) -----					

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) Fitchburg State University (FSU) 04-3138437 160 Pearl Street, Fitchburg, MA 01420	Education	MA	170(b)(1)(A)	2			✓
(2) FSU Foundation Supporting Organization, Inc. 04-3491990 160 Pearl Street, Fitchburg, MA 01420	Support FSU	MA	501(c)3	11a			✓
(3) -----							
(4) -----							
(5) -----							
(6) -----							
(7) -----							

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) -----												
(2) -----												
(3) -----												
(4) -----												
(5) -----												
(6) -----												
(7) -----												

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) -----									
(2) -----									
(3) -----									
(4) -----									
(5) -----									
(6) -----									
(7) -----									

**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

		Yes	No
1	During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a	Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		1a
b	Gift, grant, or capital contribution to related organization(s)	✓	1b
c	Gift, grant, or capital contribution from related organization(s)		1c
d	Loans or loan guarantees to or for related organization(s)	✓	1d
e	Loans or loan guarantees by related organization(s)		1e
f	Dividends from related organization(s)		1f
g	Sale of assets to related organization(s)		1g
h	Purchase of assets from related organization(s)		1h
i	Exchange of assets with related organization(s)		1i
j	Lease of facilities, equipment, or other assets to related organization(s)		1j
k	Lease of facilities, equipment, or other assets from related organization(s)		1k
l	Performance of services or membership or fundraising solicitations for related organization(s)	✓	1l
m	Performance of services or membership or fundraising solicitations by related organization(s)	✓	1m
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	✓	1n
o	Sharing of paid employees with related organization(s)		1o
p	Reimbursement paid to related organization(s) for expenses	✓	1p
q	Reimbursement paid by related organization(s) for expenses	✓	1q
r	Other transfer of cash or property to related organization(s)		1r
s	Other transfer of cash or property from related organization(s)		1s

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) Fitchburg State University	b	\$678,792	Cash paid
(2) FSU Foundation Supporting Organization, Inc.	d	\$1,973,046	Outstanding loan balance
(3) Fitchburg State University	m	\$143,991	payroll costs
(4)			
(5)			
(6)			

**Part VI** Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1) .....													
(2) .....													
(3) .....													
(4) .....													
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# Cover Sheet

## Personnel Actions (N04- 18/19)

**Section:** IV. Notifications  
**Item:** A. Personnel Actions (N04- 18/19)  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** BOT Notifications 01292019.pdf



**FITCHBURG STATE UNIVERSITY****Board of Trustees****NOTIFICATIONS**

<b>TO:</b> Board of Trustees	<b>DATE:</b> January 29, 2019
<b>FROM:</b> The President	<b>NOTIFICATION NUMBER:</b> N04-18/19
<b>SUBJECT:</b> Personnel Actions	

**New Hire**

Kathleen Craigen, BS Effective: 1/22/19	Staff Assistant, Outreach & Recruitment Coord. Graduate & Continuing Education	\$48,000.00
Joseph LoBuono, BS Effective: 12/2/18	Assistant Vice President Capital Planning & Maintenance	\$112,000.00

**Resignation**

Jessica Augat Effective: 12/4/18	Director of Event Services Finance & Administration	\$69,725.08
Daniel Connolly Effective: 1/4/19	Associate Director for Transfer Admissions Admissions	\$ 71,985.28
Stephanie Easton Effective: 11/3/18	Staff Assistant, Clinical Placement Coord. Nursing	\$36,928.65
Brittanye Mackey Effective: 2/8/19	Staff Assistant/Coordinator International Education	\$48,450.00
Sheryl Wolnik Effective: 11/23/18	Staff Associate, Digital Learning Designer Graduate & Continuing Education	\$67,500.00

**Retirement**

Stephen Goldstein Effective: 11/10/18	Professor Communications Media	\$84,767.22
Erin Kelleher Effective: 12/7/18	Director Director, Career Counseling & Advising Center	\$93,125.17
Thomas Murray Effective: 2/17/19	Professor English Studies	\$109,484.50

Susan Wadsworth  
Effective: 8/31/19

Professor  
Humanities

\$111,375.06

**Promotion**

Mary Beth McKenzie  
Effective: 12/30/18

From: Assistant Vice President  
To: Associate Vice President  
Finance and Administration

From: \$123,600.00  
To: \$126,600.00

**Change in Salary (adjustment)**

Michelle Cota  
Effective: 12/2/18

Staff Assistant, Admissions Counselor  
Admissions

From: \$45,743.81  
To: \$48,591.86

# Cover Sheet

## Financial Statements

**Section:** IV. Notifications  
**Item:** B. Financial Statements  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Financials - Jan. 2019.pdf

**FITCHBURG STATE UNIVERSITY**

**FINANCIAL STATEMENTS**

**SEPTEMBER 30, 2018, 2017 AND 2016**

**Fitchburg State University**  
**Executive Summary**  
**Financial Statements for the Three Months Ended**  
**September 30, 2018, 2017 and 2016**

**Statements of Net Assets (pages 1 - 2):**

- Total assets increased by approximately \$11.1 million due primarily to a \$6.8 million increase in fixed assets and \$2.7 increase in cash and \$1.4 million increase in accounts receivable.
- Capital assets increased to approximately \$181.4 million net of current period depreciation of \$2.5 million.
- Current liabilities net increase was primarily due to increase in accounts payable and decrease in compensated absences and deferred revenues.
- Increase in non-current liabilities is primarily due to GASB 75 prior period adjustment of \$25 million which also resulted in a corresponding reduction in unrestricted net assets.
- Total debt from bond issues totaled \$57.04 million.

**Statements of Revenues, Expenses and Changes in Net Assets (pages 3 - 4):**

- Total revenue increased for the period to \$35.2 million
- Tuition and fee revenue increased by 7%
- Change in auxiliary revenue occurred in FY19 to include operation of dining hall which was formerly treated as an agency transaction.
- State appropriations increased to \$10.2 million in the first quarter as compared with \$9.9 million in the previous year. The increase is due to an increase in the fringe benefit rate charged by the Commonwealth. The fringe benefit rate was 33.5 % in fiscal 2017 and is 34.8% for fiscal 2018.
- Total expenditure increased overall to \$25.5 million and most of this increase was due to increase in salary and benefits
- Investment gains totaled \$211,000 as at Sept 2018 with investment income at \$159,000

**Statements of Cash Flows (page 5):**

- Total cash at September 30, 2018 was \$38.38 million which represents an increase of approximately \$2.68 million over cash balances at Sept 2017.
- Net cash provided from operations was \$5.29 million compared to \$1.72 million in Sept 17.
- Acquisitions of property and equipment totaled \$2.5 million was mainly on campus renovation of \$2.35 million.

**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF NET ASSETS  
September 30, 2018, 2017 and 2016**

	<b>ASSETS</b>		
	<u>2018</u>	<u>2017</u>	<u>2016</u>
<b>Current Assets</b>			
Cash and cash equivalents	\$ 22,096,785	\$ 17,788,762	\$ 24,432,168
Cash and cash equivalents-restricted	8,689,021	8,882,414	9,353,228
Bond proceeds	108,341	3,240,668	24,593
Accounts receivable, net	25,160,582	23,768,654	8,099,123
Loans receivable, net-current portion	1,796	1,207	137
Prepaid expenses-current portion	<u>155,937</u>	<u>446,595</u>	<u>389,994</u>
<b>Total Current Assets</b>	<u>56,212,462</u>	<u>54,128,300</u>	<u>42,299,243</u>
<b>Noncurrent Assets</b>			
Restricted cash and cash equivalents	7,491,238	5,798,726	5,372,743
Investments	16,200,707	15,379,645	16,720,872
Endowment investments	867,809	814,615	843,671
Other assets	-	1,299	-
Loans receivable, net	1,659,172	1,870,689	1,951,473
Prepaid expenses	65,884	138,100	180,081
Capital assets, net	<u>181,456,736</u>	<u>174,670,825</u>	<u>176,171,883</u>
<b>Total Noncurrent Assets</b>	<u>207,741,546</u>	<u>198,673,899</u>	<u>201,240,723</u>
<b>Total Assets</b>	263,954,008	252,802,199	243,539,966
<b>Deferred Outflows of Resources</b>			
Deferred outflows - Pensions	3,504,138	4,901,385	3,999,478
Deferred outflows - OPEB	<u>2,291,791</u>	<u>-</u>	<u>-</u>
<b>Total Assets and Deferred Outflows of Resources</b>	<u>\$ 269,749,937</u>	<u>\$ 257,703,584</u>	<u>\$ 247,539,444</u>

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY**  
**STATEMENTS OF NET ASSETS**  
**September 30, 2018, 2017 and 2016**

**LIABILITIES AND STOCKHOLDERS' EQUITY**

	<u>2018</u>	<u>2017</u>	<u>2016</u>
<b>Current Liabilities</b>			
Bonds payable-current portion	\$ 3,523,606	\$ 3,350,972	\$ 3,148,347
Accounts payable and accrued liabilities	6,481,344	1,990,583	1,763,033
Accounts payable-construction	292,305	145,310	38,814
Salaries and benefits payable	2,218,888	2,189,510	2,070,699
Accrued workers compensation-current portion	141,432	126,662	110,720
Accrued faculty payroll	712,605	744,238	748,495
Compensated absences-current portion	2,137,708	3,130,920	3,255,321
Deferred revenue-current portion	2,215,041	2,811,581	1,918,019
Capital lease-current portion	252,159	247,656	-
Deposits-current portion	332,200	328,575	247,725
Other liabilities	4,579,710	5,600,290	5,381,967
<b>Total Current Liabilities</b>	<u>22,886,998</u>	<u>20,666,297</u>	<u>18,683,140</u>
<b>Noncurrent Liabilities</b>			
HEFA bond payable	1,671,492	1,963,361	2,289,805
MSCBA bonds payable	51,848,529	55,031,222	53,927,524
DCAMM payable	5,420,360	-	-
Accrued workers compensation	507,339	454,356	397,170
Compensated absences	3,076,214	1,918,951	1,911,855
Deferred revenue	323,259	-	-
Capital lease	518,156	770,316	-
Due to federal loan programs-Perkins	1,475,490	1,571,927	1,610,321
Due to federal loan programs-Nursing	378,475	421,138	413,165
Net OPEB Liability	25,145,103	-	-
Unfunded pension liability	11,430,648	12,580,841	9,995,092
<b>Total Noncurrent Liabilities</b>	<u>101,795,065</u>	<u>74,712,112</u>	<u>70,544,932</u>
<b>Total Liabilities</b>	<u>124,682,063</u>	<u>95,378,409</u>	<u>89,228,072</u>
<b>Deferred Inflows of Resources</b>			
Deferred inflows - concessions	1,201,360	1,707,196	1,960,114
Deferred inflows - OPEB	3,346,876	-	-
Deferred inflows - pensions	679,709	51,499	358,503
<b>Total Deferred Inflows of Resources</b>	<u>5,227,945</u>	<u>1,758,695</u>	<u>2,318,617</u>
<b>Net Assets</b>			
Invested in capital assets, net of related debt	120,421,335	118,593,740	118,770,927
<b>Restricted for:</b>			
Non-expendable			
Scholarships & fellowships	489,380	486,481	475,644
Expendable			
Scholarships & fellowships	524,393	509,788	466,267
Loans	259,048	277,672	274,563
Capital projects	1,321,556	1,272,121	406,197
Debt service	8,729,812	7,793,352	6,989,929
Other	387,716	930	930
Unrestricted	7,706,689	31,632,396	28,608,298
<b>Total Net Assets</b>	<u>139,839,929</u>	<u>160,566,480</u>	<u>155,992,755</u>
<b>Total Liabilities, Deferred Inflows and Net Assets</b>	<u>\$ 269,749,937</u>	<u>\$ 257,703,584</u>	<u>\$ 247,539,444</u>

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY**  
**STATEMENT OF REVENUE, EXPENSES & CHANGES IN NET ASSETS**  
**SEPTEMBER 30, 2018, 2017 and 2016**

	<u>2018</u>	<u>2017</u>	<u>2016</u>
<b>Operating Revenues</b>			
Student tuition and fees	\$ 26,099,245	\$ 24,523,586	\$ 23,462,859
Waivers and exemptions	(235,769)	(333,568)	(790,559)
	<u>25,863,476</u>	<u>24,190,018</u>	<u>22,672,300</u>
<b>Net student tuition and fees</b>	<b>25,863,476</b>	<b>24,190,018</b>	<b>22,672,300</b>
Federal grants and contracts	550,159	381,933	3,135,851
State and local grants and contracts	(85,444)	21,349	16,724
Stimulus grants	55,765	-	-
Nongovernmental grants and contracts	179,946	45,957	4,993
Sales and services of educational departments	136,457	353,046	359,088
Auxiliary enterprises:			
Residential life (net of scholarship allowances)	5,984,460	6,151,347	5,595,999
Resident Life - Dining Hall	2,479,274	-	-
Administrative overhead	34,970	12,673	20,858
Fundraising	36,388	60,679	35,355
Commissions	46,399	370,639	43,209
Miscellaneous	2,180	6,830	4,190
Nursing and Perkins	6,831	10,263	7,267
	<u>35,290,861</u>	<u>31,604,734</u>	<u>31,895,834</u>
<b>Total Operating Revenues</b>	<b>35,290,861</b>	<b>31,604,734</b>	<b>31,895,834</b>
<b>Operating Expenses</b>			
<b>Salaries:</b>			
Faculty	2,850,419	2,451,363	2,993,982
Exempt wages	940,803	768,840	813,557
Non-exempt wages	4,545,441	5,164,720	4,550,570
Benefits	4,336,625	3,961,480	4,009,794
<b>Other Operating Expenses:</b>			
Employee related travel	61,073	39,689	73,929
Administrative expense	611,027	542,917	677,409
Facility operational supplies	441,756	395,215	358,405
Utilities	504,182	529,308	482,629
Consultant services	220,956	162,508	264,756
Operational services	786,577	514,362	362,364
Equipment purchases	79,766	91,410	215,378
Equipment maintenance and repairs	127,576	113,560	103,789
Purchased client services-program	33,850	34,576	55,710
Construction and building improvement	218,107	277,742	302,954
Scholarships	225,223	246,026	3,857,292
Loans & special payments	516,752	-	-
IT expenditures	2,431,563	1,744,377	1,551,324
Depreciation	2,535,922	2,421,859	2,419,491
Bad debt	(6,327)	-	2,506
Auxiliary enterprises:			
Residential life	4,048,187	4,631,759	4,314,419
	<u>25,509,478</u>	<u>24,091,711</u>	<u>27,410,258</u>
<b>Total Operating Expenses</b>	<b>25,509,478</b>	<b>24,091,711</b>	<b>27,410,258</b>
<b>Operating profit/(loss)</b>	<b>9,781,383</b>	<b>7,513,023</b>	<b>4,485,576</b>

For those charged with governance and internal management use only



**FITCHBURG STATE UNIVERSITY**  
**STATEMENT OF REVENUE, EXPENSES & CHANGES IN NET ASSETS**  
**SEPTEMBER 30, 2018, 2017 and 2016**

	<u>2018</u>	<u>2017</u>	<u>2016</u>
<b>Nonoperating Revenues(Expenses)</b>			
State appropriations	10,206,212	9,857,902	10,113,292
Investment income (net of investment expenses)	158,517	138,582	79,907
Unrealized gain/(loss)	210,795	313,865	313,322
Interest on capital debt	<u>(537,382)</u>	<u>(453,548)</u>	<u>(471,926)</u>
<b>Net Nonoperating Revenues (Expenses)</b>	<u>10,038,142</u>	<u>9,856,801</u>	<u>10,034,595</u>
<b>Income (loss) before Capital and Endowment Additions</b>	19,819,525	17,369,824	14,520,171
Capital appropriations	-	64,310	74,078
Capital grants and gifts	<u>65,532</u>	<u>105,229</u>	<u>63,229</u>
<b>Increase in net assets</b>	19,885,057	17,539,363	14,657,478
<b>Net Assets - beginning of period</b>	<u>119,954,872</u>	<u>143,027,118</u>	<u>141,335,278</u>
<b>Net Assets - end of period</b>	<u>\$ 139,839,929</u>	<u>\$ 160,566,481</u>	<u>\$ 155,992,756</u>

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**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF CASH FLOWS  
SEPTEMBER 30, 2018, 2017 AND 2016**

	<u>2018</u>	<u>2017</u>	<u>2016</u>
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>			
Increase in net assets	\$ 19,885,057	\$ 17,539,362	\$ 14,657,478
Adjustments to reconcile increase in net assets to cash provided by (used by) operating activities:			
(Gain)/loss on marketable securities	(306,640)	(400,022)	(313,322)
Depreciation	2,535,922	2,421,859	2,419,491
(Increase) decrease in assets:			
Accounts receivable	(22,907,194)	(21,726,981)	(6,495,797)
Loans receivable	42,828	55,602	45,090
Other assets	221,633	(93,061)	(60,505)
Increase (decrease) in liabilities:			
Accounts payable and accrued liabilities	3,395,954	511,012	(303,677)
Compensated absences	(127,359)	(111,375)	(287,317)
Accrued faculty payroll	(2,797,754)	(2,598,508)	(2,200,810)
Deferred revenue	481,340	894,058	806,934
Other liabilities	<u>4,862,902</u>	<u>5,232,794</u>	<u>5,330,362</u>
<b>Net cash provided by operating activities</b>	<u>5,286,689</u>	<u>1,724,740</u>	<u>13,597,927</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>			
Unrealized gain on cash investments	(56,710)	(62,096)	(27,999)
Purchase of investments	(436,032)	(174,007)	(540,841)
Proceeds from the sale of investments	459,791	159,721	313,565
Acquisition of property, plant and equipment	<u>(2,543,133)</u>	<u>(3,689,357)</u>	<u>(3,593,491)</u>
<b>Net cash (used by) investing activities</b>	<u>(2,576,084)</u>	<u>(3,765,739)</u>	<u>(3,848,766)</u>
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>			
Federal loan program	8,600	(44,847)	5,623
Proceeds of capital leases	(124,387)	(122,165)	-
Payments of capital debt	(255,611)	(309,839)	(271,468)
Amortization of bond premiums	<u>(66,070)</u>	<u>(77,381)</u>	<u>(77,380)</u>
<b>Net cash (used by) financing activities</b>	<u>(437,468)</u>	<u>(554,232)</u>	<u>(343,225)</u>
<b>Net increase in cash</b>	2,273,137	(2,595,231)	9,405,936
<b>Cash and cash equivalents - beginning of period</b>	<u>36,112,248</u>	<u>38,305,801</u>	<u>29,776,796</u>
<b>Cash and cash equivalents - end of period</b>	<u>\$ 38,385,385</u>	<u>\$ 35,710,570</u>	<u>\$ 39,182,732</u>
<b>Supplemental Disclosures:</b>			
- Cash paid for interest	<u>\$ 603,453</u>	<u>\$ 1,181,207</u>	<u>\$ 1,080,805</u>

For those charged with governance and internal management use only

# Cover Sheet

## NECHE Approval of AUAI International School

**Section:** V. President's Report  
**Item:** G. NECHE Approval of AUAI International School  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** AUAI NECHE Approval.pdf



January 14, 2019

Dr. Richard S. Lapidus  
President  
Fitchburg State University  
160 Pearl Street  
Fitchburg, MA 01420

Dear President Lapidus:

I am pleased to inform you that at its meeting on November 16, 2018, the New England Commission of Higher Education considered the report submitted by Fitchburg State University regarding its plans to offer general education courses through a contractual arrangement with AUIA International School in Shanghai, China, and took the following action:

that the report be accepted and the general education courses offered through a contractual arrangement with AUIA International School in Shanghai, China, be encompassed within the institution's accreditation, with an effective date of November 16, 2018;

that a visit to assess implementation of the general education courses offered through a contractual arrangement with AUIA International School be scheduled for Summer 2020;

The Commission gives the following reasons for its action.

The report submitted by Fitchburg State University was accepted and the general education courses offered through a contractual arrangement with AUIA International School encompassed within the institution's accreditation because the Commission finds the activity to be substantially in compliance with the *Standards for Accreditation* and relevant Commission policies.

The Commission commends Fitchburg State University (FSU) for submitting a thoughtful, well-documented proposal that outlines the institution's plans to develop a contractual arrangement with AUIA International School in Shanghai, China. In addition to providing greater name recognition for FSU in the international market, the intent of the AUIA partnership is to help recruit international students and provide a cross-cultural teaching opportunity for faculty. Beginning in Summer 2019, international students who are matriculated in programs at universities in the United States and who are interested in earning general education course credits during summer break will be able to enroll in FSU's courses at the Shanghai University of Finance and Economics. We understand that AUIA will be responsible for

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Dr. Richard S. Lapidus  
January 14, 2019  
Page 2

recruiting students; hiring FSU faculty on a separate summer school contract; and providing housing, classrooms, and office space for faculty. The proposed program will be integrated into FSU's governance and assessment structures, and we are particularly gratified to learn that the University will oversee the curriculum and assess the program and student success annually. According to the budget projections included in the proposal, the University anticipates enrollment of 80 students generating \$33,500 in net revenue for FSU in year one of the program, increasing to 150 students generating \$68,500 in net revenue for FSU by year five. Finally, the report assures that "AUIA offers academic tutoring and support, dormitory space, airport pick-ups, and weekend activities for each student who registers in the program."

In keeping with Commission policy, an on-site evaluation to assess implementation of the partnership with AUIA International School will be scheduled for Summer 2020. A copy of the relevant procedural statement is enclosed for your information and use.

The Commission expressed appreciation for the report submitted by Fitchburg State University hopes its preparation has contributed to institutional improvement. We appreciate your cooperation with the effort to provide public assurance of the quality of higher education in New England.

You are encouraged to share this letter with all of the institution's constituencies. It is Commission policy to inform the chairperson of the institution's governing board and the head of the state system of action on its accreditation status. In a few days we will be sending a copy of this letter to Mr. Donald Irving and Dr. Carlos Santiago. The institution is free to release information about the report and the Commission's action to others, in accordance with the enclosed policy on Public Disclosure of Information about Affiliated Institutions.

If you have any questions about the Commission's action, please contact Barbara Brittingham, President of the Commission.

Sincerely,

  
David Quigley

DQ/jm

Enclosures

cc: Mr. Donald Irving  
Dr. Carlos Santiago

# Cover Sheet

## News Articles

**Section:** V. President's Report  
**Item:** I. News Articles  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Clips for Jan 2019.pdf



Lt. Gov. Karyn Polito joins Mayor Stephen DiNatale, far right, Fitchburg State University President Richard Lapidus, second from right, state Sen. Dean Tran, R-Fitchburg, left, and state Rep. Stephan Hay, D-Fitchburg, at the ideaLab at Fitchburg State University, where nine grants totaling \$500,000 in economic development grants were announced. Fitchburg received \$60,000.

SENTINEL & ENTERPRISE/JOHN LOVE

## Fitchburg gets \$60G economic development grant

By **Mina Corpuz**

mcorpuz@sentinelandenterprise.com

**FITCHBURG** — A half a million dollars in state grants divvied up among the city and other urban communities in the state will help support projects that drive economic development.

“If you stack them up, they add up to a lot,” said Lt. Gov. Karyn Polito, who joined city officials and nonprofit leaders from across the state at Fitchburg State University’s ideaLab in the Theater Block Thursday.

A total of nine grants totaling \$500,000 were awarded to Fitchburg and other communities through the Urban Agenda Grant Program, which focuses on economic vitality and building safer

and stronger urban neighborhoods.

Polito awarded a \$60,000 grant to Fitchburg State that will support programming at the ideaLab and provide resources for entrepreneurs to develop businesses.

She called the university an asset to the city for producing graduates who want to start their businesses and stay in the community after completing their education.

FSU President Richard Lapidus said the last time Polito visited the ideaLab was when it was just a shell. He was pleased to have her see the finished space and receive the grant that will help revitalize downtown.

“It all boils down to having strong, local leadership and creation of an impactful program that changes the way we live and work in our community.”

operates,” Lapidus said.

Mayor Stephen DiNatale said the grant is another tool in the city’s toolbox that can help Fitchburg stand out.

Award recipients from as far as Barnstable and other cities like Worcester, Boston, and Springfield accepted them from Polito. The other communities plan to use the Urban Agenda funding for programs and support services.

Fitchburg is among more than 50 communities across the state — those defined as urban centers, gateway cities, and those with a median household income below the state average — that are eligible for the grant.

Follow Mina on Twitter @mlc1 of 94

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## Trahan gets to work in Fitchburg



U.S. Rep. Lori Trahan signs her name on the wooden truss at the BF Brown School renovation, where other dignitaries had signed it at the start of the work on the site.

SENTINEL&ENTERPRISE/SCOTT LAPRADE

## Takes tour of downtown Theater Block and Arts Community

**By Mina Corpuz**  
[mcorpuz@sentinelandenterprise.com](mailto:mcorpuz@sentinelandenterprise.com)

**F**ITCHBURG — Lori Trahan's first day as congresswoman representing the 3rd District brought her to the city Monday to see economic development efforts in the downtown.

She toured the Theater Block and Fitchburg Arts Community — which are part of efforts to revitalize downtown and the North of Main neighborhood — and spoke with city leaders about ways she can help Fitchburg.

“There are lots of opportunities we should be on the lookout for to

bring funding to Fitchburg,” Trahan said. “We can always use more.”

She was sworn in last week to represent the district that spans from the Merrimack Valley to North Central Massachusetts.

Her visit began at the city offices at Putnam Place to meet with Mayor Stephen DiNatale.

Afterward, Fitchburg State University President Richard Lapidus met them at the Theater Block. He led a tour of the renovated second floor, which is a computer lab for the university's game design program and the Idea Center space for





From left, U.S. Rep. Lori Trahan, Fitchburg Mayor Stephen DiNatale and Fitchburg State University President Richard Lapidus look over the ceiling painted by students in the university's Idea Center's second floor during a tour on Monday.

SENTINEL&ENTERPRISE PHOTOS /SCOTT LAPRADE

U.S. Rep. Lori Trahan chats with Fitchburg Mayor Stephen DiNatale after leaving the Idea Lab at Fitchburg State University during her tour of the city's downtown on Monday.

# Trahan takes tour of downtown Fitchburg

**TRAHAN/From Page 1**  
entrepreneurs to meet.

Lapidus said the project has been a way to bring the university to Main Street and provide a place for people in the community to develop business ideas.

"If we can find another

place to plant the flag and make Main Street look good ... it will take care of itself," he said.

DiNatale added that the Theater Block project has been a partnership with the city that has been transformative for downtown.

Lapidus also offered Trahan the ability to hold office hours at the university like her predecessor, Niki Tsongas, did.

Last, Trahan walked with the mayor and city officials down Main Street to the former B.F. Brown School, which will be

transformed into a complex of affordable housing and studio space.

That building is across the Street from the Fitchburg Art Museum, which plans to work with the artists living at the arts community, said Director Nick Canasso.

Elite Construction and Design is working on the renovation project. During the tour, Trahan met several workers at the construction site, including the firm's president, Matt Fournier, who gave her a hard hat with her name on it that she wore to tour the

inside of the building. She and city officials climbed three flights of stairs past halls of old lockers and former classrooms to get to the roof, where she signed a truss that was placed there when construction began in November.

# LOCAL

## Taking stock of the district



**U.S. Rep. Trahan, D-Westford, who represents the 3rd Congressional District, meets with Fitchburg officials for an economic development tour Monday afternoon. [PHOTOS/PAULA J. OWEN]**

### US Rep. Lori Trahan tours Fitchburg to assess local needs

By Paula J. Owen  
 Correspondent

FITCHBURG – After a tour of key areas of the city Monday afternoon, newly seated U.S. Rep. Lori Trahan said one of her priorities is supporting an infrastructure package in 2019 that would meet the needs of Fitchburg.

Ms. Trahan, D-Westford, represents the 3rd Congressional District, which stretches from Haverhill in the northeast through Lawrence and Lowell in the Merrimack Valley, to Gardner and Fitchburg in the west, and southward through Concord and the Nashoba Valley to Clinton, Hudson and Marlboro.

She beat a Republican and an independent candidate in the Nov. 6 election to succeed Niki Tsongas. In 2007, Ms. Tsongas was the first woman elected to Congress from Massachusetts in 25 years, to the same seat held three decades earlier by her husband, Paul E. Tsongas.

On Monday, Ms. Trahan, who grew up Lowell, spent part of her first day in the district since being sworn in as a member of the 116th



**U.S. Rep. Trahan, D-Westford, who represents the 3rd Congressional District, signs a roof truss inside the former B.F. Brown School in Fitchburg. NewVue Communities is renovating the building into artist housing.**

Congress on an economic development tour in Fitchburg with Mayor Stephen L. DiNatale; Fitchburg State University President Richard S. Lapidus; Marc Dohan, executive director of NewVue Communities, and other officials. Stops on the tour included the city offices on Boulder Drive, the Fitchburg State campus, the Theater Block on Main Street

that the university is renovating, and the former B.F. Brown School on Elm Street, which is undergoing a transformation into a 62-unit artist community by NewVue Communities. The tour also stopped at the Fitchburg Art Museum across the street from B.F. Brown.

See TRAHAN, A4

# TRAHAN

From Page A3

“There’s a lot of opportunity here,” Ms. Trahan said after the tour. “You have a community with a common vision working together to achieve it including with private businesses, non-profits, and state and federal partners. It is important for me to come out and hear the needs of Fitchburg, whether it is better bridges and roads or laying broadband and fiber optics to attract employers. Those are things I will lobby for in Washington as part of an infrastructure package.”

Lowell and Fitchburg are similar cities, Ms. Trahan said, with their old mill buildings, and successful public colleges. The city’s unique history and demographics are used to leverage historic and low-income housing tax credits that help spur economic development, she said.

“Everyone is working together to change the trajectory of the city, and I am excited to be part of it,” she said.

Investments in the creative economy such as the B.F. Brown complex are exciting,



**U.S. Rep. Trahan, D-Westford, who represents the 3rd Congressional District, talks with Fitchburg Art Museum Director Nicholas Capasso on a tour of the city Monday afternoon, with Fitchburg State University President Richard S. Lapidus in the background.** [PHOTO/PAULA J. OWEN]

she said, and FSU’s revitalization of the Theater Block adds a new dimension to downtown Fitchburg.

Ms. Trahan, who went to Georgetown University on a volleyball scholarship, campaigned on helping families in Lowell, Fitchburg and other communities that she said are disproportionately harmed by the opioid epidemic, wage stagnation and lack of public transportation.

Additionally, during her campaign she said higher education needs restructuring to make it accessible to those who cannot afford it, and a

pathway is needed for undocumented immigrants living in the United States.

Monday morning, Ms. Trahan visited the UMass Lowell Innovation Hub in Haverhill to meet with community leaders regarding the partnership between UMass Lowell and private businesses on cybersecurity awareness for small- and medium-sized businesses.

After leaving Fitchburg, she stopped at her district office in Lowell to meet with federal government employees affected by the continuing federal government shutdown.

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## FSU GRADS HAVE EXTRA REASON FOR CHEER THIS SEASON



**SHE EARNED IT:** Ada Ivette Bonneau of West Townsend gets help with her Masters graduate hood from Becky Copper-Glenz, dean of Graduate and Continuing Education, during Fitchburg State University's 122nd Winter Commencement Friday night. **See a slide show at [sentinelandenterprise.com](http://sentinelandenterprise.com).**

SENTINEL & ENTERPRISE / JOHN LOVE

# With every diploma, a milestone

**By Stephen Landry**  
Staff writer

FITCHBURG — Standing before the Class of 2018 Friday night, Fitchburg State University President Richard Lapidus singled out one class member whose story inspired

him, and serves as an example for others to follow.

He spoke of Kristin Laura King, a Fitchburg resident who entered FSU after serving in the military.

“The first airplane trip of her life was to go to

training in South Carolina,” Lapidus said in his commencement address.

### Graduate list/8

After the military, including a tour in Iraq, King decided to enroll at FSU, a decision that Lapidus tracked many lives for

the better.

“Kristin doesn't give up. She sought out other veterans on campus and immediately recognized the potential support system that could be offered,” Lapidus said, singling King out

Please see **GRADS/8**

# FSU grads celebrate special gift: bright tomorrows

GRADS/From Page 1

for a round of applause from the audience. "You stand as an inspiration to all of us, who you have already taught so very much."

Lapidus said the graduates should prepare for difficulties, challenges, and loss. "Be resilient because these are the moments that might build your character and serve as a catalyst for others," he said.

It was one of many inspirational stories that marked Fitchburg State's 122nd Winter Commencement, at the Athletics and Recreation Center. The 492 graduates were urged to enjoy their triumph, prepare for new challenges, and share the knowledge they have acquired over the past four years with others.

Lapidus said the night represented a milestone for the graduates as they prepared to take the next step in their lives.

"This will become one of the most memorable nights of your life, the beginning of one journey and the completion of another," he said.

Valedictorian Quinn Staley told her fellow graduates not to be afraid as they went out into the world. She urged them to remember that the best things come to those who have patience.

"I hope you think of every failure as a hurdle and not a roadblock," said Staley, of Wareham. "You deserve this and you've earned this. Congratulations, Class of 2018."

Before the ceremony, several graduates reflected on their time at the school.

Geoffrey Hines of Leominster said he was shocked to have finally made it to graduation.

"I didn't think I was going to make it to this point, but Fitchburg State has prepared me well to go into the workforce, so I'm very excited," Hines said.

Duncan Anthony Martinez, of Hudson, said he felt a sense of relief as he prepared to receive a diploma.

"All the pressure of the past four years is finally done, so it's exciting," he said.

Nicole Elizabeth Rossi of Leominster said it was a bittersweet night.

"I'm very excited but it's a little sad to be leaving because I loved my four years here," Rossi said. "But it's a relief that we made it."

Follow Stephen on Twitter @Stephen-Landry17.



**NIGHT OF PRIDE:** Shane Donnelly of Fitchburg stands with FSU President Richard Lapidus after receiving his diploma during Fitchburg State's Winter Commencement at the FSU Athletics and Recreation Center Friday night. Below left: Decorated mortarboards were all over. Below right: Faculty make their way into the ceremony, led by Academic Adviser Elizabeth Swartz.

SENTINEL & ENTERPRISE PHOTOS / JOHN LOVE



## FITCHBURG STATE UNIVERSITY GRADS — FALL 2018

**Ashburnham:** Frederick Caswell, MED, Special Education; William R. Hoeksema, BS, Criminal Justice; Erin B. Leamy, BS, Communications Media; Thomas S. Patty, MED, Curriculum and Teaching; Sadie J. Zbikowski, MBA, Business Administration

**Ashby:** Gabriella N. Brodeur, BS, E, Elementary Education 1-6; Kimberly A. Calandrella, BS, Psychological Science; Lauren M. Godin, BS, Human Services; Trevor C. Murphy, BS, English Studies

**Fitchburg:** Gina M. Angelini, MED, Special Education; Brittany A. Bickford, BS, Human Services; Sean A. Burke, BS, Political Science; William A. Canterbury, BS, English Studies; Olivia A. Collette,

BS, Nursing - BS; Alissa R. Desilets, MED, Special Education; Shane Donnelly, MBA, Business Administration; Britney Evans, MED, Early Childhood Education; Michael K. Fossa, BS., Industrial Technology; Elaina F. Fournier, MED, Special Education; Carlos J. Garcia-Rivera, BS, Business Administration; Mackenzie E. Gray, BS, Economics; Clarisse Ishimwe, BS, Human Services; Adam J. Jacques, BS, Industrial Technology; Kelly A. Johnson, BS, Political Science; Beatrice M. Kayigwa, BS, Human Services; Kristin L. King, BSE, Early Childhood Education; Michael R. Knight, MED, Curriculum and Teaching; Erica M. Knoll, BS, Interdisciplinary Studies Educ; Peter T. Kougas, BS, Communications

Media; Christian P. LaRoche, BS, Business Administration; Elena Labovitis, MBA, Business Administration; Sandra Leger, BS, Business Administration; Scott D. Maguire, MBA, Business Administration; Sean S. Maki, BS, Criminal Justice; Hector D. Martinez-Rivera, MBA, Business Administration; John J. Murin, BS, Industrial Technology; Jami S. Parker, MS, Criminal Justice; Alondra Y. Pedraza, BS, Interdisciplinary Studies Educ; Camila V. Perlas De Leon, BS, Nursing - BS; Evan A. Pierce, BS, Biology; Andy S. Ren, BS, Criminal Justice; Nicole M. Rodriguez, BS, Interdisciplinary Studies; Tashira M. Rodriguez-Alvarez, BA, Sociology; Mamour S. Samb, BS, Business Administration; Tyler J. Scipione, BS, Biology;

Glen S. Shapland, MED, Special Education; Marvin T. Sylvain, BS, Business Administration; Christopher J. Thibodeau, MED, Curriculum and Teaching; Shannen N. Tormey, MBA, Business Administration; Susan M. Wilson, MED, Curriculum and Teaching

**Gardner:** Joseph A. Arsenaault, BS, Biology; Stacie R. Brown, MBA, Business Administration; Meaghan L. Chase, MED, Special Education; Brian J. Connors, BS, English Studies; Chelsea M. Gentile, BS, Interdisciplinary Studies Educ; Lynda L. Goodale, BS, Nursing, RN to BS; Riley L. Grinkis, BS, Criminal Justice; Stefani L. Munoz, BA English Studies; Tracy J. Salem, MED, Early Childhood Education; Felicia A. Weaver, MED, Special Education; Felicia A. Weaver, CERG, Behav-

ior Analyst Certification; Jacklyn E. White, BS,E, Elementary Education 1-6

**Lancaster:** Kimberly Liddell, BS, Business Administration

**Leominster:** Jake T. Allain, BS, Exercise and Sports Science; Samantha N. Boudreau, BS, Interdisciplinary Studies Educ; Catherine M. Brown, MED, Special Education; Taylor-Lynne V. Brown, BS, Nursing - BS; Tara P. Burke, BS, Communications Media; Ryan J. Cali BS, Psychological Science; Tyler J. Chellis, BS, Mathematics; Ashley H. Crank, BS, Interdisciplinary Studies; Yamilka M. Crespo, BS, Human Services; Melissa K. Cunningham-Aubuc, BS, Business Administration; Ashley M. Donahoo, BS, English Studies; Sarah E. Doyle, MED, Special Education; Linda M. Ferris, MBA, Busi-

ness Administration; Sydnee R. Gallant, BS, Nursing - BS; Nicole Geoffrey, BS,E, Early Childhood Education; Jocelyne D.

Goncalves, BS, Psychological Science; Geoffrey E. Hines, BS, History; Gary Inthirath, BS, Interdisciplinary Studies; Katelyn A.

Jenson, BS, Sociology; Veasna T. Kea, BS, Business Administration; Nicole A. Landry, MED, Special Education; Jonathan Lanza,

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McCann, MED, Special Education; Khomphet L. Nanthavong, BS, English Studies; Daniel J. Neal, BS, Criminal Justice;

Nathan B. Paquette, BS, Biology; Carolyn Perla, MBA, Business Administration; John M. Person, MBA, Business Administration;

Zachary Presto, MBA, Business Administration; Yamilette Ramos Lopez, BS, Interdisciplinary Studies; Alexandra Rodriguez, BS,

Interdisciplinary Studies Educ; Taylor W. Skinner, BS, Biology; Nicholas C. Starr, MED, Curriculum and Teaching; Raquel M.

Tabales, BS, Biology; Lindsey O. Tait, MED, Special Education; Annie D. Tetteh, MBA, Business Administration; Romeo Tetteh

MBA, Business Administration; Alec Van Wagoner, BS, Sociology

**Lunenburg:** William T. Cooney, BS, Criminal Justice; Heather L. Dancause, MED, Elementary Education 1-6; Joshua D. Gentilella, BS, Biology; Tonya J. Jarrett,

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Human Services; Benjamin P. McGuire, BS, Biology

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BS, Business Administration

**Sterling:** Dustin A. DelleChi- aie, MED, Elementary Education 1-6; Tanya M. Rowan, BS, Interdisciplinary Studies Educ

**Templeton:** Tina L. Dale BS, Business Administration; Erick M. Eiben, MA History; Julia K. Getz, BS, Communications Media

**Townsend:** Nicolette A. LeClair, BS, Psychological Science; Bitia Reilly, MED, Early Childhood Education

**West Townsend:** Joshua E. Page, BS, Business Administration

**Westminster:** Dominic M. Barrette, BS, Exercise and Sports Science; Jonathan Duran, MBA, Business Administration;

Nicholas R. Frederick, BS, Communications Media; Kevin M. Murphy, BS, Computer Science; Micayla J. Varieur, BS, Interdisciplinary Studies Educ; Christian A. Vogel, BS, Industrial Technology

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Nursing students from Fitchburg State University hand out clothing to the homeless in the parking lot behind Rye & Thyme in Leominster on Thursday afternoon. From left, seniors Krysten Ross, Keri Joyce, Melissa Rodrigues, Catherine Brennan, Jordan Ayotte and, Rachel Danso chat with Donald Dauphinais Jr., who came for help.

SENTINEL & ENTERPRISE/JOHN LOVE

## HIDDEN IN PLAIN SIGHT

By Peter Jasinski

pjasinski@sentinelandenterprise.com

**L** EOMINSTER — Donald Dauphinais Jr. was wearing a set of puffy, Army green coveralls when he greeted the nursing students from Fitchburg State University in a Mechanic Street parking lot Thursday morning.

The warm padding gave him a slight Michelin Man appearance and protected him from the biting wind. But he gladly accepted the sleeping bag and extra gloves the students offered.

He told them he was 55 years old and didn't know where he'd be sleeping that night.

"I haven't figured that out yet," Dauphinais told one of the students.

It was just before noon and the day's temperature had already dipped below 40 degrees. The sun would set in less than five hours.

"I might go down into the woods behind Barnes & Noble

FSU students learned about homeless people in Leominster. They set out to help.

and make a campfire," he said.

Dauphinais was just one of about a dozen people encountered by the Fitchburg State students on Thursday. They set up shop in the parking lot behind Rye & Thyme before moving on to Carter Park to see if there were any homeless people there.

The group, about 10 students, had been collecting winter clothes since late September and Thursday was the day they were finally going to hand them out.

"I had lived in Lunenburg for about 10 years and I never thought this was an issue," said Kerri Joyce, a senior in FSU's nursing program.

"I would never think twice that there were homeless in the area, or that it was even a problem."

there were homeless in the area, or that it was even a problem."

Fellow classmate Grace Muturi said she had often wondered about the people who seemed to congregate in Monument Square every day, standing at the bus stop but never

Please see **HOMELESS/8**



Nursing students from Fitchburg State University collected blankets for the homeless.

Nursing students from Fitchburg State University handed out clothing to the homeless on Thursday afternoon. Mary Begley looks for a jacket to stay warm in this winter.

SENTINEL & ENTERPRISE/JOHN LOVE



Tim Smart picks out a pair of pants.

# FSU students aid Leominster's homeless

**HOMELESS**/From Page 1

boarding the vehicle when it pulled to the curb.

"Every time I've driven by, there are so many people on the common," she said. "We started talking to them and that's when we learned that Leominster has a huge homeless population."

As part of their ongoing studies, the students were assigned a project in which they had to identify an explore a local public-health issue. They chose homelessness and have spent two months interviewing the homeless population living in and around

downtown Leominster.

Joyce said she and her classmates would regularly meet with six individuals. Others, she said, were less inclined to talk to them or weren't in the area as frequently.

The responses they received from these interviews motivated the students to collect winter clothing for the people they had been meeting with, but it's also pushed them in the direction of advocacy.

Joyce explained that some of the people she met with said they are able to get hot meals through soup

kitchens run by non-profits like the Spanish American Center, however she was also told that there are not enough hot meal services in the area to provide food every day.

"Most of them are able to get two meals a week and that's different from other areas," she said. "I went to Lowell and they have meals every day, breakfast, lunch, and dinner."

Muturi and FSU nursing student Selia Cox presented the group's findings to the City Council during its Nov. 13 meeting to ask what the city is doing to help its homeless population.

City Council President Rick Marchand praised the students for their efforts, but also warned them of

possible impacts a homeless shelter might have on Leominster.

"There was discussion years ago with the Leominster Downtown Association. Their feeling was you have to be very careful of what you bring because if you build it, they will come," he said. "You could become overpowered with people you can't serve."

Muturis said she was not encouraged by the response she received from the council.

"The answer we felt we got was they don't want to encourage people to come to Leominster by opening up a shelter," she said.

Follow Peter Jasinski on Twitter @PeterJasinski

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## Arts, culture? Fitchburg's well on the way

### Officials lead tour of Arts and Cultural District boosted by state grant program

By **Amanda Burke**

[aburke@sentinelandenterprise.com](mailto:aburke@sentinelandenterprise.com)

FITCHBURG — City officials pounded pavement Tuesday morning on a walking tour of the newly designated “Fitchburg Arts and Cultural District,” which for the next three years will benefit from a program aimed at spurring development in Gateway Cities.

The program, called the Transformative Development Initiative, is run by MassDevelopment, the state’s quasi-public agency that works to stimulate economic growth in the state.

“It’s like a business accelerator, but for places,” said executive

Please see **CULTURE/18**



Tom Skwieraski, Fitchburg’s executive director of Planning and Development, addresses the crowd before they took a tour of the Arts and Cultural District Tuesday.

Powered by BoardOnTrack



# Arts, culture? Fitchburg's well on the way

**CULTURE**/From Page 1

director of the program, Noah Koretz, of the Transformative Development Initiative.

MassDevelopment last spring chose Fitchburg, Chelsea, Lawrence and Worcester to participate in the initiative.

It's a three-year program that will give Fitchburg opportunities for technical assistance, direct capital investment and grants to develop a particular area in the city.

Over the duration of the program, the initiative's partner organizations — the city of Fitchburg, Fitchburg State University, NewVue Communities, the Montachusett Opportunity Council, the North Central Massachusetts Chamber of Commerce and Elite Construction — will focus on developing real estate and the arts within the "Fitchburg Arts and Culture District," said Koretz.

The district is shaped like a circle. Its midpoint is near City Offices at 166 Boulder Drive and expands outward to the edge of Crocker Field, Lowe Playground, Prichard Street and Laurel Hill Cemetery.

As part of the program, the city received a grant to hire economic development professional Francisco Torres for three years.

Torres, who has offices in the Fitchburg Theater Block, started in the job in September. His sole job it to move the district closer to becoming a destination for arts and culture, and connect current or potential business owners with opportunities to begin or flourish.

Officials pointed out a number of development projects already underway in the "Fitchburg Arts and Cultural District."



State and local officials surround Tom Skwieraski, Fitchburg's executive director of Planning and Development, before a tour of the Fitchburg Arts and Cultural District.

SENTINEL & ENTERPRISE/JOHN LOVE

Jay Bry, vice president of finance and administration at Fitchburg State University, said the Theater Block isn't open to the public yet. But meetings are already being held on the second floor, home to the ideaLab.

Students will be taking classes on the second floor in the spring, he said, though renovation of the theater itself will be completed later.

The Theater Block will link downtown with the university, furthering the goal of making the about 1-mile stretch from FSU and Main Street the "most walkable and bikeable" area in the city, Economic Development Director Tom

Skwieraski said.

Elite Construction, led by Matthew Fournier, will turn 409 Main St. into apartments and a restaurant at street level.

Up the street, old City Hall will be renovated and restored to municipal headquarters, freeing up the old General Electric building at 166 Boulder Drive, he said. The old Bank of America building next door, which is owned by the city, will also be municipal space.

Private developer Rick Boscardin has pulled building permits to turn the old Fitchburg Gas and Electric building into condos, according to Skwieraski.

On the final leg of the walking tour, officials stopped at the Fitchburg Art Museum. Across the street, construction was underway on the Fitchburg Arts Community, which is taking shape inside the old B.F. Brown school.

Once completed, the mixed-income community will house 70-80 tenants who each work in the field of the arts, as well as studio space.

According to the project's contractor, Fournier, the fire damage inside the building has been cleaned up, and a new roof will be put on in time for winter's snow.

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Director Nick Capasso said the Fitchburg Arts Community will attract arts entrepreneurs. Once completed, it and the FAM across the street will create something of a campus for the arts visually linked by outdoor art and sculptures.

Marc Dohan, executive director of NewVue Communities, which bought the long-vacant property this summer, said the artists colony will move the city closer to achieving its goal of becoming the destination for arts and culture in North Central Massachusetts.

"We have a promise to really create a hub for arts and culture that we've

talked about for a long time," he said.

Koretz, the MassDevelopment executive director, said developers thinking about buying or rehabbing a building in the "Fitchburg Arts and Cultural District" should reach out to Torres for guidance. (Torres can be reached at [ftorres@massdevelopment.com](mailto:ftorres@massdevelopment.com).)

"What this isn't is MassDevelopment coming in and saying, here's what you need to do," Koretz told city officials. "What this is is MassDevelopment coming in as a partnership and saying, what do you want to do and how can we help connect you with resources to make it happen." 81 of 94

December 10, 2018

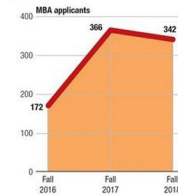
# Colleges rethink MBA programs amid application decline

BY LIVIA GERSHON



## FSU growth

MBA applications to Fitchburg State University have increased since 2016, with most growth coming from the online program.



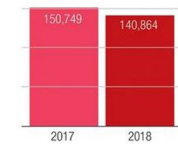
## Currently enrolled MBA students:

Online ..... 900  
On campus ..... 75

Source: Fitchburg State University

## U.S. decline

Total applications for U.S. MBA programs



Source: Graduate Management Admission Council Application Trends Survey Report 2018

Applications for MBA programs across the country fell 7 percent between 2017 and 2018, according to the Graduate Management Admissions Council, a global association of graduate business schools.

The decline is not a new story for graduate-level business programs, particularly traditional ones. Over the past three years, a majority of full-time, two-year MBA programs in the U.S. have seen declining applications.

To fight this national dip, local colleges and universities approach the needs of potential MBA students in new ways.

Fitchburg State University saw a similar 7-percent decline as the national trend from 2017 to 2018, but that one-year figure belies the surge in growth since 2016, as MBA applications jumped from 172 two years ago to 366 a year later. The growth has come almost entirely from the university's online MBA program, which now enrolls 900 students, compared to 75 who attend class on campus.

time off and do in-person programs,” said Alberto Cardelle, vice president of academic affairs at FSU. “Focusing on skills that they can acquire online gives them a credential that will help them move up in their current jobs.”

Nichols College in Dudley has grown its MBA program an average of 40 percent annually over the past five years thanks partly to a slightly different use of technology.

“We went to something we call high-flex,” said Kerry Calnan, executive director of graduate and professional studies at Nichols.

The idea, Calnan said, is students can do some of the coursework at home whenever they have time, but there are 90-minute live classes each week. Students can either show up on campus for these sessions or, if they're stuck at the office, connect remotely from there.

“You can choose week-to-week if you want to drive to campus and participate,” she said.

Assumption College in Worcester offers an option where students attend classes twice a month and work online the rest of the time.

“What we're finding is students today want flexibility,” said Robin Frkal, director of Assumption's MBA program. “They don't want to give up the in-person educational experience — every student I talked to finds so much value in the interactions they have with the professors and other students that they get in a classroom experience.”

All three schools said they serve students in a range of career situations. But Frkal said Assumption has found success in recent years with a program geared specifically to new graduates. The college's one-year accelerated MBA targets people who've decided to stay in school after completing a bachelor's degree. The idea is early-career professionals who may not yet have family commitments are often willing to sacrifice a year of work at a starting salary to enhance their options when they do hit the job market.

“Just like at one point a bachelor's degree was the gold standard, as we are becoming more and more competitive in the marketplace an MBA is seen as a necessary degree,” Frkal said. “If they spend one year and they complete their MBA degree it may open up doors for them.”

headwinds. That's partly because the economy is strong, which can make it easier for many professionals to focus on their jobs rather than retooling to become more competitive.

But Assumption has found the strong economy can work in its favor. Frkal said the college is increasingly marketing to employers rather than just potential students.

“We can partner with firms to use education as a benefit that helps to attract and retain their talent,” she said.

FSU has seen increased interest in its MBA program among employers including local credit unions and hospitals. Some offer reimbursement to workers for continuing their education, or seek out interns from the program.

“We're seeing a lot of small to medium-sized companies that are becoming learning institutions,” said Keith Williamson, dean of business and technology.

Ties with local business are crucial for all three MBA programs. With hospitals and other health providers as a crucial part of the Central Massachusetts economy, Assumption launched a healthcare-oriented concentration, and FSU is considering a similar move.

Nichols created an external advisory board made up of corporate leaders to help ensure its students were receiving the kind of education that would make them attractive as employees. In response to employers' needs, Calnan said, it has expanded its focus on soft skills, conflict resolution and leadership development, supplementing more traditional MBA components like finance and strategic management.

Despite the national decline, Frkal said, MBAs continue to appeal to many students looking for a practical path to career success. For example, Assumption's accounting track provides the credits students need – above and beyond what they receive in a bachelor's program – to receive a CPA license. Students can focus specifically on areas like marketing, banking or operations. But, Frkal said, the bottom line is, regardless of industry, an MBA prepares professionals to find their place helping whatever business they work for to thrive.

“When you graduate with an MBA, you understand all the functions of business operations,” she said.

# Local News

THE SENTINEL & ENTERPRISE, FITCHBURG, MASSACHUSETTS

FRIDAY, DECEMBER 7, 2018

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## FSU faculty to teach in China for summer

FITCHBURG — Fitchburg State University faculty members will take their talents to China as part of a new agreement with the AUIA International Summer School.

AUIA collaborates with American universities to provide credit-bearing summer courses, taught in English, to Chinese students during the summer months. The students are typically enrolled at other U.S. universities during the academic year but use the summer sessions to keep their English language skills sharp and to catch up on credits while still visiting family in China.

Under the new agreement, Fitchburg State faculty will teach students at the Shanghai University of Finance and Economics in China during the summer sessions.

“This agreement will create amazing opportunities for our faculty to broaden their own horizons by teaching in another country, and those experiences will enhance their teaching of our own students when they return,” Fitchburg State President Richard S. Lapidus said.

“We are honored to collaborate with Fitchburg State on this new partnership and look forward to their faculty members making an impact on our students’ lives,” said AUIA President Yefei Xu.

The first cohort of Fitchburg State faculty will be teaching classes in China next summer.



AUIA President Yefei Xu, left, and Fitchburg State University President Richard S. Lapidus sign an agreement that will bring Fitchburg State faculty to China next summer to teach.

SUBMITTED PHOTO

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## FSU takes action to help Latinos

### University hopes to retain students, raise graduation rates through mentors hired courtesy of \$61G grant

By **Mina Corpuz**  
mcorpuz@sentinelandenterprise.com

FITCHBURG — A first-year Latino student at Fitchburg State University knew he had to register for spring classes, but didn't know how to get started.

School officials understand that those who are the first in their families to attend college don't always have the same passed down knowledge about how to navigate college and are often on their own to figure it out. To address that, the

university is using state grant money to help first-year male Latino students stay in school and earn their degrees.

"It's a great opportunity for us to begin to provide services that we feel will make our students more successful," said Provost and Vice President for Academic Affairs Alberto Cardelle, whose office is overseeing efforts supported by a state grant.

Please see **GRANT/10**



Sean C. Goodlett, Fitchburg State University's assistant to the provost for student success, speaks about a grant awarded to the school to help keep Latino students in college and graduating.

SENTINEL & ENTERPRISE/  
JOHN LOVE

# Fitchburg State University aims to help Latino students

**GRANT**/From Page 1

Mentors funded through a grant from the state Department of Higher Education connected the student with an advisor who helped him register for classes and change to a major that was better suited for him.

Fitchburg State plans to use the \$61,000 grant to improve retention and graduation rates for male Latino students during the school year and look at how the university can build a supportive environment for its growing Latino population.

“We need to be the ones ready for them,” said Sean Goodlett, assistant to the provost for student success, who is among university officials leading the effort.

The funding the university received is from a Performance Incentive Fund grant, which is available to the 12 state universities and community colleges. They support efforts to close opportunity and achievement gaps, improve college completion rates, and make college more accessible to Massachusetts residents.

At Fitchburg State, faculty and peer mentors can provide interaction and support for first-year male Latino students and help them navigate college life, Goodlett said.

The university received the grant money and began faculty mentorship in October, he said. Student mentors will begin the spring semester.

There are four faculty members and staff from the Provost’s office are serving as mentors, including Cardelle and Goodlett.

The mentors are either fluent in Spanish or have Spanish language skills, Goodlett said.

Among the 720 first-year students, about 50 are male Latino students. Those students are divided up amongst the mentors.

Cardelle has been working with five students. He likes the individual support he can provide.

“Some students like to know they have someone to talk to,” Cardelle said. “Others need more support.”

Students from his group have asked for help with scheduling or how to register for next semester’s classes, he said. One talked with Cardelle about career interests and the provost recommended an internship.

The support and interventions are geared to help first-year students continue with their studies.

Fitchburg State’s overall retention rate, which is a measure of a student advancing from the spring of their freshman year to the fall of their sophomore year, is about 75 percent, Goodlett said. For male Latino students, the retention rate can be as low as 65 percent.

The university is doing well for other student demographics, like African American males, he said, but there is an achievement gap for male Latino students.

“Right now if we can change the story for five or 10 students, that is important,” Goodlett said.

School officials say focusing on this population of students and providing these supports are in response to changing demographics across the state, in Fitchburg, and university.

“Our region here is changing rapidly and the demographically like the whole country,” Cordelle said. “The community has changed faster than the institution and we need to be proactive.”

Within the next dozen years, Latino students could represent a quarter of the university’s student population, Goodlett said. If Fitchburg State is strategic about enrollment, that could happen sooner.

Students from Puerto Rico and of Mexican descent are the top Latino groups at the university, he said.

A goal is to have the largest enrollment of Latino students among the nine state universities, Goodlett said, which would put Fitchburg State on track to seek status as a Hispanic-Serving Institution, which is similar designation as Historically Black Colleges and Universities.

The university’s work to help first-year male Latino students also aligns with its larger, ongoing efforts to improve the first year experience for all students, Goodlett said.

Those efforts include a first year seminar, academic coaching, and workshops to develop skills like time management and goal setting.

He also mentioned the tutoring center that helps at about a thousand undergraduate students throughout the year.

*Follow Mina on Twitter @mlcorpuz*

# COLLEGE

*From Page B1*

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## **Ideas sought for FSU ideaLab**

A “think tank” for members of the Fitchburg State University campus and wider community to discuss potential uses of the ideaLab at the Main Street Theater Block will be held at 5:30 p.m. Nov. 15 in the newly renovated site at 717 Main St.

The free event will also include discussion on what types of events the community would like to see at the ideaLab, as well as how to motivate people to explore downtown and take part in supporting the city.

Visit <https://fitchburg-think-tank.eventbrite.com> to register. Powered by BoardOnTrack of 94



## FSU has at least 2 in moot court tourney

### Regional qualifiers headed to nationals

FITCHBURG — Fitchburg State University will send at least two students to the national competition of the American Collegiate Moot Court tournament in Florida in January following their performance at the regional qualifying contest held last weekend.

The campus hosted nearly 100 student competitors and more than 80 members of the local legal community served as judges during the regional tournament.

Matthew Murphy of Milton, a junior majoring in political science, and Riley Grinkis of Gardner, a senior majoring in criminal justice, made it to the regional final and will compete in the nationals at Florida A&M University College of Law in Orlando, Florida. Those teams that made it to the regional quarterfinals advance to the national tournament, while Murphy and Grinkis won two additional rounds

Please see **FSU/4**

# FSU has at least 2 in moot court tourney

FSU/From Page 3

beyond that mark.

“We compete against some very elite schools and more than hold our own,” said Professor Paul Weizer, the longtime coach of the university’s moot court team

“Matt and Riley will be a serious force at nationals,” he added.

Other Fitchburg State students may make the tournament as alternates after the other regional competitions are completed in the coming weeks.

The competition has teams of students on opposing sides of constitutional issues making timed arguments to panels of judges, as in a federal appellate court.

In addition to six teams of students from Fitchburg State, regional tournament participants included students from Bentley University; Bridgewater State University; College of the Holy Cross; Framingham State University; Merrimack College; Patrick Henry College; St. Thomas University; Suffolk University; SUNY Cortland; U.S. Air Force Academy; Wheaton College; and Williams College.

The fictional case being argued this year concerns a woman suing the Olym-



Fitchburg State’s moot court teams, from left in front row: Crystal Aneke, Theresa Klobucher, Kajahna Matos, Riley Grinkis, Lauren Poirier, Sean O’Halloran-Ciccolo and Matthew Murphy; back row from left: Matthew Badagliacca, Benjamin Butkus, Webster Bokoo, William Travers, William Cooney and Alexander Ramos.

SUBMITTED PHOTO

pus State University School of Law, alleging their admissions policy

that gives preferential weight to male applicants violates her right to equal

protection under the law. The plaintiff, who in this case also teaches part-time

at the institution, also argues her First Amendment rights were violated

when she was fired for complaining about the admissions policy.

# Remembering the women of World War II

## Fitchburg State archivist touts the contributions of females in WWII

By Julia Sarcinelli  
Correspondent

FITCHBURG — Asher Jackson, archivist at Fitchburg State University, held a talk at the Historical Society Thursday night about the brave women who served in the Women’s Army Auxiliary Corps and the Army Women’s Corps during World War II.

The inspiration for his presentation began a year ago when “The Girls of Atomic City: The Untold Story of the Women Who Helped Win World War II,” by Denise Kiernan was the book selected for all FSU members to read as part of the Community Reads program.

“That’s a familiar narrative,” said Jackson about the novel that focuses on the women who worked in factories during the war. “When I started doing research in our archive, I did not find a lot of information on women who worked in the factory, but what I did find was a number of women who fought.”

He added that many women who served in the military during this time came from Massachusetts.

Jackson talked about how restrictions on women serving



Fitchburg State University archivist Asher Jackson holds a picture of 1st Lt. Isabel Demmon, who was an Army Nurse from February of 1943 to June of 1945 and from Fitchburg. Demmon was featured in Jackson’s program on the women of World War II at the Fitchburg Historical Society on Thursday.

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changed during World War II, and about a few Central Massachusetts women who served their country.

Anna Hyland Zimmerman was the first woman to enroll in the WAAC; Elizabeth Morgan

Haskins was a captain and photography interpreter in England and took a position at Fitchburg State upon returning home; Anne B. Wurts was a Leominster native who was a nurse

Fitchburg native Isabel Demmon served as a nurse and first lieutenant.

With images of dog tags, newspaper clippings and enlistment papers Jackson painted the picture of local women who

proudly served their country.

Jackson emphasized the importance of sharing stories of veterans, especially those that might not often be told.

“We need to write our own history,” he said.

# Weekender



The Calamari Sisters perform Saturday, Nov. 3, at FSU.

COURTESY PHOTO

## Cooking and cackling with Calamari Sisters

FITCHBURG — The comic culinary stylings of two larger-than-life Italian women will come to life when the Fitchburg State University CenterStage arts and culture series presents *Cooking with the Calamari Sisters* on Saturday, Nov. 3, at 8 p.m., in

the Falcon Hub, Hammond Hall, 160 Pearl St.

Hilarity, failed dishes and food fights ensue during this live “broadcast” of a public-access cooking show hosted by Delphine and Carmela Calamari.

Tickets are \$28 or \$25 for FSU alumni, seniors

and staff, and \$5 for students, and can be ordered online at [www.fitchburgstate.edu/centerstage](http://www.fitchburgstate.edu/centerstage) or by calling 978-665-3347, or bought at the box office.

This production is sponsored by the Center for Italian Culture at Fitchburg State University.

## Depression-era ‘Diviners’ at FSU

FITCHBURG — The story of how a small, Depression-era town in southern Indiana is shaken when tragedy strikes is told in “The Diviners,” the fall main-stage production at Fitchburg State University.

The play, written by Jim Leonard Jr., and directed by professor Cap Corduan, will feature 10 performances between Wednesday, Nov. 7, and Saturday, Nov. 17, at the Wallace Theatre for the Performing Arts, McKay Complex, 67 Rindge Road.

Admission is free and open to the public.

“The Diviners” is about

a disturbed young man and his friendship with a disenchanted preacher in the fictional town of Zion, Ind., in the early 1930s.

The student cast includes Daniel Hankins, Cheyenne Winley, Ken Roberts, Liam Griffin, Belle Flint, James Estes, Sydney Morin, Natalie Scott, Sydney Lipsett, Amado Malec and Brooklyn Tawyea.

Fitchburg State alumnus Dan Daly is the scenic designer while the rest of the design team is composed of all technical theater students. Lighting design is by Amilee Do, costume design by Brian

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Meaghan Cunningham, sound design by Stef Tivnan, assistant technical director Fouad Nasr, and Lucas Cardwell stage manager. The assistant director is Rebecca Joseph, and assistant to the scenic designer is Jem Morales.

Performances will be Wednesday, Nov. 7, at 6:30 p.m.; Thursday, Nov. 8, at 6:30 p.m.; Friday, Nov. 9, at 7:30 p.m.; Saturday, Nov. 10, two shows at 2 and 7:30 p.m.; Wednesday, Nov. 14, at 6:30 p.m.; Thursday, Nov. 15, at 6:30 p.m.; Friday, Nov. 17, at 7:30 p.m.; and Saturday, Nov. 17, two shows at 2 and 7:30 p.m.



The Fitchburg State University Main Stage Theater program rehearses recently for their play "The Diviners," which opens tonight. Rehearsing a scene are Cheyenne Winley, playing Jenny-Mae Layman, Daniel Hankins, center, playing Buddy Layman, and Ken Roberts, playing Ferris Layman. SENTINEL & ENTERPRISE PHOTOS /JOHN LOVE

# For FSU theater prof, career in stage was a 'Diviner' intervention

**By Julia Sarcinelli**  
Correspondent

FITCHBURG — Cap Corduan, technical theater professor at Fitchburg State University, has been setting the stage for her students' post-graduation careers for the past 18 years.

Corduan is directing the FSU fall main-stage production of "The Diviners," opening Wednesday at 6:30 p.m. at the Wallace Theatre for the Performing Arts, McKay Complex, 67 Rindge Road. There will be 10 free performances between today and Saturday, Nov. 17.

She was first introduced to the life of theater when she was a child growing up in Connecticut. Her mom was involved with a musical theater group and once Corduan got up on stage for her first play, she knew it wasn't for her.

Corduan was taken in



Brooklyn Tawyea, left, playing Dewey Maples, works through a scene with Charlie Barbera, playing Basil Bennett.

by the tech team and was hooked. She continued to do it all through junior high and high school. But even though her sets were always well put together, her student life wasn't.

"I was a horrible student when I was in high school. I have dyslexia and other learning disabilities so I was like, 'Sit still? Forget that crap,'" said Corduan.

She never really con

sidered going to college before being told to think about it. She attended Central Connecticut State University, where an adviser turned things around for her and encouraged her to earn her bachelor's degree in fine arts in theatre design.

After earning a master's degree in fine arts in design and technology from the University of Connecticut, Corduan worked

as technical director for the Empire State Institute of Performing Arts before moving on to various freelance jobs, such as working at Disney and laying out the full design system for Mohegan Sun.

But once she was in the professional world, she hated how cut-throat it was and how she couldn't do all the different aspects she wanted to.

"I actually went back to my college adviser and he said, 'You know, you should think about teaching,' and I said, 'You've got to be kidding me,'" Corduan said with a laugh.

She decided to give it a try, and hasn't gone back since.

"Even on days when I feel like I can't even get out of bed, I think, 'No, I've got the kids — they'll liven me up,' and they always do," she said.

Corduan came to FSU

# A Divine Intervention for Fitchburg State prof

FSU/From Page 3

in 1999 to teach technical theater when the theater program was just coming together. Since then, she has completed several sabbaticals. When she's not teaching, Corduan likes to play base drum for a fife and drum core. She is also the director of an international junior fife and drum camp during the summer.

When school's in session, though, Corduan makes sure her students understand all parts of the production aspect, and she definitely sets them up for success — she has a 99 percent placement rate for her students in their field and always keeps in touch with each one.

"It's all about how I can help the kids. These guys have enough problems trying to figure out the world. If it can be a little bit more interesting and more fun to follow a dream, I want to help them do it," said Corduan.

One of her past students, Dan Daly, is coming back to FSU to be the scenic designer for "The Diviners." He graduated from FSU in 2009 and works in Brooklyn as a scenic designer and visual artist.

"The Diviners" is about a disturbed young man and his friendship with a disenchanted preacher in a small, Depression-era town in southern Indiana, and how everyo

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***"It's all about how I can help the kids. These guys have enough problems trying to figure out the world."***

*Cap Corduan, technical theater professor at Fitchburg State*

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shaken when tragedy strikes.

"I just felt that it said something to me and I think it will say something to the audience," said Corduan.

Between the different directing styles of herself and the other theater professors, she said the students get a better understanding of what it's like to work in the professional world.

"I'm not an actor so I rely a lot on their artistry," she said. "They've had to do a lot of work on their own."

Despite how much she teaches her students, Corduan said directing for "The Diviners" has reaffirmed how much she learns from them.

"It will be really fun this time to just sit in the back of the theater and be proud of the whole production team," she said. "Now I get to see them

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## Foundation provides turkeys to veterans

By **Mina Corpuz**

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FITCHBURG — Veterans and their families came to Fitchburg State University Saturday to receive a free Thanksgiving turkey from the Arrendono Family Foundation.

“It warms my heart,” said Diane Beaudoin, who came with her husband, Norman, who served in the Air Force in Vietnam. “It’s really a blessing with these type of events. It helps the veterans and it feels great.”

The Beaudoins were one of 80 families who

Please see **TURKEYS/5**



Volunteer Roi Armstrong, a member of Fitchburg State’s Alumni Board, talks with Marines veteran Tommy O’Malley while carrying a turkey to his car on Saturday.

SENTINEL & ENTERPRISE/MINA CORPUZ

## Foundation gives turkeys to veterans

**TURKEYS/**From Page 1

received a turkey and a Market Basket gift card.

By noon, about 20 collected their 16-pound birds. Some came on their own, others came with their spouses or with children.

Volunteers from the foundation, FSU, and the Red Cross greeted the veterans and thanked them for their service.

Some wore hats or shirts with the branch of the armed forces they served featured.

When veterans and families opted to carry the turkey to their car on their own, the volunteers insisted that they help. Many of them obliged.

Tommy O’Malley, who served as a medic with the Marines in Vietnam, saw an article in the newspaper about the giveaway. He wasn’t sure if he would be able to receive a turkey if he didn’t sign up beforehand.

The foundation had extras available and gave O’Malley one.

“I’m glad I stopped by,” he said.

FSU alumni board member Roi Armstrong carried the turkey to O’Malley’s car and talked with him about

the university maintaining buildings.

Brian Malone, a board member for the foundation, said this is the second year it has partnered with Fitchburg State to host the giveaway.

“We started the partnership because of Fitchburg State’s many students and faculty and because they’re a veterans and military-friendly university,” he said.

The Arrendono Family Foundation helps military families and aims to prevent military-related suicides through support services.

As part of that partnership, the foundation looks to create an endowed scholarship at FSU next year, Malone said.

Carlos Arrendono, a co-founder of the organization, lost his son Alex, a U.S. Marine, in Iraq and son Brian to suicide. He and his wife, Melinda, run the foundation.

In 2013, Arrendono was at the Boston Marathon near the finish line when two bombs went off. He was photographed wearing a cowboy hat while helping rush survivor Jeff Bauman to help.

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