



Fitchburg State University

Board of Trustees Meeting

Fitchburg State University Board of Trustees Meeting

Published on January 30, 2024 at 2:27 PM EST

Amended on January 31, 2024 at 4:09 PM EST

Date and Time

Tuesday February 6, 2024 at 8:15 AM EST

Location

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

Notice of a meeting of the Fitchburg State University Board of Trustees on Tuesday, February 6, 2024 at 8:15 a.m.

The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

Agenda

	Purpose	Presenter	Time
I. Opening Items			8:15 AM
Opening Items			
A. Record Attendance and Guests			1 m
B. Call the Meeting to Order		Deborah Phillips	1 m
C. Public Comments			3 m

	Purpose	Presenter	Time
D. Approve Minutes from the November 14, 2023 meeting - VOTE (25-23/24)	Approve Minutes		1 m
E. Approve minutes from the November 16, 2023 meeting. (26-23/24)	Approve Minutes		1 m
F. Approve minutes from the December 7, 2023 meeting. (27-23/24)	Approve Minutes		1 m
G. Approve minutes from the December 19, 2023 meeting. (28-23/24)	Approve Minutes		1 m
II. Financial Sustainability Report Discussion			8:24 AM
A. Academic Efficiencies Final Report	Discuss		10 m
B. Administrative Efficiencies Final Report	Discuss		10 m
C. Entrepreneurship and Revenue Final Report	Discuss		10 m
D. Property and Infrastructure Final Report	Discuss		10 m
E. Student Services Final Report	Discuss		10 m
III. Theater Update			9:14 AM
A. The President will provide an update on the Theater Project.			10 m
IV. Student Life Committee Report			9:24 AM
A. Dr. Laura Bayless will provide the Student Life report.			5 m
V. Notifications			9:29 AM
A. Personnel Actions (N04-23/24)	FYI		1 m

	Purpose	Presenter	Time
B. Financial Statements (N05-23/24)	FYI		1 m
VI. Brief discussion and vote for a new Trustee Retreat date.			9:31 AM
A. VOTE (29-23/24)	Vote		5 m
VII. Student Trustee Report			9:36 AM
A. Allison Turner will provide the Student Trustee report.	FYI		5 m
VIII. Presidential Search Update			9:41 AM
A. Eric Gregoire will provide an update.	FYI		10 m
IX. Chair's Report			9:51 AM
A. Debbie Phillips will provide the Chair's report.	FYI		5 m
X. President's Report			9:56 AM
A. Enrollment Update			2 m
B. New Program Approval Update			2 m
C. News Articles	FYI		1 m
XI. Closing Items			10:01 AM
A. Adjourn Meeting	Vote		1 m

Coversheet

Approve Minutes from the November 14, 2023 meeting - VOTE (25-23/24)

Section: I. Opening Items
Item: D. Approve Minutes from the November 14, 2023 meeting - VOTE (25-23/24)
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board of Trustees Meeting on November 14, 2023
Nov. 14 Minutes vote .pdf

APPROVED



Fitchburg State University

Minutes

Board of Trustees Meeting

Fitchburg State University Board of Trustees Meeting

Date and Time

Tuesday November 14, 2023 at 8:15 AM

Location

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

Notice of a meeting of the Fitchburg State University Board of Trustees on Tuesday, November 14, 2023 at 8:15 a.m.

The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

Trustees Present

A. Turner, D. Phillips, D. Tiernan (remote), E. Gregoire, J. Flanagan (remote), K. Spinelli, L. Barrieau, M. Fiorentino, Jr.

Trustees Absent

C. Stimpson, S. King-Goodwin

Ex Officio Members Present

R. Lapidus

Non Voting Members Present

R. Lapidus

Guests Present

A. McClothin, F. Barricelli, G. Doiron, G. Doiron, J. Bry, J. Harvey, J. Murdoch, J. Wolfman, L. Bayless, M. Bruun, P. Marshall, P. McCafferty, R. Toomey, S. Dodd

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

D. Phillips called a meeting of the board of trustees of Fitchburg State University to order on Tuesday Nov 14, 2023 at 8:18 AM.

C. Public Comments

D. Approve Minutes from the October 17, 2023 meeting - VOTE (15-23/24)

J. Flanagan made a motion to approve the minutes from Board of Trustees Meeting on 10-17-23.

D. Tiernan seconded the motion.

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

Roll Call

D. Tiernan	Aye
S. King-Goodwin	Absent
K. Spinelli	Aye
M. Fiorentino, Jr.	Aye
C. Stimpson	Absent
E. Gregoire	Aye
J. Flanagan	Aye
A. Turner	Aye
D. Phillips	Aye
L. Barrieau	Absent

II. Sabbatical Requests

A. Act on President's recommendation for faculty sabbatical requests - VOTE (16-23/24)

The President presented the sabbatical requests for the upcoming year. He noted the brief summaries that were included in the packet. He recommends approval for all of the requests.

L. Barrieau arrived at 8:21 a.m.

E. Gregoire made a motion to grant the faculty sabbatical leaves for the academic year 2024-2025.

J. Flanagan seconded the motion.

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

Roll Call

A. Turner	Aye
S. King-Goodwin	Absent
D. Tiernan	Aye
K. Spinelli	Aye
L. Barrieau	Aye
M. Fiorentino, Jr.	Aye
E. Gregoire	Aye
J. Flanagan	Aye
D. Phillips	Aye
C. Stimpson	Absent

III. Academic Affairs Committee- Jennifer Flanagan, Committee Chair, will provide the report.

A. New Academic Program: Creative Arts Enterprise - VOTE (17-23/24)

The President informed the Board that the Academic Affairs Committee met and unanimously voted in support of both new programs.

P. Marshall publicly thanked Dr. Franca Barricelli, Dr. Sara Levine, Dr. Amy McGlothlin, and Dr. Jonathan Harvey for their efforts in getting these programs together. She next explained all facets of the programs. They are both essentially cost neutral.

J. Flanagan made a motion to approve the Creative Arts Enterprise new program.

D. Phillips seconded the motion.

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

Roll Call

L. Barrieau	Aye
J. Flanagan	Aye
C. Stimpson	Absent
A. Turner	Aye
M. Fiorentino, Jr.	Aye
D. Phillips	Aye
D. Tiernan	Aye
K. Spinelli	Aye
S. King-Goodwin	Absent
E. Gregoire	Aye

B.

New Academic Program: Expressive Arts Therapies - VOTE (18-23/24)

P. Marshall provided a summary of the advantages of this new program. She noted that there are no undergraduate programs in art therapy.

J. Flanagan made a motion to approve the Expressive Arts Therapies new program.

D. Tiernan seconded the motion.

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

Roll Call

A. Turner	Aye
C. Stimpson	Absent
L. Barrieau	Aye
K. Spinelli	Aye
D. Tiernan	Aye
S. King-Goodwin	Absent
J. Flanagan	Aye
M. Fiorentino, Jr.	Aye
E. Gregoire	Aye
D. Phillips	Aye

IV. Budget, Finance and Facilities Committee - Karen Spinelli, Committee Chair, will provide the report

A. Presidential Search Budget - VOTE (19-23/24)

K. Spinelli reported that the Presidential Search budget was approved at the Budget, Finance and Facilities Committee meeting last week. At the committee meeting they talked about the budget in detail and recommended the inclusion of an additional \$5,000.00 for miscellaneous expenses. If the amount was not necessary, the funds would be returned back into the university budget.

There was a discussion.

K. Spinelli made a motion to approve the Presidential Search estimated budget.

E. Gregoire seconded the motion.

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

Roll Call

L. Barrieau	Aye
D. Tiernan	Aye
K. Spinelli	Aye
J. Flanagan	Aye
A. Turner	Aye
C. Stimpson	Absent
D. Phillips	Aye
S. King-Goodwin	Absent

Roll Call

- E. Gregoire Aye
- M. Fiorentino, Jr. Aye
- D. Phillips indicated that the meeting was ahead of schedule.

K. Spinelli made a motion to take a 10-minute recess.
E. Gregoire seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

- K. Spinelli Aye
- J. Flanagan Aye
- E. Gregoire Aye
- C. Stimpson Absent
- D. Tiernan Aye
- A. Turner Aye
- M. Fiorentino, Jr. Aye
- S. King-Goodwin Absent
- D. Phillips Aye
- L. Barrieau Aye

The meeting reconvened at 8:43 a.m.

V. Presidential Search Firms

A. Witt/Kieffer

D. Phillips welcomed Ryan Crawford, and Gregg Duyck, from WittKieffer. They provided their background and expertise.

R. Crawford presented a PowerPoint that was discussed in detail (attached). He talked about the process of assessing campus needs and the listening tours that would be set-up to together information on the qualities required for the next President. They stated that they would work on developing a leadership profile and after holidays, be aggressive in recruitment efforts. He talked about the importance of developing a diverse candidate pool and their firm's success in that area.

A discussion ensued regarding the timeline, developing the presidential profile, diversity, search guarantee, placement success rate, campus communication, modality for meetings, onboarding the new president and candidate confidentiality.

R. Crawford thanked the Board for taking the time to listen to their presentation and that he looks forward to working with Fitchburg State.

B. Discussion

C.

Spelman Johnson

D. Phillips welcomed Ellen Heffernan, and Dr. Sharon Meagher, from Spelman Johnson. They provided their background and expertise.

E. Heffernan presented a PowerPoint that was discussed in detail (attached). She talked about the search process and how their firm would work closely with all constituents internally and externally.

A discussion ensued regarding the timeline, developing the presidential profile, diversity, search guarantee, placement success rate, campus communication, modality for meetings, onboarding the new president and candidate confidentiality.

E. Heffernan and D. Meagher both stated they would be pleased if their firm was chosen to assist in searching for the next President of Fitchburg State.

D. Discussion

E. Academic Search

D. Phillips welcomed Nancy Crimmin, Shawn Hartman and William Kibler, from Academic Search. They provided their background and expertise.

They presented a PowerPoint that she discussed in detail (attached). N. Crimmin discussed the phases for the search process. She talked about how they work with the search committee to meet timelines.

B. Kibler talked about the strategies required in finding candidates.

A discussion ensued regarding the timeline, developing the presidential profile, diversity, search guarantee, placement success rate, campus communication, modality for meetings, onboarding the new president and candidate confidentiality.

S. Hartman thanked the Board for the opportunity and expressed that they would be very interested in providing their services.

F. Discussion

G. Diversified Search Group

D. Phillips welcomed Dr. Kim Morrison, and Euris Belle, from Diversified Search Group. They provided their background and expertise.

They presented a PowerPoint that was discussed in detail (attached).

K. Morrison noted that they are associated with a number of firms, and bring a broad array of experience. She commented that they are a high-touch firm and understand their clients.

A discussion ensued regarding the timeline, developing the presidential profile, diversity, search guarantee, placement success rate, campus communication, modality for meetings, onboarding the new president and candidate confidentiality.

K. Morrison stated that they are team-based and enjoy their work. They emphasized that they are hands on and that she and E. Belle would be involved in every area of the process. That noted that they come to meetings prepared with specific actions.

H. Discussion

I. Isaacson Miller

D. Phillips welcomed Daniel Rodas, and Joanna Cook from Isaacson, Miller. They provided their background and expertise.

They presented a PowerPoint that was discussed in detail (attached). They talked about the search process and how their firm would work closely with all constituents internally and externally. D. Rodas would be the lead on all aspects for the search and J. Cook would serve as managing associate. J. Cook talked about the five phases of the search process.

A discussion ensued regarding the timeline, developing the presidential profile, diversity, search guarantee, placement success rate, campus communication, modality for meetings, onboarding the new president and candidate confidentiality.

D. Rodas' concluded by saying we think highly of Fitchburg State and that they would be honored to do this important work to find the next President. J. Cook commented that their commitment to equity and diversity is a personal promise by their firm.

J. Discussion

K. Break

The Board took a ten-minute break at 10:47 a.m.

L. Discussion and VOTE (20-23/24)

The Board reconvened at 11:03 a.m.

K. Spinelli left the meeting in person and joined remotely.

D. Phillips next talked about the Presidential Search website that would be created. The Board will review the website and discuss what will be incorporated before it goes live.

A discussion ensued regarding the five search firms. The firms were similar in what they had to offer for services. The Board talked about the advantages and disadvantages that each firm could offer.

J. Murdoch explained the role of the search firms is to present all viable candidates that meet the criteria of the presidential profile. They provide guidance, structure, and support. They are not going to tell why you should or should not hire someone.

The consensus of the Board was a comfort level with WittKieffer.

J. Flanagan made a motion to authorize WittKieffer to conduct the Presidential Search for the next President of Fitchburg State University.

A. Turner seconded the motion.

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

Roll Call

A. Turner	Aye
J. Flanagan	Aye
K. Spinelli	Absent
C. Stimpson	Absent
D. Phillips	No
E. Gregoire	Aye
M. Fiorentino, Jr.	No
S. King-Goodwin	Absent
L. Barrieau	No
D. Tiernan	Aye

There was a conversation regarding off site locations for confidential interviews. D. Tiernan offered access to a conference room in Boston that he could secure if needed.

D. Phillips stated the need for a special meeting to discuss the Presidential Search Committee membership. After reviewing calendars, it was decided to hold a special Board meeting on Thursday, Nov. 16 at 3:30 p.m.

VI. Notifications

A. Personnel Actions (N03-23/24)

The personnel actions were submitted for informational purposes.

VII. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 11:54 AM.

Respectfully Submitted,
D. Phillips

Documents used during the meeting

- VOTE Minutes.pdf
- VOTE Sabbaticals 2023.pdf
- Memo to Board sabbatical recommendations 24-25.pdf
- Sabbatical brief write ups.pdf
- VOTE New Program Creative Arts Enterprise.pdf
- Creative Arts Enterprise Phase I LOI (1).pdf
- VOTE New Program Expressive Arts Therapies.pdf
- Proposed Degree Expressive Arts Therapies.pdf
- VOTE Presidential Search Budget.pdf
- Estimated Expenses for BOT Approval 2023.pdf
- WittKieffer proposal - Fitchburg State University President Search (1).pdf
- Spelman Johnson Proposal.pdf
- Academic Search Fitchburg State University President proposal 2024.pdf
- Diversified Group Fitchburg State President DS proposal.pdf
- IM Proposal_Fitchburg State University President.pdf
- VOTE Presidential Search Firm selection.pdf
- Report 11142023 (1).pdf
- November news clips.pdf

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	REQUEST NUMBER: 25-23/24
SUBJECT: November 14, 2023 Board Meeting minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the November 14, 2023 Board Meeting.

Coversheet

Approve minutes from the November 16, 2023 meeting. (26-23/24)

Section: I. Opening Items
Item: E. Approve minutes from the November 16, 2023 meeting. (26-23/24)
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Special Board of Trustees Meeting on November 16, 2023
VOTE Minutes Nov. 16, 2023.pdf

APPROVED



Fitchburg State University

Minutes

Special Board of Trustees Meeting

Board of Trustees Meeting

Date and Time

Thursday November 16, 2023 at 3:30 PM

Location

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

Notice of a special meeting of the Fitchburg State University Board of Trustees on Thursday, November 16, 2023 at 3:30 p.m.

The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

Trustees Present

A. Turner, D. Phillips, D. Tiernan (remote), E. Gregoire (remote), J. Flanagan (remote), K. Spinelli (remote), L. Barrieau (remote), M. Fiorentino, Jr. (remote)

Trustees Absent

C. Stimpson, S. King-Goodwin

Ex Officio Members Present

R. Lapidus (remote)

Non Voting Members Present

R. Lapidus (remote)

Guests Present

A. Marini, G. Doiron, G. Doiron, J. Bry, J. Murdoch, J. Wolfman, L. Bayless, M. Bruun, P. Marshall, P. McCafferty, P. Weizer, S. Dodd

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

D. Phillips called a meeting of the board of trustees of Fitchburg State University to order on Thursday Nov 16, 2023 at 3:31 PM.

C. Approve minutes from the November 9, 2023 meeting - VOTE (23-23/24)

The minutes were tabled due to lack of time for Board members to review.

II. Composition of the Presidential Search Committee

A. Discussion and VOTE (22- 23/24)

D. Phillips discussed the proposed search committee composition. She stated that she reviewed all of the proposed members from the previous meeting and added two additional members as requested and approved by the Board at the prior meeting. A faculty member and a student were added. The slate of members were presented for consideration.

D. Phillips discussed each search committee members' credentials and the rationale for being selected to serve on the search committee.

They are as follows:

MSCA/Faculty Representatives

Dr. Margaret Hoey/ Professor

Dr. Elisabet Takehana/Professor

APA/Professional Administrative Representative

Ms. Lindsay Carpenter-Connors/Director of Career Services and Advising Center

AFSCME/Administrative and Technical Support Group

Ms. Carolyn Hughes, Administrative Assistant II, Department of Education

NUP/Non-Unit Representative

Mr. Richard Toomey/Associate Vice President, Enrollment Management

Student Representatives

Ms. Allison Turner

Ms. Adriana Padilla Salgado

Trustee Representatives

Ms. Jennifer Flanagan

Mr. Eric Gregoire

Ms. Deborah Phillips

Mr. David Tiernan

Board of Higher Education Representative

Mario Delci, Assoc. Com. Research and Planning

Community at Large Representative

Mr. Jonathan Thompson, Interim Superintendent of Fitchburg Public Schools

D. Tiernan made a motion to approve the Presidential Search committee membership presented.

E. Gregoire seconded the motion.

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

Roll Call

D. Phillips Aye

K. Spinelli Aye

M. Fiorentino, Jr. No

C. Stimpson Absent

E. Gregoire Aye

A. Turner Aye

J. Flanagan Aye

S. King-Goodwin Absent

L. Barrieau Aye

D. Tiernan Aye

D. Phillips informed the Board that WittKieffer was notified of their selection and that they have agreed to provide their services for this important work. She next talked about the listening sessions that will be scheduled before the holidays and stated that a calendar will be shared with the Board. She discussed the various selected groups that would meet with the search firm such as faculty and librarians, APA, AFSCME, students, administrators, community members, non-unit members, BOT, Search Committee. There will be a general session to capture those that can not attend their specified session. A remote option will be made available for external constituents.

D. Phillips asked if a group had been missed.

E. Gregoire suggested a dedicated session with the alumni and perhaps even scheduling a session in person.

D. Phillips agreed. The alumni will be added as a constituent group for a listening session. She also stated that there are three alums on the search committee. She also added that the Presidential Profile would be approved by the full Board.

There was a discussion on the Presidential Profile timeline.

J. Murdoch spoke about the website being created and that it will go live and BOT members will have an opportunity to view prior to the site going live.

L. Barrieau asked who will be the chair of the search committee. D. Phillips responded that she has not decided yet.

A discussion ensued about marketing, the presidential profile, the timing for the listening sessions, and the authority of the commissioner over this entire search.

The consensus from the discussion was that in person meetings during this search process was very important.

III. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 4:08 PM.

Respectfully Submitted,
D. Tiernan

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	REQUEST NUMBER: 26-23/24
SUBJECT: November 16, 2023 Board Meeting minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the November 16, 2023 Board Meeting.

Coversheet

Approve minutes from the December 7, 2023 meeting. (27-23/24)

Section:	I. Opening Items
Item:	F. Approve minutes from the December 7, 2023 meeting. (27-23/24)
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Board of Trustees Meeting on December 7, 2023 VOTE Minutes December 7, 2023.pdf

APPROVED



Fitchburg State University

Minutes

Board of Trustees Meeting

Fitchburg State University Board of Trustees Meeting

Date and Time

Thursday December 7, 2023 at 8:15 AM

Location

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

Notice of a special meeting of the Fitchburg State University Board of Trustees on Thursday, December 7, 2023 at 8:15 a.m.

The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

Trustees Present

A. Turner, D. Phillips, D. Tiernan, E. Gregoire, J. Flanagan, K. Spinelli, L. Barrieau (remote), M. Fiorentino, Jr.

Trustees Absent

C. Stimpson, S. King-Goodwin

Guests Present

A. Tourigny, E. Takehana, F. Barricelli, G. Doiron, G. Doiron, G. Duyck, J. Bry, J. Hanselman, J. Murdoch, J. Wolfman, K. Lundgren, L. Bayless, M. Bruun, M. Hoey, P. Marshall, R. Crawford, R. Toomey, S. Dodd

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

D. Phillips called a meeting of the board of trustees of Fitchburg State University to order on Thursday Dec 7, 2023 at 8:19 AM.

II. Listening session with WittKeiffer

A. Agenda attached

D. Phillips announced that Trustee Eric Gregoire will serve as the Chair of Presidential Search Committee. She next introduced Greg Duyck and Ryan Crawford from WittKieffer. They each provided their extensive background in these types of executive searches.

G. Duyck next talked about the search process and timeline. He noted that we are now at the intake phase and reported on the meetings with the various campus colleagues. We will put together the leadership profile with the history of the school and tell the story. He asked the group what specific pieces of your story are important? They are hoping to get the advertisement out before the December holiday and their research team will go through candidates behind the scenes using every marketplace. The search firm will be out in the world talking about Fitchburg State and touch base mid-way with the Trustees. The end of February, we will be presenting candidates to the search committee and they can identify who they are interested in. Those early interviews will be held in March via zoom. After that, they will make decisions and bring candidates to campus. He stated that we are in a good point of the hiring season.

D. Phillips introduced each Board member and provided their background. She next opened the meeting up for discussion regarding desired candidate qualifications, qualities, and experiences, opportunities and challenges, and points of pride.

J. Flanagan commented that the family perspective of first-generation college students coming from economic challenges is important for the next President to understand. Also, the degrees conferred here mean something to the community. Our graduates remain in the area and give back.

M. Fiorentino talked about the person applying for the position should have experience across all sectors, and a thorough understanding of leadership. He talked about fundraising, and advancing the institution as a whole, along with recognizing we are in an ever-changing world. The person will need not just academic experience, but a myriad of experience.

K. Spinelli stated that understanding the role of the university within the City of Fitchburg and surrounding area is crucial. The town has struggled and has not grown like a lot of other cities. Fitchburg State is helping the city grow. Whoever is brought in must understand the community.

D. Phillips said that Fitchburg State is a major economic engine for the area. There are often town gown issues, and this university works really hard to be cooperative and collaborative, and we want that relationship with the city to continue.

D. Tiernan noted that experience, and diverse expertise, and we want someone seasoned. That means coming in with an open mind and this job is not a stretch for their capabilities. Fitchburg State is viable part of the city, and the next President is going to have to work well with community partners.

J. Flanagan talked about thinking outside the box, and we need a creative leader. She said Fitchburg State is a focal point within the region.

M. Fiorentino stated that there are mixed feelings about the institution and we can do a better job of telling our story, someone who has extensive experience is needed. The President needs to be the face of the institution, and needs to be out on campus and in the community. We need to be the leaders in the community with our students and alumni. He acknowledged that it takes a great deal of attention. This is why institutional advancement work is so important.

R. Crawford asked beside being the economic engine for the community, what are the other criteria that should be included.

M. Fiorentino said that there are a number of programs that have a direct connection to the community such as health care, and education. We need to tell the story and tell it in a positive way. The community has a transient population and a move to become a real community within the school would help.

J. Flanagan talked about the efforts made to bring the train station here and getting a better schedule. The trend with the new Governor is more affordable housing. She said with Fitchburg's location, there is much opportunity for growth. The newest academic programs show growth, Fitchburg State continues to evolve.

G. Duyck stated that when he spoke to people in the various sessions yesterday, that there is a remarkable story of adaptability.

D. Phillips stated that when she served on the Foundation Board, there was significant investments in structure and infrastructure on the campus. Now where do we go, we need a person that has experience in finance, ability to be flexible, and need to garner the support of various constituents, on campus and off campus.

M. Fiorentino said the next President needs to be very nimble. This institution came through Covid well. He expressed his belief that we need to renew our long-range planning activities. Where we are today and what areas are under consideration for the future. The ability to remain flexible and change where change is needed and not tied to a particular agenda. The next President needs to be able to make those changes quickly, and guide the staff and keep the Board informed.

A discussion ensued about lack of funding from the legislature, diversity, strong leadership, and the team already on staff. The next President needs to be a good communicator, focused on diversity, and an engaged leader.

M. Fiorentino said the President going forward, in public higher education, needs to be a role model and guide people and someone who is decisive, be actively engaged and be visible on campus and the community. We also need someone who is an example of public and government relations.

The Board talked about what they would like to see in the next President:

- A good collaborator
- Genuine
- Personal integrity
- Creative in meeting the demands of the workforce
- Innovative
- Expand current programs such as the Honors Program
- Create new programs
- Adaptable
- Decisive
- Understand the union environment

G. Duyck asked what is the appetite for international students?

A discussion ensued. The more exposures to other cultures and learning types is good for all students. We need to be cautious that we have support for students from other countries and do we have the infrastructure to support those students, and understand the culture they are coming from.

There was a discussion on support services on campus.

R. Crawford asked with a new Governor, is there a concern about state support?

E. Gregoire responded that the percentage of our state support is not keeping pace with costs. Our revenue depends upon the economy and it doesn't go much deeper.

G. Duyck asked what will be different in five years with a different President?

D. Tiernan hoped for more programs and increased enrollment.

M. Fiorentino said a university with a community that engages with each other as individuals and as groups. A place where people feel free to express their opinions, and are recognized for their work. Having a real sense of community that demonstrates to students that it's a healthy place where they can thrive and grow.

E. Gregoire said the financial perspective and an alignment with strategic planning that provides stability. A focus on a long-term financial planning.

D. Phillips expressed her hope that the next President would not make any drastic moves for the first six months.

M. Fiorentino said the next person needs to understand data. There could be missed opportunities, and data leads us, we are currently not in a serious financial crisis but we need to avoid that.

D. Phillips stated data and analysis is very important.

G. Duyck asked what are the personal qualities needed for the next President?

M. Fiorentino responded someone comfortable and excited walking throughout the campus and being able to talk to everyone and having conversations. Being able to speak in the community about Fitchburg State. Someone who respects the decisions of people on campus and listen to opinions even if they disagree. To not take a different opinion as a personal issue. Someone who is self-confident and a consensus builder and able to make decisions in a timely manner.

L. Barrieau responded someone that would keep the Trustees informed, and look at them as part of a team. We can only do that if we have all the information and this is important part of the discussion. An effective listener, and confident in themselves but not over confident. Someone open to feedback and intellectually curious, and able to translate opportunities.

M. Fiorentino said someone who takes advantage of the strengths that are here, utilize the Provost and the Deans. People who want to participate in some way, take advantage of their eagerness to contribute. A team builder based on strengths and weaknesses. This is a good institution with people who care about the school and want to part of solutions.

E. Gregoire said someone passionate for the mission and wanting to contribute to the institution's overall success.

G. Duyck thanked the Trustees for the engaging discussion and encouraged them to send any nominations to the email address provided.

M. Fiorentino thanked the Trustees, faculty, staff and students who voiced their willingness to be on the Presidential Search Committee.

III. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:48 AM.

Respectfully Submitted,
D. Phillips

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	REQUEST NUMBER: 27-23/24
SUBJECT: December 7, 2023 Board Meeting minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the December 7, 2023 Board Meeting.

Coversheet

Approve minutes from the December 19, 2023 meeting. (28-23/24)

Section: I. Opening Items
Item: G. Approve minutes from the December 19, 2023 meeting. (28-23/24)
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board of Trustees Meeting on December 19, 2023
VOTE Minutes December 19, 2023.pdf

APPROVED



Fitchburg State University

Minutes

Board of Trustees Meeting

Fitchburg State University Board of Trustees Meeting

Date and Time

Tuesday December 19, 2023 at 8:15 AM

Location

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

Notice of a special meeting of the Fitchburg State University Board of Trustees on Tuesday, December 19, 2023 at 8:15 a.m.

The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

Trustees Present

A. Turner, C. Stimpson (remote), D. Phillips, D. Tiernan (remote), E. Gregoire (remote), J. Flanagan (remote), K. Spinelli (remote), L. Barrieau, M. Fiorentino, Jr. (remote)

Trustees Absent

S. King-Goodwin

Ex Officio Members Present

R. Lapidus

Non Voting Members Present

R. Lapidus

Guests Present

F. Barricelli, G. Doiron, G. Doiron, G. Duyck, J. Bry, J. Murdoch, J. Wolfman, M. Bruun, P. Marshall, R. Crawford, S. Dodd

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

D. Phillips called a meeting of the board of trustees of Fitchburg State University to order on Tuesday Dec 19, 2023 at 8:17 AM.

C. Public Comments

There were no public comments.

II. Presidential Profile

A. Discuss the Proposed Presidential Profile

D. Phillips welcomed everyone and introduced E. Gregoire, Chair, Presidential Search Committee to provide an update on the Presidential Profile.

E. Gregoire reported that the search committee met on Friday, December 15 to review the profile. The initial draft was shared with the committee and board members. The comments from the Board's recommendations and the committee's input were incorporated into the document. He stated they recognized the challenges that Fitchburg State is facing but they are attractive challenges. Specifically, important feedback was focused on student and academic programs, and showing opportunities for those programs. The committee had a robust conversation on how to note in the profile the balance of Covid's impact on the community and managing around those obstacles. The committee had a healthy discussion on the professional and personal qualities needed in the next President. There was a lot of discussion around these characteristics. There were modifications from the attributes in the should category to the must category.

E. Gregoire next reported that the Board of Higher Education have made recommendations. The profile has been updated to reflect those changes. The search committee positively approved the profile. He thanked Ryan Crawford, and Greg Duyck from WittKieffer for their guidance and feedback.

D. Phillips thanked E. Gregoire for the update. She stated that search committee voted to approved the profile and recommend to the full board.

D. Phillips opened the meeting up for discussion on following:

Opportunities and Expectations, Collaboratively Envision Future Opportunities and Strategies, Communicate Clearly About New Directions and Move to Implement, Continue to Explore and Expand New Offerings and Serve Diverse Student Populations, Enhance the Fitchburg State Community, and Engage External Partners in Advancing Shared Goals.

There was a discussion on the topic of new offerings. The language used in the profile regarding the new programs needed to be modified. We are waiting for final official approval for two new programs from the Board of Higher Education.

C. Stimpson joined remotely at 8:32 am

L. Barrieau made a motion to add the following sentence to the Presidential Profile: The university has created academic programs that are in demand and aligned with the needs of the communities it serves, including offerings in biotechnology, engineering technology, construction management, health professions, digital media innovation, and game design, as well programs pending approval in creative arts enterprise, and expressive arts therapy.

A. Turner seconded the motion.

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

Roll Call

C. Stimpson	Aye
D. Tiernan	Aye
E. Gregoire	Aye
D. Phillips	Aye
S. King-Goodwin	Absent
L. Barrieau	Aye
M. Fiorentino, Jr.	Aye
J. Flanagan	Absent
K. Spinelli	Aye
A. Turner	Aye

D. Phillips next ask for feedback on the other sections in the profile specifically professional qualifications and personal qualities.

There was a discussion.

B. Finalize and Approve the Presidential Profile

L. Barrieau made a motion to approve.

C. Stimpson seconded the motion.

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

Roll Call

C. Stimpson Aye
D. Tiernan Aye
J. Flanagan Absent
D. Phillips Aye
E. Gregoire Aye
L. Barrieau Aye
K. Spinelli Aye
S. King-Goodwin Absent
A. Turner Aye
M. Fiorentino, Jr. Aye

E. Gregoire provided the timeline for meetings and interviews moving forward. There will be a search committee meeting at the end of January to discuss questions for the candidates. The next meeting would be at the end of February or early March to review applications. The first round of interviews will begin the second week of March.

J. Flanagan joined remotely at 8:43 a.m.

E. Gregoire talked about the how the first round of interviews would take place, either via zoom or in person. The timeline for interviews was discussed.

E. Gregoire closed the meeting by thanking Greg Duyck, and Ryan Crawford for their work. He also thanked Jessica Murdoch and Kelli Lundgren for their efforts in putting the document together and keeping the various drafts in order.

III. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:44 AM.

Respectfully Submitted,
D. Tiernan

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	REQUEST NUMBER: 28-23/24
SUBJECT: December 19, 2023 Board Meeting minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the December 19, 2023 Board Meeting.

Coversheet

Academic Efficiencies Final Report

Section: II. Financial Sustainability Report Discussion
Item: A. Academic Efficiencies Final Report
Purpose: Discuss
Submitted by:
Related Material: FSTF Phase 2 ACADEMIC EFFICIENCIES.pdf

FSTF Working Group Phase Two: Final Report Academic Efficiencies December, 2023

Overview:

The Academic Efficiencies subgroup of the Phase II Financial Sustainability Task Force started its work during Summer 2023 by reviewing the fourteen recommendations generated by the FSTF Phase I Working Group and the President's Executive Cabinet. These recommendations cut across four key areas, specifically revitalizing the academic program, retention and completion, academic modalities and pedagogical innovations, and assessing the university's relationship with Academic Partnerships.

During weekly meetings, the group discussed each of the FSTF Phase I recommendations and identified common themes across the fourteen recommendations as well as specific areas of action that are consistent with the charge of our group to identify greater efficiencies, cost savings, and/or the generation of revenue. To guide our process, the group requested data and met with key stakeholders.

By the end of our summer work, the group consolidated the remaining FSTF Phase I recommendations into three categories:

- Evaluating the academic program portfolio in the context of the university's mission, considering both existing and potential new programs with an eye towards differentiation and financial impact on the institution. Essential to this idea is a commitment to facilitating smart growth, which means analyzing the cost of running a program in relation to the revenue that the program generates, and strategic investment/allocation in our academic programs.
- Conducting a thorough assessment of what falls under our retention efforts (e.g. faculty advising, alerts in SSC, CARE Team reports, student support services, FYE, etc.) in order to create a unified and targeted plan to retain students through to graduation.
- Evaluating the university's reliance on external consultants while examining potential efficiencies created by utilizing and developing the talent of the university's faculty, staff, and administrators.

A number of potential areas of action were identified under each of the above categories, and reviewing each of those areas of action became the focus of the group's work when we resumed our weekly meetings during Fall 2023. The full list of potential recommendations can be found in our [Interim Report](#) submitted at the end of the summer.

Throughout the fall semester, the group met weekly to narrow and refine our recommendations. This process continued to be informed by the review of data as well as interviews with key stakeholders. Additionally, our group attended a joint meeting with the

Administrative Efficiencies group to discuss overlapping ideas for recommendations in a conversation with the university's Vice President for Finance and Administration.

A key outcome of the group's discussions during the Fall 2023 semester was the consolidation of our recommendations about evaluating the academic program and the university's reliance upon external consultants to generate data regarding our academic programs. The group's recommendation regarding retention efforts was refined after learning that the university, through a consultant funded by a donor, is currently conducting a review of our retention efforts. This review is being conducted during the current academic year.

After refining the recommendations, the group divided into smaller writing groups to draft each recommendation. The entire group reviewed and edited these drafts, and this final report represents the collaborative and combined efforts of the Academic Efficiencies group. Furthermore, it is informed by information and data provided by key stakeholders in Academic Affairs, Student Affairs, Institutional Research and Planning, Enrollment Management, and Finance.

Chosen Recommendations:

The three priorities chosen are as follows:

1. Eliminate specific EAB contracts (APS, Global Partnerships, Edify) and develop a collaborative internal process and holistic data set that allows us to evaluate the academic program portfolio in the context of the university's mission, considering both existing and potential new programs with an eye towards differentiation and financial impact on the institution.
2. Change the Academic Innovation Fund (AIF) process, identifying shared priorities with input from all stakeholders and reallocating the AIF money to the Provost's budget, to allow for strategic decision-making and the most efficient utilization of limited resources.
3. Create a unified and targeted retention plan based on a comprehensive assessment of student success efforts to support students at all levels - academic, financial and social - through their journey from matriculation to graduation.

For each of the recommendations listed above, we will provide an executive summary highlighting the importance of the recommendation, a review of the data that led to the recommendation, as well as a bulleted list of specific recommendations with an implementation strategy.

Recommendation 1:

Eliminate specific EAB contracts (APS, Global Partnerships, Edify) and develop a collaborative internal process and a holistic data set that allows us to evaluate the academic program

portfolio in the context of the university's mission, considering both existing and potential new programs, with an eye towards differentiation and financial impact on the institution.

Summary and Importance:

In 2014, the university signed its first contract with the Education Advisory Board (EAB) for a product then called the Student Success Collaborative (now SSC Navigate) for the purpose of improving student success through the use of institutional data. Since that time, the use of outside consulting products for nearly every facet of the university has grown dramatically.

During the tenure of the Financial Sustainability Committee on Academic Efficiencies, and in collaboration with the Administrative Efficiencies group, we have reviewed and cataloged all EAB contracts that now approach \$1.2 million annually. This sum represents a tenfold increase over the last nine years. The committee interviewed key stakeholders throughout the university's administration, including Academic Affairs, Institutional Research and Planning, Enrollment Management, and Finance.

It has become increasingly common for the university to bring in expensive external consulting firms such as EAB, and undeniably, our increased use of consultants mimics trends across the national higher education landscape, where EAB is a well-known firm with thousands of partners. However, none of those interviewed were able to articulate any strategic decision or transformational initiative resulting from the services recommended for elimination below. The committee has been unable to assess the ROI or value-add from several of the EAB products or point to any direct benefit to students, and no one in the administration has been able to quantify any specific dollars or person-hours saved.

Further, the committee was able to confirm that [campus usage](#) of several of these consultant products has been minimal at best. Additionally, deliverables from some EAB products have not been provided in a timely fashion. For example, Edify dashboards are still under development after years of setup work. Equally frustrating is the fact that the very product that has been sold to us by the EAB has relied in part on the contributions and expertise of FSU staff. Moreover, campus users have questioned the reliability and validity of the data and the relevance of how EAB data is packaged in relation to our campus. The EAB products do not necessarily match up with the needs of our users.

Based on all of the above, three things have become clear to the committee. First, there are times when consultant services are valuable and necessary. But, the use of consultants should be vetted in a transparent process that includes community input, clear goals, and measurable return on investment. Second, it is essential that we conduct rigorous assessment of the outcomes of these products and services; without assessment, these products constitute mere expense without efficiency.

Third, we need a shift in focus from the primary reliance on external consultants to the increased use of internal experts who know our campus best and can generate useful data for

those in decision-making roles. For example, we already have an Office of Institutional Research and Planning that provides rich data for important initiatives and reports such as the NECHE self-study, program reviews, and our campus climate survey. In fact, for the past several years, EAB has leveraged the skills of our Institutional Research and Planning staff in implementing their products. We also have faculty and staff across disciplines who are dedicated researchers and experts in higher education policy, strategic planning, data analysis, program evaluation, and more. Tapping into their knowledge and experience could provide tremendous insight for enhancing our university. While this would require a reallocation of some of the savings generated from eliminating EAB contracts in order to provide the human capital necessary, it would be at a fraction of the cost of private consultants.

EAB itself has done a decade of research on cost savings and efficiency on both the academic and administrative side. The core is that **across-the-board cuts don't work**. Consequently, it is crucial for institutions to engage in proactive and nuanced cost-control strategies to ensure financial viability.¹

Therefore, we propose a nuanced and strategic approach to the problem. We propose to eliminate the costly, underutilized, and unassessed consultant products below. Then, we recommend harnessing the talent and institutional knowledge of our own campus community to develop a collaborative process and holistic data set that allows us to evaluate the academic program portfolio in the context of the university's mission, considering both existing and potential new programs with an eye towards differentiation and financial impact on the institution.

Data/Information:

The data for this recommendation came from several sources. The group reviewed cost data from EAB contracts as well as utilization data. Several interviews were conducted with subject-matter experts in Academic Affairs, Institutional Research and Planning, Finance, and Enrollment Management.

Cost of EAB Products:

In total, EAB contracts exceeded \$1,170,659 in FY24. The cost of the specific products targeted for elimination is as follows: APS (cost of \$89,585 in FY 24 alone); Global Partnership (cost of \$98,810 in FY24 alone); and Edify (cost of \$228,486 in FY 24 alone). Pinpointing exact figures has been a challenge as evidenced by the various tabs in the documents linked [here](#) and [here](#).

¹ Reduce long-term cost growth to right size your university, EAB Research Insights, accessed 11/21/23 (https://eab.com/insights/blogs/operations/cost-control-strategies-rightsize-your-university/?x_id=003C000001gwNnvlAE&utm_source=eabdb&utm_medium=email&utm_campaign=eabdb&utm_term=&utm_content=&mkt_tok=NzMyLUdLVi02NTUAAAGPkNUPEPkfb8spnLkV3jggCgSKyE-RpUgl44LgU33SpyKhfLPkkoScDQU0NrUJTQYqU_6pQ1ss8LJfcHKgpnbk7zWSPBTrjZ8ka9gnlGRD0ko-fA)

According to the university budget figures provided by our finance team, the contracts for APS and Global Partnership end after FY24. Therefore, eliminating those two contracts would result in an approximate cost savings of \$188,395 each year according to the [documentation](#) provided by our Finance Office. According to the provided budget figures, the Edify contract has two remaining years at a cost of \$352,254 (\$233,910 in FY25 and \$118,344 in FY26).

Overall, the elimination of APS, Global Partnerships, and Edify will ultimately result in a cost savings to the university of ~ \$416,881 per year starting in FY25. This figure is based on the FY24 figures for each product as well as the reallocation of hours purchased to work on Edify. We learned in a joint meeting of two FTSF committees with the VP of Finance and Administration that the university's EAB contract is structured through purchased hours. Therefore, we recommend reallocating all remaining hours towards the remaining EAB products, specifically SSC Navigate and the Admissions products that directly benefit students and impact enrollment and retention.

Utilization and Usefulness:

The [utilization](#) of the three EAB products targeted for elimination has been minimal.

APS: The university has created 39 APS user accounts since we bought the product in 2020. Of these 39 accounts, only 5 have accessed the site 10 or more times. Fifteen accounts have never logged in, and only 6 accounts have been active on the site during 2023.

Regarding usefulness, various sources have called into question the reliability and validity of the data included in APS. Department chairs have reported that the data do not provide a true picture of their departments and are not useful in developing position requests. As an example, it is impossible to obtain data for individual academic programs in multi-disciplinary departments. Also, the benchmark data for course planning optimization in APS is based on AY20. It is the group's understanding that EAB has no plans to update this information. As such, more relevant and up-to-date information about key metrics (e.g., course fill rate) can be obtained from our own internal sources such as the seats list that are maintained regularly, in real time. The EAB product is not useful for course planning and scheduling on our campus.

Global Partnerships: Global Partnerships was marketed to the university as a warehouse for best practices. However, the usage of the service has been very low, especially with respect to initiatives that are tailored specifically to Fitchburg State University. In 2022-2023, the university made use of the following services: 6 responses to questions with pre-packaged, not Fitchburg State-specific, research on topics; 18 instances of participation in EAB webinars; 6 phone calls with "experts"; and 4 market research projects to inform demand for new programs.

Regarding usefulness, the group asked at multiple levels of our administration for concrete examples of actionable items that resulted from the above-noted consultation. Other than the market demand research, no one could provide a single actionable item that resulted from the reports, webinars, or phone calls.

Edify: Edify was marketed to the university as a data hub that would make access to data seamless and reporting easier. A key goal of Edify is to develop dashboards that would allow collaborative decision-making across divisions of the university. The university is currently three years and \$562,206 into the Edify contract and none of the deliverables are up and running.

To date, there have been 18 Edify accounts created, mostly in Information Technology working to assist in the development of deliverables. Only 8 accounts have accessed the site in 2023. Not only do we have nothing to show for the money spent to date, but considerable person-hours from both Institutional Research and Planning and Information Technology have been invested in this project.

In summary, our review of the various EAB products found several – specifically SSC Navigate and those used by our Admissions and Enrollment Management team – with value to the institution. However, three products – APS, Global Partnerships, and Edify – failed to demonstrate value in comparison to the cost of the contract.

Specific Recommendations/Implementation Plan:

- After evaluating our reliance on outside consultants to reduce costs in this area, we recommend the elimination of the following EAB products with cost savings to the University of ~\$416,881 per year:
 - Global Partnerships (\$98,810 in FY 24)
 - Academic Performance Solutions (APS) (\$89,585 in FY 24)
 - Edify Data Hub (\$228,486 in FY 24)
 - We recommend reallocating all remaining hours in the Edify contract to remaining EAB products, specifically SSC Navigate and the Admissions products, as these directly benefit students and impact enrollment and retention.
- We also recommend examining potential savings offered by utilizing our own staff, faculty and librarians, and administrators, and our existing organizational structure, with our Office of Institutional Research and Planning, who possess a wealth of institutional knowledge and expertise. By utilizing and developing this internal talent, while also being mindful of national best practices and trends in higher education, the university can tap into a deep understanding of its unique challenges, culture, mission, and values, leading to more tailored and effective solutions to our challenges.
- More specifically, following the elimination of the consultant products above, we recommend developing a collaborative process informed by a holistic set of data to align academic program plans with the university's mission as well as long-term enrollment demands. This collaboration requires input from all stakeholders including Academic Affairs, Student Affairs, Institutional Research and Planning, Enrollment Management, and Finance, as the current practice of relying on academic data generated by various

offices, divisions, and EAB has been a source of operational confusion and unnecessary expense.

The key to success must be a process and a data set on which all institutional stakeholders agree. A different version of the “Phase 1 Data Report” produced by the university in years past offers a potential place to start. Through collaborative conversations that inform all stakeholders about potential variables to include, a new approach to generating a complete academic data set by our Office of Institutional Research and Planning would better meet the needs of analyzing our academic programs. The committee recognizes that the reallocation of some of the savings above may be needed to provide the human capital to get the work done; but, substantial savings will still be realized.

This robust data set would allow us to facilitate smart growth, which means analyzing the cost of running a program in relation to the revenue that the program generates, and making strategic investments in and allocations to our academic programs. Likewise, it could assist us in implementing a strategic process that would drive the modification of existing programs and/or the creation of new ones.

Recommendation 2:

Change the Academic Innovation Fund (AIF) process, identifying shared priorities with input from all stakeholders and reallocating the AIF money to the Provost’s budget, to allow for strategic decision-making and the most efficient utilization of limited resources.

Summary and Importance:

In Spring 2022, the Academic Innovation Fund (AIF) and the University Innovation Fund (UIF) were created. Each was started with \$250,000 (for a total of \$500,000).² It is unclear where this pool of money came from; we learned that it was not redirected from a previously existing source and it was not allocated to Academic Affairs. It is also unclear if this funding mechanism will remain in place during future years.

During the first year of the fund, an internal grant application and review process were quickly established, as the funds needed to be allocated within a few months. During the second grant cycle, the grant application was significantly revised, particularly with respect to requiring applicants to discuss outcomes assessment and sustainability plans. Additionally, a university-wide committee was established to review grant applications and provide recommendations to the Provost. The committee included seven MSCA members selected from various disciplines to represent the breadth of the university curriculum as well as representation from Academic Affairs (two deans and the AVPAA as an *ex-officio* member).

² As our group is focused on Academic Efficiencies, the focus of this recommendation will be on the AIF only.

We endorse the concept of the AIF grant that taps into the interest and expertise of our faculty and librarians to initiate academic innovation. We also recognize the value of the new RFP (Request for Proposal), built with reference to the strategic plan and sustainability concerns. However, given that the AIF budget - the primary driver of new academic initiatives and programs - lies outside the purview of Academic Affairs, the current AIF process raises issues that need to be addressed.

While the funded projects are exciting and valuable in many ways, and each has intrinsic value in itself, the AIF process prevents the collective impact from being apparent. In the absence of coordinated curricular priorities for the campus, the model risks leading us to an increasingly fragmented academic portfolio. It also risks leading to a proliferation of initiatives that are valuable but unsustainable, and thus the current model does not represent the most efficient use of our limited resources. Moreover, many of the grants provide seed money but do not plan for added expenses to support the outcome of these projects in a sustainable way.

Though we fully support innovation and investment in our academic program portfolio, we suggest a different approach and process that may yield more successful, cohesive, sustainable, and measurable outcomes.

In order for the Academic Innovation Fund model to be successful, the following ambitious conditions must be met.

- The highest academic priorities in terms of establishing a comprehensive university curricular portfolio must be agreed upon and clearly articulated prior to a grant cycle.
- These specific academic priorities need to drive grant decision-making in relation to the comprehensive curricular plan.
- Communication across the academic community needs to ensure interconnectedness.

Given the complexities associated with meeting all of the above conditions, the current internal grant process is not the most efficient way to fund the development of programs and initiatives. For example, as will be highlighted in the data below, over \$100,000 across both grant cycles was not invested into academic innovations.

Further, until we are able to have conversations and agree on shared priorities and goals (the first bullet above), we cannot move forward strategically, as an institution. Thus, a more lasting investment in our academic programs would be to have these urgent conversations at the School level and to strengthen the Academic Affairs budget to support the collective strategic vision for the campus curriculum.

Data/Information:

AIF AY23-24 Funding Cycle:

\$250,000 was made available to support initiatives during AY23-24. Twelve grants were awarded with a total of \$154,124. The specific grant amounts ranged from a low of \$6,252 to a high of \$25,204, with almost half of them falling under \$10K. It is unclear what happened to the

remaining ~\$96,000 in the AIF pool for AY23-24. The money was not redirected to any other academic initiative that the committee could identify and the money is not in the budget of the Provost.

Eight of the twelve grants impacted the academic program portfolio. More specifically, two grants supported the creation of new majors, while two funded the development of new courses. Four existing courses were redesigned using AIF monies. A number of grants were awarded to repeat recipients and program areas. See the full list [here](#).

AIF AY22-23 Funding Cycle:

\$250,000 was available to support initiatives during the spring of AY22-23. Thirteen grants were awarded with a total of \$222,101. The specific grant amounts ranged from a low of \$5,000 to a high of \$39,250, with five of them falling under \$10,000. Approximately \$18,000 was unspent during this cycle. Where those funds were redirected is unknown and they were not in the budget of the Provost.

Eight of the thirteen grants impacted the academic program portfolio. More specifically, three grants supported the development of new majors, and one supported the creation of a new minor. One grant was allocated to establish a new 4+1 program, and two supported the development of new courses. One grant supported the redesign of a course while another supported the redesign of a sequence of courses. Finally, there was also a grant to formalize high-impact practices, a key institutional priority, but only in four specific departments. See the full list [here](#).

Specific Recommendations/Implementation Plan:

- We strongly support the goals and funding of the AIF as an investment in academic innovation and quality, but not the current process.
- We recommend reallocating the AIF money to the Provost's budget. It is the responsibility of the Chief Academic Officer to oversee the innovation of the curriculum. This will allow for strategic decision-making and help prevent the development of initiatives outside of strategic academic processes. Further, we recommend that the Provost create an internal budgetary process to empower the Deans to play a more significant role in the efficient use of academic resources and the leadership of academic innovation.
- We recommend that the Provost, the Deans, Department Chairs, and Faculty and Librarians facilitate urgent conversations at the School level to articulate a concrete vision and set of strategic priorities for academic innovation in the context of the curriculum that Fitchburg State University offers. These priorities will be based on the input of stakeholders as well as the mission and needs of each School.
- We recommend strengthening the Academic Affairs budget to support the development of a collective strategic vision for each School that will drive its growth and renewal.
- We thus also recommend changing the Academic Innovation Fund (AIF) process in relation to the above.

Recommendation 3:

Create a unified and targeted retention plan based on a comprehensive assessment of student success efforts to support students at all levels - academic, financial and social - through their journey from matriculation to graduation.

Summary and Importance:

To improve the financial sustainability of Fitchburg State University, we must focus on retaining our undergraduate day students once they enroll. Retaining our students is essential to fulfilling the mission of Fitchburg State University, and a hallmark of financial sustainability. National estimates show the cost to recruit a new student exceeds the cost to retain one who is already enrolled.³ We cannot build our financial model on the assumption that students who leave can be easily and inexpensively replaced.

Based on publicly-available first-time, full-time enrollment figures for the 2021-2022 academic year, 157 Fitchburg State University undergraduate day students failed to continue from their first year to second year (FSU [Factbook 2022](#)). Using the conservative price point of in-state, off-campus tuition and fees of \$11,046, the attrition of these students reduced university revenue by \$1.7 million dollars (FSU [Website COA](#)). In addition, the size of the university's first-year class fell 30% between 2018 and 2022, from 1108 to 775 (FSU [Factbook 2022](#)). It is imperative that retaining students be a key efficiency focus of our community.

Data/ Information:

We anticipate increased access to retention and student success data in the near future. Funded solely by an anonymous grant, Fitchburg State has hired [Batista Consulting Services](#) to perform a comprehensive review of FSU's student success and retention processes, policies, and initiatives. The scope of BCS's work includes:

- Performing policy audits related to student success and retention through an equity lens.
- Reviewing institutional data related to student success to identify gaps.
- Evaluating FSU's matriculation and onboarding protocols for specific populations including transfer, first-generation, and pre-major (undecided) students; this includes an assessment of our orientation programs and their modalities.
- Reviewing FSU's mixed advising structure, which combines professional and faculty advising.

³ Gonzalez, Vanessa (2022). The cost of academic dismissal and attrition from students on academic probation. *New Directions for Higher Education*, 198, 75-85.

Is student retention an expense or investment?, Education Insights Blog, Ruffalo Noel Levitz, accessed 12/5/23 (<https://www.ruffalonl.com/blog/student-success/is-college-student-retention-an-expense-or-an-investment/>)

- Creating an inventory of current student success initiatives and retention strategies to identify gaps and duplication of effort.
- Reviewing FSU's inventory of student success data management platforms to identify gaps in our processes for leveraging the data we have regarding student success and persistence.
- Partnering with Institutional Research and Planning and Student Success to develop an evaluation plan for the First Year Experience program; this is in anticipation of program expansion to include co-curricular components.
- Developing a report of the findings and recommendations.
- Partnering with campus constituents to develop an implementation plan.

As noted in [recommendations from the NECHE report](#), the Office of Institutional Research and Planning “has significantly advanced the value of evidenced-based practice on this campus.” Consistent with this approach, the Associate Director of Institutional Research, and the new role’s focus on student success, will be instrumental in supporting the assessment of key questions that emerged while our academic efficiencies group was conducting its work. These include:

- What is the role of Enrollment Management in retention?
- How can the ROI on programs and services promoting retention and student success be meaningfully calculated?

Specific Recommendations/Implementation Plan:

- We recommend creating a comprehensive map of all our existing retention efforts (including staffing, advising models, curricular efforts, student services, enrollment management, externally funded efforts, and more). This map will integrate the outcomes of the Batista Consulting Services’ review.
- We recommend using the comprehensive map of Fitchburg State retention efforts to:
 - Identify where our retention efforts are successful, where there are gaps in our services related to student success, and where there are duplicative efforts.
 - Examine expenditures in relation to these successes, gaps, and duplications
 - Gather data across undergraduate day student constituencies to determine factors that influence retention (including and exceeding direct retention efforts).
 - Identify key areas of intervention (curricular, financial, institutional, etc.) as well as potential efficiencies, including the coordination of services.
- From the above map and analyses, we recommend creating a coordinated and targeted retention plan, through collaboration between Academic Affairs, Enrollment Management, Student Affairs, and the Office of Institutional Research and Planning, that is specific to the needs of Fitchburg State University.

Future Considerations:

While our group chose to focus on the aforementioned recommendations, there are additional areas for evaluation and future consideration with respect to academic efficiencies.

The first is to assess the university's relationship with Academic Partnerships (AP). After much discussion and consideration, the group decided not to put forth the recommendation to reevaluate our contract with AP at this time. The primary conclusion was that eliminating the partnership would not be the source of significant-enough savings in the immediate future, as our contract runs through 9/30/26. That said, AP charges ½ of the tuition and fees generated by the university for programs run in conjunction with AP. This calculation does not include the significant cost of FSU staff time in managing our programs with AP. Therefore, the group recommends re-evaluating the AP contract when it is up on 9/30/26. (The contract will be automatically renewed for 5 years unless we give notice 270 days prior to the end date, or by 2/1/26.)

A second area for future consideration is related to marketing and enrollment management. We recommend investigating how marketing strategies may impact program enrollments and exploring additional opportunities for academic-specific/mission-specific marketing campaigns. The group met with the Associate Vice President for Enrollment Management. He relayed that it was his belief that targeted marketing efforts for specific academic programs are not feasible at this time. Reasons provided included a more pressing need to market the brand of Fitchburg State University as a whole and limited resources. Our group suggests further discussion about this approach and whether or not it has yielded the outcome desired.

The AVP also provided a strategic enrollment plan brochure to the group. He indicated that it is not available online as he did not want our competitors to know our plans. The plan included reference to an Enrollment Advisory Group that reports directly to the President. However, it is our understanding that while members of Academic Affairs attended the initial meeting of the Enrollment Advisory Group, they have not been included in any subsequent meetings of this group, if any occurred. The Provost has not been a member of this Advisory Group. Looking forward, it is critical that the Provost and Academic Affairs be involved in all aspects of enrollment management. Going forward, we recommend including the Provost and Academic Affairs in the Enrollment Advisory Group and further exploring the benefits of marketing our unique and distinctive academic programs.

Other Accomplishments:

It is important to reiterate that this report is the product of a collaborative effort between representatives from frequently siloed units across campus. We believe that bringing together voices from across the campus - administrators, staff, faculty and librarians - is incredibly important and productive and should not be limited only to emergency situations. We have all appreciated this opportunity.

Coversheet

Administrative Efficiencies Final Report

Section: II. Financial Sustainability Report Discussion
Item: B. Administrative Efficiencies Final Report
Purpose: Discuss
Submitted by:
Related Material: FSTF Phase 2 ADMINISTRATIVE EFFICIENCIES.pdf

Financial Sustainability Task Force Phase Two: Administrative Efficiencies December 15, 2023

Overview:

As part of the Financial Sustainability Task Force Phase 2, the Administrative Efficiencies Working Group received broad recommendations in approximately twenty areas that were identified by FSTF Phase 1 and the President's Executive Committee. The working group assessed these and read the original survey responses to Phase 1 for additional context. Cognizant of our charge to identify cost savings, revenue generation, and/or greater efficiencies, the working group identified six areas of study. The six study areas were:

- Personnel and reorganization of departments and offices
- Organizational structure with an emphasis on student-facing departments and offices
- External consultants, services, and systems
- Allocation of academic resources to campus offices and initiatives
- Consolidation of department and office operations
- Commencement efficiencies

Priorities:

After consideration, the working group eliminated the consolidation of physical offices from consideration. While the idea may produce efficiencies, the group determined that the scope of the inquiry involved multiple constituencies on campus that were not involved in Phase 2, including broad faculty, staff, and maintenance departments. Moreover, the FSTF Phase 2 Property and Infrastructure report should influence future considerations of consolidation on the campus.

Among the five remaining study areas, the Administrative Efficiencies group requested data and met weekly or biweekly during the summer of 2023. It completed an Interim Report and reconvened in the fall of 2023.¹ Data was received quickly; the subcommittee reviewed information as it became available.² Through review and discussion, the working group concentrated its analysis in three areas: Commencement Revisioning, Operational Savings, and Personnel Efficiencies.

Data and Information:

The committee conducted its work with the knowledge of the mission of public state universities in Massachusetts:

Each state university places a special emphasis on teaching and lifelong learning and promotes a campus life that fosters intellectual, social, and ethical development.

¹ [Financial Sustainability Task Force Interim Report, Administrative Efficiencies](#)

² [Data Request Form Phase 2 Financial Sustainability Task Force](#)

Committed to excellence in instruction and to providing responsive, innovative, and educational programs of high quality, they seek to develop each student's critical thinking, quantitative, technological, oral, and written communication skills, and practical appreciation of the arts, sciences, and humanities as they affect good citizenship and an improved quality of life.³

It undertook its work with a focus on Fitchburg State's commitment to excellence in teaching and learning, its ability to blend "liberal arts and sciences and professional programs within a small college environment," and its responsibility to serve North Central Massachusetts and the Commonwealth of Massachusetts.⁴ With its responsibility to the taxpayers of the Commonwealth in mind, the Administrative Efficiencies Working Group examined expenditures across the campus in all divisions. This process included assessing expenses, structures and potential efficiencies through data obtained from Integrated Postsecondary Education Data System (IPEDS), the Massachusetts Higher Education Institutional Research System (HEIRS), the Division of Academic Affairs, the Office of Institutional Research and Planning, the Financial Services Office, Board of Trustee records, the National Education Association Fitchburg State Financial Audit Analysis, the New England Association of Higher Education accreditation reports and responses, and reports and information from divisions and departments across campus. The committee assessed such data within the context of national trends and the initiatives of the Massachusetts Department of Higher Education. At all times, the committee remained mindful of Fitchburg State University's role as a comprehensive state university that integrates liberal arts and sciences programs with professional education as well as the unique history and character of the institution.⁵

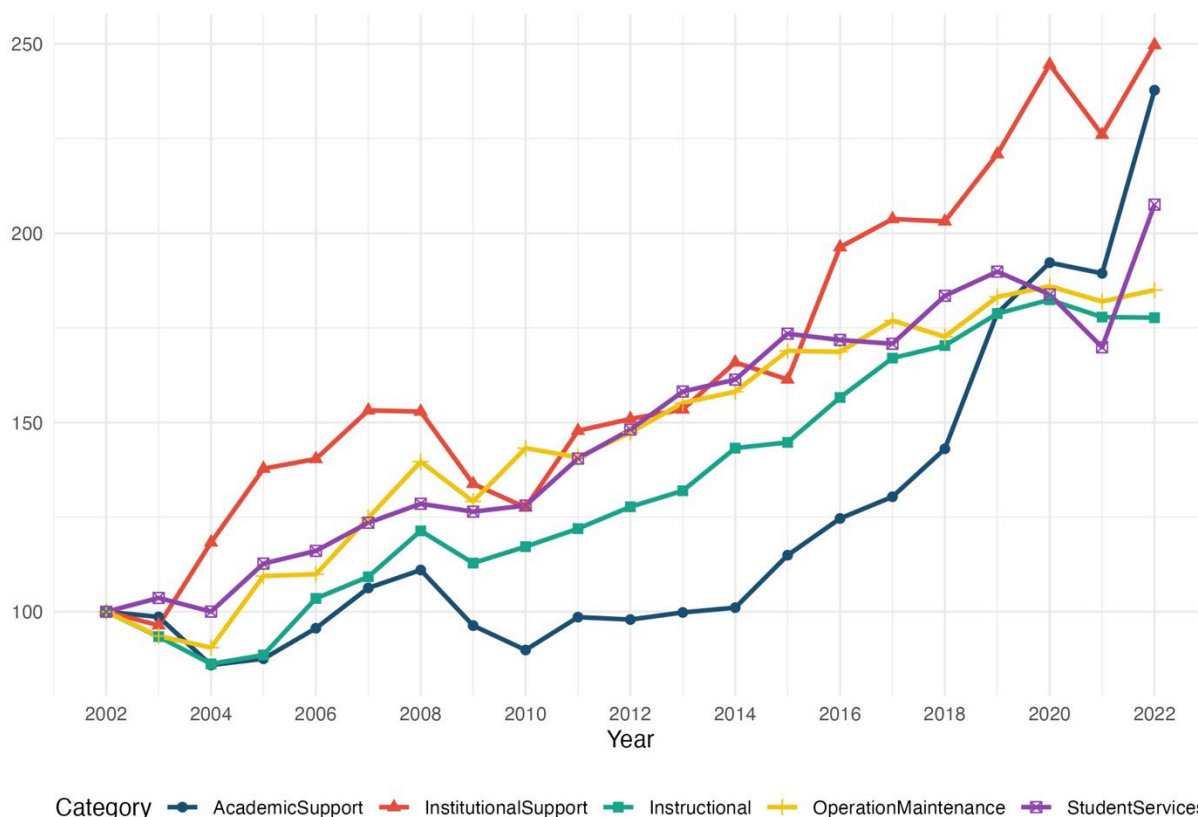
The Administrative Efficiencies group began its inquiry by considering university expenditures across two decades as represented in Figure 1: Indexed Expenditures by IPEDS Category from 2002 through 2022.

³ Massachusetts Department of Higher Education, "[Mission of the State Universities.](#)"

⁴ [Fitchburg State University Mission Statement.](#)

⁵ The unique character of each institution and the support for individualized and flexible responses is recognized and supported by the Massachusetts Board of Higher Education. See, for example, [Massachusetts Board of Higher Education 22-67 "Student Success Framework."](#) (2022).

Figure 1: Indexed Expenditures by IPEDS Category from 2002 through 2022⁶



Note: 2002 values Indexed at 100. All others are relative to this value. Index can be interpreted as the percent of the 2002 value in Year X.

The committee identified a decades-long trend in expenditures that shaped the contours of its inquiry. From 2002 through 2022, allowing for pandemic adjustments to university operations, the university experienced the largest growth in the areas of Academic Support, Institutional Support and Student Services—a period of operating expense growth identified by an independent audit as “substantial.”⁷ However, this growth was not constant. From 2017 and continuing through 2022, the university experienced an undergraduate day enrollment decline of over 33 percent.⁸ According to IPEDS data, Academic Support expenditures increased 82 percent during the same period. Institutional Support increased 23 percent and Student Services

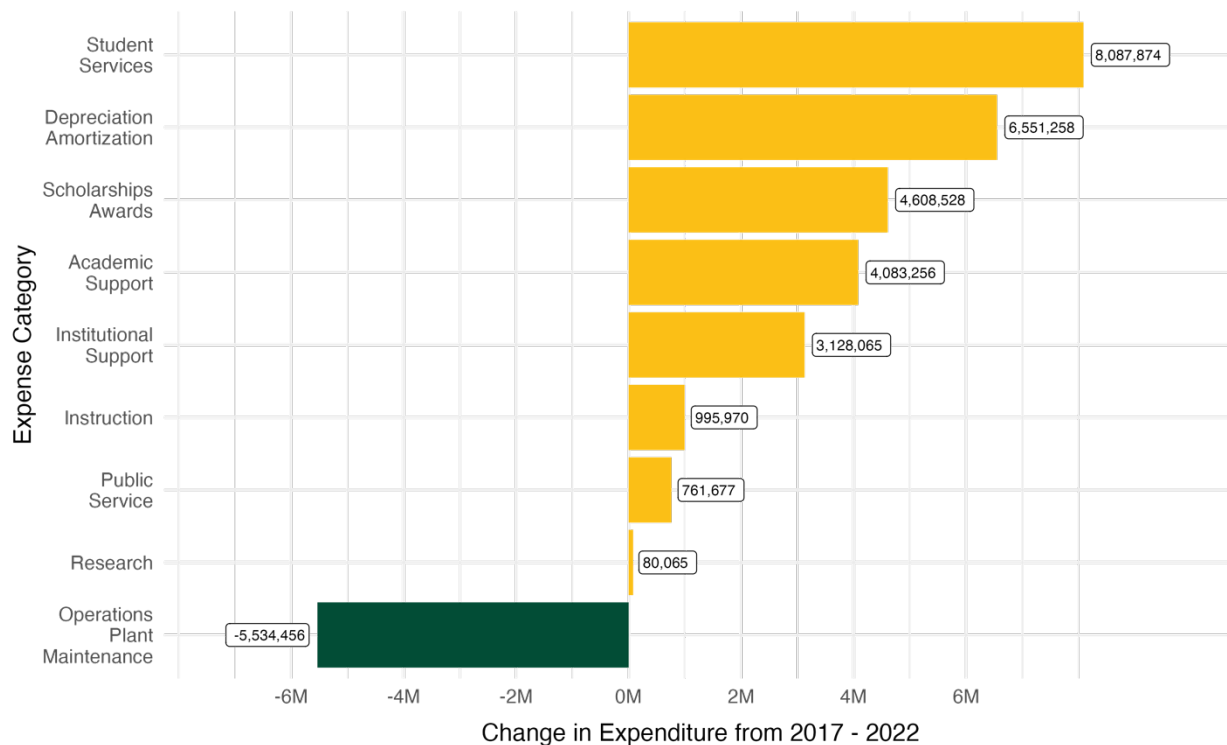
⁶ Data taken from Salary and Benefits per Activity Code, 2002-2022. It should be noted that these categories are defined by the National Association of College and University Business Officers for public institutions in the NAUCBO Financial Accounting and Reporting Manual. These are accepted as functional expense classifications for reporting for the Integrated Postsecondary Education Data System (IPEDS) Finance Survey. See Gregg M. Gascon, MPA, PhD Social Science Research, Evaluation and Measurement, L.L.C., “Fitchburg State University Financial Audit Analysis,” December 2022, 13.

⁷Gascon, “Fitchburg State University Financial Audit Analysis,”16.

⁸Massachusetts HEIRS data, student enrollment.

increased 22 percent. By contrast, Instruction increased 6 percent and Operation and Maintenance increased 5 percent.⁹

Figure 2: Fitchburg State Changes in Operating Expenses, FY2017-22¹⁰



In the financial audit analysis of 2017-2022, Instructional Expenses, which excludes administrative costs, increased at a modest 2.8 percent over five fiscal years. During the same period, operating expenses for Academic Support, which includes instructional support and academic administration, increased by 64.8 percent.¹¹ Student Services includes “expenses for admissions, registrar activities and activities whose primary purpose is to contribute to students’ emotional and physical well-being and to their intellectual, cultural and social development outside the context of the formal instructional program. Examples are career guidance, counseling, financial aid administration, student records, athletics, and student health services, except when operated as a self-supporting auxiliary enterprise.”¹² Student Services expenses increased 84.7 percent between 2017 and 2022. Operating expenses for Institutional Support, categorized as executive activities for planning and operational management, increased 29.0 percent.¹³ Operation and Maintenance of Fitchburg State’s physical plant decreased by 46.3

⁹ Gascon, “Fitchburg State University Financial Audit Analysis,” 16. IPEDS HEIRS data, student enrollment.

¹⁰ Gascon, Table 3, “Fitchburg State University Financial Audit Analysis,” 16.

¹¹ Gascon, *supra* note 5.

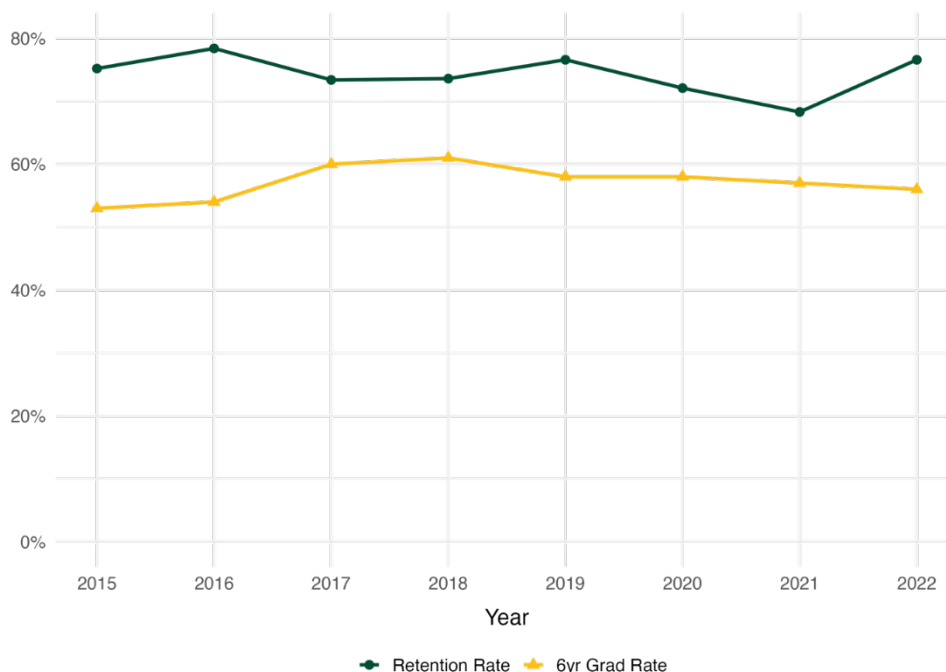
¹² Gascon, “Fitchburg State University Financial Audit Analysis,” 15.

¹³ Institutional Support is classified as “expenses for central, executive-level activities concerned with management and long-range planning for the entire institution, such as the governing board, planning and programming operations, and legal services; fiscal operations, including the investment office; administrative information technology (when not accounted for in other categories); space management; employee personnel and records; logistical activities that provide procurement, storerooms, printing, and transportation services to the institution;

percent during 2017-2022.¹⁴ The *Fitchburg State University Factbook* for 2022 indicates that from 2018-2022, Instruction expenses declined from \$49,271,000 to \$48,209,000. In contrast, Academic Support expenses increased from \$9,571,000 to \$13,551,000. Student Services expenses increased from \$14,885,000 to \$26,401,000. Institutional Support increased from \$15,112,000 to \$19,854,000.¹⁵ According to HEIRS figures, from Fiscal Year 2022 to Fiscal Year 2023, categories of Student Services and Academic Support each increased by 22 percent. Institutional Support decreased by 18 percent, Instruction by 2 percent, and Plant Operation and Maintenance by 45 percent.¹⁶

Since 2002, the university’s retention rates have shown little variation, averaging 75 percent. Six-year graduation rates have remained stable as well.¹⁷ Both rates parallel the range of institutions within the Massachusetts state system and are in line with national averages.¹⁸

Figure 3: First Year Retention Rate and Graduation Rate within 6 Years¹⁹



support services to faculty and staff that are not operated as auxiliary enterprises; and activities concerned with community and alumni relations, including development and fundraising.” Gascon, 15.

¹⁴*Ibid.*, 12-15.

¹⁵Fitchburg State University Office of Institutional Research and Planning (OIRP), *Fitchburg State University Factbook*, 2022, “Fitchburg State University Expenditures,” 35. Amounts are rounded to the nearest thousand. Operations and Maintenance is not included in the table.

¹⁶HEIRS, SRENCA Budget Worksheet, November 23, 2022, 3. OIRP, *Fitchburg State University Factbook* “Retention and Graduation Rates,” 29

¹⁷OIRP, *Fitchburg State University Factbook*, 2022, “Retention Rates 2002-2022,” 29.

¹⁸See, for example, the [Student Achievement Measure](#), which Fitchburg State University participates in. According to SAM, of the 2016 cohort graduating in 2022, Fitchburg State’s graduation rate from the institution was 56 percent, Salem State was 52 percent, Worcester State was 59 percent, and MCLA was 55 percent. The other state universities did not report. Accessed December 15, 2023.

¹⁹ OIRP, *Fitchburg State University Factbook*, 29; OIRP, “Common Data Set 2023,” 7.

In conducting its work, the Administrative Efficiencies working group benefited from the expertise of many individuals and are grateful for their time and effort. The group received presentations from the following:

Dr. Patricia Marshall, Provost and Vice President for Academic Affairs
 Jay Bry, Vice President for Finance and Administration
 Richard Toomey, Associate Vice President of Enrollment Management
 Pamela McCafferty, Associate Vice President for Institutional Research and Planning
 Christian Estrella, Associate Vice President of Finance, Planning and Analysis
 Jason Smith, Assistant Dean for Student Success
 Brion Keagle, Assistant Director of Core Services, Technology Department
 Elena Arranz Alonso, Director of Operations, School of Graduate, Online, and Continuing Education

The Administrative Efficiencies working group also consulted with the following individuals:

Angela Cruz-Guzman, Staff Associate, Events Management
 Bruce Serret, Director, Capital Planning & Maintenance
 Stefanie Aiken, Associate Director of Admissions
 Erin Turchetta, Director of Enrollment, School of Graduate, Online, and Continuing Education
 James R. Moughan, Assistant General Manager/Director of Sales DCU Center/ASM Global

Administrative Efficiencies Working Group Members:

Stefan Dodd, Chief Information Officer, executive sponsor
 Carin Bullis, Director of Budgeting, co-chair
 Christine Dee, Professor of History, co-chair
 Denise Brindle, Director of Financial Aid
 Rhonda Burgess, Administrative Assistant II, Engineering Technology
 Rala Diakite, Professor, Humanities
 Pat Jennings, Print Production, Auxiliary Services
 Cate Kaluzny, Director of Assessment
 Mark LeBlanc, Senior Associate Registrar
 Kenneth R. Mackie, Visiting Assistant Professor of Political Science
 Gretchen Mayhew, Senior Associate Director, Admissions
 Kim Page, Director of Human Resources
 Tara Prosser, Administrative Assistant II, Student Development

Recommendation 1: Commencement Revisioning and Elimination of Winter Ceremony

- Combine Winter, May Graduate Commencement, and May Undergraduate Commencement at the DCU Center during the week or on campus during a May weekend.
- Limit one paper commencement program per graduate in favor of digital programs.
- Estimated Cost Savings: approximately \$47,000-\$50,000 for commencement, plus additional savings derived from digital/print commencement program options.

The Administrative Efficiencies Task Force recommends the elimination of the winter commencement and the consolidation of undergraduate and graduate commencement exercises into a single May commencement. Together, the three ceremonies cost Fitchburg State University \$153,692 in FY2023.²⁰ Staff costs alone for the winter 2022 commencement were \$7,204. The winter commencement in 2022 conferred 366 graduate degrees and 180 undergraduate degrees for a total of 546 degrees conferred. Of those, 140 graduate and 97 undergrad students attended the graduation ceremony for a total of 237 student attendees. For the May 2023 commencement, 417 graduate degrees and 399 undergraduate degrees were conferred for a total of 816 degrees conferred. Of those, 202 graduate and 419 undergraduate students attended the graduation for a total of 621 student attendees.²¹ Based on 2022-2023 attendance, a combined ceremony would include 342 graduate attendees and 516 undergraduate attendees for 858 attendees.

The committee examined data provided by Fitchburg State’s Office of Financial Services. It researched costs associated with the DCU Center in Worcester, which is a popular venue for university commencements, and GameOn in Fitchburg. The committee learned from GameOn that their capacity is 1700, which eliminated it from consideration.

Figure 4: Graduation Revisioning Models²²

	Option A: DCU Center	Option B: Combined On Campus	Option C - program printing
Current Costs	\$153,692	\$153,692	\$34,207
Estimated Cost	\$107,000	\$104,046	\$0.00
Savings	\$46,692	\$49,646	\$34,207

The Administrative Efficiencies Task Force identified the following options for cost savings:

A. DCU Center Commencement: [Per the information provided by the DCU Center](#), Rental of space \$42,000; Average estimated costs for additional expenses based on the information provided in the quote would be approximately \$45,000 depending on our need; Estimate for Ancillary costs would be approximately \$20,000. (For total costs we would calculate the \$42,000 flat rental plus additional costs of \$45,000 plus \$20,000 ancillary costs= \$107,000 estimate). Optional catering costs are Continental Breakfast \$15.50/person or Boxed Lunch \$22/person. Holding commencement at the DCU Center would eliminate or reduce the following expenses:

- Custodians necessary for maintenance

²⁰ All historical cost data from Fitchburg State University cited below is referenced from the [FY23 T65 Graduation 0001 07 18 2023](#) report provided by the Finance department and the [Cost of Staff Commencement report](#) provided by the Human Resources department.

²¹May commencement includes some undergraduate students who walk in the ceremony, but do not have a degree conferred until they complete up to two remaining requirements.

²²Financial Services Office, [FY23 T65 Graduation 0001 07 18 2023](#); James R. Moughan to Mark LeBlanc, November 19, 2023.

- Campus police needed for parking
- Staffing costs for one ceremony instead of three
- FY23 cost of \$27,880 for tents and chairs for the May and Winter ceremonies combined
- FY23 cost of \$9,197 for three separate meals (two dinner, one breakfast) for volunteers
- FY23 cost of \$3,737 for shuttle parking services for guests for the May and Winter ceremonies combined
- FY23 cost of \$5,000 for lighting the Winter and Graduate ceremonies

The benefits of this option are that the ceremony is not dependent on weather, eliminating the need for a rain plan; guests are unlimited; security is provided by DCU staff. A potential drawback to this option is that moving the ceremony 30 minutes away would impact events for online student graduates-some of whom are on campus for the first time. Such events would need to occur on a different day. In addition, institutions currently holding commencements at the DCU Center are given priority for date selection. Currently, weekends in May are fully booked, so FSU would most likely have to schedule a weekday ceremony. A weekday commencement, however, would reduce staffing overtime costs.

B. Combined May Graduate and Undergraduate Commencement on Campus with weather contingencies: The commencement ceremonies could be combined to serve approximately 850-900 students and their guests. The variable continues to be weather. Contingency plans could involve moving the ceremony to the Recreation Center on Saturday. The \$104,046 figure includes an additional \$7,000 estimated for additional staffing costs due to lengthened ceremonies. This does not include costs for Campus police or reduction in printing and does not allow for unlimited seating and attendance.

C. Eliminating printed programs to students and providing digital programs with a QR code and providing a .pdf version on the commencement website would result in savings of over \$30,000 based on the FY 2023 cost of \$34,207 for printing.²³

Implementation Strategy:

For option A, eliminate the Winter 2024 ceremony and combine it with May 2025 graduate and undergraduate ceremonies at the DCU Center for immediate savings. Contact the DCU Center for further information and to determine available dates for May 2025. Option C can be implemented along with Option A for further savings.

For option B, eliminate the Winter 2024 ceremony and combine with the May 2025 ceremony for immediate savings. Option C can be implemented along with Option B for further savings.

For option C, eliminate printed commencement programs through the use of a QR code that links to a .pdf program for both May 2024 graduate and undergraduate ceremonies for immediate savings. Associated publicity on signage at the ceremonies and online/social media could highlight the QR code.

²³ Financial Services, "Operating Report, Graduation, FY 23."

Importance:

Consolidating commencement ceremonies realizes cost-savings. Goal Six of the Strategic Plan requires the university “steward physical and financial resources responsibly and navigate a path to long-term organizational sustainability.” Conducting a single commencement in an indoor venue saves costs and alleviates the contingency time and expenses of weather alterations. Potential benefits include raising visibility and marketing for the university in the Worcester area, reflecting Goal Five to “proactively reach, engage, and recruit prospective students through marketing efforts whose reach extends regionally.” Celebrating both graduate and undergraduate success together would showcase Fitchburg State University’s graduate programs to undergraduates and their families, which also meets Goal Five of the Strategic Plan. Alternatively, without use of the DCU center, eliminating the winter ceremony and combining all graduates into the two traditional May ceremonies can reduce costs but does not address the weather and space limitations. Eliminating commencement printing and moving to a digital QR code and placing a .pdf version on the commencement website demonstrates the university’s commitment to environmental stewardship reflected in Goal Four of the Strategic Plan.

Recommendation 2: Operational Savings by Reducing External Expenditures and Leveraging Internal Expertise

- Discontinue EAB products APS, and Global Executive Strategies. Consider the Edify product in light of an altered scope of work. Retain admissions products Enroll360, UVisit and Intersect. Retain SSC Navigator.
- Create a process that identifies software efficiencies and enhances budgeting for any products that exceed \$10,000 in cost.
- Educate departments about potential reductions in the expenses for catering, print services, and branded merchandise for non-admissions and non-athletic departments.
- Review professional development programming to maximize efficiency.

The committee identified a pattern of increased expenses deriving from costs for initiatives, services and products that are not best suited or of a scale appropriate for Fitchburg State University. This is not unique to our university. The higher education industry, including consulting services and ancillary products, are designed to appeal to the greatest number of institutions and to profit. In the prevailing climate of higher education, it is imperative to consider most carefully the advice we follow and the products we utilize. We must ensure that our desire to follow industry standards and innovative practices is accompanied by critical analyses and enhanced processes.

In this spirit, beginning in June 2023, the Administrative Efficiencies Task Force began researching the complete EAB suite of products used by the university. The business model of EAB and its steady acquisitions of products renders it ubiquitous in higher education. In FY 2023, the university spent \$1,174,400 on EAB products. Over many months, the Administrative Efficiencies members researched the contract, scope of work, return for each individual product

and usage data. It consulted with the offices of Finance, Institutional Research, Admissions and Academic Affairs to assess product usage, effectiveness, and need. It held a joint meeting with the Academic Efficiencies committee. In all cases, the contracts, costs, and product information were supplied in a timely, detailed, and accurate manner through the Financial Services office. Their efforts should be commended.

The Task Force determined that the admissions products Enroll360, UVisit and Intersect were utilized and essential to admissions and enrollment operations. Similarly, SSC Navigator has proven effective for both faculty and staff in their work with students. It found that EAB products Academic Performance Solutions (APS) and Global Executive Strategies had not provided value or utility for the university and should be discontinued. The EAB product Edify has not proven effective when measured by its original scope of work.

Figure 5: EAB Product Elimination, Fiscal Year 2022-2025 figures²⁴

EAB Product	Main Usage	Cost FY 22	Cost FY 23	Cost FY 24	Cost FY 25
Edify*	Finance	\$220,800	\$225,840	\$231,132	\$236,688
Academic Performance Solutions aka APS	Finance	\$91,598	\$ 95,952	\$ 100,525	Contract ended
Strategic Advisory Services, aka Global Partnership	Executive Cabinet	\$95,673	\$ 100,257	\$ 105,069	Contract ended
Total Estimated Cost Savings				\$436,726	

*Note: The amounts listed represent costs for hours needed to build the product. It does not represent actual costs. It represents Annual Program Fee and Annual Service Fee, Gold Tier.

Academic Performance Solutions (APS) promises to assist with academic annual reviews, plan academic course offerings, standardize faculty hiring, and reduce academic instruction costs. The Administrative Efficiencies Task Force learned that the information available in APS is of limited use owing to the structure of academic programs, scale of the data, and the limits of using return on investment models to measure academic effectiveness and allocate resources. The provost, as chief academic officer of the university, affirmed that the Office of Institutional Research and Planning provides specific data for academic questions related to university operations, making APS an unnecessary expense. Similarly, the committee determined that EAB SAS/Global is not a necessary product for Fitchburg State University. When queried, university officials could identify a single report produced through this service in 2017.²⁵ The SAS/Global Product has not provided information beyond what can be ascertained by utilizing campus expertise. The committee concludes that the Office of Institutional Research and

²⁴ Fitchburg State University Finance, “EAB Summary of Service,” 2023 https://docs.google.com/spreadsheets/d/1zLSUL5KGC8myOU6mNmb3WDg_OKSJQtRg/edit#gid=1556351057

²⁵ “Integrating Academic and Career Development: Strategies to Scale Experiential Learning and Reflection Across the Curriculum” (2017).

Planning, coupled with the researching expertise of campus departments, can meet the strategic needs of the Fitchburg State. It affirms the value and utilization of the EAB Admissions products as seen by an increase in enrollment yields. Similarly, usage data for SSC Navigator indicates wide-spread utilization across departments within the university.

The product Edify, also referred to as the “Educational Data Hub,” has a troubled history at Fitchburg State University. Its contract began on December 31, 2020, and runs through December 30, 2025. The Edify product, by EAB’s description, promises to “support higher education organizations in deriving value from data through a cloud-based data management technology and associated professional services.”²⁶ Edify was contracted according to a tiered fee schedule.²⁷ According to the contract from 2020-2025, the total cost to the university for the product will be \$914,460.²⁸

The initial objective of the Edify project at Fitchburg State University was to integrate data from the Banner Student Information System (SIS) and the Slate Customer Relationship Management (CRM) system into EAB’s cloud-based data hub. This integration was aimed at enhancing reporting capabilities and providing insightful dashboard metrics, equipped with predictive analytics features. The early phase of the project focused on delivering dashboard insights to the university. Additionally, Edify was to establish a functional data feed from the Slate CRM to the Ellucian Banner SIS.

Despite over three years of dedicated effort, the project has been plagued by consistent issues in data integration, resulting in a non-functional data feed between Slate CRM and Banner SIS and no project completion date in sight. Multiple departments have indicated significant dissatisfaction with the Edify Slate to Banner project. Diligent and countless work hours in Information Technology, Admissions, the Office of Institutional Research and Planning, and the School of Graduate, Online and Continuing Education have been devoted to these efforts. In Admissions alone, on average, an equivalent of more than one full workday per week is spent on the project in the hope of producing a complete and accurate report from Edify. In addition, Information Technology has provided uncounted hours of work to support the project, resulting in hidden costs absorbed by departments. This significant time investment has increased the

²⁶ EAB Edify Program Order Form, December 22, 2020. The form states, “In exchange for full and active participation in this Program, including the fulfillment of Organization Requirements outlined below, EAB's Education Data Hub ("EDH") will provide the following services to Organization: Education Data Hub Technology. EDH is an extensible, cloud-based technology built specifically for higher education institutions that consists of inbound data connectors, a higher-ed specific canonical data model, and an accessible interface to make data available for Organization's use cases.” EAB also contracts to be “pleased to offer additional professional services to Organization to support technical and business use cases and serve as an extension of your team. These professional services are available to organization via access to a block of service hours per year, which can be used for a variety of use cases and needs in addition to the initial Implementation of Selected Data Sources.”

²⁷ EAB Edify Fee Schedule includes the following tiers of service: \$36,000/yr. \$66,000/yr., \$120,000/yr., \$216,000/yr. In addition, overage fees are billed by the hour on a sliding scale inverse to the expense of the tiers. For example, a \$36,000/yr. tier of service includes a fee of \$325 per hour for overage hours whereas the \$216,000/yr. tier is charged \$250/hr. for any necessary overage hours beyond those contracted in the tier of service. EAB is changing the pricing to a fee structure based on institutional enrollments beginning in 2025.

²⁸ [EAB Summary of Services](#)

workload for Fitchburg State employees, contrary to the project's original intention of streamlining processes and reducing labor.

Efforts by EAB to use Edify to streamline HEIRS reporting proved equally challenging.²⁹ The Office of Institutional Research and Planning decided to discontinue using EAB's Edify for HEIRS reporting due to significant efficiency issues. EAB struggled to replicate the HEIRS reports effectively, leading the department to conclude that their existing methods were more productive and efficient. This decision reflects a broader concern and doubts among university stakeholders regarding Edify's ability to function as anticipated, particularly in delivering the advanced predictive analytics and in meeting the university's data analysis requirements.

Beginning in September 2023, Financial Services began an Edify project “The Financial Sustainability Accelerator- Four Year.”³⁰ The revised statement of work for this Edify project would be to create analytics for Financial Services to determine the revenue and expenses per student credit hour broken out by academic faculty member, department, and school including top and bottom performing departments and programs, measured against average faculty salary cost, class size, classes under 10 students, drop/fail/withdraw rates.³¹

The Administrative Efficiencies Task Force met with the provost, who indicated that this scope of work is not necessary because the Office of Institutional Research and Planning provides the information required for planning. The Administrative Efficiencies Task Force recognized the similarities between the scope of work in the Academic Performance Solution (APS) product that was recommended to be discontinued and the new scope of work designed for the Edify product. The current cost of Edify is \$224,486 in FY 2024.³²

The Financial Services department desires to use Edify for future projects if a satisfactory contract can be negotiated. This includes using Edify instead of the current process of extracting Crystal Reports and using Excel for data analysis. Financial Services finds this process labor-intensive because of the lack of built-in computational capabilities in Crystal Reports and Banner and the reliance on Excel workbooks. The process requires reformatting reports, careful review, and delays in detecting financial discrepancies. Financial Services wants to use Edify to improve the frequency and efficiency of report generation to produce reports covering all university revenues and expenses, including comparisons to historical data, produce Board of Trustee reports to monitor actuals compared to the approved budget, and design the Edify dashboard to measure student enrollment by credit hour and full-time equivalencies. It would also like to use Edify to manage unallocated and lapsed salaries from budget positions and actual payroll expenses.

²⁹The HEIRS Reporting project’s statement of work (SOW) explained “Fitchburg State produces annual and term reports for HEIRS. This project will allow Edify to serve as the source of data for HEIRS reporting needs, to streamline data transformation and reporting work across campus.”

³⁰ Financial Services, [Edify Statement of Work “Financial Sustainability Accelerator – 4 Year” Fitchburg State University](#). September 1, 2023.

³¹ *Ibid.*

³²Fitchburg State University Finance, [EAB Summary of Services](#), *supra* note 28.

Recommendation:

Regarding the use of EAB Edify at Fitchburg State, the committee believes that the Slate to Banner integration project should be executed with a different vendor. The three-year project suggests that the use of Edify for that project is untenable. The OIRP's decision to discontinue the Edify HEIRS project highlights the need for a process that ensures products' efficacy and congruence with institutional strategic objectives.

A majority of members of the committee oppose the continued efforts, this time by Financial Services, to attempt to utilize an Edify product that has proven unreliable and has drained resources from Fitchburg State University with nothing to show for it. It believes this would constitute a sunk cost fallacy and does not believe the product is suited to the university.³³ If the Edify product were continued beyond the current contract, Fitchburg State would assume an annual cost of approximately \$85,000 to 165,000 per year if it contracted at the newer pricing structure from EAB.³⁴

A minority of members of the committee believe that Financial Services should attempt to use Edify to access data and insights for reporting and projections through the new scope of work because extracting the data currently in Banner Finance and Banner HR is neither timely nor convenient. If the university negotiates a new contract at a reasonable cost, Edify could streamline processes and create efficiencies in Financial Services, including enhanced salary reports. Financial Services could improve its ability to manage salaries which make up 40.62 percent of the operating budget.³⁵

The Administrative Efficiencies group recommends discontinuing EAB APS and EAB SSA/Global for a savings of \$188,395. Eliminating Edify, as recommended by a majority of the committee, would add an additional \$236,688 of savings, in addition to eliminating unknown future product costs.

The analysis of EAB suite demonstrates that the university needs a new process for software acquisitions to ensure efficiencies in the contracting process and renewals.³⁶ The Administrative Efficiencies Working Group endorses the "Fitchburg State University Software Request Review

³³ For a discussion of the sunk cost fallacy, for example, see for example Ryan Doody, "[The Sunk Cost Fallacy is not a Fallacy.](#)" *Ergo* 6 (2020); Emma Williams, "[Is the Sunk Cost Fallacy Sinking Your Career?](#)" *Times Higher Education* February 24, 2022; Steven Mintz, "[Is Higher Ed Tackling the Right Problems?](#)" *Inside Higher Ed* November 13, 2023.

³⁴ EAB Edify Fee Schedule includes the following tiers of service: \$36,000/yr. \$66,000/yr., \$120,000/yr., \$216,000/yr. In addition, overage fees are billed by the hour on a sliding scale inverse to the expense of the tiers. For example, a \$36,000/yr. tier of service includes a fee of \$325 per hour for overage hours whereas the \$216,000/yr. tier is charged \$250/hr. for any necessary overage hours beyond those contracted in the tier of service. EAB has changed its product pricing for Edify that would go into effect if the university were to extend its contract. It is based on enrollment and EAB has indicated the approximate cost for Edify beginning in 2026 would be \$165,000 per year, excluding potential discounts for pricing and not accounting for inflation.

³⁵ FY 25 Board of Trustees, Summary Financial Services.

³⁶ For example, to address the Slate to Banner connection issue, a potential solution may lie in contracting with a vendor renowned for their expertise and track record in successfully completing similar projects. Such a change could not only resolve the current challenges but also free up valuable hours for staff to dedicate to other important initiatives. This is an example of the scope of work the Software Request Review Committee would engage with.

Committee Charter” proposed by the Property and Infrastructure Committee. It makes the following additional suggestions:

- The threshold for review be set at \$10,000
- All software acquisitions, including those funded by grants, should include a comprehensive budgeting plan.
- Comprehensive budgeting plans outline the funding transition strategy from grant support to a departmental budget allocation.
- Scope of work, timelines, and Service Level Agreements (SLAs) are articulated.
- Security and data integrity policies are adhered to.

These measures will ensure that university stakeholders are involved in software procurement decisions on an ongoing basis and align software purchases with the university's strategic plan.

As requested by the Fiscal Sustainability Task Force Phase 1, the Administrative Efficiencies committee reviewed budgets and expenses across the university. Expense data indicated that the university has made efforts to reduce costs and commensurate with budgetary realities in areas of travel, catering, and printing. The committee believes enhanced awareness and information conveyed to university departments can result in additional savings. The committee examined expenses in these areas, removing the expenses accrued by Admission and Athletics, and calculated potential savings by reducing costs by five percent and ten percent based on Fiscal Year 2023 costs. It determined that in procurement, the university should require due diligence; all managers should research potential purchases and expenses thoroughly to ensure efficiency and productivity. The process should include research for similar products, requesting procurement bids, and contacting existing clientele for feedback on the proposed vendor and product.

Figure 6: Fiscal Year 2023 Expenses and Reduction Models (Travel Expenses exclude Admissions and Athletics)³⁷

	Fiscal Year 2023 Expenses:	5% Reduction Saves:	10% Reduction Saves:
Travel	\$338,507.43	\$16,925	\$33,850
Chartwells	\$416,204	\$20,810	\$41,620
Printing	\$483,791	\$24,189	\$48,379

Data indicates that except for student printers in the library, five academic departments and three university offices print over 20,000 pages per year.³⁸ Reducing printing is economical and

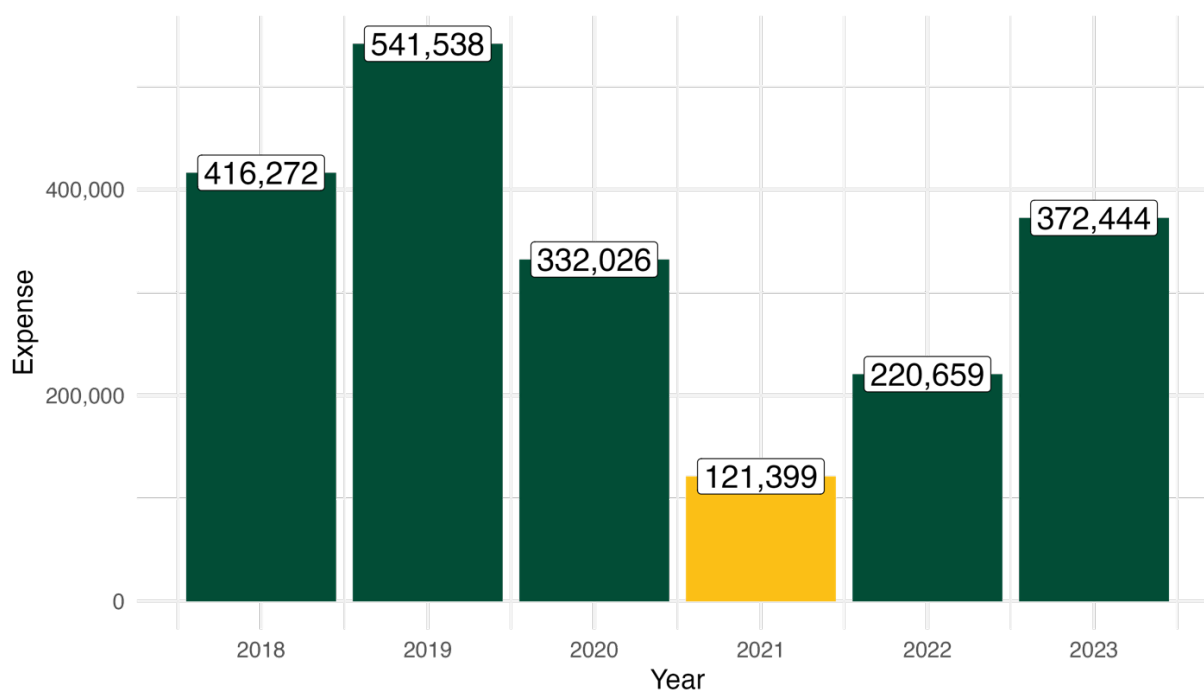
³⁷ Financial Services, “Consolidated Travel Expenses Banner w [FY23 Dept Operating Report Travel all funds](#)”

³⁸ These include Behavioral Science, Education, Math, Biology and Chemistry, Nursing, Capital Planning and Maintenance and the Executive Office and University Police.

valuable for increased sustainability. Reductions in printing costs within departments would save a few thousand dollars per year while aligning with the university’s goal of environmental stewardship.³⁹ The committee recommends that travel, catering and printing expense information be distributed to all departments on a regular basis. The university should engage in a unified campaign across all divisions to secure additional savings.

Fitchburg State University is committed to the professional development of its employees. It is part of the university’s strategic plan, including Goal Four to “Provide faculty and staff professional development opportunities and appropriate tools, including technology, to ensure they can be effective in their roles.”⁴⁰ Yet professional development products and services have proliferated at a similar rate as data analytics products in higher education. At the same time, technology has provided opportunities for savings in travel and conference fees. Employees should be educated about the importance of attending virtually through teleconferencing, virtual conferences, and accessing digitized content. The Administrative Efficiencies group recommends that current guidelines on travel outside of the region be more clearly communicated to deans and department and office heads. In addition, information should be presented to departments across campus to educate constituencies about the travel approval process and the importance of multiple quotes for flights and lodging, advance bookings, and ride sharing.

Figure 7: Travel Expenses, All Funds, 2018-2023 Including Athletics and Admissions⁴¹



Note: 2021 value reflects COVID-era travel restrictions.

³⁹ FSU Strategic Plan 2020-2025, 9. Goal 4.6.

⁴⁰ FSU Strategic Plan 2020-2025, 9. Goal 4.4

⁴¹ Financial Services, “Consolidated Travel Expenses Banner w [FY23 Dept Operating Report Travel all funds](#)”

The Administrative Efficiencies working group believes that reinvigorating travel policies and procedures with a focus on financial sustainability will result in savings for the university.

The Administrative Efficiencies Working Group recommends ongoing consideration of professional development costs related to initiatives. Like the process recommended for software purchases, the university should consider initiatives and their cumulative costs over time. This is especially important because student retention and graduation rates have remained stable even with the proliferation of initiatives.⁴² It is difficult to identify or quantify direct correlation between professional development expenses and results. This does not mean that programs and training are without value. Professional development is aspirational by its nature. It arises out of individuals and institutions seeking to advance and improve. Within the context of retention and graduation rates, economic headwinds, and the evolution of higher education, it is incumbent upon us as an institution to assess programs and initiatives within the context of 2023 and adjust. It calls for a reconsideration of resource allocation.

The group recommends the review of professional development for faculty to ensure that resources are efficiently deployed to reach and assist the greatest number of faculty and students at Fitchburg State. The Administrative Efficiencies group recognizes that the Division of Academic Affairs is examining professional development, program administration, increases in committee responsibilities, and issues of workload equity. As these initiatives are ongoing, the committee believes that the First Year Experience is worthy of attention.

Initially grant funded, the FYE program was developed in 2017. It began with eight sections of the course in the Fall 2018, scaling up to full operation in 2019. From its inception in 2017, the program required summer professional development and academic year professional development. This limited the number of faculty teaching in the program as well as the reach of pedagogical initiatives. The professional development for the program in 2023-2024 reached 21 faculty members.⁴³ A separate initiative, Faculty Academy, emerged out of the Achieving the Dream program. This program was introduced to the faculty in 2020. It has offered professional development for 30 faculty over three years in cohorts of 10.⁴⁴

The Administrative Efficiencies group believes that these models of professional development are not as efficient as they could be. These two initiatives have reached at most a quarter of the faculty. Desired professional development can be generalized and scaled to the larger number of faculty by taking advantage of existing structures. All faculty participate in three required days allotted to professional development each academic year. In addition, the Center for Teaching and Learning convenes professional development programs every two weeks, overseen by the Teaching and Learning coordinator. Using these existing structures would enhance efficiencies by reaching the largest possible audience and broaden the pool of faculty available to teach the

⁴² OIRP, *Fitchburg State University Factbook*, 2022, 29; OIRP, "Common Data Set 2023," 7.

⁴³ Academic Affairs, Master APRs, 2023-2024.

⁴⁴ See Dr. Alberto J.F. Cardelle to Faculty, February 14, 2020, February 27, 2020 and April 2, 2021, referencing the January 2020 Faculty Development Day presentation by Dr. Paul Hernandez, author of *The Pedagogy of Real Talk: Engaging, Teaching and Connecting Students At-Promise* and senior advisor to the president and CEO of [Achieving the Dream](#) and the creation of the Faculty Academy, which began with nine faculty members in June 2020.

university's essential gateway FYE. This would mitigate adjunct needs and strengthen pedagogical initiatives.

Implementation:

Eliminating EAB products should follow the Commonwealth Terms and Conditions Information Technology Contracts and, when applicable, the individual product contracts.⁴⁵ The creation of the "University Software Request Review Committee" should follow all procedures to establish University committees. Education around cost-savings can follow existing channels of disseminating information to departments. The consideration of efficiencies in professional development can be made within the Division of Academic Affairs.

Importance:

These recommendations to achieve efficiencies in software, processes, expenses, and professional development programming support Strategic Plan Goal One: Forge innovative paths to knowledge acquisition; Goal Two: Become a model student-ready university; Goal Four: Establish inclusive excellence, innovation, and environmental stewardship; Goal Five: Assert our distinctive value proposition.

Recommendation 3: Achieve personnel efficiencies across all university divisions.

Recommendations:

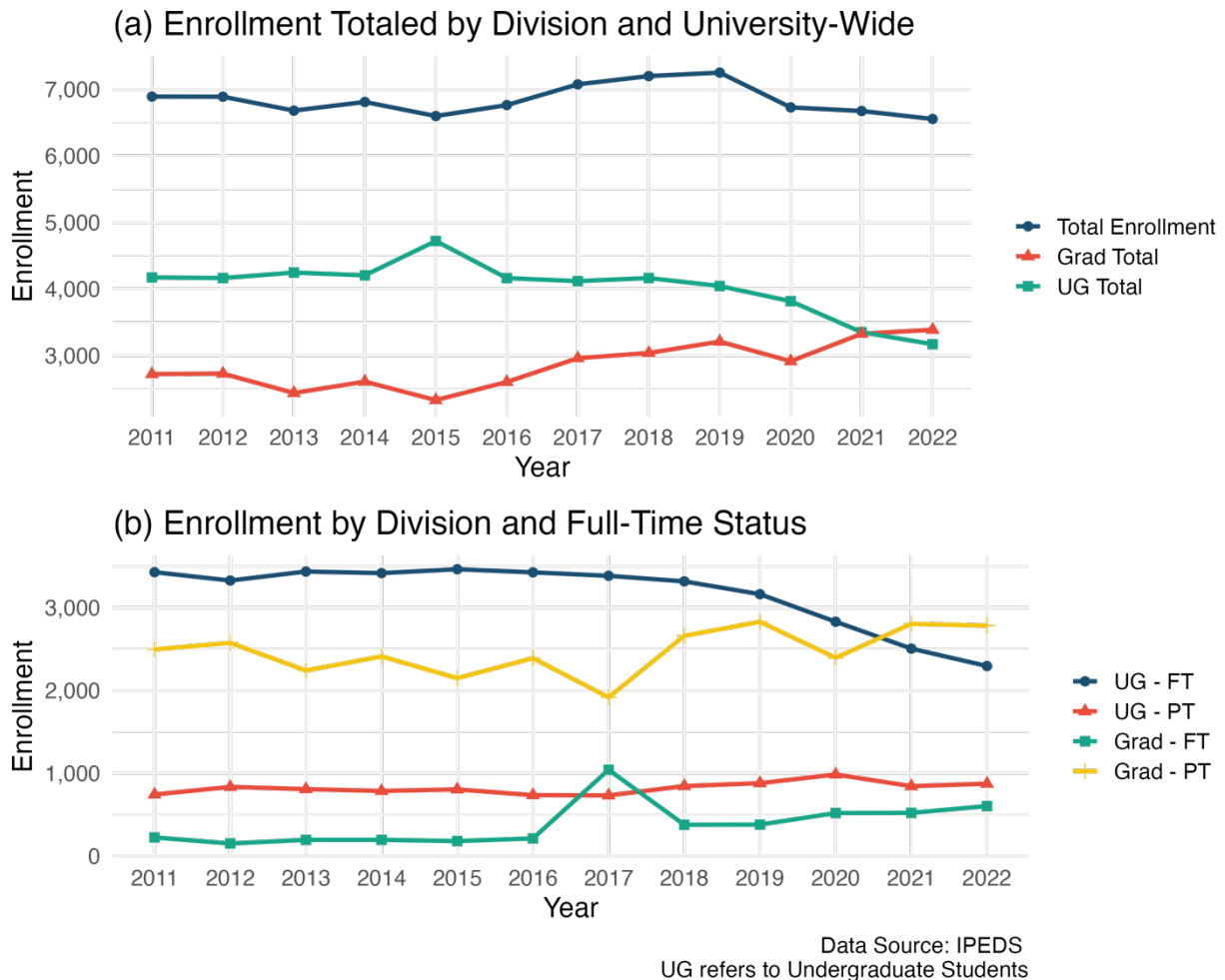
- Strategically examine all positions at the university.
- Review the structure of the Student Success division to eliminate redundancies and clarify department scope and responsibilities.
- Consider placing Disability Services within the Division of Academic Affairs

This recommendation is grounded in the university mission as an institution that blends liberal arts and sciences and professional programs within a small college environment. It reflects the belief that the university can better utilize its personnel resources and expertise to strengthen recruitment, achievement, and retention of students. This recommendation is made within the context of the growth in expenses in the categories represented by Figure 1: Indexed Expenditures by IPEDS Category from 2002 through 2022.⁴⁶ This recommendation is made in response to the trajectory of enrollments and spending at Fitchburg State University. Fitchburg State has seen an undergraduate enrollment decline since 2016.

⁴⁵ Commonwealth of Massachusetts, Office of the Comptroller, "Commonwealth Terms and Conditions for Information Technology Contracts" https://www.macomptroller.org/wp-content/uploads/form_commonwealth-terms-and-conditions-for-information-technology.pdf

⁴⁶ *Supra* note 6. These include Academic Support, Institutional Support and Student Services.

Figure 8: Change in Enrollment From 2011 to 2022 (a) Aggregated by Division, and (b) Separated by Division and Full Time Status⁴⁷



Since 2016, the administrative structure expanded.⁴⁸ For example, in 2017, the University had completed a hiring cycle that included the addition of elevation of a dean position to a Vice President position and the addition of four deans, resulting in a six dean structure.⁴⁹ In 2023, the structure was reduced to five deans: Library, Graduate, Online and Continuing Education, Arts and Sciences, Education, and Business and Technology and Health and Natural Sciences. There are seven assistant or associate vice presidents. The executive cabinet consists of four vice presidents, the provost, and the president.⁵⁰ During this same period, faculty numbers have declined. In FY 2023-2024, the university eliminated seven tenure-track faculty positions and

⁴⁷ OIRP, IPEDS data.

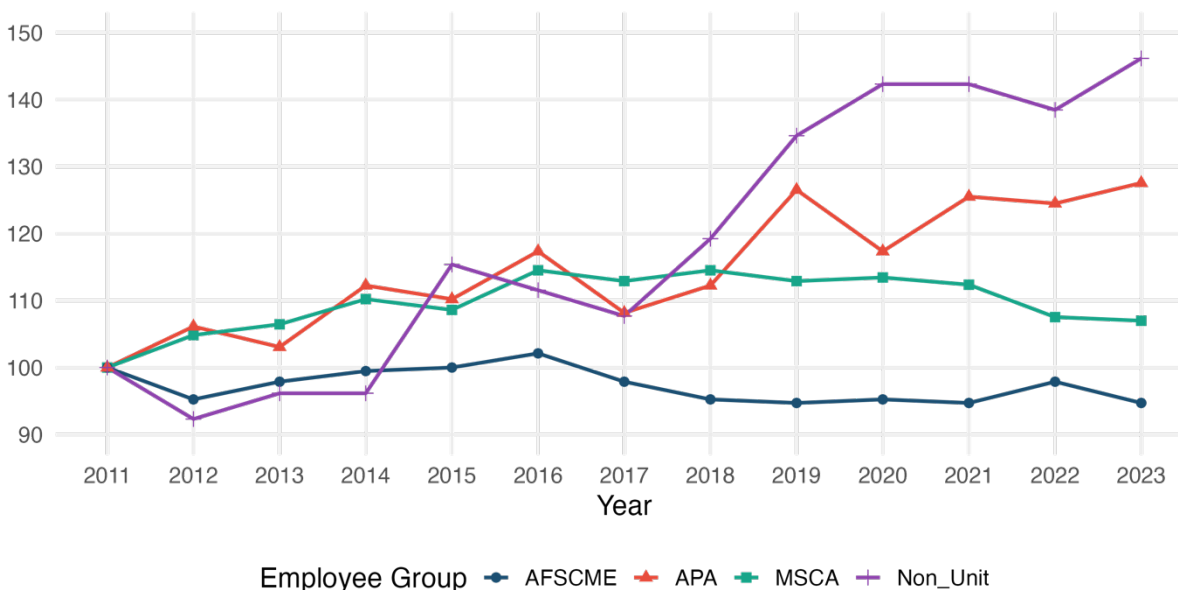
⁴⁸This is not unique to Fitchburg State University. See, for example, [Jones, Jr.Lamont, “One Culprit in Rising College Costs: Administrative Expenses.” U.S. News and World Reports, June 1, 2023.](#)

⁴⁹ *Fitchburg State University Today*, April 3, 2017.

⁵⁰ This growth is captured in in categories that include Institutional Support, Academic Support and Student Services See Figure 1. For category definitions, see Gascon, MPA, PhD, Social Science Research, Evaluation and Measurement, L.L.C., “Fitchburg State University Financial Audit Analysis,” December 2022, 13.

two maintenance positions, reducing expenses by \$1,180,629. Reducing courses taught by adjunct faculty saved an additional \$450,000.⁵¹ Whether measured by labor unit, by headcount or by cost, faculty ranks have been reduced.

Figure 9: Indexed Growth in Employee Unit Headcount, 2011-2023⁵²



Data Source: DHE-HEIRS; BANNER
 Note: 2022 values Indexed at 100. All others are relative to this value.
 Index can be interpreted as the percent of the 2022 value in Year X.

Considering the data represented in Figures 8 and 9, the committee recommends a strategic examination of all positions at the university.

The Financial Sustainability Task Force Phase 1 charged the Administrative Efficiencies Working Group with considering university expense data by category. The group noted growth in the areas of Academic Support and Student Services as represented in Figure 1. Considering this data, the committee recommends a review of the structure of the unit of Student Success to enhance efficiencies and clarify department scope and responsibilities. The recommendation is made within the context provided by the New England Commission of Higher Education (NECHE) 2022 accreditation process. In its final report, NECHE determined that the university has “respectable rates for retention and graduation rates.”⁵³ This assessment is supported by retention rates and graduation rates that parallel peer institutions.⁵⁴ Within the assessment, however, is evidence that students believe career advising could be improved. Significantly, NECHE found “discussions with students indicate their relationships with faculty are warm and

⁵¹ Fitchburg State Financial Services Budget Narrative to the Board of Trustees, June 6, 2023.

⁵² HEIRS data, 2011-2023.

⁵³ NECHE Evaluation Team to the Faculty, Administration, Trustees and Students of Fitchburg State University, March 20-23, 2023, 8.

⁵⁴ *Supra*, note 18.

informal, and that faculty are available to assist and guide students in curricular, co-curricular, and career-related issues,” and that “students expressed concern about having limited access to faculty advisors.”⁵⁵

The committee recommends the review of the structure of the unit of Student Success within the context of the Department of Higher Education’s “Student Success Framework.” The framework supports a combined faculty and professional advising model in which student supports include “structurally embedded opportunities for faculty to engage with students, formally and informally” within the guiding principle that institutions can be flexible and craft individualized approaches that meet the needs of their unique circumstances.⁵⁶ The Administrative Efficiencies committee recognizes that Academic Affairs is reviewing the Student Success unit. This includes ongoing work to evaluate student success and retention initiatives and develop an evaluation plan for the First-Year Experience.⁵⁷ The committee affirms the important role that these state and campus initiatives play in supporting retention and graduation during our changing climate in higher education.

It is worth noting, however, that Fitchburg State’s current organizational structure for Student Success was created in AY 2017-2018.⁵⁸ During that period, two centers were created: the Academic Coaching and Tutoring (ACT) center and the Career Services and Advising Center (CSAC). Both were placed under the direction of a Student Success director. The position has since become an assistant dean position. Within the new alignment, professional academic advising was placed within the Career Services and Advising Center. Professional advisors were tasked with advising undeclared undergraduate students and transfer students. These efforts were undergirded by the ideas and initiatives set forth by Complete College America, Incorporated.⁵⁹ During this same period, the American Association of State Colleges and Universities Re-Imagining the First Year of College Program influenced the adoption of the FYE program, increases in peer tutoring, increased use of non-faculty advisors. It also recommended overall budget increases and resources allocated for these services.⁶⁰ Since 2018, the Student

⁵⁵NECHE Evaluation Team to the Faculty, Administration, Trustees and Students of Fitchburg State University, March 20-23, 2023, 13, 14, 18, 29.

⁵⁶ [Massachusetts Board of Education 22-67 Student Success Framework](#), “Faculty Engagement and Pedagogy.” June 21, 2022.

⁵⁷ See the Batista Consulting Services Proposal, July 25, 2023. This consulting work is grant-funded by an anonymous donation to the university.

https://drive.google.com/file/d/1D4YcB3KKAvdv1U2uqzuiXPR4L4i2u2Hc/view?usp=drive_link

⁵⁸ See Fitchburg State University Board of Trustees Packet, September 12, 2017, p.14 that notes the merging of these departments and that “their size was doubled.” This was connected to the strategic goal to “Promote Student Success by Breaking Down Barriers.”

⁵⁹Complete College America, Inc., is a non-profit organization that promotes “Guided Pathways to Success.” This program asserts “Too much choice —especially uninformed choice — leads to indecision or poor decisions” and suggests “a substantial number of people accept — even welcome — a default choice designed by informed professionals.” CCA promises increased graduation rates, closing the achievement gap and a decline in lost credits among students. It recommends that students follow degree maps, marketing these efforts as “guarantee[d] for on-time completion. See, for example CCA Presentation 2017 <https://completecollege.org/wp-content/uploads/2017/11/GPS-BOOKLET-06-14-FINAL.pdf>

⁶⁰ American Association of State Colleges and Universities Re-Imagining the First Year of College Program, Presentation, Fitchburg State University, May 23, 2017.

Success office, and specifically the CSAC, has become responsible for a peer mentor program for the FYE, advising students with undeclared majors, advising transfer students, advising students changing majors, career services, some internships, professional development for staff, and campus initiatives around issues of orientation, retention, academic deficiencies, and career development.⁶¹

The Administrative Efficiencies committee recommends a review of the structure of Student Success to enhance efficiencies and eliminate duplication of efforts. Currently, consulting is underway to inventory of Student Success initiatives, create an assessment plan for the FYE program, and “enhance leadership development and readiness efforts for leaders including the Executive Cabinet, Student Success, and other leaders from Student Affairs and other identified areas.”⁶² In addition, the Administrative Efficiencies committee recommends that special attention should be paid to academics and the centrality of the faculty in the academic mission of the university. Currently, within the Student Success division, Career and Advising is responsible for career development, academic advising and internships. According to annual reports, approximately 52 percent of the students served by Career Services and Advising received academic advising in 2021-2022 and 48 percent received career services. In addition, Career Services and Advising advised 42 students to change their majors in 2021-2022.⁶³ According to the institutional data set, Fitchburg State University employed 189 full-time faculty members in AY 2022-2023, all of whom are contractually responsible for academic advising. Across academic departments, advising loads vary, as indicated in Figure 10.

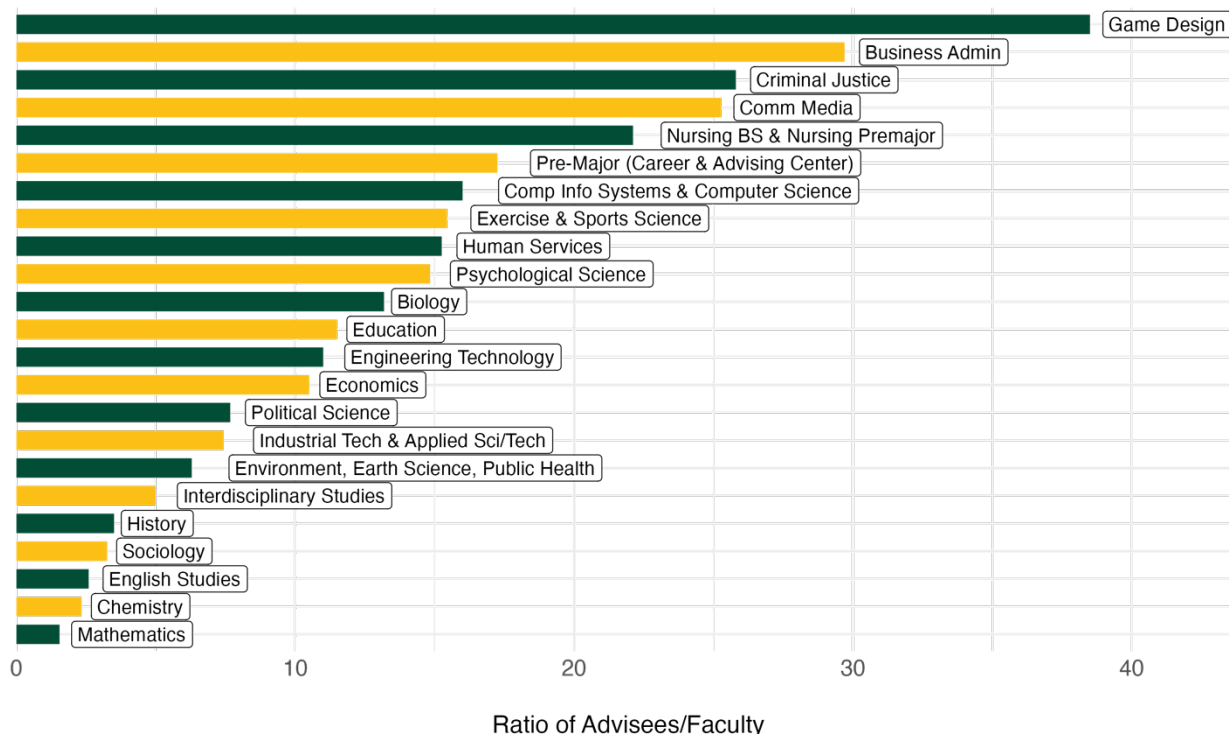
⁶¹ [Office of Student Success Annual Reports \(including CAC and ACT\), 2020-2023.](#)

⁶² Batista Consulting Services Proposal, July 25, 2023.

https://drive.google.com/file/d/1D4YcB3KKAvdv1U2uqzuiXPR4L4i2u2Hc/view?usp=drive_link

⁶³ Career and Advising Center Annual Report, 2021-2022.

Figure 10: Faculty Advising of Undergraduate Students by Major/Concentration Fall 2022⁶⁴



There is a wide variation between undergraduate advising among academic departments as well as the Career Services and Advising Center, which advises students who have not declared a major. According to SSC Navigator, in Fall 2023 there are 66 undeclared majors under 45 credits who are being advised by professional advisors in the Career and Advising Center.⁶⁵

The Administrative Efficiencies committee recommends a strategic reallocation of academic advising across some academic departments and selective utilization of professional advisors to support larger programs, especially those with growing graduate programs. Indeed, between 2018-2022, annual registered graduate credits increased from 41,754 to 51,153. In contrast, annual registered undergraduate credits declined, from 109,356 to 85,245.⁶⁶ Faculty in departments with fewer advisees, especially in departments that serve the general education curriculum, are well-positioned to advise undeclared students and transfer students.

By placing undeclared and transfer advising with faculty, it would be possible to embed professional advising within large departments, fostering synergies between professional advisors and specific programs, many of which are professional in orientation.⁶⁷ At the same time, realigning undeclared and transfer students with faculty members at the earliest point in their careers at Fitchburg State will provide students formal and informal access to faculty

⁶⁴ Financial Services Office, Major Data, 2018-2022, Financial Sustainability Task Force Data, October 22, 2022.

⁶⁵ Fitchburg State Common Data set, 2022-2023 reported October 19, 2022.

<https://www.fitchburgstate.edu/about/institutional-research-and-planning/institutional-data>

⁶⁶ Fitchburg State University, *Factbook*, 2022, 23.

⁶⁷ The University of Massachusetts Lowell, for example, employs professional advisors within its schools, including its [Manning School of Business](#).

members, the value of which is supported by both the NECHE report and the Massachusetts Student Success Frameworks.⁶⁸ Faculty academic advising of undeclared and declared majors is not unprecedented at Fitchburg State. Three decades ago, faculty staffed an academic advising center on the first floor of Thompson Hall. As a catalog indicated, the advising center “specialize[d] in assisting undeclared students, non-traditional students, students experiencing academic difficulty, and students needing help in interpreting specific academic regulations.”⁶⁹ The Academic Advising Center was staffed by faculty and was overseen by Academic Affairs. The deemphasis of the faculty role in advising students is a relatively new development, marked by the removal of faculty from the section on student advising in the 2020-2021 university catalog.⁷⁰

A more strategic approach to allocating academic advising resources has the potential to better support career service personnel, providing greater opportunities to enhance career services and internship development for the Fitchburg State community. This has been identified as a signature aspect of an education at Fitchburg State University. It fits within the university goal to support experiential learning and position the University as the leader in the region and the state. To do so, it may be most efficient to return academic advising—including pre-major and transfer students—to faculty which is provided for in the MSCA contract and support summer advising as necessary.

The Administrative Efficiencies Task Force recommends that the university administration consider placing the Office of Disability Services within the Division of Academic Affairs to enhance connections between disability services, academic support services, career services, and the Schools of Education, Arts and Sciences, and Health and Natural Sciences. This may be the most effective means to enhance efficiency and effectiveness, considering national trends in higher education, Massachusetts, and Fitchburg State.⁷¹ Nationally, the movement for disability services for post-secondary education is growing.⁷² Research indicates that students with disabilities are an at-risk student population with lower retention and graduation rates than students without disabilities.⁷³ It also suggests that this student population is an underserved population in the student services profession.⁷⁴ To address this deficit in higher education, the University of Massachusetts Boston’s center “Think College” has been at the forefront of the movement to increase access for students with disabilities and to promote best-practices.⁷⁵ In

⁶⁸ Current university policy requires undergraduate students to declare a major and move to faculty advising by the 45-credit point. See Fitchburg State AUC 15/16-03. See *supra* note 55, 56.

⁶⁹ Fitchburg State Catalogs, 1987-2000. See for example, 1993-1994, 164.

⁷⁰ As a comparison of the *Fitchburg State Catalog* indicates, between [2019-2020](#) and [2020-2021](#) “faculty” was removed from the catalog section on student support services.

⁷¹ See Massachusetts Department of Elementary and Secondary Education, [“Report to the Legislature: Annual Report on Students with Disabilities 2015-2016, Chapter 159, Acts of 2000 September 2017.”](#) and Mark Fermanich, [“DESE Policy Brief: Exploring MA Special Ed Data.”](#) February, 2020.”

⁷² See, for example, Cate Weir, [“Why Your College Should Join the Intellectual-Disability Movement.”](#) *The Chronicle of Higher Education*, July 10, 2023.

⁷³ Adam Richard Lalor, “Identification of Disability-Related Competencies for Student Affairs Generalists: A Delphi Study” Ph.D. dissertation, University of Connecticut, 2017, 2. Lalor cites national data that 66 percent of students with disabilities do not graduate and the attrition rate is 17 percent higher than students without disabilities.

⁷⁴ *Ibid.*, 10

⁷⁵ [Association on University Centers on Disabilities, “Think College Launches Public Awareness Campaign to Expand College Access for Students with Intellectual Disability”](#)

Massachusetts, as of December 1, 2022, the Department of Education reported that 19.2 percent of all students in public schools and charter schools in the Commonwealth had a disability.⁷⁶ As a student-ready university, Fitchburg State should strive to make services accessible, break down silos, and allow students to succeed through accessing a menu of opportunities without being hamstrung by an organizational structure that emerged as other units were reorganized.

At Fitchburg State, data indicates that the number of students with disabilities has increased. In 1992, 33 students completed a disability census; in 2019, 500 students self-reported to disability services through the census. 60 percent of these students had Autism Spectrum Disorders, Learning Disabilities, and Attention Deficit Disorders.⁷⁷ In 2022-2023, the Office of Disability Services registered 388 students.⁷⁸ Beginning in the Fall 2024, Fitchburg State will participate in the Massachusetts Inclusive Concurrent Enrollment Initiative (MAICEI). After a decade in existence, the program was codified into law in 2022. At Fitchburg State the program is overseen by the School of Education within Academic Affairs. Moreover, since 2012 an interdisciplinary minor in Disability Studies exists within the School of Arts and Sciences and Academic Affairs. Faculty teach content and co-curricular activities centered on an interdisciplinary understanding of disabilities.⁷⁹

The models for the organization of disability services in higher education include placing the office within student affairs units, academic affairs units, and within offices of diversity and inclusion.⁸⁰ Scholarship indicates that a collaboration between practitioner and faculty working with disability services would benefit students at Fitchburg State, especially considering the academic synergies that already exist.⁸¹ Furthermore, scholarly assessments of the place of disability services within higher education indicate that very large institutions most often place disability service offices within student affairs whereas smaller institutions more frequently place

⁷⁶ See the Department of Education [“Selected Populations Report, 2022-2023.”](#) The state counted 179,095 students with disabilities enrolled in public and charter schools.

⁷⁷ See Katrina Durham and Juli Maki, “Disability Services: A Historical Perspective,” January 27, 2020. According to IPEDS Data Feedback Report 2021, 500 students in 2019 comprised approximately 10-15% of the student population depending on whether FTE or headcount calculations are used. This data seems to reflect the larger study conducted by Huber, Table 6 p. 147.

⁷⁸ The Vice President of Student Affairs provided the following data on students registered with Disability Services: 2020-2021 N=394, 2021-2022 N=375, 2022-2023 N=388.

⁷⁹ In 2022, the MAICEI was codified into Mass. General Laws. The law allows for individuals “to: (i) take a credit-bearing undergraduate academic course for credit if they have met the course prerequisites and requirements; or (ii) audit a credit-bearing undergraduate academic course, consistent with campus policies governing selection of students for audit participation if they have not met the course prerequisites and requirements.” It pertains to undergraduate day courses. See Jeffrey C. Riley, Commissioner to Members of the Board of Elementary and Secondary Education, April 20, 2023. The MAICEI Program can be accessed at <https://www.mass.edu/strategic/maicei.asp> ; See also Massachusetts General Laws, [c. 15A, §30A](#); [c. 71B, § 17](#). In 2012, Fitchburg State University created a Disability Studies Minor to advance “knowledge of the historical, social, aesthetic, literary, legal, educational, philosophical, biological and political framing of disability. Students develop a strong interdisciplinary foundation, with emphasis on cultural constructions of human ability, and the intersections of disability, race, gender, sex, age, class and other markers of diversity and difference.” See Fitchburg State AUC 2012-35. See also Dr. Kisha Tracy, Fitchburg State University Exhibit, [“Disability Heritage.”](#)

⁸⁰ Scott, S., Markle, L., Wessel, R. D., & Desmond, J. (2016). Disability Services Partnerships with Faculty Members. *Journal of Postsecondary Education and Disability*, 29(3), 215-220.

⁸¹ Scott, et al.; “Disability Services Partnerships with Faculty Members,” 216-217.

disability services within academic affairs.⁸² The Financial Sustainability Task Force Phase 1 recommended that the university consider a hub service delivery model for student services. Placing disability services within the same structure as Student Success would strengthen the relationship between academic departments and disability services, facilitate career development and transition support for students with disabilities, and remove structural and ableist access barriers to instruction.

Historically, Fitchburg State followed the model that placed disability services within an administrative structure aligned with academic support. In the 1990s, following the passage of the Americans with Disabilities Act, Fitchburg State's disabilities coordinators worked within the academic success program.⁸³ Through 2010, Disability Services was part of the Academic Success Center. Placing Disability Services within the Office of Counseling Services is a recent decision. The Office of Counseling Services currently oversees Counseling Services in addition to Disability Services. Counseling Services reports to the Office of the Vice President for Student Affairs. The Office of Disability Services is, according to its website, responsible for "Empowering qualified students with disabilities to engage in all facets of academic, residential and student life" which and is "responsible for verifying student eligibility for accommodations and for coordinating those accommodations across campus."⁸⁴ Fitchburg State's Disability Services identifies its goals for 2022-2023 as:

- Build effective collaborations between the Disability Services office and a variety of academic departments and support services to create accessible instructional and social environments.
- Students associated with the Disability Services Office will demonstrate the development of self-advocacy skills and a healthy disability identity.
- Reduce structural and access barriers to campus physical and instructional environment.⁸⁵

The committee believes the university should consider a model that places Disability Services within Academic Affairs to accelerate the department's stated goals, each of which involve academics. Aligning Disability Services with Student Success would support historically underrepresented populations more effectively, including neurodiverse populations.⁸⁶ Upon transitioning to post-secondary education, students with disabilities must self-identify, provide

⁸² Wendy S. Harbour, "The Relationship Between Institutional Unit and Administrative Features of Disability Services Offices," 150.

⁸³ In the 1990s, disability services worked within Academic Success. See Katrina Durham and Juli Maki, "Disability Services: A Historical Perspective," January 27, 2020. It should be noted that the goals for Disability Services are found on the university website but annual reports and outcomes are unavailable. It is therefore not possible to measure outcomes with the emerging accreditation standards for students with disabilities.

⁸⁴ [Fitchburg State Disability Services website](#), accessed December 15, 2023.

⁸⁵ Student Affairs Assessment Webpage <https://www.fitchburgstate.edu/student-support/office-student-affairs/student-affairs-assessment>, accessed December 15, 2023. As of the NECHE report in 2022, the assessment of student affairs departments is in development. NECHE Report to the Faculty, Administration, Trustees and Students of Fitchburg State University, March 20-23, 2022, 13.

⁸⁶ Lalor, "Identification of Disability-Related Competencies for Student Affairs Generalists: A Delphi Study," 82.

their documentation or obtain evaluations and assessments, and request disability services to facilitate access. As the burden is placed on disabled students in post-secondary education, it renders it especially important that impediments are reduced for student access. Placing this department within Academic Affairs as with Career Services and Advising and the Academic Tutoring Center would move toward the seamless service delivery recommended by the Student Success Framework adopted by the Board of Higher Education.⁸⁷

Implementation:

A strategic consideration of AFSCME, APA, MSCA and Non-Unit professionals at the university can be conducted within divisions spearheaded by leadership. Review of the structure and responsibilities of Student Success can be considered in conjunction with the grant-funded consulting work and reviews by Academic Affairs. Placing Disability Services within Academic Affairs could be part of a structural realignment of the Student Success area within Academic Affairs.

Importance:

Strategic consideration of personnel is crucial to identifying efficiencies, as demonstrated in Figure 1 and Figure 9. This aligns with the Strategic Plan Goal Four: Promote a culture of transparent organizational communication and decision making so that all members of the campus community feel valued and heard; Promote environmentally sustainable values across the institution and Goal Five: Remain affordable and accessible to all prospective and current students.

A review of the structure of Student Success would aligned with Goal One of the Strategic Plan: to forge innovative paths to knowledge acquisition, career readiness, social mobility, and lifelong learning; Goal Two: Achieve a cultural shift around how we advise, mentor, and teach all students, especially traditionally underrepresented and underserved students, so that we meet them where they are; Develop and implement a purposeful and holistic model of student support services grounded in evidence-based practices; Ensure all processes and support services are adequate to meet the unique needs of transfer students, non-traditional students, online learners, and graduate students; Integrate career services into departments and curriculum, and build more consistent career advising across campus, especially for first-year students and sophomores.

The consideration of placing Disability Services within Academic Affairs would support historically underrepresented populations, including neurodiverse populations. This would meet

⁸⁷ For example, Massachusetts Department of Higher Education and Deloitte, “Implementation Options & Recommendations Student Success Framework,” May 27, 2022, which calls to “expand one-stop models of student support to create seamless service delivery with essential student-facing functions of the student experience from matriculation to graduation.” It also supports the goal of cultivating “inclusive environments that promote a sense of belonging for students socially, academically, as well as inside and out of the classroom.” “The New Undergraduate Experience: A Vision for Dismantling Barriers, Recognizing Students’ Cultural Wealth, and Achieving Racial Equity in Public Higher Education in Massachusetts,” January 14, 2022.

the Strategic Plan Goal Five: Establish Fitchburg State's commitment to education justice; Goal One: Fortify and promote the distinct role of the general education curriculum that provides every undergraduate student a relevant and challenging liberal arts foundation; Establish a learning environment in which academic and co-curricular programs work in synergy to offer applied learning experiences that prepare students for purposeful personal and professional lives; Leverage existing curricular strengths to develop new programs that meet demand and forge deeper connections between our curriculum and community needs; Goal Four Increase the visible diversity of our faculty and staff in order to nurture the commitment to equity and inclusion throughout the campus community; Goal Three: Continue to provide educational opportunities and cultural programming that attract and engage members of the local community. Finally, this recommendation would support every subset of Goal Two: To become a model student-ready university and narrow the achievement gap.

Future Considerations:

In the spirit of recommendations made regarding a reorganization and clarification of roles and responsibilities in Student Success and the most effective and synergistic placement of Disability Services in the university community, the Administrative Efficiencies Task Force recommends a thorough assessment of the organization structure of the university considering how we may best meet the needs of students amidst the continuous evolution of technology. This will position Fitchburg State University to embrace the opportunities to engage with both our present and our and future students.

Coversheet

Entrepreneurship and Revenue Final Report

Section: II. Financial Sustainability Report Discussion
Item: C. Entrepreneurship and Revenue Final Report
Purpose: Discuss
Submitted by:
Related Material: FSTF Phase 2 ENTREPRENEURSHIP AND REVENUE.pdf

FINANCIAL SUSTAINABILITY TASK FORCE: ENTREPRENEURSHIP AND REVENUE Phase II Recommendations | Final Report 2023

Overview:

Introduction

The Entrepreneurship and Revenue sub-committee for the Financial Services Task Force convened in the summer 2023 and the fall 2023 semester to review recommendations provided by the Phase I working group. The recommendations for review included:

- Recruitment
- Review tuition/fees pricing models
- Marketing academic programs
- Conferences and events
- Work towards Hispanic-Serving Institution (HSI) Designation
- Grants and fundraising efforts
- Advocate for Massachusetts state funding
- Evaluate the return on investment of current marketing efforts and recruitment strategies for both day and SGOCE programs
- Evaluate revenue of non-credit initiatives to determine if they are at least revenue neutral

The group delved into each of these focus areas to explore what opportunities may exist for revenue growth for the university. After thorough investigation and discussion, we have eliminated the following options from further consideration: working towards HSI designation, advocate for MA state funding and evaluate revenue of non-credit initiatives to determine if they are at least revenue neutral. These options were eliminated for various reasons.

Limitations

Over the summer and throughout the fall, we have not had faculty representation in the group, which left a vacancy in the co-chair space as well as a lack of faculty voice. As we further assessed whose voice is being represented in our recommendations, we noticed there is no student voice. Possible ideas to incorporate the student voice into this work in the future would be to:

- invite a student representative into each of the task force sub groups this fall
- host focus groups with the SGA or another student organization
- collect additional data based on student surveys, focus groups or other such events that have occurred in the last 1-3 years that may touch upon student needs, gaps, and services needed in order to retain and ultimately help students persist to graduation

What priority did you choose:

In looking at the recommendations provided from Phase I, the group struggled with the recommendations aligning with the scope of our group. The recommendations presented did not necessarily read as entrepreneurial and revenue generating; so we've had to be creative in our

interpretation of the recommendations. Additionally, we know that some of the other subgroups have focused their attention on areas that we would've looked into further, which include:

- Upgrades to the residence halls in an effort to host more summer conferences/events as well as housing for upperclassmen, graduate students, international students and etc.
- Reassessing relationships with third party companies that provide educational services for colleges and universities - such as EAB

Recommendation:

Executive Summary

The Entrepreneurship and Revenue sub-group met weekly throughout the summer and a few times in the fall to discuss focus areas and dive into the recommendations. As a result, we have narrowed our focus, currently, to the below recommendations. The three recommendations include:

1. Marketing programs
2. Grants and fundraising efforts
3. Conferences and events

Recommendation 1:

Marketing academic programs: We know that in order to make money, we need to spend money and that marketing and brand awareness is integral to sustaining enrollment and building new pipelines. A much deeper dive into current contracts, expenditures and budgets will be explored in the fall with more specific recommendations for how marketing can create renewed and expanded revenue streams long term.

Implementation Strategy:

Explore higher education marketing firms that are designed to meet the business needs of a small regional public institution with limited resources (aka: consider alternatives to existing contracts with vendors like EAB).

Recommendation 2:

Grants and fundraising efforts: Currently, there is not a Major Gifts Officer at Fitchburg State University. In comparing other Massachusetts state universities, we are the only institution that does not have personnel dedicated to planned and major giving. This would be a great opportunity to have a person serve in a role that can focus on building, fostering and maintaining large donors and continued increases and maintenance of the endowment. In the fall, the group will explore anticipated ROI of the position and how an increase in major gifts can have a positive ripple effect on enrollment, community connections, and overall stabilizing of the university's financial health.

Investing in fundraising personnel will be a long term commitment. An institution cannot expect that new staff coming in will be able to build relationships and trust immediately - this takes time and it takes bringing in the right people who have the right experience to foster these connections. Once a strong infrastructure is in place, however, it can be expected for a major

gifts officer(s) to raise five, ten or even more times their salary. Not only would that bring in additional revenue, but those funds could be repurposed for the most critical student needs whether scholarship, food, housing, etc.

Implementation Strategy:

Hire an experienced major gifts officer who has a proven track record of making an impact in university fundraising and is well connected to the community. **Pay them market value.** The ROI will pay off within 3 years and hiring can be done immediately (within 6 months).

Recommendation 3:

Conferences and events: Based on the results and recommendations of the other Phase II subgroups, we recommend expanding summer conference and on campus event offerings. If some of the residence halls can be equipped with air conditioning units or some type of resolution to house folks during the summer, we can expand a more entrepreneurial vision for bringing community members and conference goers to campus.

Implementation Strategy:

Expand upon our existing relationship with GameOn by coordinating housing options for their summer camps, tournaments, and other such events. By building upon a pipeline that already has visitors to the area, we are tapping into existing resources minimizing the personnel needed to get something like this off the ground.

We know if we can open Mara during the academic year, there's an opportunity for revenue up to \$500,000 if full occupancy is reached. This also leaves the summer for conferences, tournaments at GameOn, etc. that could bring in additional funds to the university depending on the rate we charge and what the overhead costs would be.

Data/Information:

There are important data points to consider when implementing a new strategy. Some leading questions may include:

- What is the revenue for the last 5 years of conferences? Can this be disaggregated based on time of year?
- How many beds do we have open in the residence halls in the summer that would otherwise be available / equipped for occupancy?

Importance:

These recommendations are important to the university because of the state of higher education and the competition we face regionally. Innovation will continue to be a driving force in the sustainability of institutions. It needs to be understood that in order to make money you need to spend money. But you have to spend money strategically, and in areas that are going to have the biggest impact and the biggest ROI. Simultaneously, and in parallel, we want to remain true to who we are as a university and continue to make an impact on the community of north central Massachusetts.

Future Considerations:

This project proved to be very challenging as the overall goals and logistics for this work were really ambiguous and not well defined. When bringing constituents across campus together and pulling them away from their day-to-day tasks, expectations and time commitments need to be made clear to ensure time equity among groups and stakeholders.

Other Accomplishments:

Aside from the outcomes of the Financial Services Task Force, the bringing together of staff from across differing divisions on campus has enabled us to learn a bit about what we all do in more depth. And why. It has served as a great opportunity to break down some of the silos that exist and has fostered connections that will organically lead us into a more collaborative future.

Coversheet

Property and Infrastructure Final Report

Section: II. Financial Sustainability Report Discussion
Item: D. Property and Infrastructure Final Report
Purpose: Discuss
Submitted by:
Related Material: FSTF Phase 2 PROPERTY AND INFRASTRUCTURE.pdf

**Financial Sustainability Task Force
Working Group for Property and Infrastructure
Final Report, 15 December, 2023**

Overview:

Following the 14 June kickoff meeting for Phase II of the Financial Sustainability Task Force, the working group for property and infrastructure held seven weekly meetings from 21 June through 2 August, 2023. The group was initially co-chaired by a staff and faculty member – respectively Stefan Dodd and Sean C. Goodlett – but due to shifting responsibilities at the University, Stefan joined another working group, and, on 26, July J.D. Head, the Assoc. Vice President for Capital Planning and Maintenance, became the staff co-chair. The working group members also included Mary Beth McKenzie (*ex officio*, as the executive cabinet’s representative), Bradley Cohrs, Mike Desmarais, Cheryl Johnston, Matthew Lechter, Michael Letziesen, Diane Lucas, Nirajan Mani, and Angela Marini. (Ms. Lucas resigned from the committee in mid-July.) MSCA did not appoint a third member for the summer work.

In our summer weekly meetings, the group carried out a multitude of tasks with an eye toward fulfilling the charge of “developing specific and actionable recommendations to realize cost savings, increase revenues, and achieve greater efficiencies” (memo from Dr. Lapidus, 14 June, 2023). We first reviewed the Phase II charge and expected summer outcomes and then revisited the eight relevant bullet points in the Phase I report (on pp. 19-20) and three consolidated bullet points proposed by the executive cabinet. Working group members were also encouraged to consult the 2007 Fitchburg State Master Plan, 2020-2025 strategic plan, 2022 NECHE self-study, and Worcester State’s 2022 Phase I financial sustainability task force report. In the ensuing weeks, we assembled data on physical or built structures as well as lands owned, occupied, or leased, software contracts, and hardware refresh cycles. We then utilized this data to determine our fall-term priorities. In the end, the group focused heavily on existing built structures, believing that most savings and new revenues are to be achieved here, but we agreed to continue our review of lands for potential sale or future use, and we vowed to return to the software contracts and hardware refresh.

In late October, after the several bargaining units reconsidered membership, the working group reconvened. AFSCME named Ms. Alecia Campbell to replace Ms. Lucas, but MSCA still did not supply a third member to the working group and only belatedly asked for the working groups to recommence their deliberations. This meant, then, that the working group for property and infrastructure operated with only ten members from June through December. Moreover, because we did not reconvene until 25 October, the working group had less than two months to complete its Phase II work. With this ambitious timeline before us, the members agreed to separate into four subgroups that would meet upwards of twice a week to develop separate recommendations on discrete issues; the full working group, meanwhile, came together every other week (or 5 times) so that the entire membership could be apprised of the progress of each subgroup. The four subgroups treated (1) information technology software contracts and hardware refresh rates, as well as grant-funded equipment purchases (Cheryl Johnston, chair); (2) the repurposing of existing built structures and lands (Matthew Lechter, chair); (3) the sale of the same (J.D. Head, chair); and (4) a handful of what we termed “priority properties,” including, of course, the Recreation Center and the so-called Theater Block, as well as properties we both rent and lease (Sean C. Goodlett, chair).

The upshot of our deliberations was the development of eight recommendations with the potential for hundreds of thousands of dollars in annual savings and possibly several times this in new revenues. Unfortunately, much more time would be needed to calculate one-time profits from property sales.

Working Group Priorities:

After a careful review of the Phase I recommendations and the consolidated recommendations by the Executive Cabinet, in August the group settled on three priorities:

- Review select software contracts and hardware refresh rates for usage, redundancy, and fiscal and financial implications. Hardware refresh rates should take into consideration the lifecycle efficiency of devices and how often the Technology department encounters repair needs and hardware deficiencies.
- Review the current portfolio of University properties (i.e., built structures and lands) for highest and best use and fiscal and financial implications. Our preliminary review turned up roughly a dozen built structures in addition to select lands that will be our particular focus; the built structures we will focus on include (in alphabetic, not ranked, order):
 - Conlon IA and FA
 - 66 Day Street
 - Herlihy Hall
 - 164-174 Highland
 - 1191 John Fitch Highway
 - 150 and 152 Main Street
 - Mara 6 and 7
 - 185 North Street
 - McKay A and B Wings
 - O Pearl Hill Road
 - The Recreation Center
 - The Service Center
 - The Theater Block
 - Weston Hall
- Develop an inclusive planning process that annually reviews the portfolio of built structures and lands and makes recommendations for development, renovation, and sale or lease; such recommendations should comport with any strategic plan, the institutional vision, and the University's mission.

Data/Information:

Above and beyond the preparatory reading in the 2007 Fitchburg State Master Plan, 2020-2025 strategic plan, 2022 NECHE self-study, and Worcester State's 2022 Phase I financial sustainability task force report, the working group for property and infrastructure assembled and examined a large amount of data. For the purposes of this report, we have split these data into two chunks. For information technology, we assembled data on and/or reviewed carefully all software contracts, hardware failure rates (by device type, with a specific emphasis on Apple products), and past and present hardware refresh cycles; because hardware purchased with grant monies represented a special fiscal and financial burden, a review of existing University grant-writing policies was also necessary.

For built properties and lands, the working group assembled separate building and land catalogues. For the built structures, these included information on ownership – whether, e.g., by the Division of Capital Asset Management and Maintenance (DCAMM), the Massachusetts State College Building Authority (MSCBA), the Fitchburg State Foundation or its Supporting Organization, or public or private leasing agencies – the number of finished stories, total finished and gross square footage, space function, years of original construction and renovation(s), as well as debt service, rent paid, and revenue acquired through leasing. This data we supplemented with so-called “comp” prices when investigating potential sales, deferred maintenance and potential renovation costs, as well as debt loads for structures we considered selling. Similarly, for lands, the catalogue included, once again, ownership, the total and “improved” versus “unimproved” acreage, the current use of any lands, and all debt service. In the case of at least one property – approximately 120 acres located in Lancaster, MA – we also investigated covenants and bequest stipulations that would limit the sale or use of the lands. When it came to proposed renovations of the Recreation Center and the Theater Block, the working group also consulted

the 2012 Fitness Center Study, Landry Arena Master Plan, and an overarching Recreational Facilities Plan (all authored by Symmes Maini and Mckee Associates) and the 2018 Theater Block Feasibility Study (by Webb Management Services). These latter documents were then used to determine the feasibility and costs of both renovation projects. Last, a subgroup investigating the repurposing of properties met weekly to conduct on-site visits to each property delineated in its charge; the aim was to gain a comprehensive understanding of current usage, assess existing conditions, and contemplate potential future uses for the several properties.

Recommendations, Rationales, and Implementation Strategies:

Again, because time was short, each of the four subgroups developed recommendations that were then discussed and put to a vote before the full working group for property and infrastructure. In every case, the recommendations received unanimous support; below are the eight recommendations (with accompanying votes) and their respective rationales, implementation strategies, and analyses of the importance of the recommendations to the University and the broader City and region:

1. Create a University-wide “Software Request Review Committee” (SRRC) that meets throughout the year to review redundant software (Vote: 8:0:0).

Rationale: The committee’s ongoing task will be to review new and old software contracts in order to minimize unnecessary expenses. The committee also aims to streamline the software request approval process and leverage existing software assets before considering new purchases. (The committee’s proposed charter appears in Appendix A.)

Implementation Strategy: Implementation begins as soon as Trustees review and approve the financial sustainability task force recommendations. The hope is for the review process to commence in the fiscal year 2025. Thus, the steps taken here include:

- Review of the Software Request Review Committee Charter document by the Board of Trustees;
- Review of the same by the MSCA bargaining unit leadership, who will then provide the name(s) of the nominee(s) to serve on committee;
- Review of the same by leadership of the other bargaining units (APA and AFSCME) as appropriate; request for additional committee member nominees.

Importance: The SRRC will achieve cost savings by identifying redundancy as well as leveraging existing software before purchasing new. No cost savings have been estimated, as the proposed work is prospective.

2. Lengthen the MacBook refresh rate from every 3 years to 4 (Vote: 8:0:0).

Rationale: Given the low percentage of repairs observed over the last three years, adjusting the refresh rate for MacBooks from every 3 years to 4 will not significantly impair performance. MacBooks can reliably operate for an extended period. The revised refresh rate is expected to generate immediate and recurring savings.

Implementation Strategy: Implementation would begin in fiscal year 2025. The only step to take here is to reorganize the refresh schedule, where the oldest devices would continue to be refreshed first, but then subdivide the total pool into four (as opposed to three) groups.

Importance: The estimated average annual savings are approximately \$23,424. (This figure is based on current inventory and purchase price.) Altering the refresh rate, moreover, helps to offset the increased cost of choosing a MacBook instead of a Windows laptop. It will also assist with efficiency: the Help Desk will issue fewer MacBooks per year, and end users will be able to maintain their device for another year; after all, having a laptop refreshed can hinder an end user's efficiency and productivity until they get "settled" into their new device.

3. Develop a practice of funding the refresh and replacement of relevant IT equipment within grant proposals. Additionally, consider the establishment of a revolving fund for such purposes (Vote 8:0:0).

Rationale: This recommendation aims to optimize software usage, reduce unnecessary expenses, and allocate resources efficiently when refreshing hardware, ensuring financial sustainability and technological advancement at the University.

Implementation Strategy: The Grant Center will work internally and with grant writers to develop the practice of including language in future grant proposals for refreshing relevant IT equipment. (See Appendix B for a draft of the Technology Equipment Replacement Policy.)

Importance: Establishing these practices ensures adequate funding for replacement of grant-funded IT equipment, creating opportunities for future savings. No cost savings have been estimated, as, once again, the proposed work is prospective.

4. Repurpose all or parts of the following built structures to achieve cost savings, generate new revenues, and/or increase efficiencies: 185 North Street, 340 Highland Avenue, Herlihy Hall, Mara 6 and 7, and the Klondike Service Center (Vote: 8:0:0).

Rationale and Implementation Strategies (where possible): The various properties each have distinct potential for repurposing:

- A. *185 North Street:* This property presents a strong revenue-generating opportunity, particularly as potential housing options for faculty, staff, and graduate assistants or students. Based on an initial walk through of the building, the current configuration of six apartments allows for family rentals and/or individual bedroom rental opportunities. Costs of retrofitting these spaces and thus potential for revenue is unknown, given needed "behind-the-walls" maintenance and deferred maintenance due to underutilization in recent years. At full capacity, annual revenues are likely to top \$100,000.
- B. *340 Highland Avenue:* As with the previous property, this stand-alone house presents a strong opportunity for revenue generation. Institutional Research has already begun the process of moving to Sanders; only a small renovation project is needed to prepare the house for occupancy by faculty or staff. Given the location in the main "propeller" of campus, moreover, it is critical that the building remain in good condition and kept as an asset.

- C. *Herlihy Hall*: This structure is a prime candidate for repurposing to office space or other uses. This would entail moving the building from the Housing & Residential Services (MSCBA) portfolio and over to DCAMM. It would also require the settling of debts for any renovations on the structure, a process that will be complicated by the comingling of borrowed monies across multiple MSCBA properties. The following are two scenarios that we considered:

Plan A – Creation of a daycare facility in one half of Herlihy Hall; Financial Services and Upward Bound Math & Science would remain in current occupied spaces.

Plan B – Removal of all offices and equipment from the Service Center (Klondike) facility. CPM and Environmental Services staff would be dispersed between Herlihy and Dupont. At the same time Housing staff would move to Herlihy from Mara 8, which could be repurposed for furniture storage. Financial Services & Upward Bound would once again remain in Herlihy. Added considerations include:

- Potentially moving salt and sand sheds to Elliott Field. (This might not be necessary with the current management of grounds being provided by a vendor.)
 - Utilization of 1st floor of Dupont by material management, while the top floor becomes Print Services.
 - Relocating continuing education to Dupont or Herlihy depending on specific department needs and space utilization.
- D. *Mara 6 and 7*: With only minor adjustments, these dormitories could represent significant revenue generating opportunities. Students are increasingly prioritizing “singles.” As with Mara 1-5, upgrades here would include full-size beds and single-bedroom opportunities. It is important to note that Housing & Residential Services successfully occupied the other five Mara spaces, retaining sophomores, juniors, and seniors on campus as residential students. Thus, the proposed usage for these two spaces is a “Premium Single with Full-Size Bed,” accommodating as many as 46 residents at annual rates of roughly \$10,000 per room.
- E. *Klondike Service Center*: Depending on the repositioning of offices and services elsewhere on campus, parts or all of this space represent significant opportunities for rental or even sale at market rates. At a minimum, the University will want to consider renting out the office space recently vacated by Financial Services. N.B.: Currently, the Klondike facility affords space to a wide variety of offices and functions, including Print Services, CPM (Academic Trades, Locksmith and Grounds), Materials Management, Environmental Health Services Hazardous Waste, and Universal/Electronic Waste; the facility also provides campus-wide storage and has one of the few loading docks.

Importance: Reexamining our usage of the above spaces is critical to achieving efficiencies and improving day-to-day operations. Some built structures are currently sitting vacant and/or underutilized. As we plan for the future, we should continue to search for revenue-generating opportunities, particularly when it comes to the vacant housing options; doing so could help us meet the affordable housing needs not just of students but faculty and staff. We also need to continue to think about space utilization and building for the needs of tomorrow. (On this latter, see under “future considerations,” where we raise the prospect of a campus-wide “space

committee.”) The working group members all felt that Herlihy Hall represents the strongest potential for rethinking space utilization.

5. Engage with real estate consultants to advise on the value and explore the sale of 66 Day Street and the multifamily housing unit at 164-174 Highland Avenue (Vote: 9:0:0).

Rationale: 66 Day Street is a property owned by the Foundation Supporting Organization and was purchased for \$50,000 dollars. The building is not habitable at this time. Currently this property is not earmarked for any specific long-range purpose. Similarly, the 164-174 Highland Avenue structure is owned by the Foundation Supporting Organization. It was purchased at a total cost of \$559,800, with 164-168 Highland costing \$389,900 and 174 Highland \$169,900. Both the Day Street and Highland properties would require significant capital investments to make them functional. One estimate for the Highland structure places the costs at \$7 million or more. When considering the sale of these properties, one should bear in mind that comparable properties sold in the past year at an average price-per-square-foot of \$98.51: see, for example, 119-121 Day Street, 4-12 Holt Street, and 15-25 Lunenburg Street. These two properties could best be described as commercial/residential apartments and are currently in livable condition. N.B.: “Comps” are not exact matches, and our properties are not livable in their current state.

Implementation Strategy: The committee recommends that stakeholders research and identify a reputable and experienced real estate consultant with a proven track record in property valuation and sales. Once selected, a preliminary meeting should be scheduled to discuss the objectives and expectations for the specific properties in question. Clear communication of the property’s unique features, recent improvements, and any relevant market trends will enhance the consultant’s understanding of the assets. Collaboratively setting realistic goals and timelines for the valuation process is essential to align expectations. Providing comprehensive access to relevant data, such as property documentation, recent appraisals, and financial records, will enable the consultant to conduct a thorough assessment. Regular check-ins and open lines of communication should be established throughout the valuation process to address any emerging issues or considerations.

Importance: The evaluation and potential sale of properties at 66 Day Street and 164-174 Highland Avenue carry significant importance for the university’s financial landscape. The divestiture of these structures has the potential to alleviate some of the University’s (Supporting Organization) debt burden.

6. Renovate the existing Recreation Center on North Street, refurbishing the pool, locker rooms, racquetball courts, classrooms, and recreational exercise facilities (Vote: 7:0:0).

Rationale: Despite the completion of construction in only 2000, the Recreation Center requires extensive renovations. In fiscal year 2020, based upon usage statistics and cost, the president made the decision to close the facility’s swimming pool. This has left a literal hole in a large part of the building. Prior to the 2018 renovations (costing \$4.2 million) at the Landry Arena, which now houses a strength-and-conditioning center and an indoor fieldhouse for our student athletes, the University had conceived of placing some facilities (e.g., the strength-and-conditioning center) within the existing footprint of the Rec. Center where the empty pool now sits. To that end, in late 2012, the University hired the architectural firm, Symmes Maini & McKee Associates, to create conceptual drawings of several options for renovating the pool

space, the locker rooms, as well as the second-floor recreational exercise facilities, racquetball courts, and classroom spaces. In terms of design, the project is as advanced as the so-called theater block.

Implementation Strategy: The architects' preferred option for renovations would increase and improve recreational fitness spaces, increase the visibility of athletic and wellness activity, improve the image of the Center and its relationship to the campus, as well as enhance the overall student experience. At present, the University has no other revenue streams for the renovation of the Recreation Center than borrowing. The original cost estimates fell between \$5.5 and 6.5 million; assuming a 6% annual rise in construction costs since, these figures would now approach somewhere between \$11 and \$13 million. (Market rate for borrowing costs are currently ~\$85,000 of debt service for each \$1 million if borrowed over 20 years or \$75,000 for each \$1 million borrowed over 30 years.) The original 1997 note for \$6 million will be retired in the fiscal year 2024, and a second note (from 2019) to cover the cost of roof repair that ran \$1.1 million has an anticipated retirement date of 2039, although we have deferred payments on this loan due to Covid and other reasons, so the payout may be extended. Of course, with the construction of the strength-and-conditioning area and fieldhouse space in Landry, the renovation of the Recreation Center could be scaled back considerably, with accompanying cost savings. We might also reexamine how the campus utilizes Recreation Center space and alter the designs accordingly.

Importance: Students and parents “shop” for first-rate recreational facilities. A strong potential for a renovated Recreation Center to attract new students, in short, exists. It is also well established through national data that students who take part in recreational programming on campus report higher GPAs, are more likely to remain a student on that campus, and report greater benefits to their psychosocial health ([NIRSA Recreation & Wellness Benchmark Survey](#), Spring 2019). Our Recreation Center, moreover, lies in the original “propeller blade” of the main campus (an area designated in the 2007 Master Plan that runs along North Street and Highland Avenue, where the Hammond Building forms the center of the “propeller.”) Given the goals identified by Symmes Maini & McKee and the retirement of most of the debt on this facility, as well as the prominence of the building in our gateway (North Street) entrance, the University must consider this project a priority. It is also the case that renovating the Recreation Center will cost half what a standalone “black box” is predicted to cost, with possibly similar amounts of borrowing.

7. Construct the proposed “black box” theater within the existing footprint of the original 1910 theater (Vote 7:0:0).

Rationale: The University has a tremendous sunk cost in the so-called Theater Block project, not just in dollars, but also in public pronouncements. Since 2015, expenditures for property acquisitions and renovations on this project have totaled nearly \$9 million. The main theater and storefront properties were acquired for \$350,000 in 2016. In the first phase of renovations, we built out the IdeaLAB and game studio above the storefront properties at a cost of \$3.8 million, and in subsequent years we conducted stabilization and infrastructure repairs on the main theater and adjacent properties at a cost of \$2.2 and \$2.4 million, respectively. In 2019, the University acquired the former Fidelity Bank building at 675 Main Street, at the corner of Grove Street; at the time, it had an assessed value of \$616,000. At the opposite end of the block, the University acquired a property, on which a proposed parking deck is scheduled to be built,

and this land came with a nearly \$500,000 liability due to environmental cleanup needs. In the end, bringing to fruition the existing conceptual plans to construct what is being called the TheaterLAB (also known as the “black box” theater) and to renovate the main theater (originally built in 1910) will cost somewhere in the range of \$75 million at current market rates: the cost for a standalone “black box” is roughly \$23 million, whereas the main theater is currently projected to cost \$52 million. However, siting the “black box” within the footprint of the original theater has the potential to save tens of millions of dollars.

Implementation Strategy: In the case of the “black box” theater, the University has a variety of potential revenue streams to cover the cost. For instance, we have an earmark in the Massachusetts state budget for \$3 million (see the press announcement [here](#)), which must be expended by the end of calendar year 2024. Along the same lines, the federal government has awarded the project a \$2 million grant that expires on a similar timeline ([here](#)), and the National Endowment for the Humanities has awarded us \$750,000 with a 4:1 fundraising match requirement; these NEH funds must be expended fully by July, 2027. Furthermore, in its 2022 estimates for revenue sources, the University has anticipated fundraising at least \$5 million dollars, even as, depending on the presence of state and federal monies, the University might have to borrow as much as \$10 million or more to bring a standalone “black box” project to completion. (Borrowing costs would be the same here as stipulated above for the Rec. Center.) The revenue sources for the main theater project are as yet inchoate, and accordingly realization of the larger project is many years away. Whether we wish to pursue a standalone “black box” theater or one situated within the footprint of the 1910 theater, the timeline to act is short. We would need to move beyond the design development drawings to full construction drawings early in fiscal year 2025.

Importance: Given the high-profile nature of the University’s commitments to revitalizing downtown, the \$9 million in expenditures already made on Main Street properties, as well as the presence of nearly \$6 million in one-time monies from the Commonwealth and the federal government, it is hard to conceive of our not carrying out at least the construction of the “black box” theater within the footprint of the larger (1910) theater. Conversely, leaving this project unfinished and returning the state and federal monies could significantly damage the University’s reputation and town/gown relations.

8. Consider ending the leases of 150 and 152 Main Street (Vote: 7:0:0).

Rationale: With the repurposing of Herlihy Hall and other built structures, a significant potential exists to relocate both the Center for Professional Studies (CPS) and the Crocker Center and end the leases at the Montachusett Regional Transit Authority (MART) “intermodal” station.

Implementation Strategy: Investigate the possibility of relocating both offices either to Herlihy Hall or another built structure within the “propeller” of North Street and Highland Avenue.

Importance: While the combined leases for the CPS and Crocker Center total just \$38,000 per annum, relocating their offices to the main campus would not only achieve modest savings, but raise the profile of both Centers, and it has the potential to improve town/gown relations by bringing more visitors to campus.

Future Considerations: [unfinished]

The working group for property and infrastructure had a variety of items that it deliberated on but ultimately deferred to a later discussion. Among these are the following:

- *An inclusive planning process that reviews on an annual basis the portfolio of built structures and lands and makes recommendations for development, renovation, and sale or lease.* Most campuses have so-called “space committees” that bring together all stakeholders. At Fitchburg State, opportunities for input on the use or repurposing of space are rare at best. Again, such space usage recommendations should comport with any strategic plan, the institutional vision, and the University’s mission.
- *The addition of a dollar threshold to the Software Request Review Committee Charter.* In its discussions, the working group did not have time to establish such a threshold, but we believe one is necessary, as smaller grants will have little impact on overall technology purchases.
- *An evaluation of the vacant properties at 1191 John Fitch Highway and 0 Pearl Hill Road for possible repurposing or sale.* The first of these lands currently consists of approximately 12 acres of undeveloped land owned by DCAMM. It is wooded, on a fairly steep grade, and a portion of the property is bisected by a perennial brook. The 0 Pearl Hill Road property consists of approximately 41 acres and is also owned by DCAMM. The property is forested with some variable sloping grades, and is accessible by two 20 ft wide swaths or paths off of Pearl Hill Road. These properties have value beyond their assessed cash value: both are large carbon sinks (with the carbon sequestered in forested spaces) and undisturbed, and as such they contribute significantly to environmental sustainability. Importantly, the Commonwealth of Massachusetts is expected to begin to hold public entities responsible for their carbon levels. Retaining these properties as offsets could therefore be very valuable to the University in the near future, while retention of forested spaces presents a unique strategic value. Holding onto these forested lands not only aligns with ecological responsibility, but also provides the University with long-term value and flexibility, tapping into the growing importance of sustainable practices in land management. Balancing the financial gains from property sales with the environmental benefits of retaining forested areas is essential in crafting a holistic strategy that aligns with the sustainability goals of the Commonwealth of Massachusetts as described in Executive Order 590 as well as 815 CMR 6.00.

Appendix A

Software Request Review Committee Charter

1. Purpose:

The Software Request Review Committee (SRRC) is established to ensure the efficient and effective evaluation, prioritization, and decision-making process for all software requests within Fitchburg State University. The SRRC's primary purpose is to assess the value, feasibility, and alignment of software request, including software as service requests, with the organization's goals, policies, and resources.

2. Scope:

The SRRC is responsible for reviewing all requests for new software, software upgrades, and software integrations submitted by Fitchburg State University departments or individuals.

3. Responsibilities:

The SRRC shall have the following responsibilities:

- a. Evaluate software requests based on their alignment with the organization's strategic goals, security and compliance requirements, and available resources (Financial, Training, Technical Support)
- b. Define the specific learning objectives and outcomes to be achieved by integrating software into the curriculum. (This should be provided by requestor.)
- c. Assess the technical feasibility of software requests, including compatibility with existing systems and infrastructure.
- d. Evaluate the availability of the necessary infrastructure, such as computer labs, electrical/power, devices, and internet connectivity. Ensure that students and instructors have access to the required technology. Determine if the software license terms are being violated in any way (i.e. installing software in a VDI lab w/access from off campus - does the license agreement allow this?)
- e. Review the budgetary implications of software requests and make recommendations to the finance department.
- f. Communicate decisions to requestors, along with explanations and next steps.
- g. Monitor the implementation and progress of approved software requests.

4. Committee Composition:

The SRRC shall consist of the following members:

- a. Chairperson: [Name of Chairperson]
 - Responsibilities: Preside over committee meetings, coordinate the review process, and ensure timely decision-making.

b. Members: [List of Members, to include 1 faculty, 1 staff]

- Responsibilities: Actively participate in the evaluation and prioritization of software requests.

c. IT Representative: [Name of IT Representative]

- Responsibilities: Provide technical expertise and assess the feasibility of software requests.

d. Legal and Compliance Advisor: [Name of Legal Advisor]

- Responsibilities: Ensure that software requests comply with legal and state regulatory requirements (Commonwealth of MA Terms and Conditions for Information Technology Contracts, Standard Contract Form)

See also:

Commonwealth of MA Terms and Conditions for Information Technology Contracts ([here](#)).

Commonwealth of MA Standard Contract Form ([here](#)).

5. Meetings:

The SRRC shall meet on a regular basis, as needed, to review software requests. The Chairperson shall schedule and facilitate meetings and provide notice to committee members in advance.

6. Decision-Making:

Decisions regarding software requests shall be made by a consensus of the committee members.

7. Reporting:

The SRRC shall provide regular reports to the Fitchburg State University leadership team regarding the status of software requests and their impact on the organization.

8. Amendments:

This charter may be amended as necessary to reflect changes in the University's needs or processes. Proposed amendments must be approved by a majority vote of the SRRC.

9. Review:

This charter shall be reviewed annually to ensure its relevance and effectiveness.

10. Approval:

This Software Request Review Committee Charter is hereby approved on [Date] by [Name and Title of Approving Authority].

Appendix B

Technology Equipment Replacement Policy for Grant-Funded Purchases

This policy applies to all technology equipment purchased using grant funds.

Definition of Technology Equipment:

Technology equipment includes, but is not limited to, computers, servers, laptops, tablets, monitors, printers, acquired through grant funding.

Replacement Criteria:

a. Technological Obsolescence:

Technology equipment may be considered for replacement if it becomes technologically obsolete, impeding its ability to support the objectives of the grant.

b. End of Life (EOL):

Replacement may be necessary when equipment reaches its manufacturer's End of Life (EOL) or End of Support (EOS) date, making it vulnerable to security risks and diminishing support.

c. Failure or Degradation:

Equipment that experiences frequent failures or significant degradation in performance, hindering its functionality, may be eligible for replacement.

Replacement Process:

a. Assessment:

A periodic assessment will be conducted to identify equipment that meets the replacement criteria.

b. Budgeting:

Adequate budgeting for replacement will be incorporated into the grant proposal, with consideration for the expected lifespan of the technology equipment.

c. Procurement:

Replacement equipment will be quoted by the Business Manager in the Technology Department and forwarded to the department in compliance with grant regulations and university procurement policies.

d. Data Management:

Proper data backup and transfer procedures will be followed during the replacement process to ensure the continuity of essential information.

Documentation:

All decisions related to technology equipment replacement, including assessments, approvals, and procurement, will be documented and maintained for auditing purposes.

Communication:

Stakeholders, including end-users, will be informed of the replacement process, timelines, and any potential impacts on their work.

Review and Revision:

This policy will be reviewed annually and revised as necessary to reflect changes in technology, organizational needs, or grant requirements.

Responsible Party for Technology Equipment Replacement: Chief Information Officer

Coversheet

Student Services Final Report

Section: II. Financial Sustainability Report Discussion
Item: E. Student Services Final Report
Purpose: Discuss
Submitted by:
Related Material: FSTF Phase 2 STUDENT SERVICES Final.pdf

Phase 2

Financial Sustainability Task Force: Student Services

Final Report

December 15, 2023

Table of Contents

Working Group Members.....	3
Meeting Schedule and Tasks Accomplished.....	3
Overview.....	4
Priorities.....	4
Data Collection.....	5
Summary of Findings.....	5
Recommendations for Focus Area 1: Housing and Dining Services.....	5
Recommendation 1.....	6
Recommendation 2.....	7
Recommendation 3.....	8
Recommendation 4.....	9
Recommendation 5.....	10
Recommendations for Focus Area 2: Athletics and Recreation.....	11
Recommendation 6.....	11
Recommendation 7.....	12
Recommendations for Focus Area 3: Student Entertainment and Engagement.....	14
Recommendation 8.....	14
Recommendation 9.....	16
Recommendation 10.....	20
Recommendation 11.....	21
Importance.....	22
Future Considerations.....	23
Appendix A - Housing and Dining.....	24
Item 1. Average Off-Campus Rent Comparison.....	24
Item 2. Residence Hall Room Rents Fall 2022.....	26

Item 3. Survey data informing Chartwells proposal.....	27
Item 4. Commuter Meal Plan Proposal and Commission Percentage Changes.....	28
Item 5. Excerpts from Amendment 5 to Chartwells Contract.....	28
Item 6. Herily Hall Listing in the FSU Building Catalog & Data 12-3-2020.....	29
Appendix B - Athletics and Recreation Services.....	31
Item 1. Fitchburg State Historical Athletic Rosters (2016-present) and Averages, NCAA D3 Averages.....	31
Item 2. Calculations of Return on Investment for Athletic Programs.....	31
Item 3. Athletics Staffing - MASCAC Comparison Table (2023).....	33
Item 4. Athletics Roster Sizes, FSU and NCAA Comparison in Men’s and Women’s Programs.....	33
Appendix C - Student Engagement and Entertainment.....	35
Item 1. CSI Data on Social Engagement: Fall 2019 - Fall 2023.....	35
Item 2. Strategic Plan Metrics and CDI Goals: Calculation of Alignment.....	36
Item 3. Detail Transaction Activity for Selected Organizations in Student Services AY 2023.....	40
Item 4. Detail Transaction for AY2023 Across All Student Services, Alphabetically..	41
Item 5. Academic Innovation Fund Application Questions.....	43

Working Group Members

Co-chairs: Matt Burke, Katherine Jewell

Jennifer Abbott, Jescah Apamo-Gannon, Lindsay Carpenter Connors, Junior Pena, Bettiann Peura, Eric Soucy, Jeff Nardone. The summer work the committee completed also included Joe Flanagan and Carolyn Hughes.

Ex Officio coordinator: Pamela McCafferty

Meeting Schedule and Tasks Accomplished

June 14, 2023	FSTF Phase 2 Kick-Off Meeting
June 20, 2023	Co-Chair Meeting Prep Meeting
June 21, 2023	Student Services Phase 2 Group Meeting (1)
June 26, 2023	Co-Chairs Summer Convening Meeting Student Services Working Document and Structure Established
June 28, 2023	Student Services Phase 2 Group Meeting (2)
July 5, 2023	No Meeting, sub-groups identified and individuals continued working on identifying existing information, ongoing initiatives, and initial data requests
July 13, 2023	Student Services Phase 2 Group Meeting (3) <i>delayed because of electrical outage on campus</i>
July 17, 2023	EC Weekly Meeting of Executive Sponsors and Co-Chairs
July 19, 2023	Student Services Phase 2 Group Meeting (4)
July 25, 2023	Student Services Co-Chair Meeting
July 26, 2023	Student Services Phase 2 Group Meeting (5) Finalized data requests and language, began entering requests into Google Form
July 31, 2023	EC Weekly Meeting of Executive Sponsors and Co-Chairs Academic, Student Affairs, and Administrative Co-Chairs Meeting
August 1-7, 2023	Drafting of Initial Data Requests Report and Recommendations
October 11, 2023	Began fall work and finalized meeting schedule
October 18, 2023	Reviewed information and a presentation of the Department of Recreation
October 25, 2023	Presentation by Matt Lechter on housing and the sky factor survey
November 1, 2023	Presentation by Jeff McVoy and James Giles from Chartwell's on the proposed renovation project of Holmes Dining Hall
November 8, 2023	Discussed recommendations on previously discussed areas
November 15, 2023	Presentation by Junior Pena on the Center for Diversity and Inclusiveness and discussion on student engagement
November 29, 2023	Further discussion on the budgeting of student engagement and Entertainment
December 6, 2023	Presentation by Matt Burke on the Department of Athletics
December 13, 2023	Drafting of final recommendations.

Overview

The Student Services Working group identified three key focus areas from the Phase 1 report. The group collected data to explore these areas and to specify guiding questions to review the collected information.

The three focus areas for the group are straightforward yet broad, requiring significant effort to contextualize each, identify ongoing work and proposed changes, and craft specific yet significant recommendations.

The efficiencies and effectiveness that inform the working group's recommendations in these three areas relate to on-campus experiences that will define the residential, activities, and on-campus engagement opportunities that complement and enhance the academic life of Fitchburg State students. These programs are essential components of fulfilling Fitchburg State's mission as a liberal arts institution with professional programs in a small-college setting. Above all, the institution must offer high-quality academic instruction and educational opportunities on par with private colleges and universities with the accessibility of a public institution. To ensure accessibility, it is essential that the committee evaluate the collected data and pursue recommendations that evaluate the processes for resource allocation in line with these goals as outlined and emphasized in the university's Strategic Plan 2020-2025.

Creating an engaged campus community both in and out of the classroom requires alignment between the institution's administrative and academic culture and resource allocation and administrative structures. Recommendations in this working group grow from a priority of building an institutional culture that aligns with the core values of the university as a regional public university. Aligning administrative structures, facilities, and programs with this priority and the creation of specific financial, housing and dining, and strategic planning will create more effective and efficient processes that reduce waste while enriching the campus community in ways that will engage students, foster belonging, and support goals of enrollment and retention.

Priorities

The working group accepted the three focus areas recommended by the review of FSTF Phase 1 for Student Services. The group determined that focus area 3 should pertain specifically to student development and engagement, with an emphasis on entertainment options and events to increase student belonging and on-campus engagement, which pursue key priorities outlined in the Strategic Plan 2020-2025 as well as connect to focus areas 1 and 2.

The working group identified the following categories for data collection, contextualization, analysis, and specific recommendations:

Focus Area 1: Housing and Dining Services

Focus Area 2: Athletics and Recreation

Focus Area 3: On-Campus Entertainment and Engagement

Data Collection

The working group identified a large amount of contextual information to explain the current status of each focus area, as well as made data requests drawn from across the university, comparable institutions, and regional data such as market costs and resources. The working group collected information across the focus areas to craft recommendations for efficiencies, cost savings, and potential avenues for new revenue in the following areas. Relevant findings that inform these recommendations are listed in three appendices at the end of this document.

Summary of Findings

Recommendations for Focus Area 1: Housing and Dining Services

Residential Services comprises both housing and dining facilities, and the group pursued strategic-plan informed goals of fostering belonging, providing resources, creating a safe and respectful environment, supporting academic success, recognizing and nurturing diversity, and engaging with the community. The FSTF Phase 1 survey indicated much community distrust regarding the decision-making process and lack of information about the costs and fees associated with housing and dining options. Involving community members such as faculty, staff, and students in a structured manner is essential to creating a culture of trust surrounding smart investment and efficient use of facilities. Greater transparency define the committee's recommendations to enhance campus culture and trust.

The Student Services committee identified, through market surveys and research, potential new markets for on-campus housing and dining options. They reviewed the plausibility of converting current housing options to more popular options in line with other area and comparable colleges and universities, the potential for offering residential learning and social communities with existing spaces, and the debt structure of residence halls both occupied and unoccupied. The group considered programmatic changes such as flexible

dining options and residential community options for efficiencies and cost-savings to encourage greater use of on-campus housing and dining facilities and improve the use of physical spaces.

Housing and Dining Services represent the structural costs of doing business as a university. These costs are deeply connected to the institution's status as a public university, with debt structures and contract bidding determined by laws of the commonwealth of Massachusetts. Any changes require long-term planning and strategizing and must include interested stakeholders. Regarding these capital expenditures and planning, the Student Services committee has an overall recommendation to improve transparency of the cost and debt structures, planning process, and structure of costs in housing and dining options.

Nonetheless, the recommendations in these areas as detailed below suggest process revisions to consideration of facility use, long-term planning, and the decision-making structures that consider use of funds received from contracts, the costs passed along to students, and other matters related to these high-cost, high-return expenditures and cost structures. A strategic plan for housing that folds dining options into the plan is essential for future success.

Recommendation 1

- ❖ **Create a transparent process for determining the break-even point for housing with benchmarks established for achieving it as part of a long-term strategic plan for housing.**

Currently, the institution uses 80% occupancy as the figure for residence hall occupancy to not operate at a loss with Housing Authority requirements (overall). What Fitchburg State charges each student, however, is determined by several factors, and that figure could change depending on facility use alterations, including the continued reallocation of doubles to full-size singles. The institution must consider the implications for campus life and vibrancy when evaluating occupancy rates and allocation of residence hall space. Furthermore, other benefits accrue with greater occupancy, such as increasing the dining "kickback" funds detailed in Recommendation 4.¹

Currently, the MSCBA identifies 1,705 beds on campus, which includes the offline properties of Herlihy and Mara 6 and 7. In AY24, 1,058 beds are occupied, reflecting an increase of 105 first-year students living on campus from the previous academic year. That 7 percent increase is the highest of all MSCBA institutions. At the moment, with current

¹ Matt Lechter, presentation to FSTF Student Services Committee, October 25, 2023.

residence hall configurations, the break-even number is between 1,360 or 1,380 students living on campus.²

Fitchburg State is among only three public universities in the Commonwealth that have housing rates on par or higher than nearby rental unit average costs. The relative affordability of off-campus housing places a premium on ensuring that the facilities, costs, and experiences offered by housing on campus are attractive to students.³

Strategic investments are currently being weighed to both calculate the break-even residency rate as well as balance upgrading housing options for upperclassmen with costs. For example, upgrading double rooms to a single with a full bed might convince more to stay on campus, but the rate received for that room will decrease. Whether such upgrades will lead to an operating loss is still being determined. Furthermore, calculating the debt service on Herlihy Hall remains complicated because of the age and bundling of that debt with other campus properties.

Implementation

Next Steps: Continue with the current plan of strategic investments and planning for attractive housing options and improvements.

Short-Term: Identify methods to communicate the calculations of and break-even point for housing occupancy on campus.

Participants: Director of Housing

Recommendation 2

- ❖ **Continue to seek methods to remove Herlihy Hall from the total occupancy rate.**

Converting vacant dormitories to other uses has been a constant point of discussion throughout the FSTF process. In particular, Herlihy Hall currently generates no revenue and no long-term reuse plan has emerged for this space.⁴ This process of removing a residence hall is complex, and could require selling the building outright to a separate party, as in the case of converting it to an on-campus day-care facility or other revenue producing activities. The group recommends expanding current efforts to work with potential internal or external community members for alternative uses of Herlihy Hall in ways that maximize on its central location to benefit academic and community functions.

² Lecter, October 25, 2023.

³ Off-Campus vs. On Campus Rental Analysis: 2022, MSCBA Residential Hall Rental Market Analysis, *Demographic Perspectives*, 2022. Appendix A: Items 1 and 2.

⁴ See Herlihy Hall Listing in FSU Building Catalog & Data 12-3-2020, Appendix A: Item 6.

The deficit in housing is significant, amounting to roughly \$1.4 to \$1.5 million of the university's structural deficit in AY24. The lack of revenue from vacant properties constitutes the greatest challenge to addressing that number.

Implementation

Next Steps: Identify a process to review a wide range of possible uses for the space.

Long-Term: Facilitate the reuse of this building to reduce its burden on university finances.

Participants: Director of Housing; academic, campus, and community representatives

Recommendation 3

- ❖ **Work with faculty and staff to pursue attractive housing options such as living-and-learning or themed housing options, creating a strategic plan that connects relevant interests from student services and organizations, academics, and athletics.**

Options include supported housing for students on the Autism Spectrum, athletic housing, graduate students, international students, or academic communities. Connect these conversations to discussions of the use of Simonds Hall, with its potential attraction for graduate and international students or other specific groups in need of its room, kitchen, and bathroom arrangements.

Steps to create more attractive housing offerings have been taken. A spring 2022 student survey identified areas for improvement in facilities and maintenance, dining, and overall cleanliness. Currently, residential services are working with capital planning and maintenance to address cleaning, timeliness, and process for repairs and cleaning schedules. Staff in the residence halls are a key point of contact for students and a regular presence, meaning there needs to be a concerted effort to ensure proper staffing and communication, as well as implementing a training program that focuses on service and solution-based thinking. Increased partnerships between Housing and Residential Services and Capital Planning and Maintenance will provide the infrastructure connections that match student perceptions about the links between these areas. Attention to improvements in painting and carpeting will also help enhance views regarding cleanliness.

Initial results regarding these changes are positive, in addition to the 7 percent increase in on-campus residents. Programming in housing in September 2023 saw a 130 percent increase in engagement from the previous year, which will enhance student perceptions of the value added by living on campus.

The next step in this plan must be to continue working to create attractive options for students to live on campus as well as to specify and strategically plan changes to room amenities, themed housing options, or links to academic and student support services.

Implementation

Next Steps: Identify a long list of potential housing options, student populations to be served, and relevant groups and offices on campus for coordination (including, but not limited to, academic programs, athletics, student organizations, student services, and disability services).

Short Term: Pursue campus-wide conversations to collect information about desired housing options and improvements, perhaps using existing and contracted survey tools, as well as facilitate creative, data-driven options.

Long Term: Implement a range of new housing options in line with identified priorities and needs.

Participants: Vice President of Student Affairs; Director of Housing; Athletic Director; Academic Affairs

Recommendation 4

- ❖ **Pursue transparent communication and revised processes for implementing new dining services plans and contract renewal, particularly related to FSU's 1,320 commuter students and the use of funds received from Chartwell's contracts.**

The committee was unable to determine whether other proposals were sought, or if they were required by this process.⁵ Chartwells' proposal, as Matt Lecter explained in his presentation to the committee and to the Board of Trustees, responded to a 2022 Skyfactor survey of students that noted dissatisfaction regarding dining hall hours and food quality specifically.⁶ The group recommends being open to competitive potential proposals regarding this important student service that directly relates to student satisfaction and on-campus engagement.

⁵ The university operates on an amended contract with Chartwells, the original document dating to 1999, with five subsequent amendments agreed to in contract extensions, the most recent pending Amendment 5 including the proposed \$5.8 million capital investment in renovations:

In addition to the foregoing sums, Concessionaire shall provide Client with a new investment in the sum of \$5,800,000 for capital improvements to the Client's dining service facilities (the "2023 Investment"). The 2023 Investment will be disbursed on a schedule as agreed by Concessionaire and Client. The 2023 Investment will be amortized on a straight-line basis from September 1, 2024, or when it starts generating revenue, whichever is later, through June 30, 2034. (Amendment Five, 2023, revised 5/22/2023).

See Appendix A: Item 5.

⁶ Chartwells, "Voice to Vision: 2022 Campus Survey: 2022 Campus Survey," see Appendix A: Item 3.

Creating transparency around this process is essential to ensure community faith in the cost-savings and benefits accrued with extending this contract and the renovations pursued, particularly as the plan accompanies a significant change to fees charged to commuting students. This process should include a discussion of how commission funds coming back to the university will be applied, particularly in conversation with the required commuter dining plan, as detailed in Recommendation 5.

Implementation

Next Steps: Create a transparent process to review whether the proposed renovations meet student demand and if new cost structures will be able to be absorbed by students

Short Term: Transparently communicate the cost factors and competition for potential other proposals

Participants: Dining Services, Board of Trustees, Executive Cabinet

Recommendation 5

- ❖ **Structure conversations with interested stakeholders regarding the use of shared revenue from the new Dining Services plan, including support for students on Pell Grants.**

The Student Services group discussed at length plans for the changes in dining plans and revenue coming back to the university and processes for reviewing how those funds are allocated on campus. To fund this renovation, Chartwells will expand the options for commuter students' plans, expanding the requirement for a meal plan but offering an entry-level plan at 10 meals per semester. The institution can expect revenue from two sources. The first are in-kind gifts detailed in the contract amendment. The second source of funds is a change in the contract, a reduction in the commission percentage granted back to the university from 12% (4.5% for McKay facility) to 2% of gross receipts from the food service program.⁷

Representatives from Chartwells presented the proposed renovation and service changes to Holmes Dining Hall, to be implemented in 2024.⁸ The report, presented to the Board of Trustees in June, is part of a contract extension yet to be signed.

The proposal includes a significant change to the dining services, emphasizing mobile ordering, retail experience, and expanded hours. Students indicate a desire for additional study space and social support. The new seating arrangements and coffee shop space

⁷ Appendix A: Item 5.

⁸ Chartwells representatives, FSTF Student Services Committee Meeting, November 1, 2023.

address these concerns, and changes to hours and ordering options address both student needs as well as sustainability concerns.⁹

Implementation

Next Steps: Review the details of Amendment 5 to the Chartwells contract and concerns regarding the addition of the commuter meal plan.

Short Term: Identify working group to implement a transparent plan for use of commission funds if the new Chartwells proposal is accepted. Link dining costs and commission funds to larger financial planning.

Participants: Dining Services, President's Office, Financial Affairs

Recommendations for Focus Area 2: Athletics and Recreation

Phase 1 tasked this group to review the return on investment of athletics. This review determined that athletics remain a valuable and worthy investment for the university. The graduation, retention, and academic performance of student-athletes is the same, if not slightly higher, than the non-athlete student population. Athletics, especially Division III athletics, are a fundamental part of a well-rounded liberal arts education and a valuable part of the overall enrollment at Fitchburg State University. Athletics also benefits the vibrancy on campus and overall school pride. Currently, athletic participation involves approximately 350 students, with the potential to increase to 400 in current athletic programs. The Recreation Center offers fitness facilities, classes, and locker room space as well as hosts campus functions and employs thirty to thirty-five students through the academic year.

The group collected data to determine potential cost savings in athletics and recreation and analyzed data to understand athletics as a tool for recruitment and retention. Further consideration of facilities costs, management, and services in conversation with the potential for attracting new constituents and accompanying revenue inform these recommendations.

Recommendation 6

- ❖ **Pursue opportunities for summer recreation and camp options to generate revenue from campus facilities.**

The university's Recreation Center is a prominent building on campus with a significant amount of daily activity. Currently, there are not extensive programs that use the facility through the summer months. Additional use of this space offers opportunities for revenue and to offset maintenance costs associated with the facility.

⁹ Chartwells, "Voice to Vision: 2022 Campus Survey: 2022 Campus Survey," see Appendix A: Item 3.

Nearby sport camp options run by private companies cost between \$1900 and \$2400 for a full summer of programming (with average weekly costs totalling \$300). An 8-week camp of just 30 full-time attendees would thus yield potentially \$50,000-\$70,000 in overall revenue, a subset of which would rent the facility.

The key barrier to expanding use is the lack of HVAC in the gymnasium. Capital expenditures to add cooling to this space could cost between \$2 million and \$10 million depending on existing equipment, ductwork, electrical, and other infrastructure.

In the short term, the group recommends pursuing university, and university varsity athletic coach, run sports day camps. The current lack of air conditioning might deter an outside group from renting the space. Using existing coaches could make good use of the space, supplement maintenance costs, and allow coaches to supplement their own income by running the camps. In addition, rentals may be possible for December/January programs to be run between semesters.

Implementation

Next Steps: Survey current staff for interest in running summer programs.

Short Term: Explore feasibility of proposals for summer camps run.

Long Term: Look at potential summer programs that could use the space as it is or which would generate enough revenue to warrant upgrades to the HVAC system.

Participants: Athletics and Recreation; Capital Planning and Maintenance

Recommendation 7

- ❖ **Increase the rosters of existing athletic programs while exploring how to further strategically and intentionally use athletic programs as part of a strategic enrollment plan, including the potential addition of new varsity programs.**

The group recommends increasing the roster size of existing athletic programs to match the NCAA average for roster size. Strategies vary based on each program. In football, Fitchburg State recruits and enrolls athletes at a significantly lower rate (currently approximately 60) than NCAA averages (approximately 100).¹⁰

Some initial investment would be necessary to pursue this work. Fitchburg State has the lowest number of full-time coaches and staff in the MASCAC despite maintaining similar numbers of athletes and teams.¹¹ Investing in full-time coaches will allow further time investment in recruiting, retention, and team performance. The athletics programs employ

¹⁰ "Fitchburg State Historical Athletic Rosters (2016-present) and Averages, NCAA D3 Averages," Appendix B: Item 1. "Athletics Roster Sizes, FSU and NCAA Comparison in Men's and Women's Programs," Appendix B: Item 4.

¹¹ Athletics Staffing - MASCAC Comparison Table, Appendix B, Item 3.

10 part-time head coaches at an average salary of \$10,000 per year. Additionally, 30 part-time assistant coaches facilitate the remaining sports, each making \$3,500/year on average. These rates are lower than or equal to the average salaries for some club team or high school coaches, and budgets for these stipends have not been adjusted in over 10 years and make recruiting and retaining talented coaches challenging.¹²

A more significant investment would be required to pursue new athletic programs, which would require long-term projections on return on investment. Initial calculations suggest a strong potential for revenue and institutional benefits to adding new programs.¹³ Women's ice hockey has been explored previously and projected to generate an additional 25 students per academic year in enrollment.

Other benefits would accrue with adding this program, beyond enrollment. Currently, 172 student-athletes live on campus out of 350. Of these, 44 are football players, representing an 80% on-campus residency among those student athletes. Increasing that roster, in particular, carries a high chance of adding on-campus residents and associated dining plans. Baseball players also have a high rate of on-campus residency. Adding women's ice hockey would address the institution's current gender equity and Title IX compliance. Such compliance would need to be addressed to add men's lacrosse, which is a feasible expansion as there is an existing and successful club sport. Men's lacrosse would generate a roster of 25-30 student-athletes annually. Other potential options include an e-sports team that could be coupled with the game design major.

New programs would require investment in staff and budget, but adding 25+ students per year would yield an additional \$250,000 in revenue and pay for any necessary upfront investment. The most significant expense would be additional locker room space.

One complicating factor regarding university staffing are union contract limitations. At nearby small private colleges, coaches can have other responsibilities on campus, such as working as a housing director or in residential life. Academic support, DEI efforts, and equipment manager - coaches are also doing these roles as well, but those will get less attention with the part-time situation.

Implementation

Next Steps: Identify the costs required for adding new varsity athletic programs and work strategically to identify methods to increase the roster size of existing athletic programs.

Short Term: Implement plan for adding additional sports, including necessary facility upgrades, and facilitate new plans for increasing roster sizes. Begin plan to add women's ice hockey, men's lacrosse and/or other potential programs.

¹² \$230,000 of fundraising and earned funds spent to supplement athletic programs. They raise funds for overnight trips, travel gear, bags, banquets, meals and bonding. They pay for hotels on travel events.

¹³

Long Term: Continue to explore possible additions to varsity and club sports offerings based on participation trends in high schools and emerging markets.

Participants: Athletics and Recreation Services; Vice President of Student Affairs; Capital Planning and Maintenance

Recommendations for Focus Area 3: Student Entertainment and Engagement

The university's Strategic Plan 2020-2025 emphasizes diversity, inclusion, and accessibility in its goals, strategies, and metrics. As a result, the working group focused on measuring current levels of student engagement and entertainment options with attention to these goals and their implementation. Pursuing the recommendations in this area will be essential to aligning university resource allocation with stated goals to recruit, retain, and graduate underrepresented students and to provide the appropriate programming and support services to ensure their success. The working group seeks to streamline processes regarding resource allocation to make the best use of staff time and labor while ensuring the widest possible range of opportunities for all students to engage with the university community outside of the classroom. Moreover, as an institution that emphasizes its role as an agent of social mobility, addressing the needs of students in these areas will be essential to fulfilling that mission. Guiding recommendations and data requests in this area are the 2020 and 2022 Campus Climate Surveys. Complicating recommendations in this area are assessing the effects of the Covid-19 pandemic on on-campus events and engagement. Nonetheless, the group assessed what co-curricular and entertainment options students want using student survey data and other contextual information, keeping in mind what voices may not be included in these data sources. The group reviewed attendance information for current event programming to assess populations engaged.

Opportunities exist for co-curricular programs that will draw in new populations of students as well as revised processes, advising structures, and budget requests to enhance on-campus engagement. The group paid particular attention to the structure, costs, and offerings of student development programs, including orientation, student organization events, DEI engagement initiatives, student employment, career services, and the events management office. Limits on student fees for expenditures structure these recommendations. Furthermore, the working group shaped recommendations based on evaluating the processes for accessing resources, seeking to streamline these, and reviewing how funds are controlled and allocated. In particular, efficiencies will be found that align the process of securing resources relative to their availability.

Recommendation 8

- ❖ **Align resource allocation in student activities and entertainment to the strategic plan's stated priorities and assessed metrics by addressing base budgets in certain areas as well as pursuing a more efficient system of allocation for existing funds.**

Throughout Fitchburg State's academic and strategic planning, the institution's role as a public university pursuing the improvement of knowledge, skills, and development of the Commonwealth is central. These goals include ensuring access to high-quality academic programs with liberal arts and professional degrees. Ensuring that student engagement opportunities create a supportive academic and social environment for students is essential not only to recruitment and retention but also to ensuring the university meets its stated strategic plan metrics.

Currently, the dispersed structure of academic and student services creates multiple channels of funding and oversight for student entertainment and engagement. For example, the CDI coordinates both academic and student organization programming related to groups organized around identity and to support students in their path to degree completion, but workflows, budgets, and the labor of requesting funds detract from pursuing those goals. While 31% of the strategic plan metrics attend to increasing service for Black, Latinx, first-generation, and veteran students, as well as students receiving Pell Grants, the departmental and organizational structure, the CDI's base budget is not adequate to administer programming across the many areas and overlapping student constituents it serves, especially given the requirements of continually needing to seek more funding. In this area, the group recommends increasing the center's base budget as it clearly relates to the strategic plan. Current funding creates an efficiency in the use of center labor that detracts from planning of events, attending to students, advising student groups, and ensuring the center is able to pursue the goals as outlined in the strategic plan. In short, the institution does lip-service to the goals of diversity and inclusion, but there is scant academic or programmatic support for these goals.

Additionally, the organizational structures governing the allocation of funds pursuing diversity, equity, and inclusion lack a clear hierarchy of responsibility for tracking and meeting strategic plan metrics to support traditionally underserved student populations. Funds dedicated to achieving strategic goals exist but are often divided across academic and student service areas, creates a difficult process of tracking student progress and engagement as well as engaging in long-term planning.¹⁴ In group discussion, the group often referred to this organizational structure as creating "random buckets of money," initiatives that align strategically with institutional commitments but organizationally cause confusion. Furthermore, the processes of requesting funds is onerous, with some processes asking redundant questions and with different funds having divergent requirements for

¹⁴ See calculation of Strategic Plan Metrics, Appendix C: Item 2.

applications.¹⁵ Rather than asking for additional funding, the group recommends a better allocation system of existing dollars and to create a more accessible and efficient process for fund requests, funding notifications, and dispersal.

Rationales for the above recommendations arise from the wide range of activities, expenditures, and advising conducted by CDI staff, which are supported by financial data as well as attendance tracking. CDI meticulously tracks office visits and event attendance. As such, CDI provides a useful window into student engagement and potential practices. Expectations are strong for vibrant programming and full calendars of events, which the CDI has fulfilled despite the challenges of long-term, multi-year planning and uncertainty regarding finances (see Recommendation 9).

The CDI expends funds in a manner that supplement other services on campus, or fill in gaps where other services are unable to meet student needs. Students seek to utilize the space during evening hours, leading the center to expand hours and staffing to meet that need. Added hours increased student visitations significantly. Furthermore, the campus food pantry is only open 9 a.m. to 4 p.m. and thus presents a challenge for students with busy schedules. The CDI, recognizing this need, expends operational funds on snacks, ramen, and food for students to consume in the center when other options are not available. While such expenditures are in line with the normal functions of a student-facing office, they are made more difficult when combined with the multiple streams of funds for campus programs and the timelines regarding fund dispersal from these various streams. These budgeting processes complicate spending an already small budget at the center.

Implementation

Next Steps: Create a map of current available funds, responsible parties, and application materials for review

Short-Term: Review these areas for efficiencies and labor-saving mechanisms to create a clearer process that allows for improved planning

Participants: Vice President of Academic Affairs; Vice President of Student Affairs

Recommendation 9

- ❖ **Create streamlined budgeting processes and workflows that allow departments the ability to engage in year-long planning. Reevaluate timelines for budget request processes and timeline for disbursement of funds. Compare support staff allocation across all offices.**

¹⁵ For an example of the redundant questions in a funding application, see Appendix C: Item 5.

The lack of a transparent financial plan linked logically to strategic plan goals, initiatives, and metrics translates to difficulties in budgeting and planning at the granular level in student engagement. Creating a visible financial plan and processes for budgeting across areas will significantly streamline operations and create more efficient processes for planning and thereby increasing student engagement and satisfaction.

A key area to pursue efficiency is in budgeting processes and fund allocation. Organizations and departments often exist on ad hoc funding without a clear base budget that is substantial enough to plan. Reapplying for funding every year for money from multiple sources does not count as an institutional commitment to an area's programming. For example, the CDI currently receives around \$21,000 per academic year, which includes funds to supplement work-study students who staff the center. These funds provide supplies and programming funding, most notably for the heritage months: LatinX Heritage, Black History, and Women's History. Shane Franzen coordinates LGBTQ History Month. These funds are held separately in a fund of \$2,500 each. Included in the CDI's total expenditures are the funds allocated to student groups associated with programming for these months. These groups request their own funds from SGA through a different process, but which are also part of the budgets for these months. Office of Student Development has a fund for events separate from the student activities fee in addition to those of the VP of Student Affairs, which are dispersed to Housing and Student Development for late-night and weekend programming. However, these funds are not allocated in time for the events, requiring the office to pay for heritage months' programming up front with center funds and then backpay the operational fund with the heritage funds. This inefficiency in fund allocation requires a delicate balancing of several budgets.¹⁶

Currently, student engagement expenditures occur across several departments and organizations, each with funds disseminated from various sources. The Vice President of Student Affairs is the key officer responsible for ensuring students have access to engagement, entertainment, and services. Responsibilities for student success and engagement are currently divided between Student Services and Academic Affairs, particularly in Tutoring, Career Services, the Advising Center, Disability Services, and Counseling Services. The CDI's expenditures demonstrate the linkages between academic and student services, with their programs fulfilling important academic support needs. Moreover, the difficult process of budgeting, funding requests from across these areas, and inability to engage in year-long or multi-year planning limits the effectiveness of these projects. Onerous requirements of student group advisers preclude many faculty from this service, as well as opaque processes and responsibilities, despite the natural connections between numerous academic departments, programs, and student activities, as well as the expertise and experiences of faculty members.

¹⁶ See Detail Transaction reports in Appendix C, Items 3 and 4.

Discussion among the group as well as a review of processes revealed frustration with the lack of clarity regarding allocation of funds for initiatives, including at times little transparency regarding who is in charge of funding allocation or decisions for certain expenditures. Indeed, community members report the feeling of needing to beg for funds, whether for student programs, academic events, or supplemental meal costs for athletes.

For example, CDI requests funding from multiple sources and on multiple timelines to cover speakers and center programming, including for heritage months. In the recent academic year, CDI requested \$5,828 for programming needs and submitted two requests for \$12,000 and \$10,000 for innovation funds. Of the requested funds, the CDI received graduate assistant funding and support for identity programming, which funded 20 programs and students' travel to Washington D.C. to explore Black history. Each funding source has separate timelines, requirements, and reporting protocols. Leading for Change, as an example, requires extensive information regarding how fund usage links to the strategic plan and other budget request protocols. These budgeting limitations reduce the scope and scale of program offerings.

Relatedly, access to uniform procedures and processes for student groups, as well as clarity and simplification of these processes would greatly enhance student engagement by providing a clearer method of obtaining funding to plan for student events, marketing, and execution. The CDI director advises six student organizations, attending all their meetings, programs, and serves as the responsible official for events and presence on campus. BSU, Latin American, and Gay Straight Alliance were the only operating in 2022, but both membership of organizations and the number of organizations has increased since. New organizations are also seeking funding, such as the Jewish Student Organization, Caribbean Student Association, and CDI Unity Roundtable. Each of these groups require guidance for how to request funds and present budgets to the Student Government Association, which distributes student-fee encumbered funds to student organizations. Campus requirements for signage, use of logo, and other regulations should be clearly communicated across departments and organizations in a uniform manner to ensure access.¹⁷

The potential engagement of student-facing offices and centers is high. At the CDI, two full-time and one graduate assistant average 30-35 programs a semester, serving up to 3,600 students in an academic year, in addition to 1,872 center visits in AY 2023. Greater collection of data regarding student engagement could provide needed insight into the effective use of funds across these areas.

Implementation

The group discussed a number of specific steps to begin implementing this recommendation.

¹⁷ Appendix C: Item 4.

Next Steps: Formation of a university-wide financial plan in conversation aligned with our 2022 NECHE self-study to review processes, budgeting procedures, and data collection revisions in this area. Connecting this plan to metrics will address perceived gaps between stated priorities and funding.

Short Term: Develop a streamlined event and financial system is needed for entertainment initiatives to maximize on campus.

Event Management: Currently, the event management system used to reserve spaces on campus requires account approvals for all new executive board members of organizations and employees, which delays the process of reserving and creating initiatives. IT and EMS managers can review making access available to all student leaders as soon as they are identified and for all new staff members to automatically receive access. Additionally, student organizations are automatically entered on to Falconnect but there should be strong consideration for departments facilitating programming to be added to Falconnect to ensure all programming is centralized for students interested in getting connected on campus. The Office of Student Development can provide training for tracking attendance through Falconnect. There can be additional discussion about departments that use alternative engagement platforms such as Handshake. The group recommends Career Services consider moving programming to Falconnect, while perhaps continuing tracking and employer engagement through Handshake. The more campus community members involved and connected in a centralized location, the better.

Financial Systems: Significant opportunities to improve efficiency exist in the short term.

- **University-wide budgeting:** Reconsider the request that extraordinary budgets be submitted and when departments receive notice of their total budget allocations for the next academic year. Currently, this process begins in February and budget notices do not typically come out until July. If this process takes such an extensive review process, there should be consistent updates in terms of when budgets are being reviewed, what stage of deliberation is happening, and when finalized reviews are happening. If requests are not going to be honored or considered, there should be notification in advance of the typical timeline so departments can plan to move forward with their standard allocation of resources. This allows for more considerate communication and ensures that departments submitting innovation fund requests or extraordinary budget requests are at least mindful of decisions as they occur and not all at the same time, which could impact preparation for the next academic year.
- **Office Budgeting:** Creating a process that allows for budgets to be made available at the month start will address inefficiencies in planning and programming, particularly when an office manages resources that are not at the department's disposal. Evaluate resources requested from the identity fund to determine if there are departments doing the majority of the work and

identifying ways to allocate remaining resources. While \$2,500 per heritage month is allocated, these funds are not enough to manage a month with a significant amount of programming and high levels of student attendance. Managing multiple sources of funding slows the process of programming for these visible events on campus.

- **Work Flows:** A significant existing inefficiency is the redundancy of information requested when applying for funds from the various sources across campus, as well as the workflow of obtaining payments for services. Currently, departments contracting a single performer/artist/or speakers must file a new vendor packet, contract, requisition, payment voucher, an email with the contract and payment voucher must be sent to accounts payable, but only after requisitions are turned into purchase orders. There should be more communication between financial services to ensure that once requisitions are approved that accounts payable automatically receive the information to create the check or deposit the funds. A potential recommendation to explore is uploading contracts to Banner when submitting a requisition for a performer. Similarly, the group recommends identifying if payment voucher information can be included in the requisition process on Banner, as all of the same information is used for the payment voucher and requisition. Creating a more coordinated work flow could prevent the inefficient labor of restating the same information to multiple systems or areas on campus.
- **Credit Card Reconciliations:** Similar to the requisition process, for high-engagement departments reconciling credit cards is an arduous and inefficient process. Currently, FOAPALS and descriptions must be inserted for every credit card purchase, receipts must be maintained physically, and then credit card statements are sent to departments separately. The person reconciling the credit card must send the credit card statement scanned with all receipts for a month to accounts payable for review and maintain a physical copy. This process can be streamlined if the workflow is required as part of the reconciliation on JP Morgan to submit a PDF of the receipt during this process. The end users can submit the pdfs as they are being charged and the reviewers can easily see a chronological order of receipts. This is a functionality that is not currently being utilized in the financial process.

Participants: Financial Services; Vice President of Student Affairs; Executive Cabinet; with reference to regulations and rules set by the Commonwealth's comptroller

Recommendation 10

- ❖ **To streamline and normalize data collection, identify one system for tracking student attendance and office visitation that can be compared across departments and services.**

Currently, redundant systems exist for tracking student attendance without any campus-wide preferred system for data collection. The campus requires better data to identify what events, services, and offices students make use of to better align resource allocation and budgeting of activities and events. The group recommends adding graduate students and academic departments to FalConnect and making this system the preferred method of data collection for events, office visits, and engagement. Robust and uniform data collection will enable better reporting and programming planning related to NECHE projections and strategic plan metrics.

Adding graduate students and academic departments to the Falconnect engagement system will help gauge interests for engagement across the campus community, as well as provide further information for the distributions of student-fee funds by SGA and other student engagement offices.¹⁸ This would allow for more academic units to ensure marketing and recognition of programming/community engagement efforts and would reduce the amount of separate programming communication that is shared with students.

Implementation

Next Steps: FalConnect appears to be the preferred method among the group for a common engagement-tracking system, and can be discussed across student services and academic departments in the immediate future.

Recommendation 11

- ❖ **Review policies and procedures around student engagement and advising to bring in more groups and promote distribution of labor and involvement.**

Advising student organizations requires advisers to attend all executive board meetings and other requirements that preclude widespread participation. These policies place significant burdens on certain offices to advise student groups, including academically connected groups. Renewed policies could include adding graduate and international students to university established tracking system.

Additionally, there is opportunity for there to be an evaluation of the role of advisors with students' organizations to ensure more staff and faculty have the capacity to fulfill roles for community engagement and support on campus. Reducing the number of events and overall presence of the advisor might make it more manageable or developing a system to easily identify staff and faculty interested in serving as an advisor might ease the process

¹⁸ Detail of current expenditures across student organizations and activities is detailed in Appendix C, Items 3 and 4.

for student organizations looking for a new advisor or interested in starting a new organization.

Implementation

Next Steps: Conduct conversations between Academic Affairs and Student Affairs to consider requirements for advising of student organizations and ways to create more efficient connections between students, student organizations, faculty, and staff.

Participants: Vice President of Academic Affairs; Vice President of Student Affairs, Dean of Students

Importance

Because the Student Services working group focuses on student experiences outside of the classroom, with connections to academic success, community engagement, and an overall sense of belonging that contributes to retention and graduation rates, the group agreed to focus on diversity, equity, and inclusion in shaping recommendations in these three areas. This emphasis engages with the core values established in the 2020-2025 Strategic Plan of Accessibility and Enrichment, and they pursue the strategic imperatives of Equity and Inclusivity outlined therein (highlighted in bold below).

Specifically, recommendations in this area pursue sub-items in **Goal Three**, and **strategy 6. Continue to provide educational opportunities and cultural programming that attract and engage members of the local community, including alumni.**

Goals for this area include establishing a baseline of attendance and ticket sales for campus events, with attention to students, alumni, and community members. There are specific enrollment targets for African American, Latinx, and first-generation undergraduate student enrollment and retention that are connected to evaluating the success of these initiatives.

Goal Four of the Strategic Plan, particularly reflecting the following strategies:

- 1. Increase the visible diversity of our faculty and staff in order to nurture the commitment to equity and inclusion throughout the campus community.**
- 5. Promote a culture of transparent organizational communication and decision making so that all members of the campus community feel valued and heard.**

Regarding strategy 1, the working group seeks to establish further information about the number of students participating in living-learning communities and to collect data about further opportunities in this area to achieve the target of 200-225 students participating in these initiatives. Events seek to increase the sense of belonging of faculty, staff, and students, particularly constituencies of underrepresented groups, and to build inclusive

communities and engagement with cultural diversity. This goal relates to Goal Three, strategy 6 benchmarks and targets as well.

Recommendations pursue **Goal Five**, specifically strategy **1. Establish Fitchburg State's commitment to education justice and being a student ready campus as a cornerstone of the University's positioning strategy.**

Events on campus, housing and dining options (including living-learning communities), and athletic participation opportunities pursue this strategy and its targets by increasing on-campus offerings.

Pursuing recommendations in Housing and Dining Services similarly pursues Goal 5, strategy **7. Remain affordable and accessible to all prospective and current students.**

Lastly, recommendations pursue **Goal Six**, strategies

- 1. Align budget priorities with strategic plan priorities and improve transparency in financial, budgetary and other decision making;**
- 2. Align academic and co-curricular program plans with long-term enrollment demands by taking a data-driven, mission-focused approach to evaluate performance of current offerings and guide development of new programs; and**
- 6. Align academic and co-curricular program plans with long-term enrollment demands by taking a data-driven, mission-focused approach to evaluate performance of current offerings and guide development of new programs.**

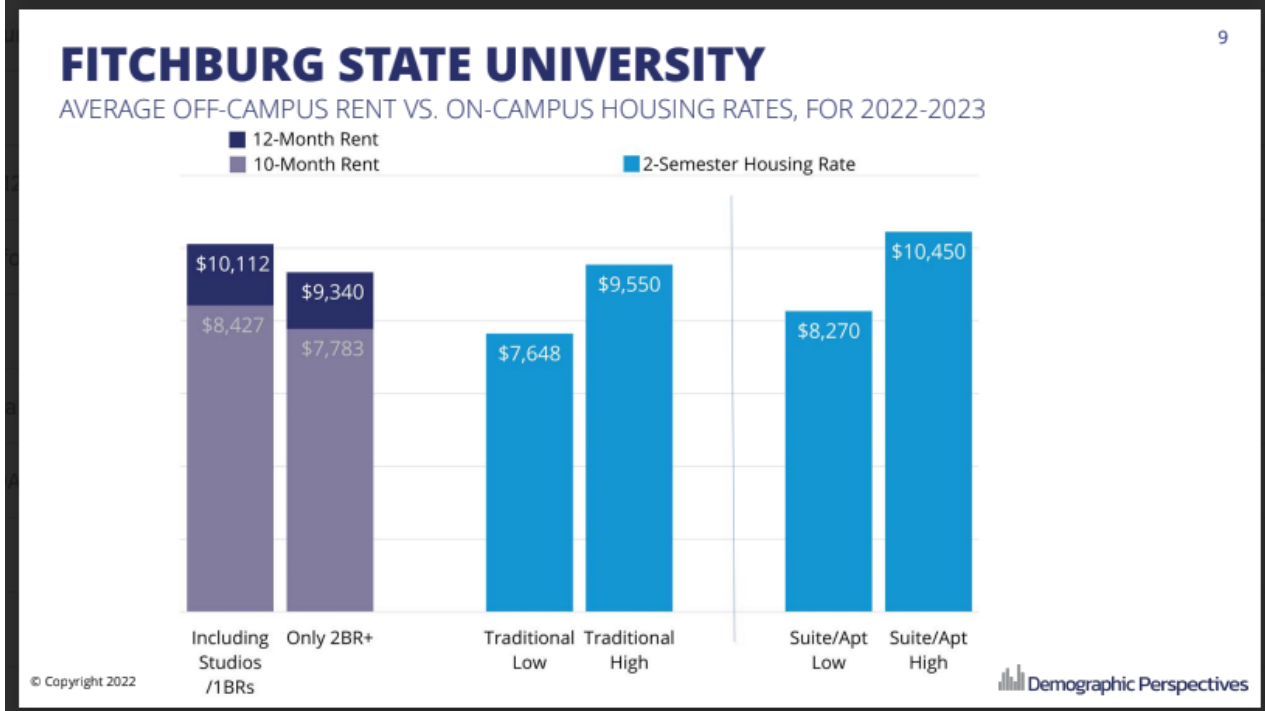
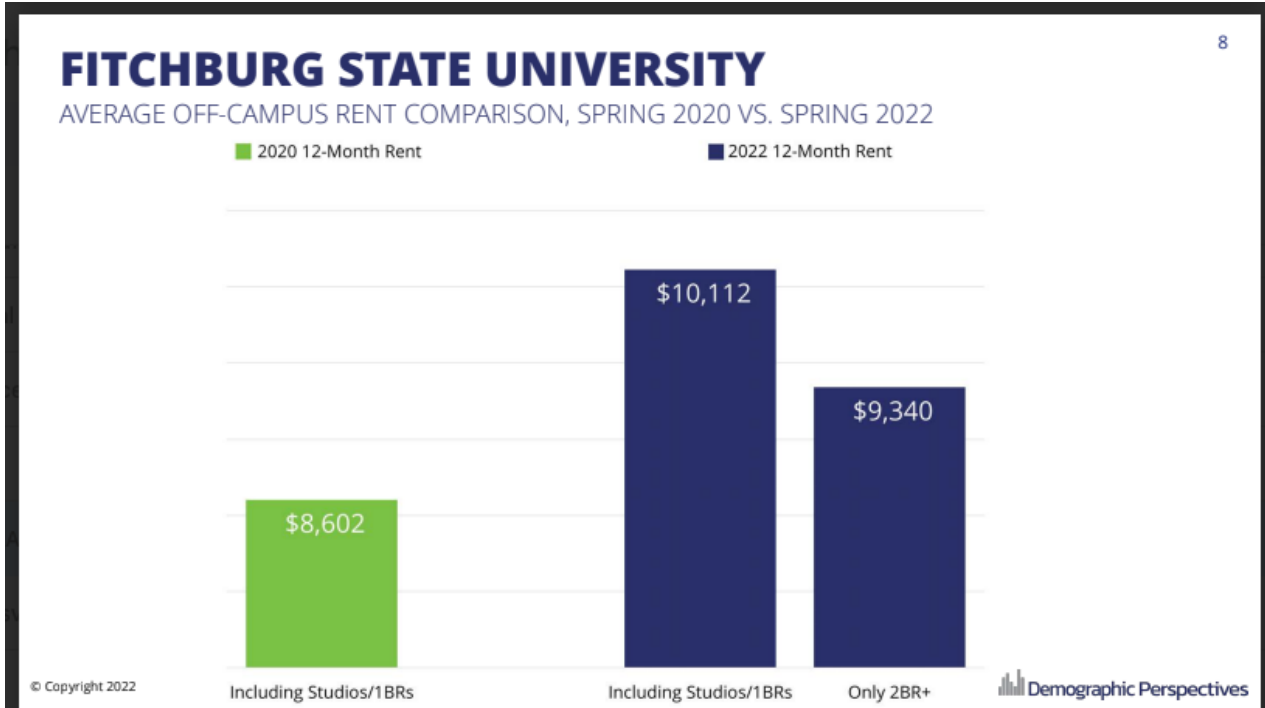
Future Considerations

During this process, the group reviewed not only Fitchburg State's programs and offerings but also information about comparable institutions and nearby colleges and universities. Furthermore, the information collected about student wants and needs regarding on-campus offerings in housing, dining services, athletics, and entertainment and engagement draw from many types of surveys and reports, which the group carefully examined for the populations who respond and whose voices might be excluded from these resources. Streamlined processes regarding student surveys and data collection will enable efficient collection and analysis of what experiences students appreciate and which aid in their academic goals and degree completion.

Appendix A - Housing and Dining

Item 1. Average Off-Campus Rent Comparison

“MSCBA Res Hall Rental Market Analysis *Demographic Perspectives*, August 2022.



OFF-CAMPUS VS. ON CAMPUS RENTAL ANALYSIS: 2022

University	Average Off-Campus Rent				Average of On-Campus Housing Rates*			
	All Unit Types		Only 2BR+		Traditional		Suites and Apartments	
	10-month	12-month	10-month	12-month	10-month	12-month*	10-month	12-month*
Bridgewater	\$12,323	\$14,788	\$10,575	\$12,690	\$8,740	\$10,488	\$9,345	\$11,214
Fitchburg	\$8,427	\$10,112	\$7,783	\$9,340	\$8,599	\$10,319	\$9,360	\$11,232
Framingham	\$17,817	\$21,380	\$15,629	\$18,755	\$9,190	\$11,028	\$10,140	\$12,168
MassArt					N/A	N/A	\$12,770	\$15,324
<i>Near Campus</i>	\$22,080	\$26,496	\$19,759	\$23,711				
<i>Other N'hoods</i>	\$15,558	\$18,670	\$13,233	\$15,880				
MCLA	\$6,897	\$8,276	\$6,427	\$7,712	\$7,650	\$9,180	\$7,900	\$9,480
Salem State	\$18,305	\$21,966	\$16,948	\$20,338	\$10,369	\$12,442	\$11,916	\$14,299
Westfield State	\$10,927	\$13,112	\$8,377	\$10,052	\$8,300	\$9,960	\$8,300	\$9,960
Worcester State	\$10,616	\$12,739	\$10,191	\$12,229	\$8,398	\$10,078	\$8,848	\$10,618
UMass Amherst	\$16,048	\$19,258	\$13,241	\$15,889	\$9,001	\$10,801	\$10,638	\$12,765
UMass Boston					\$10,964	\$13,157	\$11,452	\$13,742
<i>Near Campus</i>	\$14,243	\$17,092	\$13,338	\$16,006				
<i>Other N'hoods</i>	\$17,338	\$20,806	\$15,671	\$18,805				
UMass Dartmouth	\$11,575	\$13,890	\$9,003	\$10,804	\$11,267	\$13,520	\$11,558	\$13,869
UMass Lowell	\$15,621	\$18,745	\$12,266	\$14,719	\$8,710	\$10,452	\$10,455	\$12,546

Note: Off-campus rent includes all unit types.

*On-campus 12-month housing rates are interpolated from stated 2-semester rates.

On-campus rates are the average of the highest and lowest advertised rates. Exceptions are Westfield State, which has flat rate housing, and UMass Lowell, which has flat rates for traditional units.

Item 2. Residence Hall Room Rents Fall 2022

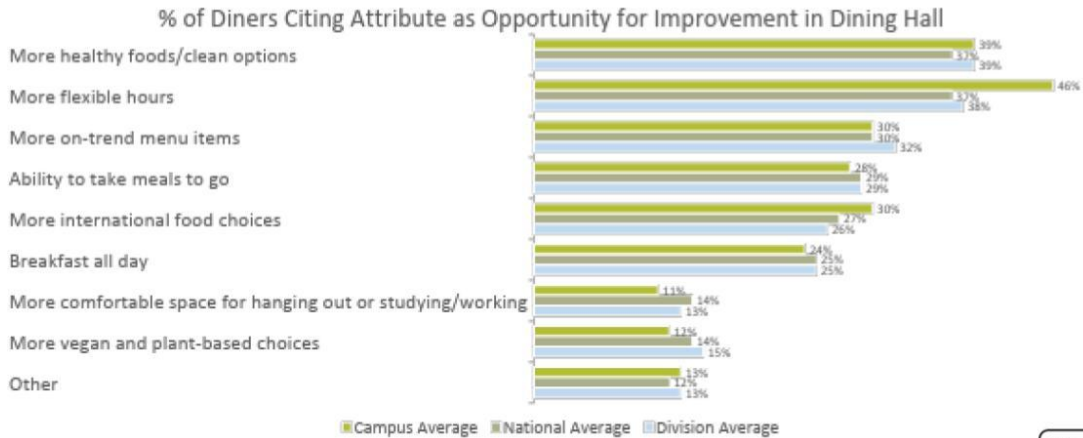
Massachusetts State College Building Authority Schedule 4: Residence Halls Room Rents

Certified Fall 2022 design occupancy and proposed rents for fiscal year 2024 for both "system" and "campus" beds. Reflects base room rent for the Residence Hall Trust Fund. Auxiliary and other fees not shown.

	Fall 2022 Design Occupancy	FY23 Update Rent	FY24 Proposed Rent (\$)
Fitchburg State	1,705		
Apartments - RA	3		9,800
Apartments - Singles	186	9,800	9,800
Aubuchon Suites - RA	10		7,620
Aubuchon Suites - Premium Singles (Doubles as Singles)	0	9,534	9,534
Aubuchon Suites - Doubles	315	7,620	7,620
Herlihy - RA	4		6,998
Herlihy - Singles	3	8,404	8,404
Herlihy - Designed Premium Singles	1	8,918	8,918
Herlihy - Premium Singles (Doubles as Singles)	8	8,890	8,890
Herlihy - Doubles and Triples as Singles	0	8,404	8,404
Herlihy - Doubles	114	6,998	6,998
Herlihy - Triples	24	6,998	6,998
Mara - RA	9		7,620
Mara - Singles	3	8,918	8,918
Mara - Premium Singles (Doubles as Singles)	0	9,534	9,534
Mara - Doubles	316	7,620	7,620
Mara 1-2 A/C Standard Double	0		7,992
Mara 1-2 A/C Designed Single	0		9,296
Mara 1-2 A/C Premium Single	0		10,218
Russell - RA	12		6,998
Russell - Singles	14	8,404	8,404
Russell - Single Suites	12	8,918	8,918
Russell - Designed Premium Single w/ Bath	9	8,900	8,900
Russell - Doubles & Triples as Singles	0	8,404	8,404
Russell - Doubles	244	6,998	6,998
Russell - Double Suites	110	7,620	7,620
Russell - Triples	34	6,998	6,998
Russell - Triple Suites	10	7,620	7,620
SUBTOTAL - SYSTEM	1,441		
Cedar Street House - RA	1		9,240
Cedar Street House - Singles	27	9,240	9,240
Mara Village Expansion - RA	2		7,992
Mara Village Expansion - Singles	2	9,296	9,296
Mara Village Expansion - Premium Singles (Doubles as Singles)	0	10,218	10,218
Mara Village Expansion - Doubles	100	7,992	7,992
Simonds Hall - Singles	132	9,800	9,800
Simonds Hall - Designed Premium Singles	0	10,484	10,484
SUBTOTAL - CAMPUS	264		

Item 3. Survey data informing Chartwells proposal.

Opportunities of campus dining halls



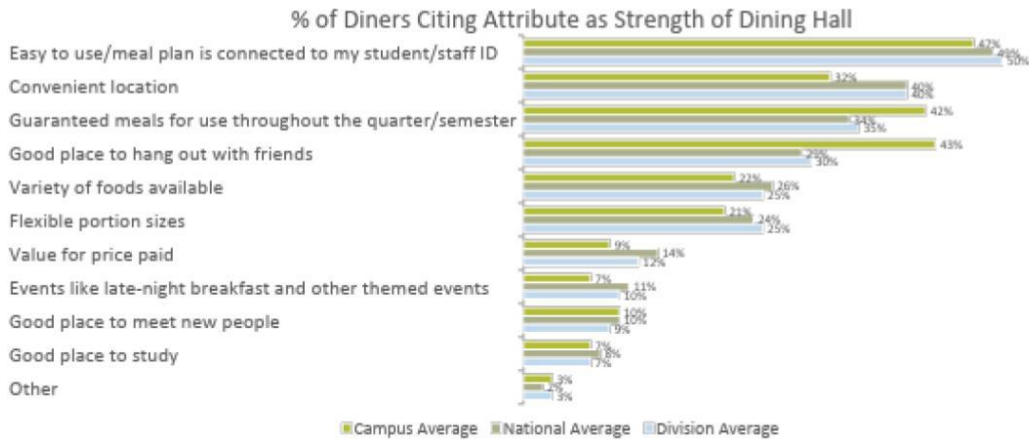
Base: 122 Campus; 56378 National; 11114 Division
 Q: What improvements would you like to see in your all-you-care-to-eat dining hall? Select up to three.

©2023 Chartwells Higher Ed. confidential and proprietary. All rights reserved.



7

Strengths of campus dining halls



Base: 105 Campus; 44151 National; 9078 Division
 Q: What do you like most about your all-you-care-to-eat dining hall? Select up to three.

©2023 Chartwells Higher Ed. confidential and proprietary. All rights reserved.



6

Item 4. Commuter Meal Plan Proposal and Commission Percentage Changes

The following detail is excerpted from Amendment Five - 2023 (draft revised as of 05.22.23) of the Chartwells original contract. The amendment details the changed requirements for a commuter student dining plan. The commission percentage change will reduce the 12% commission to the university from food service operations (4.5% in the McKay facility) to 2%.

Item 5. Excerpts from Amendment 5 to Chartwells Contract

10. Change to Meal Plans. Article VIII of the Agreement is hereby amended by deleting sections 8.1 and 8.2 and replacing them with the following:

8.1 The CONCESSIONAIRE will operate on a profit-and-loss basis and shall offer the following food plans.

8.1.1 **Student Meal Plan Descriptions and Requirements:** Below are the meal plan options for Client students as of school year 2024-2025. For academic year 2024-2025, and for each academic year thereafter, Client will require all commuter students to purchase either one of the Residential Meal Plans or one of the “Commuter Meal Plans” listed below.

The 75 Block Meal Plan will only be available for purchase by resident students living in the Townhouses, on Cedar Street, in the North Street apartments, any students residing in off campus housing, and by commuter students.

Client faculty and staff have the option to (but are not required to) purchase a meal plan of their choice.


1.4.19 Concessionaire shall provide the following In-Kind contributions to Client on an annual basis:

- \$10,000 to be utilized by Client for student scholarships
- \$5,000 to be utilized by Client for sustainability efforts
- \$5,000 worth of catering services at Client’s discretion (retail value)

section.

11. **Change to Commission Percentage.** Section 9.14 of the Agreement is hereby amended by deleting the entire Section and replacing it with the following:

9.14 Beginning with the 2024-2025 academic year, the CONCESSIONAIRE shall pay the COLLEGE commissions in an amount equal to two percent (2%) of its gross receipts from its operation of the food service program. For purposes of this paragraph 9.14, the aforesaid gross receipts will include all receipts from catering and from the serving of casual meal.

 **Mary Beth McKenzie**
May 22, 2023

Verify as to whether this includes a change to the vending commission (which is set at 12% right now); and or also related to McKay/Hammond – currently at 4.5%. Those are sections 10.1 and 12.1 of the original agreement.

From imported document

Item 6. Herily Hall Listing in the FSU Building Catalog & Data 12-3-2020

	OWNED BY	FIN. STORIES	100 CLASS ROOM ASF	200 LAB AREA ASF	TOTAL ASF	GSF INCLUDES UNFINISHED BASEMENT SPACE	PRIMARY FUNCTION	YEAR OF ORIG. CONST.	YEAR OF MAJOR RENO.	Building Footprints SF
Herily Hall	MSCBA	3.25		approx.	27,213	37,796	Residence Hall	1957		12,778

----- Forwarded message -----

From: **Denise Brindle** <dbrindl1@fitchburgstate.edu>

Date: Tue, Oct 3, 2023 at 9:35 AM

Subject: Re: FA Gap

To: Jay Bry <jbry@fitchburgstate.edu>

CC: Richard Toomey <rtoomey1@fitchburgstate.edu>

Good morning Jay, I have a report that gives me data on Budget Group, EFC, Unmet Need, and Gross Need. From this; here are a few preliminary stats that I believe could be useful for the Board to determine the financial impact of a mandatory commuter meal plan. Please let me know if this is what you are looking for. I have no concerns regarding a \$250 per year mandatory meal plan for commuters, especially given the increase of state funding from OSFA for MA residents.

647 <u>in state off campus/commuters</u> of which 398 pell eligible	61%	pell
297 have aid that covers 10,921 tuition and fees	46%	tuition and fees <u>covered</u> with free <u>monies</u>
152 have an EFC greater than 10,921 and consider no need	23%	no need

Best,
Denise

Appendix B - Athletics and Recreation Services

All information in this Appendix provided by Fitchburg State Athletics and Recreation Services.

Item 1. Fitchburg State Historical Athletic Rosters (2016-present) and Averages, NCAA D3 Averages

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	FSU Average	NCAA D3 Average
Men's Sports										
Basketball	11	13	15	13	13	17	16	18	14.50	18.45
Baseball	31	31	31	30	27	39	36	35	32.50	37.15
Football	78	77	71	56	76	90	62	62	71.50	101.9
Ice Hockey	26	25	26	25	21	28	26	29	25.75	29.22
Cross Country	26	25	20	25	24	17	13	20	21.25	14.2
Indoor/Outdoor Track	42	48	42	36	35	35	27	35	37.50	31.97
Soccer	25	25	27	28	24	24	31	31	26.88	30.13
Women's Sports										
Basketball	16	13	14	9	11	13	14	12	12.75	15.23
Soccer	20	23	19	22	23	19	25	21	21.50	25.66
Indoor/Outdoor Track	25	24	23	25	22	21	21	14	21.88	27.77
Cross Country	17	12	11	10	12	8	13	7	11.25	11.69
Softball	17	15	18	17	16	19	22	17	17.63	19.6
Field Hockey	22	19	18	18	20	23	23	20	20.38	21.25
Volleyball	N/A	13	15	11	10	15	13	16	11.63	16.52
Lacrosse	20	21	20	18	16	19	19	26	19.88	21.1
								363	366.75	421.84

Item 2. Calculations of Return on Investment for Athletic Programs

The committee analyzed the return on investment of sponsoring a NCAA Division III athletic program through the following calculations:

- Fitchburg State is the home of 17 varsity sports. As a Division III program, Fitchburg State’s athletics integrate these activities into well-rounded academic experiences. These schools do not provide athletics scholarships, and academics and degree completion take precedence.
- Athletics has approximately 350 student-athletes this fall semester. Roster sizes fluctuate from year-to-year ranging from 350-400 students. This represents approximately 11% of the undergraduate student population.
- In FY23, Fitchburg State athletics spent \$1,515,744, amounting to 69% of the \$2,179,930 average spending of other MASCAC institutions (per EADA report). The athletics operating budget has declined by \$90,000 compared to five years ago, which places significant demand on operations while buses, uniforms, officials, and food have risen while serving a similar number of student-athletes.
 - The largest expense of the athletics budget is for part-time staff, totalling \$259,500, followed by transportation: \$167,859; and meals: \$48,178 for pre-season, which does not include breakfast.
- The average cost per athlete based on the annual operating budget is \$2,219.


- Using the university's \$10,000 of general revenue from one student figure, athletics thus generates \$3.5 million from student-athletes, minus the \$1.5 million direct annual expense. In sum, current athletics generates \$2.5 million in revenue for the university.
- Athletics contributes to the university beyond finances. Student-athletes graduate and retain at the university slightly above to the same as the general student graduation rates: 59.92 (student athletes) compared to 58.98 (general); retention 73.57 (student athletes) vs 72.5 (general).
- Athletic programs enhance campus life and entertainment. Student athletes tend to live on campus or nearby, be on campus on weekends, attend campus events, and demonstrate school pride. Participants report improved academic and life skills, including improved time management, perseverance, teamwork, and leadership.

Removing or eliminating athletics would result in an enrollment decline for the university and cause further budgetary issues. Among student-athletes surveyed, 55% of male athletes say athletics participation was the most influential reason they attended the institution. Of that group, 35% named athletics as having some influence, 10% no influence at all. Female athletes reported athletics as 45%, 41%. 14%

Item 3. Athletics Staffing - MASCAC Comparison Table (2023)

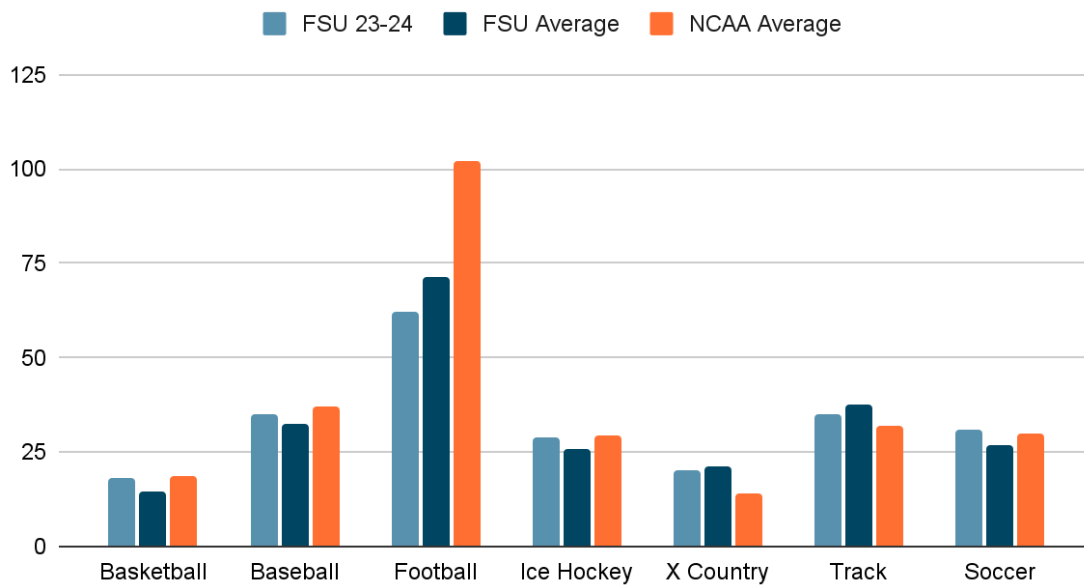
Athletics Staffing - MASCAC Comparison

School	FT Admin	FT Coaches	Total FT Staff
Bridgewater	15	7	22
Westfield	10	8	18
MCLA	6	11	17
Worcester	8	6	14
Salem	8	5	13
Mass Maritime	7	6	13
Framingham	7	5	12
Fitchburg	8	3	11

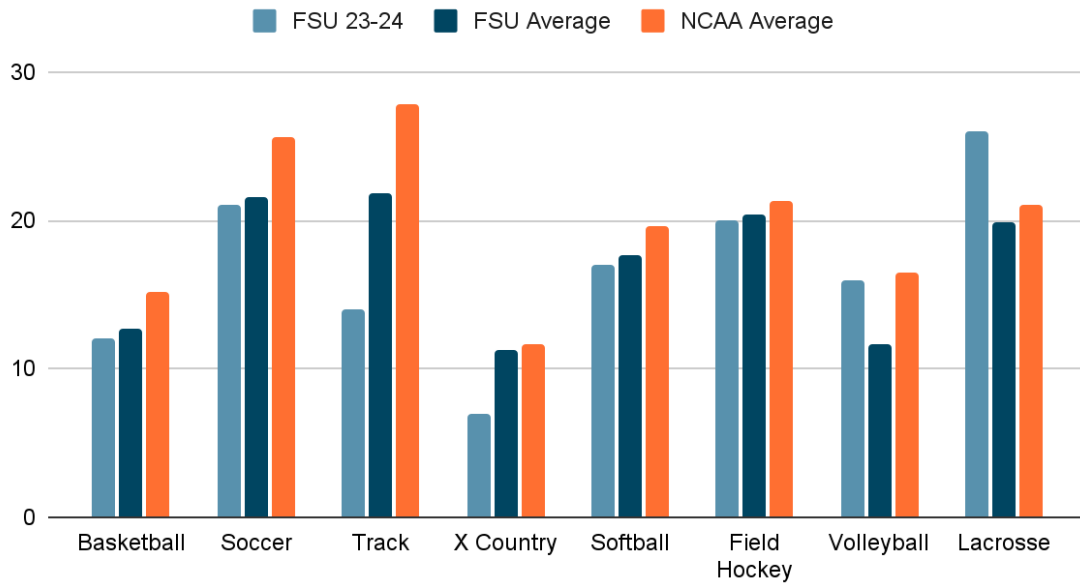
 FITCHBURG STATE UNIVERSITY

Item 4. Athletics Roster Sizes, FSU and NCAA Comparison in Men's and Women's Programs

Men's Sports Roster Sizes



Women's Sports Roster Sizes



Appendix C - Student Engagement and Entertainment

Item 1. CSI Data on Social Engagement: Fall 2019 - Fall 2023

The College Student Inventory is administered to all incoming freshmen at summer orientation; this is a nationally administered survey of incoming college students' self-assessments of their attitudes towards college. Below is a summary of all social-related data from the past 5 years:

Semester	# of Students	Desire to Transfer	Commitment to college (0 - 99)	Capacity for Tolerance (0 - 99)	Social Engagement (0 - 99)	Receptivity to Social Engagement (0 - 99)	Get advice from an experienced student (0 - 9)	Get info on student activities (0 - 9)	Get info about clubs and orgs (0 - 9)	Get help in meeting new friends (0 - 9)
Fall 2019	645	19.84%	48.77	63.62	56.88	60.00	6.04	5.9	6.3	6.49
Fall 2020	626	23.48%	49.54	54.85	52.86	51.04	5.997	5.78	6.13	6.36
Fall 2021	430	37.44%	35.02	50.55	44.34	34.64	5.44	5.4	5.84	6.22
Fall 2022	476	32.56%	38.42	48.01	45.82	46.59	6.14	5.9	6.41	6.56
Fall 2023	505	31.68%	42.45	47.29	45.39	46.86	6.12	5.78	6.4	6.52

Some notes on this data: "social engagement" refers to students' self-assessment of how often they seek out social support. "Receptivity to social engagement" is their self-assessment of how interested they are in receiving social outreach from the university.

Commitment to college scores are not directly related to social engagement, but they do indicate students' sense of identification with the university and how much they trust that college will be a beneficial, positive experience for them; these middle scores in the 40s indicate ambivalence about college.

Desire to transfer is coded as a 0/1 dichotomy; students who considered transferring schools score a 1 and students who did not score a 0. The percentages reflect the proportion of students who were considering transferring; it does not necessarily mean that they had definite plans to transfer.

Item 2. Strategic Plan Metrics and CDI Goals: Calculation of Alignment

Percentage of Strategic Plan Metrics Pertaining to CDI Functions	Percentage of Strategic Plan Metrics Pertaining to CDI Functions Plus Pell and First-Generation Students
23%	31%

Metric	CDI Area	CDI + Pell and First-Gen
Degree production in high-demand fields	No	No
Enrollments: Certificates and Continuing Ed	No	No
Enrollments: 4+1 programs	No	No
Enrollments: interdisciplinary and team-taught courses	No	No
Number of graduates from degree completion programs	No	No
Number of students participating in living learning communities	No	No
Number of students studying abroad	No	No
Percentage of faculty utilizing OER	No	No
Percentage of Honors Program Students: African American	Yes	Yes
Percentage of Honors Program Students: LatinX	Yes	Yes
Percentage of UG students completing a high impact practice	No	No
Percentage of UG students utilizing open educational resources OER	No	No
Credits in programs run via third party partnerships	No	No
Enrollments: third party partnerships	No	No
UG admissions yield: out of state	No	No
UG admissions yield: African American	Yes	Yes
UG admissions yield: Latinx	Yes	Yes
UG admissions yield: overall	No	No
Number of alumni engaged in recruitment and marketing	No	No
Number of alumni engaged in university connections in region	No	No

Metric	CDI Area	CDI + Pell and First-Gen
Percentage of alumni participating in annual giving	No	No
Total giving by alumni	No	No
Number of internships and practica available in community	No	No
Number of public-private partnerships	No	No
Number of students engaged in community service/research projects	No	No
Cultural events attendance and ticket sales	Yes	Yes
Main Street commercial space occupancy	No	No
Number of students participating in internships and practica in community	No	No
Enrollment: adult students	No	No
Enrollments: Early College	No	No
Enrollment: local undergraduate students	No	No
Enrollment: Pell recipients	No	Yes
Enrollment: transfer students	No	No
Enrollment: undergraduate students	No	No
Enrollment: undergraduate veteran students	No	No
Enrollment: online	No	No
Enrollment: out of state undergraduates	No	No
GHG emissions per 1000 GSF	No	No
Recycling tonnage	No	No
Sense of belonging of faculty and staff: underrepresented groups	Yes	Yes
Sense of belonging of students: underrepresented groups	Yes	Yes
Student experience: inclusiveness & Engagement with Cultural Diversity	Yes	Yes
Capital expenditures	No	No
Deferred maintenance value	No	No
Audit status	No	No
Performance of individual trust fund balances	No	No
Number of planned gifts/bequests	No	No
Resources allocated to instruction and student support	No	No

Metric	CDI Area	CDI + Pell and First-Gen
Amount of operating budget dedicated to strategic activities/priorities	No	No
Percentage of students living in the residence halls	No	No
Percentage of unmet financial need on direct costs	No	No
Scholarship funding spent on experiential learning	No	No
Student loan debt at graduation	No	No
Student loan default rate	No	No
Total amount of grant funding received	No	No
Tuition and fees as percentage of median household income in the country	No	No
Tuition and fees as percentage of median household income in the state	No	No
Overall course completion rate	No	No
Cost per credit hour	No	No
Instructional staff headcount	No	No
Attempted credit hours	No	No
Satisfaction: faculty and staff: underrepresented populations: climate survey	Yes	Yes
Number of employees serving on city and regional development boards	No	No
Number of employees engaged in community service and research projects	No	No
Overall satisfaction of staff and faculty: climate survey	No	No
Percentage of FT faculty and staff from under-represented populations	Yes	Yes
Graduate enrollments	No	No
Graduate enrollments: African American	Yes	Yes
Graduate enrollments: Latinx	Yes	Yes
Number of mentions in regional and national press	No	No
Volume of website traffic to marketing landing pages	No	No
Eight year comprehensive student success	No	No

Metric	CDI Area	CDI + Pell and First-Gen
Eight year comprehensive student success: Pell	No	Yes
Percentage of UG students with on-time credit completion: African American	Yes	Yes
Percentage of UG students completing gateway courses in first year: African American	Yes	Yes
Percentage of freshmen utilizing student support services	No	No
percentage of UG students completing gateway courses in first year: Latinx	Yes	Yes
Percentage of UG students completing gateway courses in first year: Pell	No	Yes
percentage UG students with on-time credit completion	No	No
Retention rate	No	No
Retention rate: African American students	Yes	Yes
Retention rate: first-generation students	No	Yes
Retention rate: latinx students	Yes	Yes
Retention rate: Pell recipients	No	Yes
Retention rate of staff	No	No
Retention rate of underrepresented staff	Yes	Yes
Six year graduation rate	No	No
Completion rate of adult learners	No	No
Six year graduation rate: African American	Yes	Yes
Six year graduation rate: first-generation	No	Yes
Six year graduation rate: Latinx students	Yes	Yes
Graduation rate: online learners	No	No
Six year graduation rate: Pell	No	Yes
Completion rate: veteran students	No	No
Satisfaction of students from underrepresented populations as evidenced by the climate survey	Yes	Yes
Student satisfaction and egnagement as measured by NSSE	No	No
Transfer four year graduation rate	No	No

Metric	CDI Area	CDI + Pell and First-Gen
Transfer four year graduation rate: African American	Yes	Yes
Transfer four year graduation rate: LatinX	Yes	Yes
Transfer four year graduation rate: pell	No	Yes

Item 3. Detail Transaction Activity for Selected Organizations in Student Services AY 2023

Organization	D04	D06	D09	ID99	Grand Total
37XX - Athletics		\$796,565.51			\$796,565.51
3810 - SGA/FAB		\$103,583.73			\$103,583.73
3900 - Orientation		\$98,293.28			\$98,293.28
3800 - SGA		\$78,019.77	\$5,000.00		\$83,019.77
3300 - OSD		\$78,224.96		\$237.19	\$78,462.15
3400 - Recreational Services		\$74,507.20		\$70.00	\$74,577.20
3350 - CDI	\$17,341.43	\$26,953.60			\$44,295.03
3000 - VP of Student Affairs		\$41,243.77		\$1,220.00	\$42,463.77
3936		\$38,104.35			\$38,104.35
3070 - Summer Bridge	\$0.00	\$18,363.57		\$15,200.00	\$33,563.57
3847		\$29,058.45			\$29,058.45
3310 - Campus Center		\$20,739.29		\$3,205.00	\$23,944.29
3964		\$23,915.07			\$23,915.07
3845		\$21,172.96			\$21,172.96
3839		\$19,809.88			\$19,809.88
3812	\$1,894.74	\$16,520.14			\$18,414.88
3921		\$17,135.14			\$17,135.14
3020 - Disability Services		\$12,965.79			\$12,965.79
3843		\$12,446.36			\$12,446.36
3844		\$9,807.11			\$9,807.11

Item 4. Detail Transaction for AY2023 Across All Student Services, Alphabetically

Alpha Phi Delta	\$1,832.38
Alpha Sigma Tau	\$5,331.58
Athletics	\$440,256.92
Baseball	\$62,610.31
Basketball - Men	\$24,482.13
Basketball - Women	\$12,156.70
Billiards Club	\$296.74
Biology Club	\$50.95
Black Student Union	\$18,414.88
Business Society	\$107.91
Campus Center	\$23,944.29
Card Game Club	\$308.67
Center for Diversity & Inclusiveness	\$44,295.03
Cheerleaders	\$38,104.35
Christian Fellowship at FSC	\$5,204.09
Commuter Affairs	\$5,786.48
Computer Science Club	\$1,462.51
Counseling	\$5,745.70
Cross Country - Men	\$1,366.89
Cross Country - Women	\$1,531.78
Dance Club	\$12,446.36
Disability Services	\$12,965.79
Equipment Manager	\$254.30
Fal Connect	\$609.48
Falcon Friends	\$604.17
Falcon Players	\$96.93
Field Hockey	\$12,411.16
First Responders	\$3,280.46
Football	\$19,506.37
Gay Straight Alliance	\$17,135.14
Greek Council	\$21,172.96
Habitat for Humanity	\$23,915.07
Health Services	\$1,961.02
Hockey	\$95,232.39
Improv Club	\$1,808.65
Kappa Delta Pi	\$5,333.49
Lacrosse Club	\$6,045.00

LASO	\$6,771.94
Leadership Development	\$6,645.17
Live Action Role Playing (LARP)	\$349.52
Musical Theatre	\$48.82
Nursing Student Association	\$4,107.75
Office of Student Development & C.C.	\$78,462.15
Orientation	\$98,293.28
Outdoor Adventure Club	\$1,083.78
Panhellenic Association	\$1,187.11
Phi Sigma Sigma	\$9,807.11
Pokemon Society	\$1,814.30
Recreational Services	\$74,577.20
SGA	\$87,019.77
SGA - Fitchburg Activities Board - FAB	\$110,183.73
Sigma Beta Delta Honors Society	\$1,041.74
Sigma Pi	\$29,058.45
Sigma Sigma Sigma	\$6,732.65
Sigma Tau Gamma	\$5,322.24
Smash Club	\$226.45
Soccer - Men	\$8,677.76
Soccer - Women	\$15,144.11
Softball	\$43,860.94
Sports Information Department	\$10,144.24
Sports Medicine	\$6,642.79
Strength & Conditioning	\$813.99
Summer Bridge	\$37,540.07
Track - Men	\$10,857.85
Track - Women	\$7,184.04
Underground	\$3,246.69
University Police	\$138,799.13
Veteran Center	\$449.39
Vice President of Student Affairs	\$58,463.77
Volleyball	\$5,704.01
Volunteer Center	\$551.83
Women's Lacrosse	\$17,726.83
World Integrated Nations (WIN)	\$1,959.73
WXPL Radio Station	\$19,809.88

Item 5. Academic Innovation Fund Application Questions

Abstract: In 2 or 3 sentences, indicate the summary of the project, funding request estimate, and project timeline.

Application asks for a detailed timeline below.

Project Overview: Describe the goals of the proposal. What you are trying to accomplish; what positive outcomes are expected; how is the proposal innovative? Indicate its alignment with one or more of the objectives noted under the Fund Description and Purpose.

Project Need/Rationale: What problem or issue are you trying to solve/address? What is the significance and potential impact of the proposal? Please indicate data sources used and highlight data to support the proposal.

In practice, identifying the problem the project solves is a goal of the project, as outlined in the overview. Detailing “significance and potential impact” is another way of asking “What are you trying to accomplish” is another sub-question in the Project Overview. Indicating data sources used and “highlight data” appear to be redundant requests and together are vague.

Project Design: Provide details on how you will achieve the goals of the proposal. Include a project timeline with related activities. If the success of your project depends on collaboration with campus colleagues outside of your department, identify those partnerships and indicate their anticipated participation with letters/emails of support as attachments.

Another request for a timeline, with slightly more detail.

Anticipated Product: Describe what will be created, developed, or enhanced. If the proposal seeks to develop a new program, indicate whether it replaces an existing program.

Presumably, the product would be detailed in the Abstract, an Overview, as well as in any details regarding product design as well as any proposal to replace a program would be addressed in the Rationale or problem to be solved.

Evaluation: Describe the criterion for a successful project. What information or data will you need to collect that helps evaluate the success of the project?

Criterion is the singular of criteria

Project timeline: Provide a timetable for the work including anticipated milestones.

Asked for above in two places.

Budget: *Funds will become available after July 1, 2022 and must be expended by June 30, 2023*

Include budget narrative that details the expenditures on the worksheet below including anticipated timelines including information of potential resource needs beyond the project funding cycle.

Another request for a timeline (#4).

Coversheet

Personnel Actions (N04-23/24)

Section: V. Notifications
Item: A. Personnel Actions (N04-23/24)
Purpose: FYI
Submitted by:
Related Material: Report 02062024 Notifications.pdf

TO: Board of Trustees
 FROM: The President
 SUBJECT: Personnel Actions

DATE: February 6, 2024
 NOTIFICATION NUMBER: N04-23/24

Hires

Michael Kennedy, MS Effective: 12/18/2023	Director of Student Development Student Development <i>Replacement Position - Budgeted line</i>	\$87,500.00
Rebecca Newell, MA Effective: 2/5/2024	Director of Title IX/EEO Human Resources & Payroll Services <i>Replacement Position - Budgeted line</i>	\$115,000.00
Timothy St. John, MS Effective: 1/29/2024	Dean of Students Student Affairs <i>Replacement Position - Budgeted line</i>	\$125,000.00
Eric Wheeler, MED Effective: 1/2/2024	Staff Assistant, Area Coordinator Housing & Residential Services <i>Replacement Position - Budgeted line</i>	\$49,000.00
Alexandra Wysocki, BS Effective: 1/8/2024 End Date: 9/30/2024	Interim Director, Police Concentration Academy Behavioral Sciences <i>Replacement Position - Budgeted line</i>	\$85,000.00
Reduction in Force/Cost savings		
Christian Estrella Effective:	Associate Vice President for Finance and Administration Finance and Administration	\$151,142.78

Resignations

Elena Arranz Alonso Effective: 12/9/2023	Director of Operations SGOCE <i>Resignation</i>	\$73,000.00
Maya McCabe Effective: 12/22/2023	Assistant Director, Upward Bound Math and Science Upward Bound Math and Science <i>Resignation</i>	\$51,500.00
Brooke Morgan Effective: 12/15/2023	Staff Associate, Environmental Health, Safety, and Risk Manager Capital Planning & Maintenance <i>Resignation</i>	\$88,500.00
Jeanette Robichaud Effective: 3/8/2024	Director, Grants and Sponsored Programs Alumni & Development/Grants <i>Retirement</i>	\$97,966.17
Brian Schremser Effective: 1/12/2024	Staff Assistant, Outreach & Recruitment SGOCE <i>Resignation</i>	\$52,020.00
Aaron Tourigny Effective: 12/15/2023	Special Assistant to the President for Community, Governmental Affairs and S President's Office <i>Resignation</i>	\$95,000.00
Erin Turchetta Effective: 12/29/2023	Director of Enrollment Management SGOCE <i>Resignation</i>	\$88,713.20

Change in Title and Salary

Carin Bullis Effective: 1/29/2024	From: Director of Budgeting To: Senior Director of Budgeting Finance and Administration <i>**Additional Responsibilities added**</i>	From: \$117,649.77 To: \$122,649.77
--------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------

Change in Salary/Degree Adjustment

Summer Fetterroll	Director of Student Accounts	From: \$114,026.47
Effective: 12/4/2023	Student Accounts	To: \$115,526.47
	<i>**Increased \$1500 due to receiving MBA**</i>	

Change in Salary/Return from Interim Pay

Joseph Flanagan	Staff Assistant	From: \$68,021.038
Effective: 2/10/2024	Student Affairs/Conduct	To: \$65,333.88
	<i>**Accepted additional responsibilities due to vacancy in department. Position has been filled**</i>	

Eric Soucy	Assistant Director/Area Coordinator	From: \$62,400.00
Effective: 12/29/2023	Housing & Residential Services	To: \$57,200.00
	<i>**Accepted additional responsibilities due to vacancy in department. Position has been filled**</i>	

Interim Position

Peter August	From: Assistant Director	From: \$75,646.95
Effective: 1/1/2024	To: Director of Enrollment for SGOCE (Interim)	To: \$83,446.95
	SGOCE	
	<i>**Currently performing additional responsibilities in SGOCE due to resignation of Director**</i>	

Leave/No Pay

Reid Parsons	Associate Professor	\$78,025.21
Effective: 12/31/2023	Environmental, Geographic and Public Health Sciences	
End: 12/31/2024		

Sabbatical Leaves 1/2 Year

Karina Bautista	Associate Professor	\$77,133.80
Effective: 1/14/2025	Humanities	
End: 5/31/2025		

Eric Budd	Professor	\$124,182.37
Effective: 1/14/2025	Economics History Political Science	
End: 5/31/2025		

Xuzhou Chen Effective: 9/1/2024 End: 1/13/2025	Professor Computer Science	\$146,820.73
Elyse Clark Effective: 1/14/2025 End: 5/31/2025	Assistant Professor Earth, Geographic, and Public Health Sciences	\$67,439.78
Yasser Derwiche Djazaerly Effective: 1/14/2025 End: 5/31/2025	Professor Humanities	\$89,228.33
Steven Edwards Effective: 1/14/2025 End: 5/31/2025	Professor English Studies	\$86,120.88
Jonathan Harvey Effective: 1/14/2025 End: 5/31/2025	Associate Professor Humanities	\$73,494.66
Timothy Hilliard Effective: 9/1/2024 End: 1/13/2025	Professor Exercise & Sports Science	\$97,326.51
Michael Hoberman Effective: 1/14/2025 End: 5/31/2025	Professor English Studies	\$103,695.42
Kim Kay Effective: 1/14/2025 End: 5/31/2025	Professor Business Administration	\$109,503.37
Megan Krell Effective: 1/14/2025 End: 5/31/2025	Professor Behavioral Sciences	\$84,966.58

John Ludlam Effective: 1/14/2025 End: 5/31/2025	Professor Biology	\$90,024.48
Nirajan Mani Effective: 9/1/2024 End: 1/13/2025	Associate Professor Engineering Technology	\$82,040.48
Amy McGlothlin Effective: 1/14/2025 End: 5/31/2025	Assistant Professor Humanities	\$64,176.55
Kelly Morgan Effective: 1/14/2025 End: 5/31/2025	Professor Communications Media	\$130,799.18
Andrea Olmstead Effective: 1/14/2025 End: 5/31/2025	Assistant Professor Humanities	\$67,439.78
Robert Shapiro Effective: 9/1/2024 End: 1/13/2025	Associate Professor Education	\$76,579.05
Jason Talanian Effective: 1/14/2025 End: 5/31/2025	Assistant Professor Exercise & Sports Science	\$69,071.38
Samuel Tobin Effective: 9/1/2024 End: 1/13/2025	Professor Communications Media	\$84,966.58
Wafa Unus Effective: 1/14/2025 End: 5/31/2025	Assistant Professor English Studies	\$67,439.78

Eric Williams Effective: 9/1/2024 End: 1/13/2025	Associate Professor Biology	\$76,579.05
--------------------------------------------------------	--------------------------------	-------------

Sarah Wright Effective: 1/14/2025 End: 5/31/2025	Associate Professor Mathematics	\$76,583.17
--------------------------------------------------------	------------------------------------	-------------

Hong Yu Effective: 1/14/2025 End: 5/31/2025	Assistant Professor Engineering Technology	\$76,141.68
---------------------------------------------------	-----------------------------------------------	-------------

2nd Year Reappointment

Lynn D'Agostino Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Education	\$73,156.70
----------------------------------------------------------	----------------------------------	-------------

Patricia Kio Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Engineering Technology	\$74,082.48
-------------------------------------------------------	-----------------------------------------------	-------------

Eileen Kirk Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Behavioral Sciences	\$70,289.77
------------------------------------------------------	--------------------------------------------	-------------

Min Li Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Behavioral Sciences	\$69,208.17
-------------------------------------------------	--------------------------------------------	-------------

Jessica Oehrlein Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Mathematics	\$70,570.98
-----------------------------------------------------------	------------------------------------	-------------

Kiernan Riley Effective: 9/1/2024 End: 5/31/2025	Assistant Professor Nursing	\$86,528.00
--------------------------------------------------------	--------------------------------	-------------

Olivia Rossetti Effective: 9/1/2024 End: 8/31/2025	Assistant Librarian Library	\$56,228.97
----------------------------------------------------------	--------------------------------	-------------

Jennie Snow Effective: 9/1/2024 End: 5/31/2025	Assistant Professor English Studies	\$71,371.37
------------------------------------------------------	----------------------------------------	-------------

Coversheet

Financial Statements (N05-23/24)

Section: V. Notifications
Item: B. Financial Statements (N05-23/24)
Purpose: FYI
Submitted by:
Related Material: Financial Statements Dec. 31, 2023,2022, and 2021.pdf

FITCHBURG STATE UNIVERSITY

Board of Trustees

NOTIFICATIONS

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	NOTIFICATION NUMBER: N05-23/24
SUBJECT: Financial Report	

FITCHBURG STATE UNIVERSITY

FINANCIAL STATEMENTS

FOR THE SIX MONTHS ENDED

DECEMBER 31, 2023, 2022 AND 2021

FITCHBURG STATE UNIVERSITY
FINANCIAL STATEMENTS
FOR THE SIX MONTHS ENDED
DECEMBER 31, 2023, 2022 AND 2021

Fitchburg State University
Executive Summary
Financial Statements for the Six Months Ended
December 31, 2023, 2022 and 2021

Statements of Net Assets (pages 4-6):

- Total assets decreased by approximately \$3 million between fiscal years 24-23 while total assets increased by \$53 million between fiscal years 22-23. The major changes between fiscal years 22-24 were mainly due to the adoption of GASB 87 – ROUA - Right Of Use Asset (Housing Dorms) and GASB 96- SBITA – Subscription Based IT Agreements. In fiscal years 24-23 ROUA and SBITA were responsible for a \$2.7 million decrease in total assets while in fiscal year 23-22 a ROUA amount of \$54 million was added to total assets. Investments increased by \$2.3 million in fiscal year 24 after a \$3.8 million loss in fiscal year 23.
- Current liabilities increased by \$8.7 million between fiscal years 23-24 and had a decrease by \$2.8 million between fiscal years 22-23. The increase in fiscal year 24 was due primarily to an increase of \$5 million in deferred revenue, most of which is related to state appropriations received. Other liabilities also increased in fiscal year 24 – and this increase relates to both right of use liability amount due but unpaid as at December 2023 and an increase in state financial aid amount on hand.
- The decrease in noncurrent liabilities between fiscal years 24-23 was mainly due to GASB related pronouncements and a decrease in bonds payable. The decrease of \$14 million in fiscal year 24 was due to a reduction of a \$8 million in Pension and OPEB liabilities and a \$6 million reduction in long term payables. The \$32 million change in fiscal year 2023 is from a net \$59 million increase caused by GASB 87 -right of use liability and a \$24 million reduction in OPEB/Pension liability.
- Although, total net assets remained unchanged between fiscal year 23-24, unrestricted net assets increased by \$4 million and debt service and capital projects amounts decreased by \$2 million each.

Statements of Revenues, Expenses and Changes in Net Assets (pages 7-8):

- Net Tuition and fee revenue have remained unchanged over the last 3 years while all other operating revenue increased slightly between fiscal year 23-24. Fiscal year 21 federal grant income is an outlier as that amount was because of COVID related HEERF funds.
- Total operating expenses increased by \$1.6 million between fiscal years 24-23. Payroll accounted for \$2.5 million in fiscal year 24-23 but \$1.4 million of this increase was due to increase in benefits expenses. Electricity cost increased by 24% in fiscal year 24 which caused Utilities expense increase of \$.7 million. The decrease in loans and special payments and IT expenditure is related to ROUA and SBITA expenses which are credited to these accounts and debited to their respective liability accounts and interest expense. Residential housing expense decreased by \$2 million in fiscal year 24-23 and this was related to timing of MSCBA housing loan payment in fiscal year 23. \$2 million was paid early in fiscal year 23.
- The increase in interest expense on capital asset is due to ROUA and SBITA interest expenses.

Fitchburg State University
Executive Summary
Financial Statements for the Six Months Ended
December 31, 2023, 2022 and 2021

Statements of Cash Flows (page 9)

- Total cash at December 2023 decreased by \$1 million to \$51.4 million but had a net increase in cash for the period of \$15 million.
- Net cash provided from operations increased by \$9 million in fiscal year 24. This increase was mainly due to a \$6 million increase in deferred state appropriation revenue and an increase in other liabilities of \$3 million stemming from ROUA and SBITA payments outstanding.
- Net cash used by investing activities increase was mainly due to a reduction of approximately \$4 million in acquisition of property and plant expenditure.

FITCHBURG STATE UNIVERSITY
STATEMENTS OF NET ASSETS
DECEMBER 31, 2023, 2022 AND 2021

ASSETS

	<u>2023</u>	<u>2022</u>	<u>2021</u>
<u>Current Assets</u>			
Cash and cash equivalents	35,749,099	30,700,255	38,435,396
Cash and cash equivalents, restricted	5,734,339	7,688,903	8,774,310
Accounts receivable, net	2,886,766	1,574,095	2,317,130
Loans receivable, net	500	3,018	451
Other Assets (prepaid expenses)	27,492	101,306	160,710
	<hr/>	<hr/>	<hr/>
Total current assets	44,398,194	40,067,576	49,687,997
<u>Noncurrent Assets</u>			
Restricted cash and cash equivalents	9,986,571	14,118,359	12,713,398
Endowment Investments	1,047,800	940,035	1,151,779
Other Investments	19,689,972	17,471,044	21,075,234
Loans receivable, net	84,885	113,076	958,580
Other non current assets	112,215	71,914	103,948
Capital assets, net	191,139,802	194,079,219	182,427,974
Right of use assets, net	49,483,697	54,091,444	-
SBITA assets, net	1,856,977	-	-
	<hr/>	<hr/>	<hr/>
Total noncurrent assets	273,401,918	280,885,091	218,430,913
	<hr/>	<hr/>	<hr/>
Total Assets	317,800,112	320,952,667	268,118,910
Deferred outflow-OPEB	1,576,035	3,275,872	5,802,040
Deferred outflow-Pension	2,786,519	4,122,377	7,386,093
	<hr/>	<hr/>	<hr/>
Total assets and Deferred Outflows of Resources	322,162,666	328,350,917	281,307,043

For those charged with governance and internal management use only

FITCHBURG STATE UNIVERSITY
STATEMENTS OF NET ASSETS
DECEMBER 30, 2023, 2022 AND 2021

LIABILITIES AND NET ASSETS

Current Liabilities

Bond payable - current portion	\$ 3,930,918	\$ 4,357,576	\$ 2,526,545
Lease Liability - current portion	3,055,458	3,914,664	-
SBITA Liability - current portion	1,029,041	-	-
Account payable and accrued liabilities	1,202,314	603,809	2,618,558
Salaries & benefits payable	2,307,027	1,902,621	1,855,474
Account payable - construction	11,075	253,222	392,197
Accrued workers compensation - current portion	175,952	137,942	131,181
Compensated absences - current portion	3,892,091	3,610,603	3,218,381
Faculty payroll accrual	2,880,119	2,801,264	2,535,460
Deferred revenue - current portion	14,163,779	9,146,944	17,328,975
Deposits - current portion	155,400	146,700	163,050
Other liabilities - current portion	4,172,963	1,408,222	303,979
	<hr/>	<hr/>	<hr/>
Total current liabilities	36,976,138	28,283,566	31,073,800

Noncurrent liabilities

Bond payable	42,847,051	46,738,193	51,995,463
Lease liability -Right of use asset	55,232,168	58,805,367	-
SBITA -Subs Based IT Agreement	1,300,490	-	-
Accrued workers compensation	944,571	1,006,311	957,244
Compensated absences	2,385,475	2,407,068	2,057,653
Deferred revenue	3,242,430	3,268,094	126,459
Due to federal loan programs-Perkins	43	47,985	995,004
Due to federal loan programs-Nursing	-	-	136,300
Unfunded pension liability	6,326,084	8,015,299	20,091,153
Unfunded opeb liability	7,961,317	14,073,004	25,852,605
	<hr/>	<hr/>	<hr/>
Total noncurrent liabilities	120,239,629	134,361,321	102,211,881
	<hr/>	<hr/>	<hr/>
Total liabilities	157,215,767	162,644,887	133,285,681

Service concession agreement	(0)	252,918	505,836
Deferred inflow-debt refunding	2,021,264	2,454,703	2,051,768
Deferred inflows-opeb	15,583,682	14,142,424	6,269,569
Deferred inflows-pension	7,628,785	8,917,207	779,813
	<hr/>	<hr/>	<hr/>
Total Deferred Inflows of Resources	25,233,731	25,767,252	9,606,986

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY
STATEMENTS OF NET ASSETS
DECEMBER 30, 2023, 2022 AND 2021**

NET ASSETS

Invested in capital assets, net of related debt	132,628,424	132,405,754	127,831,749
Restricted for:	-	-	-
Non-expendable	-	-	-
Scholarships and fellowships	540,718	537,210	578,873
Research	-	-	-
Expendable	-	-	-
Scholarships and fellowships	354,233	282,559	448,311
Research	-	-	-
Instructional department uses	-	-	-
Loans	115,601	219,138	169,949
Capital projects	934,897	3,348,078	84,072
Debt service	12,543,935	14,872,898	14,692,445
Other	239,753	225,543	163,253
-	-	-	-
Unrestricted	<u>(7,644,392)</u>	<u>(11,952,401)</u>	<u>(5,554,276)</u>
Total net assets	<u>139,713,168</u>	<u>139,938,778</u>	<u>138,414,376</u>
LIABILITIES and NET ASSETS	<u>322,162,666</u>	<u>328,350,917</u>	<u>281,307,043</u>

For those charged with governance and internal management use only

FITCHBURG STATE UNIVERSITY
STATEMENTS OF REVENUES, EXPENSES & CHANGES IN NET ASSETS
FOR PERIOD ENDED DECEMBER 31, 2023, 2022 and 2021.

	2023	2022	2021
Operating Revenues			
Student tuition and fees	24,014,189	24,104,844	24,734,188
Waivers and exemptions	(322,004)	(302,477)	(336,464)
Net student tuition and fees	<u>23,692,185</u>	<u>23,802,367</u>	<u>24,397,724</u>
Federal grants and contracts	3,862,723	3,617,754	9,617,248
State and local grants and contracts	787,615	519,129	482,390
Nongovernmental grants and contracts	626,090	422,490	271,075
Sales and services of educational departments	692,257	240,544	781,942
Auxiliary enterprises			
Auxiliary enterprises - Res Life	4,326,758	4,136,306	4,563,797
Auxiliary enterprises - Dining Hall	1,828,112	1,532,426	1,544,131
Other operating revenues	180,885	257,779	294,249
Total Operating Revenues	<u>35,996,624</u>	<u>34,528,796</u>	<u>41,952,556</u>
Operating Expenses			
Salaries:			
Faculty	11,520,478	11,205,055	10,375,036
Exempt wages	2,525,404	2,343,259	2,043,069
Non-exempt wages	11,202,438	10,597,539	9,844,144
Benefits	10,044,211	8,631,686	7,569,594
Other Operating Expenses			
Employee related travel	112,870	116,161	53,929
Administrative expense	1,251,593	1,135,068	1,392,885
Facility operational supplies	871,824	807,375	768,720
Utilities	2,045,678	1,368,291	1,587,952
Consultant services	1,462,454	1,392,636	1,081,083
Operational expenses	2,917,426	3,081,196	2,976,973
Equipment purchases	388,962	300,611	362,353
Equipment maintenance and repairs	347,135	345,933	302,590
Purchased client services-program	132,709	138,627	75,814
Construction and building improvement	1,207,094	705,415	697,311
Grant and Subsidies	53,522	60,090	33,900
Scholarships	4,808,803	4,285,823	7,447,553
Loans & special payments	(1,017,163)	7,920	1,131,379
IT expenditures	2,681,444	3,384,899	3,314,424
Amortization Expense	3,230,789	2,411,388	-
Depreciation	6,090,113	5,921,937	5,972,067
Bad debt expense	(8,428)	(67,009)	(17,792)
Auxiliary enterprises:	-	-	-
Residential life - Housing	3,240,898	5,223,785	4,082,924
Residential life - Dining	1,464,589	1,549,017	1,546,519
Total Operating Expenses	<u>66,574,843</u>	<u>64,946,701</u>	<u>62,642,427</u>
Operating profit/(loss)	<u>(30,578,219)</u>	<u>(30,417,906)</u>	<u>(20,689,871)</u>

For those charged with governance and internal management use only

FITCHBURG STATE UNIVERSITY
STATEMENTS OF REVENUES, EXPENSES & CHANGES IN NET ASSETS
FOR PERIOD ENDED DECEMBER 30, 2023, 2022 and 2021.

	2023	2022	2021
Nonoperating Revenues (Expenses)			
State appropriations	27,686,278	26,598,868	22,850,749
Investment income (net of investment expenses)	963,759	892,910	698,603
Unrealized gain/(loss)	480,678	(525,434)	(141,352)
Interest expense on capital asset	(2,470,872)	131,441	(406,070)
Total Nonoperating Revenues (Expenses)	<u>26,659,843</u>	<u>27,097,785</u>	<u>23,001,930</u>
Income (loss) before Capital and Endowment Additions	(3,918,376)	(3,320,121)	2,312,059
Capital appropriations	(170,015)	477,149	737,650
Capital grants and gifts	126,459	121,209	126,459
Total Capital and Endowment Additions	<u>(43,556)</u>	<u>598,358</u>	<u>864,109</u>
Increase in net assets	(3,961,932)	(2,721,762)	3,176,168
Net Assets - beginning of year	<u>143,675,100</u>	<u>142,660,540</u>	<u>135,238,210</u>
Net Assets - end of period	<u>139,713,168</u>	<u>139,938,778</u>	<u>138,414,378</u>

For those charged with governance and internal management use only

FITCHBURG STATE UNIVERSITY
STATEMENTS OF CASH FLOW
DECEMBER 31, 2023, 2022 AND 2021

	<u>2023</u>	<u>2022</u>	<u>2021</u>
CASH FLOWS FROM OPERATING ACTIVITIES			
Increase in net assets	(3,961,932)	(2,721,762)	3,176,168
Adjustments to reconcile increase to cash Provided by (Used by) operating activities:	-	-	
(Gain)/loss on marketable securities	(232,491)	(348,175)	(500,882)
Depreciation	6,090,113	5,921,937	5,972,067
Amortization-Right of use asset /SBITA	3,230,789	2,411,388	-
(Increase) decrease in assets:			
Accounts receivable	572,114	587,175	10,351,664
Loans receivable	14,589	770,491	82,004
Other Assets	192,699	179,225	13,816
Increase (decrease) in liabilities			
Accounts payable and accrued liabilities	(2,025,793)	(3,221,715)	(1,155,064)
Compensated absences	472,455	203,451	(85,365)
Accrued faculty payroll	(1,358,027)	(1,374,292)	(1,340,868)
Deferred revenue	13,880,424	7,781,253	8,236,467
Other liabilities	3,780,573	888,164	(2,924)
Net Cash Provided by operating activities	<u>20,655,513</u>	<u>11,077,141</u>	<u>24,747,083</u>
CASH FLOWS FROM INVESTING ACTIVITIES			
Unrealized gain on investments	(480,678)	525,434	141,352
Purchase of investments	(3,718,990)	(2,869,452)	(1,876,288)
Proceeds from the sale of investments	3,305,411	2,879,314	1,547,580
Acquisition of property, plant and equipment	(1,503,144)	(5,959,303)	(2,870,015)
Net Cash (used by) investing activities	<u>(2,397,401)</u>	<u>(5,424,008)</u>	<u>(3,057,371)</u>
CASH FLOWS FROM FINANCING ACTIVITIES			
Federal loan program	(33,499)	(746,984)	(23,488)
Payments of capital leases	-	-	(131,295)
Payments of capital debt	(721,522)	(400,000)	(390,003)
Amortization of bond premiums/ROUA/SBITO	(2,274,967)	(1,247,014)	(110,450)
Net Cash (used by) financing activities	<u>(3,029,988)</u>	<u>(2,393,998)</u>	<u>(655,236)</u>
Net increase in cash	15,228,124	3,259,135	21,034,476
Cash and cash equivalents - beginning of period	<u>36,241,884</u>	<u>49,248,381</u>	<u>38,888,628</u>
Cash and cash equivalents - end of period	<u>\$ 51,470,008</u>	<u>\$ 52,507,516</u>	<u>\$ 59,923,104</u>

For those charged with governance and internal management use only

Coversheet

VOTE (29-23/24)

Section: VI. Brief discussion and vote for a new Trustee Retreat date.
Item: A. VOTE (29-23/24)
Purpose: Vote
Submitted by:
Related Material: Trustee Retreat Date- VOTE.pdf

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees	DATE: February 6, 2024
FROM: The President	REQUEST NUMBER:
SUBJECT: Trustee Retreat Date	29-23/24

It is requested that the Fitchburg State University Board of Trustees vote to approve the date for the Trustee Retreat.

Coversheet

News Articles

Section: X. President's Report
Item: C. News Articles
Purpose: FYI
Submitted by:
Related Material: News clips for Feb 6 2024.pdf

127TH COMMENCEMENT

'BURNING BRIGHTER THAN EVER'

Fitchburg State University celebrates grads at Winter Commencement



COURTESY FITCHBURG STATE UNIVERSITY

Graduates at the Fitchburg State Winter Commencement ceremony decorated their caps with inspirational messages and designs.

Submitted Article

FITCHBURG » More than 400 graduate and undergraduate degrees were awarded during Fitchburg State University's 127th commencement ceremony recently on Dec. 22.

The ceremony included speeches by undergraduate valedictorian Dylan J. Dandy of Leominster and Graduate Student Leadership Award recipient Maryanne Fiorino of Danvers.

Dandy graduated with a dual major in mathematics and chemistry. In his remarks, he thanked members of the faculty who had taken him under their wing and offered guidance and mentorship through his studies. He singled out Professor Gerald Higdon of the Mathematics Department for overseeing his capstone research project.

"Through him and my capstone project, my passion for mathematics truly began burning brighter than ever," Dandy said. "So, for all of that, and some directions for the future, I want to thank him and the other professors who got me to this point by pushing and be-

lieving in me. I hope that all of you have someone or something that can do that for you."

Dandy plans to pursue his PhD in mathematics.

Fiorino, a nurse for the past 27 years, completed a Master of Business Administration with a concentration in healthcare management.

"Leadership, as I've come to understand, is not confined to titles; it's a way of life. It's about guiding, supporting, and nurturing, even when the world sleeps," said Fiorino. "To all those facing challenges, remember, you can persevere. Keep pushing through, stay positive, and smile, even in the face of adversity. It's an integral part of life.

In his keynote remarks, Fitchburg State President Richard S. Lapidus highlighted several graduating students for embodying the University's motto of "perseverantia," meaning persistence. They included:

- Nathacha Santiago-Prado of Leominster, who completed a bachelor's degree in education, and looks forward to being an inspiration to future stu-



COURTESY FITCHBURG STATE UNIVERSITY

Undergraduate valedictorian Dylan J. Dandy, of Leominster, delivers his address during the Winter Commencement at Fitchburg State University Dec. 22, 2023.

dents of color by showing them they can lead their own classrooms.

- Mary Nankya, a native of Uganda who left her young family to pursue her dreams of an advanced education and build a better life for them. She completed a Master of Science in computer science.

- Stephen Wells of Ayer, who completed a bachelor's degree in English Studies at the age of 70, overcoming serious illness

to complete a long-held ambition. He plans to continue his studies in graduate school.

The ceremony also included the presentation of the Robert V. and Jeanne S. Antonucci Student Leadership Award to Christopher Shaddock of Ayer. A veteran and cancer survivor, Shaddock completed a degree in interdisciplinary studies and plans to continue his studies at the graduate level with an eye toward becoming a counselor.

Sentinel & Enterprise

Friday, January 26, 2024

\$2.50

FACEBOOK.COM/SENTINELANDENTERPRISE

TWITTER.COM/SENTANDENT

sentinelandenterprise.com

FITCHBURG STATE UNIVERSITY

FSU joins pilot to rethink law school readiness

LSAT alternative to help more pre-law students succeed

Submitted Article

FITCHBURG » As the longtime advisor to its pre-law program, Fitchburg State University Professor Paul Weizer has seen many former students go on to successful careers in the law. He has also seen otherwise successful students struggle with the standardized test that can qualify them for law school.

This year, Weizer led the effort for Fitchburg State to join a pilot program of five institutions nationwide to try an alternative to the Law School Admission Test, better known as the LSAT.

Weizer said many institutions are rethinking standardized tests in general — Fitchburg State is one of many colleges and universities that made the SAT largely optional as part of the undergrad-

uate admissions process, for example — and now law schools are engaging in similar discussions.

Fitchburg State is launching its pilot of LawReady this semester, in collaboration with the Law School Admission Council.

The program is designed to meet students earlier in their undergraduate studies, providing a roadmap to law school readiness with academic skills development

FSU » PAGE 8



Fitchburg State University campus.

COURTESY
FITCHBURG STATE
UNIVERSITY

FSU

FROM PAGE 1

aligned with courses already taking place on campus, resources to assist navigating the pre-law process, and community support along the students' journey

to a legal education.

"This is an alternative to the LSAT, wherein students may build a portfolio that demonstrates they have the skills to succeed in law school," Weizer explained.

The program is launching with four courses in Fitchburg State's pre-law track, covering top-

ics including argumentative writing, ethics, and the law. The pilot is being funded through an Academic Innovation Fund grant from the university.

Weizer said he hopes the LawReady program will help students who are considering law school but may not perform as well on

standardized tests. "It really should level the playing field, because it takes standardized testing out of the equation," he said.

Weizer noted he has had several former students who struggled with the LSAT but later went on to successful careers as attorneys. Their journeys would

have been streamlined had they been given the option of a portfolio-based assessment, he said.

Fitchburg State's pre-law offerings include a partnership with the UMass Dartmouth School of Law, wherein students may complete their bachelor's degrees and law de-

grees within six years (saving a year of undergraduate tuition and fees). Weizer is also the advisor to the university's lauded moot court team, wherein students compete at the regional and national levels.

—*Fitchburg State University*

LivingArts

By James Sullivan

GLOBE CORRESPONDENT

Kate Jewell wasn't too surprised to learn that her most-streamed artist of 2023 was a band she'd loved back in her days as a college radio DJ. From 1997 until 2001, the Vermont native cohosted a show on WRVU, the student-run station at Vanderbilt University, where she was an undergrad.

Those were banner years for Sloan, the Nova Scotia power-pop band that has remained one of Jewell's favorites.

"I still like the comforting sounds of yore," she says.

But "comforting" may not be the first word that comes to mind when discussing college radio. Since at least as far back as the 1960s, college radio has challenged its listeners to stretch their ears beyond the limited playlists of the commercial airwaves. From punk and hip-hop to ethnic and avant-garde music, student-run radio stations have been "a place where ordinary Americans can come together and discuss what they want the nation to sound like," says Jewell, a history professor at Fitchburg State University.

The author of "Live from the Underground: A History of College Radio," a new book from the University of North Carolina Press, Jewell was moved to write a definitive history of the medium after her old station, WRVU, sold its broadcasting license to a local public radio station in 2011. It was one of several stations with university ties, including KUSF in San Francisco, to decide that decreasing listenership — instigated by the rising popularity of streaming services — made the stations expendable.

That attitude, as Jewell points out in her meticulously researched book, does a disservice not only to students hoping to learn the art of broadcasting, it also ignores college radio's long history of new music discovery and critical community programming.

"We need institutional support for cultural production, whether or not it has market value," she says.

The Boston area plays a prominent role in Jewell's book, which is out Tuesday. Launched in 1975 at



LIZ LINDER

A Fitchburg State professor's new book traces left-of-the-dial history of college radio

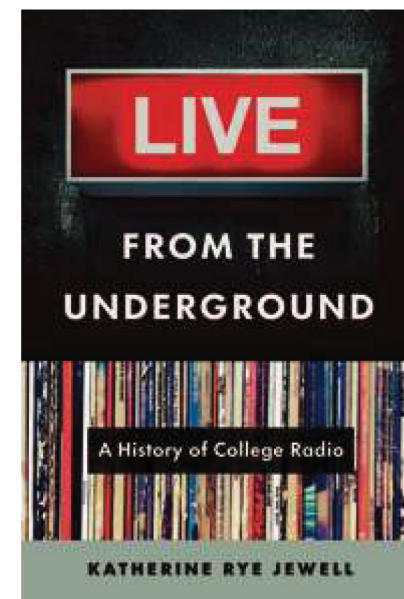
MIT's WTBS (now WMBR), the program that came to be known as "The Demi-Monde" has been widely cited as the first in the country dedicated to punk rock. The show's host, Oedipus, was the first DJ to interview the Ramones on the air, in 1976, when the band traveled for the first time outside their native New York. Within a few years Oedipus, of course, would become program director at WBCN.

MUSIC

Other stations breaking new ground in the Boston area included Emerson College's WERS, which for years ran nighttime shows dedicated to reggae ("Rockers") and hip-hop ("88.9 at Night"); Harvard University's WHRB, which launched a country music show, "Hillbilly at Harvard," way back in the 1940s; and

Boston College's WZBC, which hosted two members of Nirvana on the day their epoch-making "Nevermind" album was released in 1991.

In Boston, "the club scene was so close to the college scene," explains Jewell, who earned her PhD at Boston University. "There were so many different types of stations in a small metropolitan area, they all had to distinguish themselves from each other."



UNC PRESS

"Live from the Underground" author Katherine Rye Jewell (left) at Village Vinyl and Hi-Fi in Brookline.

But the stations sometimes worked in solidarity, too — organizing boycotts, for instance, when a few record labels tried to institute subscription fees for their new releases. In 1978, Robert Haber, a Brandeis University graduate and alum of its radio station, established CMJ (College Media Journal), the industry tip sheet for college radio programmers. With its annual Music Marathon in New York City, the company enjoyed considerable influence as the college radio of the '80s evolved into the "alternative" rock radio of the '90s. ("Alternative, ugh, I hate that word," former WFNX DJ Kurt St. Thomas says in the book.)

After growing up in rural Vermont, where radio choices were few and far between, Jewell arrived for school in Nashville a blank slate.

"I came into college radio without any preconceived notions," she recalls. All she knew was that WRVU — where fellow DJs hosted programs for gay and goth audiences — felt like a haven for the counterculture.

"I was never fully of it," she says, adding, unsurprisingly: "I was always kind of observing."

James Sullivan can be reached at jamesgsullivan@gmail.com. Follow him @sullivanjames.

LOCAL NEWS

Wednesday, November 15, 2023 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://www.facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

[sentinelandenterprise.com](https://www.sentinelandenterprise.com)

STUDENT FILMMAKER



COURTESY FITCHBURG STATE UNIVERSITY

Fitchburg State University junior Isaiah Manuel, right, poses at the Student Media Summit with fellow student Adam Fournier.

Fitchburg State junior takes top honor in statewide summit

Student media summit hosted 14 schools last month

Submitted Article

BOSTON » Fitchburg State University student filmmaker Isaiah Manuel took first place in the recent Student Media Summit, where he competed against students from 14 institutions of higher education, including Emerson College, Northeastern University and Boston University.

In addition to networking opportunities, the summit, held at Emerson College on Oct. 27, included a “pitch contest” where student filmmakers had two minutes to articulate their vision for a narrative or

documentary film project.

Manuel, a junior from Leominster, submitted a proposal for his documentary “Thrown Away,” about where Massachusetts’ trash goes once it is shipped out of state. It was one of 77 submissions to the contest, from which 14 were selected for oral pitches at the summit. From that pool, he won the \$1,000 cash prize, with additional funds for equipment rental to produce the film.

“I was surprised, especially because most of the other projects were narrative films,” Manuel said. “It was a great experience.”

The annual contest is organized by the Massachusetts Production Coalition’s Education Consortium. In addition

SUMMIT » PAGE 4

Summit

FROM PAGE 3

to Fitchburg State, participating colleges included Bentley University, Boston University, Bridgewater State University, Emerson College, Endicott College, Lasell University, Lesley University, Massachusetts College of Art & Design, Middlesex Community College, Northeastern University, Suffolk University, Tufts University, and Wheaton College.

Manuel’s project spawned from his curiosity about the trains full of trash he saw being shipped on the tracks from Leominster. With long-held interests in photography and trains, the documentary film project started to take shape in his mind.

“I took (Associate Professor) Kevin McCarthy’s documentary development class last spring, and I spent the whole semester learning about something I really wanted to know more about,” Manuel said.

His research included

finding out that vast quantities of waste produced in Massachusetts is shipped to a landfill in Uniontown, Ala., where more than half the population lives below the property line, and that raised additional questions in his mind about societal habits toward waste and recycling, and how those attitudes have an impact extending far beyond the trash cans in our driveways.

Manuel said he hopes to pursue a career in film or television. This fall, he has enjoyed McCarthy’s multi-camera television production class that is taught in collaboration with Fitchburg Access Television (FATV). The class includes work in the FATV studios downtown, and additional hours as a member of the production crew in community settings, including scholastic sports and election coverage.

“It’s been really interesting,” Manuel said. “It’s what I look forward to doing for my career.”

Courtesy Fitchburg State University

Sentinel & Enterprise

Thursday, December 28, 2023

\$2.50 FACEBOOK.COM/SENTINELANDENTERPRISE TWITTER.COM/SENTANDENT

sentinelandenterprise.com

FITCHBURG STATE

Teacher training at FSU nationally recognized

National Education Honor Society chapter receives ACE award

Submitted Article

FITCHBURG » With its institutional roots in teacher training, Fitchburg State University has had a long-active and engaged chapter of the international education honor society Kappa Delta Pi. Through the society, future educators engage in projects that benefit children in the community and enhance their own learning through professional development and mentorship.

Each year, the organization recognizes KDP chapters that demonstrate excellence in membership, leadership development, and programming in support of the KDP's mission and strategic goals with its Achieving Chapter Excellence (or ACE) award.

In 2023, only nine chapters out of 600 chapters nationwide were selected to receive the ACE award. This fall, The Xi Psi Chapter at Fitchburg State was selected out of those nine chapters to receive the Ace of the ACE Award. Although the Xi Psi Chapter has

TRAINING » PAGE 8

Training

FROM PAGE 1

won 10 consecutive ACE Awards, 2023 is the first time the chapter was selected to receive the Ace of the ACE.

“The Xi Psi Chapter at Fitchburg State University has implemented a comprehensive and innovative membership plan that engages a diverse range of students and educators,” said Joe Clemmer, KDP's Membership Experience Manager for teacher candidates in the Northeast, when he presented the award this fall. “The Chapter hosts a staggering array of programming, all aimed at elevating the profession, or serving others.”

Among the KDP chapter activities recognized were its informational meetings, professional development sessions, alumni engagement and campus outreach events.

Also the chapter hosts events that benefit literacy projects in local schools like Dot Day and Read for the

Record, and projects that serve the wider community including writing letters to veterans for Veterans Day. The chapter also organized the local Special Olympics games until they were interrupted by the pandemic.

“Most impressively, the chapter has sustained a long term relationship with the Nambale Magnet School in Kenya,” Clemmer said. “This partnership has allowed chapter members to visit the school, provide resources and training to the Nambale teachers, and learn from them in exchange.”

The chapter was recognized along with their faculty counselors including Dean of Education Nancy Murray, Associate Professor Karen DeAngelis and Associate Professor Laurie Link.

Murray said the collaboration with the school in Kenya has been a rewarding experience for all involved. “One of the reasons we stay so connected is due to the mutual respect we have for each other and the ongoing learning that occurs,” she said. “Teachers at the Nambale Magnet school were often used to

visitors sharing their expertise without seeking their knowledge and skills, which are embedded in their culture.”

Erin Maida, a 2023 graduate of Fitchburg State, was delighted to hear about the chapter's recognition.

“It meant the world to know that our efforts over the past year truly made as big of a difference as we hoped for,” said Maida. “KDP has granted me opportunities throughout my time at Fitchburg State that I will always be grateful for. From elementary classroom visits, to workshopping innovative ideas, to bonding with our new members through pizza and keychain-making parties, KDP has been a significant ingredient to my positive experience at this school.”

Maida was also volunteer coordinator for the chapter during her senior year, an experience she said improved her organization and event preparation skills.

“I was able to see the immediate effect our KDP members had on the community,” said Maida.



COURTESY FITCHBURG STATE UNIVERSITY

Representatives from Fitchburg State University's Xi Psi Chapter of the education honor society Kappa Delta Pi recently gathered to celebrate their Ace of the ACE award.

NATIONAL COMPETITION

Fitchburg State hosting Moot Court Tournament

Teams from 17 colleges
and universities competing

Submitted Article

FITCHBURG » The question of whether a constitutional right to privacy includes use of contraception will be among the legal issues analyzed when Fitchburg State University hosts the American Moot Court Association's Eastern Regional Tournament on Friday, Nov. 17 and Saturday, Nov. 18.

Competing students are judged on their oral and written arguments on opposing sides of legal principles, with this year's tournament case posing questions about access to contraception and the intersection of law and religious belief. During the competition, the students will present arguments and answer questions from a panel of judges, as in an appellate court proceeding.

The teams with the highest scores at the regional tournament will move onto the national finals in January.

Fifty teams of students representing 17 colleges and universities will gather for the regional tournament this month, including five students from Fitchburg State.

"My kids have worked hard," said Professor Paul Weizer of

COURT » PAGE 8

Court

FROM PAGE 1

Fitchburg State's Economics, History and Political Science Department, who founded and coaches the university's moot court program. "I'm proud to have them represent Fitchburg State and am confident that they will be ready."

Lydia Palmer, a senior from Ashby, competed in last year's tournament and hopes to advance to the nationals this year. "This class has taught me invaluable research skills, an understanding of the law that no other class could give, as well as a chance to develop my leadership skills as team captain this year,"

said Palmer, who is studying pre-law with a minor in political science. "As with representing any institution in competition, it is an honor."

Adam Quinlan, a sophomore from Westford, said he joined moot court to prepare himself for law school after completing his bachelor's degree, and that the experience has already improved his confidence in public speaking, among other valuable skills. He added that he was grateful for Dr. Weizer's support in encouraging him to give it a try.

"Honestly when I began moot court the idea of representing Fitchburg State in such a large competition was very intimidating," Quinlan said. "I felt like I was just a kid

who likes arguing, staring at this mile-tall wall that is the rest of the nation's competitors. As I have progressed in moot court I have begun to understand that I do deserve a seat at the table in a national competition, and I have felt overwhelmingly proud to represent Fitchburg State in such a large scale tournament."

Fitchburg State's Moot Court program launched in 2000 and has advanced teams to the national competition in almost every year of its existence. Earlier this year, the American Moot Court Association ranked Fitchburg State in its top 25 programs nationwide in appellate brief writing.

— *Courtesy of Fitchburg State University*



COURTESY FITCHBURG STATE

Fifty teams of students representing 17 colleges and universities will gather for the regional Moot Court Tournament this month at Fitchburg State University, including five students from Fitchburg State.

FITCHBURG

STUDENTS STUDY ACROSS DISTRICTS



COURTESY MARK ARSENAULT

Several FHS students attended a symposium about genocide at Groton-Dunstable High School and shared what they are learning from the Fitchburg genocide-related curriculum.

Cross-district learning about genocide took place at symposium

By Danielle Ray

dray@sentinelandenterprise.com

FITCHBURG » A group of students from Fitchburg High School traveled to Groton-Dunstable High School in November to participate in an academic symposium based on the state-mandated genocide curriculum.

FHS teacher Mark Arsenault teaches a course at the high school along with his colleague and fellow history teacher Alissa Campbell that focuses on genocide in world history and investigates the definition of genocide and possible origins of it.

Arsenault, who has been teaching at the high school for over 20 years, said the symposium was a unique opportunity for the students to interact with each other over the topic of genocide.

“This has never been done, having two schools from different socio-economic backgrounds come together,” he said. “Very rarely do teachers work with their students across different districts. I’m hoping this becomes more of a trend in ed-

STUDY » PAGE 8



COURTESY MARK ARSENAULT

The group of educators involved with the academic symposium on genocide held in Nov. for Fitchburg and Groton-Dunstable high school students. Left to right, FHS history teacher Alissa Campbell, Fitchburg State University professor Dr. Benjamin Lieberman, FHS history teacher Mark Arsenault, Groton-Dunstable High School social studies teacher Tammie Reynolds, and FHS history coach Dan Kirouac.

Study

FROM PAGE 1

ucation and other districts get involved.”

Arsenault said the course was launched at the school following former Gov. Charlie Baker signing a bill in December 2021 requiring “genocide or some sort of component of genocide study should be imbedded in high school curriculum.”

Several FHS students who attended the symposium shared their thoughts on it and the genocide course and what they are learning from it.

Junior Cameron Montalvo, 17, said the course is helping him “understand genocide and the concept of it.”

“I believe it gave more insight on how genocide can affect a cultural group and how it can affect the world,” he said of what he came away with from the symposium.

Senior Bella Caron, also 17, echoed his sentiments, saying that “coming together for the symposium allowed us to connect more ideas together that we learned about.”

“Each of the curriculums were different and we were able to create more cohesive ideas and concepts about what we learned,” she said of how the symposium was organized.

She went on to say that during the genocide course at FHS they are studying the United Nations Universal Declaration of Human Rights and that the course is giving her and her fellow students “insight into the patterns of what leads up to a genocide and how to stop a genocide.”

Arsenault said when he and Campbell were asked by FPS Social Studies Director Dr. John Marderosian to design a course around genocide, they were happy to oblige.

“Here at Fitchburg, we

are trying to create new and innovative courses for the kids,” he said. “Alissa and I spent the summer putting together the class.”

The course syllabus includes defining genocide, looking at examples of different genocides around the world, and diving deep into why genocide happens and discussing how it can be prevented. Campbell said they are doing their “due diligence” when it comes to offering the course to students and that “the more we put into it, the more we will get out of it.”

“It’s another way for students to learn more about history and what’s going on in the world today,” she said.

Instances of genocide can be found throughout history and in today’s world. In fact, according to a recent article posted to slate.com the United Nations is currently in the midst of deciding if the level of mass deaths as a result of the war raging on in Gaza — more than 24,000 bodies is the latest estimate — amounts to genocide.

Arsenault said they plan to continue the semester-long elective class depending “on student interest and volume” and that they currently have two classes of 20 students — and more who have expressed interest.

“It’s available for students looking to fill a requirement and also learn,” he said.

Arsenault said they were joined by Fitchburg State University professor Dr. Benjamin Lieberman for the symposium. Lieberman teaches economics, history, and political science at the college, including courses on the Holocaust and Nazi Germany.

Arsenault said the symposium came about after a woman approached him one day when he was out with a colleague talking about Armenian genocide. It turned out the woman,



COURTESY MARK ARSENAULT

A group of students from Fitchburg High School traveled to Groton-Dunstable High School in November to participate in an academic symposium based on the state-mandated genocide curriculum.



COURTESY MARK ARSENAULT

Students at Fitchburg High School now have the opportunity to take a course on the topic of genocide. Left to right, FHS junior Autumn Racine, FHS history teacher Mark Arsenault, FHS senior Bella Caron, FHS history teacher Alissa Campbell, and FHS junior Cameron Montalvo

Tammie Reynolds, is a social studies teacher at Groton-Dunstable High School and was also working on a genocide course curriculum.

“Coincidentally we both had the same FSU professor, Ben Lieberman, who taught a genocide course, and he ended being a part of

said, adding that during the all-day symposium the students discussed genocide and each school designed an activity component for the program.

Campbell said she thought the symposium “was a great initial program” and they were pleased with how it went.

“I think it’s important to get students from different backgrounds together to have collaborative learning in a safe space where their thoughts and ideas are fostered and encouraged,” she said of the benefits.

FHS junior Autumn Racine, 16, is taking the class and she attended the November symposium.

“I think it gave us a better way of looking at genocide and what other people thought about it,” she said of the symposium. “I found it really intriguing because we got to understand what other students thought and what Dr. Lieberman interpreted with genocide.”

She went on to say that she has learned a lot through the course and that “it’s an important class to understand what happens during a genocide and what leads up to it.”



LOCAL NEWS

Tuesday, November 21, 2023 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://www.facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

[sentinelandenterprise.com](https://www.sentinelandenterprise.com)

HOLIDAY CONCERT

FSU and North Worcester Orchestra present ‘A Symphonic Christmas Carol’

The past, present and future of Christmas music with over 350 musicians

Submitted Article

FITCHBURG » The North Worcester County Symphony Orchestra, in partnership with Fitchburg State University, will present “A Symphonic Christmas Carol” at 7:30 p.m. Friday, Dec. 8 and Saturday, Dec. 9 at Weston Auditorium, 353 North St.

The concert will feature the music of Christmas

past, present, and future, which will be performed, over the course of the evening, by over 350 musicians from eight different musical ensembles from across the region.

The North Worcester County Symphony Orchestra will perform with Fitchburg State’s Concert Choir, Chamber Choir and Concert Band. In addition, the evening event will feature

the Nashoba Valley Chorus, the Westford Chorus, the Greater Gardner Community Choir, and Perfect Alibi.

Tickets range from \$15 to \$30 and may be ordered online at [nwcorchestra.org/upcoming-season/a-symphonic-christmas-carol](https://www.nwcorchestra.org/upcoming-season/a-symphonic-christmas-carol). This is a reserved seating event. Admission is free for Fitchburg State students and staff, and complimentary tickets may be ordered by contacting the orchestra

SYMPHONIC » PAGE 5



COURTESY FITCHBURG STATE UNIVERSITY

The North Worcester County Symphony Orchestra and Fitchburg State University are presenting “A Symphonic Christmas Carol” on Dec. 8–9, 2023. Pictured are the University officials and musical ensemble directors that have been guiding a new partnership between the school and regional orchestra.

Symphonic

FROM PAGE 3

at info@nwcorchestra.org.

The North Worcester County Symphony Orchestra was founded in 2021 on the principles of access to classical, pop, jazz, musical theater, and other genres of music to culturally enrich the quality of life in the

Twin City area and surrounding region. The principal goal of the organization is to make this music accessible to everyone at an affordable cost.

At the beginning of the academic year, Fitchburg State and the North Worcester County Symphony Orchestra announced the start of a partnership between the school’s musical ensembles and the regional or

tween the two groups was created to offer the public more performances each season that include a wider variety of musical genres and feature more musicians.

Find more information about Fitchburg State’s musical offerings at [fitchburgstate.edu/music](https://www.fitchburgstate.edu/music). Learn more about the North Worcester County Symphony Orchestra at www.NWCSymphony.org/About-Us/Who-We-Are.



FSU presents
'It's a
Wonderful
Life'
Community » E1

Sentinel & Enterprise

Sunday, December 3, 2023

\$3.00 FACEBOOK.COM/SENTINELANDENTERPRISE TWITTER.COM/SENTANDENT

sentinelandenterprise.com

HOLIDAY SHOWS

Fitchburg State presents 'It's a Wonderful Life'

By **Cheryl A. Cuddahy**
Correspondent

FITCHBURG » Relive a classic holiday tale like never before when Fitchburg State University's Communications Media Department presents "It's a Wonderful Life: A Live Radio Play" this month.

Written by Joe Landry and directed by Fitchburg State Professor Kelly Morgan and student Allison Thompson, the classic movie is retold as a charming 1940s-themed radio show, including a live foley operator for sound effects. Experience the impressive vocal range of the actors as they play multiple characters "over the air."

"It's a Wonderful Life: A Live Radio Play" will be performed at 6:30 p.m. Tuesday, Dec. 5 through Saturday, Dec. 9, with matinees at 2 p.m. Saturday, Dec. 9 and Sunday, Dec. 10 in the Wallace Theater for the Performing Arts at the McKay Complex, 67 Rindge Road. Visitors are asked to use Entrance B to access the space. Admission is free and open to the public.

"Audiences will observe the actors performing multiple voices of the characters in the story and watching the sound technician create all the unique sound effects, so the radio audience can imagine the reality of the story," said Morgan.

The holiday show is a great way to get out, have some fun, and meet people in the community.

The production crew is in full swing, doing their best to make the perfor-



COURTESY FITCHBURG STATE UNIVERSITY

Audiences attending the performance of the Fitchburg State University radio play will watch performers voice characters and use a variety of methods to create realistic sound effects in the December show."

mance come to life. "The cast captures the magic of both live theater and radio so well and the opening is such a fun time," said stage manager Colby Hairston. Part of the appeal of the production, he continued, is the off-mic work performed by the cast on stage. "In a show where the actors play actors playing voices, there's a lot that goes on in the studio while we listen to the show, and the cast has done a great job playing with that meta kind of acting."

Holiday positivity is clearly a big aspect of the set itself, even backstage.

"I'd like the readers to know that this is my favorite cast I have ever had the pleasure of working with," said cast member Chris Brennan.

"My favorite part about the production is definitely working with this amazing cast and crew," added cast member Marco Grogan. "Everyone is super talented and supportive of each other, and it's been a blast to work on this."

EVENTS

Fitchburg State presents 'Do the Right Thing'

Submitted Article

FITCHBURG » The Center for Italian Culture (CIC) at Fitchburg State University will present a free screening of Academy Award winner Spike Lee's classic film "Do the Right Thing" in November as part of its year-long exploration of the Italian immigrant experience.

The series, "Nuovo Mondo: A Century of Migrations from and to Italy," will present "Do the Right Thing" (1989) at 5:30 p.m. Thursday, Nov. 30, in Ellis White Lecture Hall in Hammond Hall, 160 Pearl St.

Lee's acclaimed comedy-drama explores the simmering racial tensions in a Brooklyn neighborhood between African-American residents and the Italian-American owners of a local pizzeria, culminating in violence and tragedy on a hot summer day. Admission to the screening is free and open to the public.

In addition, the Fitchburg State University Archives and Special Collections, the CIC, and the Fitchburg Historical Society have collaborated to present a digital exhibit on Fitchburg's Italian-American neighborhood, the Patch.

All materials were sourced from the Amelia V. Gallucci-Cirio Library, the Center for Italian Culture Archives, and the Fitchburg Historical Society.

This digital exhibit was created by Ross Caputi, archival assistant at the Center for Italian Culture Archives, and Asher Jackson, archivist at Fitchburg State University, in collaboration with the Fitchburg Historical Society.

Additional information on the CIC's series can be found online at FitchburgState.edu/Nuovo-Mondo.

(Courtesy Fitchburg State University)



COURTESY FITCHBURG STATE UNIVERSITY

The Center for Italian Culture at Fitchburg State University was established in 1999 as one of the University's community outreach programs.