



# Fitchburg State University

## Board of Trustees Meeting

### Fitchburg State University Board of Trustees

Published on May 2, 2024 at 3:31 PM EDT  
Amended on May 7, 2024 at 10:47 AM EDT

#### Date and Time

Thursday May 9, 2024 at 4:00 PM EDT

#### Location

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

Notice of a meeting of the Fitchburg State University Board of Trustees, Thursday, May 9, 2024 at 4:00 p.m.  
The meeting will take place in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

#### Agenda

|                         | Purpose   | Presenter          | Time           |
|-------------------------|---|--------------------|----------------|
| <b>I. Opening Items</b> |   |                    | <b>4:00 PM</b> |
| Opening Items           |   |                    |                |
| <b>A.</b>               | Record Attendance and Guests  |                    |                |
| <b>B.</b>               | Call the Meeting to Order   |                    |                |
| <b>C.</b>               | Public Comments   |                    | 3 m            |
| <b>D.</b>               | Approve Minutes from the Board of Trustees<br>April 2, 2024 - VOTE (39-22/23) | Approve<br>Minutes | 1 m            |

|  | Purpose   | Presenter | Time           |
|--|---|-----------|----------------|
| <b>II. Personnel Matters</b>                               |   |           | <b>4:04 PM</b> |
| <b>A.</b>  | Consideration of tenure rank for returning faculty member - VOTE (50-23/24)   | Vote      | 5 m            |
| <b>B.</b>  | Reconsideration of sabbatical pay back decision - VOTE (46-23/24)   | Vote      | 2 m            |
| <b>C.</b>  | Executive Session to review Executive Session Minutes from Sept. 13, 2022, June 6, 2023, and April 2, 2024 - VOTE (47-23/24)  | Vote      | 10 m           |
|  | It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 21(a) (7) to comply with, or act under the authority of any general or special law, and MGL c. 30A, Section 22 (f) to review executive session minutes from Sept. 13, 2022, June 6, 2023, April 2, 2024 meetings and determine whether publication may defeat the lawful purposes of the executive sessions. |           |                |
| <b>D.</b>  | Executive Session to Discuss Open Meeting Law Complaint - VOTE (48-23/24)   | Vote      | 10 m           |
|  | It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 23 (a) (1) and (b) to discuss an open meeting law complaint made against members of a public body.   |           |                |
| <b>E.</b>  | Executive Session to Review Complaint - VOTE (49-23/24)   | Vote      | 10 m           |
|  | It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 21 (a)(1) to discuss a complaint made against an employee (other information withheld under MGL c. 214, Section 1B right to privacy).  |           |                |
|  | The Board will return to open session.  |           |                |
| <b>III. Moving expenses for incoming President</b>         |   |           | <b>4:41 PM</b> |
| <b>A.</b>  | VOTE (51-23/24)   | Vote      | 5 m            |
| <b>IV. Budget, Finance and Facilities Committee Report</b> |   |           | <b>4:46 PM</b> |
| <b>A.</b>  | FY25 Proposed Budget  | Vote      | 5 m            |

|              | Purpose   | Presenter | Time           |
|--------------|---|-----------|----------------|
| <b>B.</b>    | FY25 Proposed Fee Presentation and Discussion           |           | 5 m            |
| <b>V.</b>    | <b>FY25 Budget Votes</b>                                |           | <b>4:56 PM</b> |
| <b>A.</b>    | FY25 Budget - VOTE (40-23/24)                           | Vote      | 5 m            |
| <b>B.</b>    | Day Undergrad Fee Increase - VOTE (41-23/24)            | Vote      | 5 m            |
| <b>C.</b>    | Optional Practical Training (OPT) Fee - VOTE (42-23/24) | Vote      | 3 m            |
| <b>D.</b>    | Roll Forward of Funds - VOTE (43-23/24)                 | Vote      | 1 m            |
| <b>VI.</b>   | <b>Food Service Discussion</b>                          |           | <b>5:10 PM</b> |
| <b>A.</b>    | Required Commuter Meal Plan - VOTE (44-23/24)           | Vote      | 10 m           |
| <b>B.</b>    | Chartwell's Contract Renewal - VOTE (45-23/24)          | Vote      | 2 m            |
| <b>VII.</b>  | <b>Nominating Committee Report</b>                      |           | <b>5:22 PM</b> |
| <b>A.</b>    | VOTE (46-23/24)   | Vote      | 5 m            |
| <b>VIII.</b> | <b>Notifications</b>                                    |           | <b>5:27 PM</b> |
| <b>A.</b>    | Personnel Actions (N11-23/24)                           | FYI       | 1 m            |
| <b>B.</b>    | Financial Statements (N12-23/24)                        | FYI       | 2 m            |
| <b>IX.</b>   | <b>Student Trustee Report</b>                           |           | <b>5:30 PM</b> |
| <b>A.</b>    | Allison Turner will provide the Student Trustee Report  | FYI       | 5 m            |
| <b>X.</b>    | <b>Chair's Report</b>                                   |           | <b>5:35 PM</b> |
| <b>A.</b>    | C. Deborah Phillips will provide the Chair's Report     | FYI       | 5 m            |
| <b>XI.</b>   | <b>President's Report</b>                               |           | <b>5:40 PM</b> |

|   | Purpose | Presenter | Time           |
|---|---------|-----------|----------------|
| <b>A.</b> FAFSA Update - Enrollment   | FYI     |           | 5 m            |
| <b>B.</b> End of the Year Activities  | FYI     |           | 3 m            |
| <b>C.</b> Nursing Pinning Ceremony on May 15 at 6 p.m. in Weston                                |         |           |                |
| <b>D.</b> Graduate Commencement Ceremony on May 16 at 6:30 p.m. - Recreation Center             |         |           |                |
| <b>E.</b> Undergraduate Commencement Ceremony on May 18, 2024 at 10:00 a.m. - Campus Quadrangle |         |           |                |
| <b>F.</b> News Articles   | FYI     |           | 1 m            |
| <b>XII. Closing Items</b>   |         |           | <b>5:49 PM</b> |
| <b>A.</b> Adjourn Meeting   | Vote    |           |                |

## Coversheet

### Approve Minutes from the Board of Trustees April 2, 2024 - VOTE (39-22/23)

**Section:** I. Opening Items  
**Item:** D. Approve Minutes from the Board of Trustees April 2, 2024 - VOTE (39-22/23)  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Board of Trustees Meeting on April 2, 2024  
VOTE Minutes.pdf

DRAFT



# Fitchburg State University

## Minutes

### Board of Trustees Meeting

Fitchburg State University Board of Trustees

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#### Date and Time

Tuesday April 2, 2024 at 8:15 AM

#### Location

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

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Notice of a Meeting of the Fitchburg State University Board of Trustees to be held on Tuesday, April 2, 2024 at 8:15 a.m. in Presidents' Hall, Mazzaferro Center, 291 Highland Ave., Fitchburg, MA 01420

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#### Trustees Present

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

#### Trustees Absent

D. Tiernan

#### Guests Present

B. Levy, C. Bullis, C. Hughes, G. Doiron, G. Doiron, J. Bry, J. Murdoch, J. Wolfman, K. Lundgren, L. Bayless, M. Bruun, M. McKenzie, P. Marshall, P. McCafferty, P. Weizer, R. Lapidus, R. Toomey, S. Levine

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### 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 Apr 2, 2024 at 8:15 AM.

**C. Public Comments**

There were none.

**D. Approve Minutes from the Board of Trustees February 6, 2024 meeting - VOTE (27-23/24)**

C. Stimpson made a motion to approve the minutes from Board of Trustees Meeting on 02-06-24.

J. Flanagan seconded the motion.

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

**Roll Call**

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

**II. Presidential Search Committee Report**

**A. Committee's Recommended Finalists for Trustee Interviews**

E. Gregoire read a prepared statement:

Good morning, I'm pleased to provide an update on the presidential search on behalf of the Presidential Search Committee.

I would like to begin by taking a few moments to reflect on the search committee's work and acknowledge the substantial contribution made by its members to Fitchburg State.

Each committee member approached their work with seriousness and dedication befitting the task charged to us. It was clear from the start that members were putting countless hours into their work and contributing to our discussions in meaningful ways to advance our efforts. The passion for Fitchburg State resonated as a common bond for all members and demonstrated everyone's commitment to hear the perspective shared by each other to better understand and inform our decision-making. Many of us met each

other for the first time when we gathered for our first meeting back in early December. Since then, I have been proud to witness the synergy developed among the committee to collaborate, listen to each other's perspectives and strive to reach consensus on our decisions whenever possible. Committee members understood the significance of their work as a milestone for our University and worked diligently to find a leader who will work with us all to advance our mission and forge a bright future.

I honestly wish that I could take the time to provide individual accolades for each member of this committee due to their impressive contributions. But we'd be here for a long while.

Everyone deserves to be acknowledged for the time committed to this weighty endeavor and for your focus on representing key stakeholders from our campus community and for doing it exceedingly well and for your willingness to listen and learn from one another in a respectful and professional manner. I am so fortunate to call you all colleagues and to have collaborated with you all. I do want to genuinely say thank you for harnessing your passion for our University and its community to positively contribute in such a meaningful way to its future.

Jessica & Kelli have worked tirelessly to support the committee even over nights and weekends. Personally, and on behalf of the search committee, I want to thank you for your support and hard work at each step of the process which required substantial details to be addressed behind the scenes and ensuring we remain in compliance with DHE guidance and applicable laws. We deeply appreciate your work to prepare for our meetings, (even anticipating our needs) supporting the process overall, and for your dedication to Fitchburg State.

We understood early in the search process that it was a competitive atmosphere for hiring senior leaders in higher education. The partnership with the WittKieffer team throughout this process has been invaluable both for their expert advice on best practices in the search and for their substantial contributions to developing a well-qualified and diverse pool of candidates on our behalf; all while working to meet our ambitious timelines. I want to thank on behalf of the committee and Board, Greg, Ryan, Randi, and the entire WittKieffer team for their collaboration with us thus far in the process. I'm pleased to report that our recruitment efforts and the content in our Presidential Profile generated substantial interest resulting in nearly 80 applicants for the presidency. Through WittKieffer the opportunity at Fitchburg State described via the profile was shared nationally to approximately 4,000 individuals seeking nominations and applications. These recruitment efforts were focused on individuals working with regional comprehensive universities and included targeted outreach to professional organizations and publications for women and minority groups in higher education. WittKieffer conducted outreach about the position to approximately 1,000 individuals to gauge interest and spread awareness. I'm pleased to share that these efforts yielded a diverse pool of well-qualified nominees and applicants based on various attributes including gender, ethnic/racial identification, and other classifications. Following the application deadline, the Search Committee was provided access to candidate materials



utilizing a secure web portal to maintain the highest level of confidentiality. The committee was able to evaluate candidates based upon the qualifications & qualities defined as “must have” and “should have” in the presidential profile. The Search Committee deliberated and identified ten semi-finalist candidates to invite for first round in-person interviews. The semi-finalist pool continued to be diverse based on professional experiences and along gender, racial, and other identifications. The ten semifinalists self-identified as: 4 women, 6 men, 1 identified as Asian, 1 as Black/African American, 2 as Hispanic/Latino, 6 as White. Two identified as veterans and one as a member of the LGBTQ+ community.

The Presidential Search committee met with the ten semi-finalist candidates for in-person interviews over two days. The committee subsequently deliberated to determine the finalist recommendations to the Board of Trustees. I am pleased to announce today that the Search Committee recommends the following individuals, in unranked, alphabetical order who best embody the preferred characteristics of the next president of Fitchburg State:

- Dr. Michael Godard

Currently serving as Provost at Southeast Missouri State University

- Dr. Donna Souder Hodge

Currently serving as Vice President of Operations & Advancement at Colorado State University Pueblo

- Dr. Karim Ismaili

Currently serving as Executive Vice President & Provost at Bridgewater State University

- Dr. Mark Overmyer-Velazquez

Currently serving as Dean & Chief Administrative Officer at the University of Connecticut Hartford

I am excited to share some brief observations describing each of the recommended candidates and their backgrounds in the unranked order.

Dr. Godard has served as Provost at Southeast Missouri State University for the past five years and previously served at the University of Central Missouri in several roles including as a faculty member, department chair, Vice Provost for Enrollment Management, and Interim Provost. He has held various faculty appointments in exercise

physiology spanning a twelve-year period at four institutions. Dr. Godard has demonstrated success in academic prioritization and innovation to improve curriculum while aligning with regional and workforce needs. His experience in enrollment management & student success is a key strength as he has sought to minimize barriers for students in genuine ways. He has a willingness to engage with innovative approaches including implementing changes to financial models to spur revenue generation.

Dr. Souder Hodge has served as Vice President of Operations and Advancement at Colorado State University Pueblo for the past three years. She has held a variety of administrative posts over six years including Director for the Center for Teaching & Learning, Special Advisor to the President, and Chief Strategy Officer. Prior to these posts at CSU Pueblo she held various faculty appointments in English and Women's & Chicano Studies over seven years. Dr. Souder Hodge has unique strengths due to her faculty background and administrative experience overseeing day-to-day operations of her campus including facilities management, auxiliaries, marketing, and advancement areas. Her experiences as a strong "connector" of others across the campus to address challenges and maintain focus that every area of the institutions contributes to student success. Her command of complex financial & operational issues, ability to execute on prioritized actions, and approach to building relationships on & off campus are compelling strengths.

Dr. Ismaili has served as Provost at Bridgewater State University for over six years including the past three years as Executive Vice President & Provost. Over a three-year period, he previously held other roles at Bridgewater State including as a faculty member, Dean of the College of Graduate Studies, Vice Provost, and special advisor to the president. He has held academic administrative positions at two other institutions and held various faculty appointments in criminal justice spanning 28 years at five institutions.

Additionally, he has held policy advisor positions in two ministries of the Canadian government. Dr. Ismaili has deep leadership experience across several areas at Bridgewater State and has an intimate understanding of the Massachusetts public higher education system. He has a track record of active engagement across functional areas to prioritize innovation and support the academic mission including building relationships with external groups and advancement experience. He displays an empathetic philosophy to his work and is passionate about the role Fitchburg State plays in the region and Commonwealth.

Dr. Overmyer-Velazquez has served as Dean and Chief Administrative Officer at University of Connecticut Hartford for the past six years. He previously served as Director of El Instituto: Institute of Latina/o, Caribbean, and Latin American Studies for nine years. He has previously held various faculty appointments in history, specializing in US Latinx and Latin American history for the past 20 years at UConn. Additionally, he has served as an elected member & Chair of the West Hartford Board of Education for six years. Dr. Overmyer-Velazquez's experience leading UConn Hartford demonstrates his

ability to be an effective leader and cultivate strong community relationships tied to the mission of the campus. He has experience working with students and creating student support initiatives driven by a sense of equity for all student to realize their potential and be successful. His commitment to transparency and accountability in financial management, experience creating efficiencies as part of his work within a system, and communication style to advocate for necessary resources as additional key strengths. In compliance with the DHE's Guidance on Presidential Searches and for your convenience, the finalists curriculum vitae and letter of interest will be shared with the Board and the Department of Higher Education this morning. Chair Phillips will provide official notification of the announced finalist candidates to Commissioner Ortega this morning as well. I would also note that these materials will be publicly available on the Presidential Search website for members of the campus community to reference.

As we now look forward and advance the search to the next phase of the on-campus visits with our finalists, I want to underscore the importance of our engagement in those visits both by the Board and by every member of the campus community. We have prepared robust schedules for the candidates which facilitates conversations with a wide swath of campus constituencies. As you are aware that includes dedicated interview time with the Board to learn more about each candidate's background and their vision for Fitchburg State. The appointment of a new president will be the most consequential action we will take during our tenure as trustees. I encourage everyone to participate fully in these Board sessions and to spend time on campus to attend other sessions if your schedule allows. The candidates will be visiting campus on the following dates: April 10 & 11 – Dr. Ismaili; April 16 & 17 – Dr. Overmyer-Velazquez; April 22 & 23 – Dr. Souder Hodge; April 29 & 30 – Dr. Godard. Following the candidate visits the campus community will be encouraged to respond to a survey to collect as much insight from the campus community on the candidates. These survey results would then be shared with the Trustees to help inform our decision-making process.

In closing, personally it has been a tremendously enriching experience to partner with so many wonderful colleagues across the University community and endeavor to find the right person to lead Fitchburg State at this critical moment. I am left with a palpable feeling of enthusiasm for our mission to transform the lives of our students and the commitment of our campus community to tackle our challenges together. I'm an optimist, especially about Fitchburg State, and feel confident that we're able to meet our challenges and those on the horizon when we work together as a community.

I am deeply grateful to Chair Phillips and the Board for the opportunity to lead the presidential search and contribute to the University in such a meaningful way. I'm humbled by the opportunity and appreciate the confidence placed in my leadership of this process. I'm excited about the leadership potential that each of our finalists possess and look forward to welcoming them to campus in the coming weeks.

Thank you again, that concludes my remarks, but I am happy to answer any questions from Board members.

M. Fiorentino joined at 8:16 a.m.

K. Spinelli joined at 8:29 a.m.

### III. Tenure

#### A. Tenure- VOTE (28-23/24)

The President next presented the candidates for tenure with promotion. He highlighted that there is a formal process for candidate review. All candidates are recommended and supported by the candidate's respective department, Department Chair, Dean and Provost before presidential review.

M. Fiorentino, Jr. made a motion to approve the faculty presented for tenure with promotion effective September 1, 2024.

C. Stimpson seconded the motion.

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

#### Roll Call

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

### IV. Personnel

#### A. Short Term Educational Leave Request - VOTE (30-23/24)

President Lapidus presented a staff member requesting a short-term educational leave. Ms. Nicole Salerno, Assistant Director, International Education would like to take a leave to better familiarize herself with Italy. In her position, she coordinates student trips and this leave would provide her with first hand experience.

There was a discussion.

M. Fiorentino, Jr. made a motion to approve the short term educational leave request.

E. Gregoire seconded the motion.

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

**Roll Call**

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

**V. Executive Session - Sabbatical Waiver Request**

**A. VOTE (31-23/24)**

M. Fiorentino, Jr. made a motion to enter into executive session in accordance with MGL c. 30A, Section 21 (a)(1) to discuss the reputation, character, physical condition or mental health, rather than professional competence, of an individual in relation to the sabbatical leave provision within the terms of Article XV, Section C of the MSCA and BHE collective bargaining agreement. (other information withheld under MGL c. 214, Section 1B right to privacy) The Board will return to open session.

E. Gregoire seconded the motion.

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

**Roll Call**

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

The meeting reconvened at 9:03 a.m.

**VI. Executive Session Discussion**

**A. VOTE (29-23/24)**

E. Gregoire made a motion to vote that it has been presented with reasons satisfactory to excuse a faculty member from the requirements of Article XV, Section C of the MSCA

and BHE collective bargaining agreement relative to the completion of service following a sabbatical and approves the request.

A. Turner seconded the motion.

The motion did not carry.

**Roll Call**

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

**VII. Budget, Finance and Facilities Committee Report**

**A. Update from Karen Spinelli, Chair of the Budget, Finance and Facilities Committee**

K. Spinelli updated the Board on the committee meeting last week where the draft budget was reviewed.

J. Bry provided a summary of the meeting that discussed the budget in detail which included collective bargaining, performance funding, staff reductions, personnel, enrollment projections, performance funding, graduate enrollments, housing occupancy, fund balances, fee history, fee increases and the dining hall renovations.

**VIII. Notifications**

**A. Promotions (N06-23/24)**

The promotion notifications were submitted for informational purposes.

**B. Personnel Notifications- (N07-23/24)**

The personnel notifications were submitted for informational purposes.

**C. 990's Foundation (N08-23/24)**

The Foundation 990's were submitted for informational purposes.

**D. 990's Supporting Org. (N09-23/24)**

The Supporting Org. 990's were submitted for informational purposes.

**IX. Student Trustee Report**

**A. Update from Student Trustee Allison Turner**

A. Turner reported on the various student events taking place. She said it's great to see people participating in all the programs including the student town hall that would be taking place later in the evening. SGA is implementing mandatory participation for all members to attend the Presidential Search student sessions.

**X. Chair's Report**

**A. Update from Chair Debbie Phillips**

D. Phillips will provide her report later in the meeting.

**XI. President's Report**

**A. Enrollment Update**

The president reported that not a lot has changed since the last time he reported as it relates to enrollment. We have been doing a great deal of outreach to perspective students. In review of applications, they are up slightly from last year. The Enrollment Management division is being very aggressive in finding ways to increase enrollment.

**B. Future Falcon Day**

There were two Future Falcon days scheduled this semester. The first event, the weather was not nice resulting in a 65% show rate of students. Those that did attend reported a meaningful experience. There has been strong interest in the Honor's program.

**C. AAQEP Accreditation**

The president informed the Board of the AAQEP Accreditation for the Education Department. The AAQEP team was impressed with the department. He talked about the Future Educators program as an area they were impressed with on the campus.

**D. Academic Calendar 2024-2025**

The 2024 - 2025 Academic Calendar was presented for informational purposes.

**E. News Articles**

The news articles were submitted for informational purposes.

**XII. Events for Consideration**

**A.**

**Going Away Events on April 25 at 3:30 p.m. and May 2 at 3 p.m.**

- B. Convocation - April 18 at 2:00 p.m. - Weston Auditorium**
- C. Nurse Pinning Ceremony on May 15 at 6:00 p.m. - Weston Auditorium**
- D. Graduate Commencement Ceremony on May 16 at 6:30 p.m. - Recreation Center**

The president reported that this will probably be the largest class in the history of the school, and that a ticketing system will be used. The next president will have to make decisions on possibly moving to a different location or changing the format.

As a final item not on the agenda he reported the unexpected resignation of the football coach. The coach cited personal reasons. This announcement has serious implications for the team and current recruit given the timing. The coach has notified the team. The university is talking with the assistant coaches and others to work through the situation and identify a coach for the upcoming season.

- E. Undergraduate Commencement Ceremony on May 18 at 10:00 a.m. - Campus Quadrangle**

**XIII. Candidate Interviews**

**A. Format/Develop Questions**

D. Phillips presented the last item for discussion, the format and questions for the presidential interviews. She suggested doing it similar to the search committee.

The sample questions were discussed and refined to include all sectors of managing the university. Specific questions were assigned to a board member. It was stressed that time management at the meeting will be important.

There was a discussion on the approach of what to ask, how to ask, and follow-up questions. Board members should be prepared to be asked questions as well.

The Board will meet on Friday, April 5 at 8:30 a.m. to continue the discussion.

**XIV. 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 10:06 AM.

Respectfully Submitted,

D. Tiernan



**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                                |                             |
|--------------------------------|-----------------------------|
| TO: Board of Trustees          | DATE:<br>May 9, 2024        |
| FROM: The President            | REQUEST NUMBER:<br>39-23/24 |
| SUBJECT: Board Meeting minutes |                             |

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the April 2, 2024 Board Meeting.

## Coversheet

### Consideration of tenure rank for returning faculty member - VOTE (50-23/24)

**Section:** II. Personnel Matters  
**Item:** A. Consideration of tenure rank for returning faculty member - VOTE (50-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Tenure for returning faculty.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                       |                             |
|-----------------------|-----------------------------|
| TO: Board of Trustees | DATE:<br>May 9, 2024        |
| FROM: The President   | REQUEST NUMBER:<br>50-23/24 |
| SUBJECT: Tenure       |                             |

It is requested that the Board of Trustees vote to grant tenure to Dr. Christopher Adams upon his appointment to position of Associate Professor in the Department of Psychology Science, pursuant to G.L. c. 15A, 22, and in accordance with the Memorandum of Agreement entered into between the University and the Massachusetts State College Association.

## Coversheet

### Reconsideration of sabbatical pay back decision - VOTE (46-23/24)

**Section:** II. Personnel Matters  
**Item:** B. Reconsideration of sabbatical pay back decision - VOTE (46-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE Reconsideration of sabbatical pay back.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|  |                                 |
|--|---------------------------------|
| TO: Board of Trustees                                    | DATE:<br>May 9, 2024            |
| FROM: The President                                      | REQUEST NUMBER:<br><br>46-23/24 |
| SUBJECT: Reconsideration of sabbatical pay back decision |                                 |

It is requested that the Fitchburg State University Board of Trustees vote to reconsider its April 2, 2024 vote to not excuse Associate Professor Benjamin Levy from repaying the Commonwealth in the amount equal to the portion of the salary received by him while on sabbatical leave for the 2023/2024 academic year.

## Coversheet

### Executive Session to review Executive Session Minutes from Sept. 13, 2022, June 6, 2023, and April 2, 2024 - VOTE (47-23/24)

**Section:** II. Personnel Matters  
**Item:** C. Executive Session to review Executive Session Minutes from Sept. 13, 2022, June 6, 2023, and April 2, 2024 - VOTE (47-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE Executive Session May 9, 2024 - Minutes.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                            |                                 |
|----------------------------|---------------------------------|
| TO: Board of Trustees      | DATE:<br>May 9, 2024            |
| FROM: The President        | REQUEST NUMBER:<br><br>47-23/24 |
| SUBJECT: Executive Session |                                 |

It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 21(a) (7) to comply with, or act under the authority of any general or special law, and MGL c. 30A, Section 22 (f) to review executive session minutes from Sept. 13, 2022, June 6, 2023, April 2, 2024 meetings and determine whether publication may defeat the lawful purposes of the executive sessions.

## Coversheet

### Executive Session to Discuss Open Meeting Law Complaint - VOTE (48-23/24)

**Section:** II. Personnel Matters  
**Item:** D. Executive Session to Discuss Open Meeting Law Complaint - VOTE  
(48-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE Executive Session May 9, 2024 - Open Meeting Law Complaint.pdf



**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                            |                                 |
|----------------------------|---------------------------------|
| TO: Board of Trustees      | DATE:<br>May 9, 2024            |
| FROM: The President        | REQUEST NUMBER:<br><br>48-23/24 |
| SUBJECT: Executive Session |                                 |

It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 23 (a) (1) and (b) to discuss an open meeting law complaint made against members of a public body.

# Coversheet

## Executive Session to Review Complaint - VOTE (49-23/24)

**Section:** II. Personnel Matters  
**Item:** E. Executive Session to Review Complaint - VOTE (49-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE Executive Session May 9, 2024 - Review Complaint.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                            |                             |
|----------------------------|-----------------------------|
| TO: Board of Trustees      | DATE:<br>May 9, 2024        |
| FROM: The President        | REQUEST NUMBER:<br>49-23/24 |
| SUBJECT: Executive Session |                             |

It is requested that the Board of Trustees enter into executive session in accordance with MGL c. 30A, Section 21 (a)(1) to discuss a complaint made against an employee (other information withheld under MGL c. 214, Section 1B right to privacy).

The Board will return to open session.

# Coversheet

## VOTE (51-23/24)

**Section:** III. Moving expenses for incoming President  
**Item:** A. VOTE (51-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE Moving Expenses for Incoming President.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|   |                                 |
|---|---------------------------------|
| TO: <b>Board of Trustees</b>                    | DATE:<br><br>May 9, 2024        |
| FROM: The President                             | REQUEST NUMBER:<br><br>51-23/24 |
| SUBJECT: Moving Expenses for Incoming President |                                 |

It is requested that the Board of Trustees of Fitchburg State University approve moving expenses for the incoming president not to exceed \$25,000.00.

# Coversheet

## FY25 Proposed Budget

**Section:** IV. Budget, Finance and Facilities Committee Report  
**Item:** A. FY25 Proposed Budget  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Attachment A - FY2025 Budget Narrative.pdf  
Attachment B - FY25 Proposed Budget.pdf  
Attachment C - FY25 Budget Delta Highlights.pdf  
Attachment D - Supplemental Materials.pdf

April 25, 2024

Board of Trustees  
Fitchburg State University  
Fitchburg, MA 01420

## **FY2025 BUDGET NARRATIVE**

The University continues to maintain its budget planning approach with a focus on thoughtfully-prepared enrollment projections and placing a priority on controlling expenditures, given the limitations of driving revenue being dependent on enrollment and fees. With the current fiscal year indications being on target, this provides a foundation of confidence for FY25.

The University community was directed to plan generally for a level-funded budget, with small divisional reductions as determined by the unit leadership. Initiatives to control costs have been achieved with savings in both operating and personnel expenses. The FY25 budget proposes continued efforts, including \$2.5M in personnel savings.

Other efforts being employed include working to maximize the residence hall participation and revenue, with the expansion of premium singles to Mara 6 & 7. However this is still an area of challenge, necessitating the University contributing funds to this auxiliary operation. SGOCE is also working to adjust as program enrollment continues to moderate (as predicted).

As such, the overall health of the university continues to be stable, with cash and investments of nearly \$45.8M. However, with the Housing and Day operating units continuing with post-pandemic enrollments, both units will experience operating negatives in FY25. Therefore, continued efforts will be needed to reconcile these operations with the enrollment projections. Those challenges must be addressed strategically and thoughtfully in order to permanently stabilize the University finances.

## Summary of Operating Budget

The funding forecast for revenue includes a state appropriation of \$41.9M, in addition to tuition and fees of \$47M, auxiliary services of \$12.9M, with a total revenue of \$118.5M, representing a \$1.2M increase over the FY24 updated budget. The expense forecast will increase by \$1.3M from the FY24 budget to \$121.7M. This results in a total operating deficit of \$3.1 million. This is primarily a result of shortfalls of \$1.7 million in the day division and \$1.4 million in the housing operation. With the additional targeted saving efforts, the result will reduce the day operating budget deficit to \$639K, which continues the trend toward rectifying the structural deficit.

The University has and continues to engage in efforts to achieve savings. Even with those efforts, the increase in costs related to personnel (in particular), and other expenses, exceeds the savings performance efforts. The measures initiated in recent years focused on personnel cost management, which remains a major key to limiting the growth of expenses. This includes careful management of vacant positions, holding positions open for three months, and taking advantage of opportunities to reduce positions as vacancies and needs/priorities allow. To date, this has achieved over \$2.4 million in savings. The FY25 budget proposal is again setting personnel savings targets to build on the work done to date, with an additional \$1M in staff reductions/attrition proposed.

Other measures for FY25, in addition to position management, have been deployed to enact cost savings while continuing to focus on academic and student support programs. This includes the reassessment and reduction of funding for the Academic and University Innovation funds (reduced by \$125K), another \$125K in divisional reductions, and the elimination of certain operating expenses, such as EAB global and APS (\$363K), and continued savings in both day and SGOCE adjunct budgets. These efforts assist in achieving further cost controls, which help to balance increases not fully controlled by the University.

As in past years, there is a line in the revenue section of the budget summary titled "Reserves from Fund Balances." The use of these funds allows continued level funding of programs, with sufficient reserves available. The exceptions are the Day and Housing trust fund balances, which are anticipated to be fully expended at the close of FY24. Thus in FY25, \$1.4M must be contributed to subsidize the housing trust fund in order to maintain the minimum required for bond covenants.

### Revenue and Expense Differences from FY24

The major difference between the revenue budgets for FY24 budget update and FY25 budget proposal is the \$4.9M increase in state appropriations. Tuition and Fee revenue is down by



\$700K, after experiencing a one-year increase in FY24 resulting from higher than projected enrollments. The Housing Budget is anticipating a revenue increase due to an 11% increase in year-over-year occupancy projections, as well as expansion of the option for premium singles. However, and as anticipated, the SGOCE Accelerated On-Line program revenue forecasts a decrease of \$1.7M, resulting from the expected moderating of demand for these programs.

The major difference for the increased operating expenditure is personnel costs, as well as utilities, and payments to MSCBA. This, as noted above, is partly offset by the state appropriation increase for collective bargaining contracts (but only for the day program). Further, with more salary costs being supported by the state appropriation, the university achieves a reduction in pension- and insurance-related expenses, a savings of \$1M over FY24.

Another notable difference includes Utilities. This line, inclusive of both utilities and space use costs, will decrease slightly as a result of a reduction in property obligations, even while utility commodity costs have continued to rise. Finally, with the reduction in the Accelerated On-Line enrollments, the partner payment is correspondingly reduced.

**FY25 Budget Delta Highlights**

**Savings**

|                                      |                    |
|--------------------------------------|--------------------|
| Reduce television cable services     | \$ 54,000          |
| Reduced property expenses            | \$ 135,000         |
| EAB Global and APS not renewed       | \$ 363,028         |
| Academic Affairs - Divisional Cut    | \$ 29,137          |
| Enrollment - Divisional Cut          | \$ 4,000           |
| Student Affairs - Divisional Cut     | \$ 25,390          |
| Admin & Finance - Divisional Cut     | \$ 23,932          |
| Development - Divisional Cut         | \$ 2,908           |
| President - Divisional Cut           | \$ 39,582          |
| Adjunct Budget - Day                 | \$ 188,021         |
| Print Services reduction             | \$ 40,000          |
| Innovation Funding reduction         | \$ 125,000         |
| Personnel Savings - FY25 Implemented | \$1,047,595        |
| Adjunct Budget - GCE                 | \$ 61,379          |
| <b>Total Savings</b>                 | <b>\$2,138,972</b> |

**Increases**

|                        |                    |
|------------------------|--------------------|
| Utility Cost           | \$ 125,000         |
| Housing Subsidy        | \$1,360,000        |
| CBA Increases          | \$1,444,561        |
| Housing Payments       | \$ 334,000         |
| <b>Total Increases</b> | <b>\$3,263,561</b> |

## Significant Contributors to Operating Budget

### State Appropriations

The University receives funds as appropriated by the state legislature and approved by the governor on an annual basis. The governor's FY25 budget recommendation includes an 11.43% increase in our state appropriation line, bringing the new total to \$41,993,969. The increase equates to the amount we received this fiscal year, FY24, to cover the one-year negotiated collective bargaining agreements, as well as the Performance Funding being added to the base appropriation.

The collective bargaining funding was larger than expected in FY24 as a result of the methodology used by the Executive Office of Administration and Finance. This benefited the University both from a perspective of more personnel costs being borne by the state appropriation, and also by reducing the burden on the University to cover fringe benefit costs for those not on state appropriation. Given the current condition of State finances, it is not assumed that A&F will use the same methodology. So for purposes of this budget, we have assumed the historical method used in determining CBA funding.

The FY25 **performance formula funding** is currently set level to that of FY24; however, this is somewhat in flux as the Governor's budget and the House Budget are both proposing a reduction to this funding. The formula was developed collaboratively by the Board of Higher Education (BHE) and the state universities to determine total resource requirements and the appropriate allocation of new state funding to support the individual institutions. The current formula is performance based and it is derived from five components: Enrollment; College Participation; College Completion; Workforce Alignment; and Productivity/Affordability.

FY25 will be the second year for the distribution of **Fair Share funding**. As the revenue projections appear to be stable, despite the performance of other state revenues, the Commonwealth is starting to look at longer-range approaches to maximize the benefit of this funding source, particularly with student financial aid and capital projects. While this funding does not directly add to the appropriation that the University receives, the increase in student financial aid does significantly assist students in meeting the cost of their education.

### Fair Share Funding Highlights

|  |               |
|--|---------------|
| Financial Aid MassGrants                 | \$80,000,000  |
| State University SUCCESS Program         | \$14,000,000* |
| Higher Education Endowment Match SU & CC | \$10,000,000* |
| Mental Health Grants                     | \$ 5,000,000* |

\*Governor's H2 and House Budget different

Additionally, although the state university segment is not a direct beneficiary, funding is proposed to continue for **MassReconnect** - A program designed to provide a cost-free community college education to adults age 25+. Historically community colleges have been a significant enrollment feeder; this was prior to their precipitous drop in enrollment post pandemic. The opportunity provided by these funds has reinvigorated enrollment at the community colleges. In the past, the community colleges have been the primary source of transfer students, and this resurgence may ultimately also benefit FSU enrollments if these students continue on to earn their four-year degree.

Lastly, **Deferred Maintenance** funding is again being proposed from the Fair Share funds. Rather than designating these funds for one-time use in FY25, both the Governor's and House budgets are proposing to leverage these funds to initiate a capital bond bill for higher education. The proposal includes a framework for developing how this funding would be allocated, accessed, and purposed to be completed during FY25.

## **Personnel**

### **Staffing**

Personnel costs account for nearly 50% of the operating budget. It is important to note that the state appropriation of \$41.9 million continues to fall short of the \$47.1 million needed to fully fund the day unit payroll. This shortfall is further compounded because every payroll dollar not covered by the state appropriation adds an additional 45% percent to cover employee fringe benefits – or an additional \$2.9 million.

University leadership has been working carefully to control personnel costs, including the elimination of twelve positions from the proposed FY25 budget. However, despite efforts to capture savings of over \$1M in the FY25 budget, those savings end up being absorbed by the continuing increases for employee contracts, for which the University has, as noted above, a burden beyond what the state appropriation covers. As such, the University leadership is proposing to realize another \$1M in personnel savings during the fiscal year.

The leadership team of the university also continues to evaluate and capitalize on staffing vacancies to reconfigure positions that will strategically serve current and future needs. As part of the cost containment and right-sizing efforts, evaluation of new faculty hires has been very focused. Close evaluation of course offerings is continuing to be conducted each semester to identify consolidation or elimination of under-enrolled classes, and to capitalize on utilization of full-time faculty, resulting in further reductions for FY25 of \$188K expenses for day adjunct faculty.

## **Collective Bargaining**

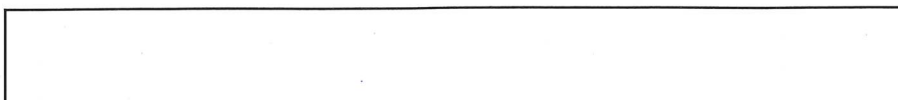
All Collective Bargaining unit contracts either have expired or will expire at the end of this fiscal year. Negotiations are currently underway for DGCE, and bargaining for other units will be getting underway in the coming weeks. Although the timing of completed and ratified contracts being effective is unclear, an increase is factored into the proposed operating budget for FY25. Unlike recent years, it appears that salary increase parameters may be available early in the process, which could be beneficial to helping the negotiations move forward promptly. However, given the current bargaining environment being seen both locally and around the country, the process has the potential to be lengthy.

## **DAY Undergraduate Enrollment**

The Enrollment Management team has been working to implement new strategies and a strategic enrollment plan for recruitment. Efforts have included participating in the Common Application - which allows prospective students to prepare a single application that can be sent to multiple schools, and also as a tool that helps to suggest additional schools for consideration. The number of applications has increased as a result, and the department is working to turn that into deposits. Additionally, the team has significantly increased the number of school visits, provided more and different types of campus visits that better suit today's high school students, and expedited the application decision and scholarship award timelines.

Also in FY24, the University received grant funding and is currently working with a consultant to assess the student success initiatives, including an inventory of current initiatives and practices, a review of policies, and development of an evaluation process for the First Year Experience (FYE) Program. The effort will be complete by the end of FY24, allowing opportunity for implementation actions in FY25. Retention being an essential component to maintaining the university enrollment performance, giving this more structured focus and measurable assessment and tools will help this effort going forward.

Current enrollment projections (see below) are expected to continue level through FY25 and FY26, before beginning to decline again in FY27. The decrease is expected as a result of demographic changes. One potential development that may help counter this decline could be an increase in transfer students, if those currently benefiting from free community college elect to continue their education and enroll to complete their bachelor degrees.



| <b>Fall Enrollment Predictions</b> |                |                |                |               |
|------------------------------------|----------------|----------------|----------------|---------------|
| <b>Day Undergraduate</b>           | <b>FY 2025</b> | <b>FY 2026</b> | <b>FY 2027</b> | <b>FY2028</b> |
| <b>UG Day FTE</b>                  | 2212           | 2210           | 2143           | 2143          |
| <b>UG Headcount</b>                | 2478           | 2475           | 2400           | 2400          |

**Financial Aid** (see Appendix 1)

One unexpected challenge impacting all of higher education for FY25 is the delay in FAFSA processing and the ability of campuses to issue financial aid awards. Deposits for the FY25 year, while showing early positive performance, have stalled somewhat. Indicators suggest that students and families are awaiting packaging before making commitments. It is too early yet to speculate what this may do to matriculation decisions altogether. Fitchburg State is continuing to monitor the developments in this process closely, maintain communication and outreach to both deposited and accepted students, and are prepared to make other adjustments (such as delaying billing and orientation dates), to accommodate students and families making later decisions. Nevertheless, the University is prepared and expects to continue its history of leveraging all university, state, and federal programs to offer the best aid packages to students possible. As of FY24:

- 73% of UG students receive “free monies” financial aid
- 91% of UG students receive financial aid

With the noted increases in the Mass Grant Plus program, among other Commonwealth funding efforts, the University is able to provide significant financial aid to students. Average aid awards for free monies have increased over the last several years, and when combined with all aid options the average net price for undergraduate commuter students is -\$737, and for on-campus resident students \$3991 as of Fall 2023. (See Appendix 2) The [MassGrant Plus](#) program has already had a significant impact on students by helping reduce their unmet need. Additional MASSGrant Plus funding will not only help reduce the gap but also expand the number of students that can be served by this program.

**Residence Hall Occupancy**

The occupancy rate of residence halls is expected to increase slightly, and the operating budget for the Housing Trust Fund, while still projected to be in deficit by approximately \$1.4 million in FY25 and \$1.1 million in FY26, is performing better than previously projected. Some initiatives to increase occupancy include working to re-establish a program to offer on-campus housing to

MWCC students, offering more single rooms, and continuing the Regional Enrollment Deposit Initiative (REDI). One highly successful initiative from FY24 that will be expanded in FY25 is the offer of more premium singles in Mara, resulting in the re-opening of Mara Village 6 & 7. These singles offer upgrades to the rooms, including the replacement of the two twin beds with a full-size, and removal of the second set of furniture, resulting in a spacious accommodation within a suite environment with only four total occupants.

However, these initiatives are not enough to solve the problem entirely. Discussions have already begun on how to repurpose the excess bed capacity in residence halls to reduce the financial impediment on the Housing Trust Fund. Some changes, such as repurposing the space for student support services and administrative support, are already being implemented along with discussions with Making Opportunity Count (MOC) for the creation of a daycare center. Furthermore, longer-term discussions are underway with both the Massachusetts State College Building Authority (MSCBA) and the Department of Capital Asset Management and Maintenance (DCAMM) regarding returning the ownership of Herlihy to DCAMM. This would take the building off the rolls for residence capacity and would make the building eligible for state capital improvement funding.

### **School of Graduate, Online and Continuing Education Update (SGOCE)**

The university generates revenue from a variety of sources, including the self-supporting operation of the SGOCE. The SGOCE has two primary sources of revenue: tuition and the Ed Service Fee. Tuition supports SGOCE programs and operations, while the Ed Service Fee generates approximately \$6.5 million that supports university operations; including academic, administrative and student services, and facilities that support students in both day and GCE programs. As such, Graduate and Continuing Education (GCE) and Accelerated Programs (AP) continue to contribute significantly to the overall financial health of the university.

The competition among universities that provide graduate, online, and continuing education programs has continued to increase, thus beginning to impact the demand for these programs. With the leveling off particularly in the Accelerated On-Line enrollments, the result is a reduction in both revenues and expenses. Revenue is projected to decrease by 7.7% to \$19.8 million. Expenses are projected to also decrease to \$19.8 million, so that overall performance will be net positive.

The nature of the SGOCE unit, with its unique collective bargaining unit for instruction, allows the unit to adjust costs in a much more rapid fashion than the day programs, in response to enrollment and changing academic program demands.

## Facility and Technology

The university has continued to deploy funds toward capital renewal as an institution and in partnership with the Division of Capital Asset Management and Maintenance (DCAMM). These efforts are designed to continue to improve the learning, living, and working environment of the campus. The University also received one-time funds in FY23 and FY24 amounting to \$4.7M that are being used to address deferred maintenance items such as HVAC equipment and roof replacements.

The FY24-28 DCAMM 5-Year Critical Repair (see Appendix 3) program is now underway; it continues to require the University to provide a match on the investment from DCAMM, and those funds must all be used for deferred maintenance. The University will also continue to fund programmatic improvements at the same time, so as to achieve modernized space to serve our students, faculty, and programs. Therefore, the University will continue to level fund its contribution to the capital program for FY25.

As such, the University has engaged a design team to focus on developing a comprehensive study for the Conlon Complex. Construction is expected to kick-off in FY25 with a project to replace all exterior windows and doors throughout both Conlon buildings. This project helps to achieve requirements for the new energy code, which helps with the ultimate goal of decarbonization as required by Executive Order 594. It is anticipated that future funding from DCAMM will also be tied to and focused on achieving this goal.

Following closely behind will be completion of the study for the third floor of Conlon to support the Communications Media Film/Video program, which is one of the University's most prominent and popular programs. This is then expected to be the second phase of what will likely be four phases of construction under the 24-28 Critical Repair Program plan. Finally, the program studies associated with Humanities and Engineering Technology will be completed and consolidated into a complete master plan for Conlon by the end of Fall 2024.

Efforts to maintain and keep up with developments in Technology are also ongoing. FY25 investments include a Firewall Refresh: the University maintains dual firewalls, which safeguard the servers and all devices used by our faculty, staff, and students, and are critical to our network security. They currently handle all network traffic and are nearly seven years old. An upgrade is essential to keep up with the increasing demands for bandwidth and heightened security measures required by today's evolving threat landscape. Other initiatives include the transition to the new Banner Self-Service platform, offering more robust and capable Banner 9 web applications; upgrade of the Identity and Access Management system, to meet increasing system security requirements; and the initiation of a multi-year effort to replace the outdated phone cabling currently used for our Wireless Access Points (WAPs) in the residence halls.

## Proposed Fee Increases

Fitchburg State continues to closely control and hold fees to minimal increases, and has done so for the past eight years, currently offering the lowest mandatory fees of all the State University campuses in Massachusetts. (See Appendix 4 & 5) The University is recommending a 3% mandatory fee increase for FY25. This will achieve multiple goals, and yet do so with minimal impact to the average student, particularly with the significant expansion of state financial aid.

The 3% fee increase proposal will cost \$150 per semester for a full-time student, which will result in additional revenue of \$626,464 for the fiscal year. Even with this increase in fees, Fitchburg State will continue with the lowest of mandatory fees of all but one of our peers; and that is before the extent of other state university campus fee increases are known for FY25. This incremental increase helps to maintain the student experience, especially as we benchmark against our state university peers.

The cost of tuition and fees is already substantially offset by federal and state financial aid, especially as aid programs in the Commonwealth are increasing dramatically as a result of the Fair Share Act. Already 73% of students receive free aid (no loans), and with the proposed expansion of the MassGrant Plus program, MA residents with family incomes of up to \$110k could receive the benefit.

The other proposed fee would be assessed to international students, and would be used to offset the costs of managing the required federal tracking, and reporting for this growing population of students, and to help them navigate these requirements. Specifically this fee would be used to expand a current half-time position to a full-time position within International Education. The proposed fee is \$250/semester.

## Conclusion

Fitchburg State University has the resources to allow the incoming president, the leadership team, the campus community, and the board of trustees the opportunity to continue working together to develop a thoughtful long-term sustainable financial model.

The FY25 budget represents ongoing efforts to strategically invest in the future, while at the same time demonstrating continued diligence in both cost containment, right-sizing of



operations, and leveraging opportunities and information to take the right actions at the right time.

The proposal as presented ensures the continued efforts of the University to move forward with its strategic plan and “provide an education that makes a difference. This means: creating a student-ready university that provides equitable access to high-quality education; offering all students the opportunity to apply their learning so that they are career-ready; working as a responsible citizen of our host community and the surrounding natural environment so that we can continue to build the public’s trust in public education; and ensuring that we steward our resources so that the university can serve the Commonwealth for another 125 years.”<sup>1</sup>

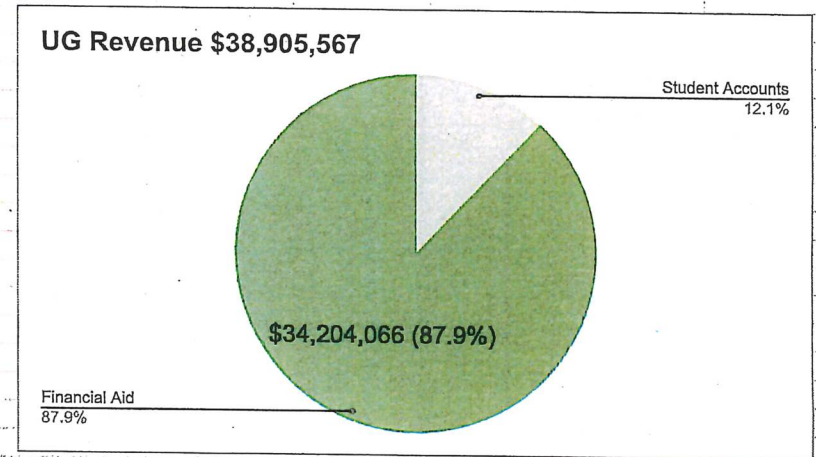
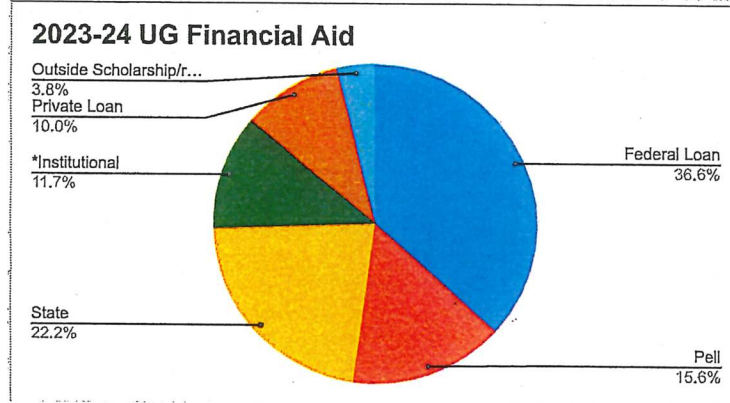
# Appendix 1

## Financial Aid Overview

### Financial Aid Overview

| 2324 financial aid           | UG amount           | # UG students | % UG | # Grad     | GA amount          | Total Aid           |
|------------------------------|---------------------|---------------|------|------------|--------------------|---------------------|
| <b>Total Aid</b>             | <b>\$34,204,066</b> | <b>2,754</b>  |      | <b>590</b> | <b>\$7,497,730</b> | <b>\$41,701,796</b> |
| Federal Loan                 | \$12,532,053        | 2,112         | 76   | 551        | \$7,062,368        | \$19,594,421        |
| Pell                         | \$5,340,658         | 1,092         | 40   |            |                    |                     |
| State                        | \$7,584,289         | 1,693         | 61   |            |                    |                     |
| *Institutional               | \$4,010,225         | 1,371         | 50   |            |                    |                     |
| Private Loan                 | \$3,425,949         | 305           | 11   | 43         | \$435,362          | \$3,861,311         |
| Outside Scholarship/resource | \$1,310,892         | 212           | 8    |            |                    |                     |

\*REDI and Falcon out of state.



| Revenue               | Total Financial Aid |                                |
|-----------------------|---------------------|--------------------------------|
| UG tuition and fe     | 26,407,459          |                                |
| Housing and foo       | 12,498,108          |                                |
| <b>Undergrad Tota</b> | <b>38,905,567</b>   | <b>\$34,204,066</b> <b>88%</b> |
| SGOCE (not incl       | 5,979,435           |                                |
| AP                    | 7,196,209           |                                |
| Extended Campi        | 833,095             |                                |
| CPS                   | 198,989             |                                |
| <b>Graduate Total</b> | <b>\$14,008,739</b> | <b>\$7,497,730</b> <b>54%</b>  |
|                       | <b>\$52,914,306</b> | <b>\$41,701,796</b> <b>79%</b> |

|  |     |
|--|-----|
| Percent of UG eligible for MassGrant+ @ \$110K AGI | 72% |
| Percent of UG students that receive "free monies"  | 73% |
| Percent of UG students that receive financial aid  | 91% |

## Appendix 2

### UG Net Price History

#### First Time Full Time DAY UG Net Price

2014-15 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 9,260       | 2,971            | 6,289     | 7,499                | 1,761     |
| on campus | 18,173      | 5,555            | 12,618    | 13,542               | 4,631     |

2015-16 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 9,935       | 3,001            | 6,934     | 8,225                | 1,710     |
| on campus | 19,105      | 4,622            | 14,483    | 13,308               | 5,797     |

2016-17 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,135      | 3,466            | 6,669     | 8,647                | 1,488     |
| on campus | 20,335      | 5,457            | 14,878    | 14,512               | 5,843     |

2017-18 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,175      | 3,531            | 6,644     | 8,909                | 1,266     |
| on campus | 20,715      | 5,986            | 14,729    | 15,017               | 5,698     |

2018-19 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,375      | 3,634            | 6,740     | 8,671                | 1,704     |
| on campus | 21,295      | 6,355            | 14,940    | 15,306               | 5,988     |

2019-20 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,520      | 3,620            | 6,900     | 8,457                | 2,063     |
| on campus | 21,815      | 6,513            | 15,302    | 15,643               | 6,172     |

2020-21 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,565      | 3,915            | 6,650     | 7,817                | 2,748     |
| on campus | 21,650      | 6,626            | 15,024    | 15,774               | 5,876     |

2021-22 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,565      | 5,053            | 5,512     | 8,613                | 1,952     |
| on campus | 21,650      | 6,936            | 14,714    | 15,286               | 6,364     |

2022-23 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 10,921      | 5,808            | 5,113     | 9,646                | 1,275     |
| on campus | 22,519      | 9,357            | 13,162    | 17,318               | 5,201     |

\*\*2023-24 Direct Cost and Net Price for FT/FT

|           | Direct Cost | less free monies | Net Price | less all student aid | Net Price |
|-----------|-------------|------------------|-----------|----------------------|-----------|
| commuter  | 11,046      | 6,975            | 4,070     | 9,408                | 1,637     |
| on campus | 22,854      | 11,459           | 11,394    | 17,730               | 5,123     |

crystal report "Use for Net Price FTFR any grants with housing group 3 using buddget FR Lecia 2 numbers are based on only FA recipients and direct costs after all aid has been applied

**DAY UG (All Students) Net Price**

**Fall 202410 Net Price**

All UG 30,100,972/2012=14,960

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | *average local aid  | net price | overall discount rate       |
|----------|-------------|----------------------|-----------|------------------------|-----------|---------------------|-----------|-----------------------------|
| commuter | 11,046      | 7,091,403/1048=6,766 | 4,279     | 13,067,374/1109=11,783 | -737      | 1,161,757/410=2,833 | 8,212     | 4,157,682/2012=2,066 18.70% |
| resident | 22,854      | 9,476,933/789=12,011 | 10,842    | 17,033,598/903=18,863  | 3,991     | 2,995,925/582=5,147 | 17,706    |                             |

**Fall 202310 Net Price**

All UG 27,671,903/1885=14,680

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | *average local aid  | net price | overall discount rate       |
|----------|-------------|----------------------|-----------|------------------------|-----------|---------------------|-----------|-----------------------------|
| commuter | 10,921      | 5,563,123/811=6,860  | 4,061     | 12,378,221/1090=11,356 | -435      | 597,399/398=1,501   | 9,420     | 2,691,680/1885=1,427 13.00% |
| resident | 22,519      | 7,717,666/672=11,484 | 11,035    | 15,293,682/795=19,237  | 3,282     | 2,094,281/604=3,467 | 19,052    |                             |

**Fall 202210 Net Price**

All UG 28,219,591/2045= 13,799 average aid package

| FT UG    | direct cost | less free monies    | net price | less all aid           | net price | average local aid   | net price | overall discount rate       |
|----------|-------------|---------------------|-----------|------------------------|-----------|---------------------|-----------|-----------------------------|
| commuter | 10,565      | 5,775,187/899=6,424 | 4,141     | 13,403,364/1193=11,235 | -670      | 392,391/249=1,576   | 8,989     | 2,226,077/2045=1,088 10.30% |
| resident | 21,650      | 6,871,118/709=9,691 | 11,959    | 14,816,227/852=17,390  | 4,260     | 1,833,683/713=2,572 | 19,078    |                             |

**Fall 202110 Net Price**

All UG 30,308,824/2504=12,104 average aid package

| FT UG    | direct cost | less free monies     | net price | less all aid          | net price | average local aid   | net price | overall discount rate    |
|----------|-------------|----------------------|-----------|-----------------------|-----------|---------------------|-----------|--------------------------|
| commuter | 10,565      | 5,502,728/1119=4,917 | 5,648     | 15,009,748/1582=9,487 | 1078      | 692,804/417=1,661   | 8,995     | 2,087,127/2504=833 7.80% |
| resident | 21,650      | 5,951,749/758=7,852  | 13,798    | 15,299,076/922=16,593 | 5,057     | 1,394,323/643=2,168 | 19,437    |                          |

**Fall 202010 Net Price**

All UG 38,478,294/2739=14,048 average aid package

| FT UG    | direct cost | less free monies    | net price | less all aid           | net price | average local aid   | net price | overall discount rate    |
|----------|-------------|---------------------|-----------|------------------------|-----------|---------------------|-----------|--------------------------|
| commuter | 10,520      | 5,113,582/975=5,244 | 5,154     | 16,352,522/1510=10,829 | -309      | 385,638/245=1,574   | 8,946     | 2,409,636/2739=879 8.30% |
| resident | 21,815      | 8,563,854/944=9,071 | 12,744    | 22,125,772/1229=18,003 | 3,812     | 2,023,998/853=2,386 | 19,429    |                          |

**Fall 201910 Net Price**

All UG 40,129,372/2875=13,958 average aid package

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | average local aid   | net price | overall discount rate    |
|----------|-------------|----------------------|-----------|------------------------|-----------|---------------------|-----------|--------------------------|
| commuter | 10,375      | 4,819,428/962=5,009  | 5,366     | 16,383,970/1500=10,922 | -547      | 620,750/377=1,646   | 8,729     | 2,786,874/2875=969 9.30% |
| resident | 21,295      | 8,428,144/1063=7,928 | 13,367    | 23,755,904/1374=17,289 | 4,006     | 2,166,124/949=2,282 | 19,013    |                          |

**Fall 201810 Net Price**

All UG 41,109,050/2929=14,035 average aid package

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | average local aid    | net price | overall discount rate    |
|----------|-------------|----------------------|-----------|------------------------|-----------|----------------------|-----------|--------------------------|
| commuter | 10,175      | 4,733,648/975=4,855  | 5,320     | 16,030,880/1523=10,525 | -350      | 487,372/310=1572     | 8,603     | 2,602,644/2929=888 8.70% |
| resident | 20,715      | 8,873,280/1136=7,810 | 12,904    | 25,270,520/1514=16,691 | 4,023     | 2,115,272/1055=2,005 | 18,710    |                          |

**Fall 201710 Net Price**

All UG 39,225,856/2948=13,305 average aid package

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | average local aid    | net price | overall discount rate    |
|----------|-------------|----------------------|-----------|------------------------|-----------|----------------------|-----------|--------------------------|
| commuter | 10,135      | 4,574,140/962=4,754  | 5,381     | 16,432,688/1506=10,911 | -776      | 645,618/418=1,544    | 8,591     | 2,574,916/2948=873 8.60% |
| resident | 20,335      | 8,270,412/1161=7,123 | 13,232    | 24,043,686/1422=16,908 | 3,447     | 1,929,298/1024=1,884 | 18,451    |                          |

**Fall 201610 Net Price**

All UG 37,863,528/2936=12,896

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | average local aid   | net price | overall discount rate    |
|----------|-------------|----------------------|-----------|------------------------|-----------|---------------------|-----------|--------------------------|
| commuter | 9,935       | 4,258,306/923=4,613  | 5,322     | 14,411,210/1424=10,120 | -185      | 422,060/294=1,435   | 8,500     | 2,780,294/2936=946 9.50% |
| resident | 19,105      | 8,621,258/1151=7,490 | 11,615    | 23,452,316/1512=15,510 | 3,595     | 2,358,234/872=2,704 | 16,401    |                          |

**Fall 201510 Net Price**

All UG 36,761,966/2,951=12,457

| FT UG    | direct cost | less free monies     | net price | less all aid           | net price | average local aid   | net price | overall discount rate      |
|----------|-------------|----------------------|-----------|------------------------|-----------|---------------------|-----------|----------------------------|
| commuter | 9,260       | 3,469,976/858=4,044  | 5,216     | 13,664,118/1394=9,802  | -542      | 460,308/333=1,382   | 7,878     | 2,942,454/2,951=997 10.70% |
| resident | 18,173      | 8,869,770/1195=7,422 | 10,751    | 23,097,848/1557=14,834 | 3,339     | 2,482,146/929=2,613 | 15,560    |                            |

Net Price\_DiscountRate\_budget group report

Only FT UG (discount rate= total insitutional aid/number of recipients=average grant) (average grant/tuition and fees=%)

### Appendix 3

## DCAMM 5-Year Deferred Maintenance Capital Plan

| Project Name                   | FY24 DCAMM DM    | FY24 FSU DM Match | FY24 FSU         | FY24 ARPA        | FY25 DCAMM DM Funding | FY25 FSU DM Match | FY25 FSU           | FY26 DCAMM DM Funding | FY26 FSU DM Match | FY26 FSU           | FY27 DCAMM DM Funding | FY27 FSU DM Match | FY27 FSU           | FY28 DCAMM DM Funding | FY28 FSU DM Match  | FY28 FSU           |
|--------------------------------|------------------|-------------------|------------------|------------------|-----------------------|-------------------|--------------------|-----------------------|-------------------|--------------------|-----------------------|-------------------|--------------------|-----------------------|--------------------|--------------------|
| Conlon Study                   | \$84,800         | \$45,655          | \$65,223         |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| Conlon Design to CD            | \$310,895        | \$167,404         | \$239,150        |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| Conlon Phase I Construction    |                  |                   |                  |                  | \$1,704,932           | \$918,040         | \$2,377,028        |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| Conlon Phase II Construction   |                  |                   |                  |                  |                       |                   |                    | \$1,704,932           | \$918,040         | \$2,377,028        |                       |                   |                    |                       |                    |                    |
| Conlon Phase III Construction  |                  |                   |                  |                  |                       |                   |                    |                       |                   |                    | \$1,704,932           | \$918,040         | \$2,377,028        |                       |                    |                    |
| Conlon Phase IV - Construction |                  |                   |                  |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    | \$1,583,124           | \$1,039,848        | \$2,377,028        |
| <b>Totals</b>                  | <b>\$395,695</b> | <b>\$213,059</b>  | <b>\$304,373</b> | <b>\$0</b>       | <b>\$1,704,932</b>    | <b>\$918,040</b>  | <b>\$2,377,028</b> | <b>\$1,704,932</b>    | <b>\$918,040</b>  | <b>\$2,377,028</b> | <b>\$1,704,932</b>    | <b>\$918,040</b>  | <b>\$2,377,028</b> | <b>\$1,583,124</b>    | <b>\$1,039,848</b> | <b>\$2,377,028</b> |
|                                |                  |                   |                  | <b>\$913,127</b> |                       |                   | <b>\$5,000,000</b> |                       |                   |                    |                       |                   | <b>\$5,000,000</b> |                       |                    | <b>\$5,000,000</b> |
| DCAMM DM Allocation            | \$7,093,615      |                   |                  |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| DCAMM DM Totals                | \$7,093,615      | \$0               |                  |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| FSU Match DM Totals            | \$4,007,027      |                   |                  |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |
| FSU A&R Totals                 | \$9,508,112      |                   |                  |                  |                       |                   |                    |                       |                   |                    |                       |                   |                    |                       |                    |                    |

Appendix 4

Fitchburg State Tuition and Fee History

Comparison of Costs for a Full Time Day Non-Residential Student - Mandatory Cost Only

| Per Semester Charges             | Tuition | University Fee | Student Activity | Capital Projects | Tech. Fee | Room (Aud) | Board (Freedom Plan) | Total    | % Increase | Annual Cost    | Annual Incr. |
|----------------------------------|---------|----------------|------------------|------------------|-----------|------------|----------------------|----------|------------|----------------|--------------|
| Academic Year 97-98              | \$ 635  | \$ 930         | \$ 24            | \$ 84            |           | n/a        | n/a                  | \$ 1,673 |            | \$ 3,346       |              |
| Academic Year 98-99              | \$ 605  | \$ 880         | \$ 30            | \$ 84            |           | n/a        | n/a                  | \$ 1,599 | -4.4%      | \$ 3,198       | \$ (148)     |
| Academic Year 99-00              | \$ 545  | \$ 850         | \$ 30            | \$ 84            |           | n/a        | n/a                  | \$ 1,509 | -5.6%      | \$ 3,018       | \$ (180)     |
| Academic Year 00-01              | \$ 515  | \$ 880         | \$ 30            | \$ 84            |           | n/a        | n/a                  | \$ 1,509 | 0.0%       | \$ 3,018       | \$ -         |
| Academic Year 01-02              | \$ 485  | \$ 880         | \$ 45            | \$ 84            |           | n/a        | n/a                  | \$ 1,494 | -1.0%      | \$ 2,988       | \$ (30)      |
| Academic Year 02-03              | \$ 485  | \$ 1,230       | \$ 45            | \$ 84            |           | n/a        | n/a                  | \$ 1,844 | 23.4%      | \$ 3,688       | \$ 700       |
| Academic Year 03-04              | \$ 485  | \$ 1,479       | \$ 45            | \$ 84            |           | n/a        | n/a                  | \$ 2,093 | 13.5%      | \$ 4,186       | \$ 498       |
| Academic Year 04-05              | \$ 485  | \$ 1,680       | \$ 45            | \$ 84            |           | n/a        | n/a                  | \$ 2,294 | 9.6%       | \$ 4,588       | \$ 402       |
| Academic Year 05-06              | \$ 485  | \$ 1,887       | \$ 45            | \$ 84            |           | n/a        | n/a                  | \$ 2,501 | 9.0%       | \$ 5,002       | \$ 414       |
| Academic Year 06-07              | \$ 485  | \$ 2,043       | \$ 45            | \$ 138           | \$ 60     | n/a        | n/a                  | \$ 2,771 | 10.8%      | \$ 5,542       | \$ 540       |
| Academic Year 07-08 (225 per ser | \$ 485  | \$ 2,268       | \$ 45            | \$ 138           | \$ 60     | n/a        | n/a                  | \$ 2,996 | 8.1%       | \$ 5,992       | \$ 450       |
| Academic Year 08-09 (204 per ser | \$ 485  | \$ 2,472       | \$ 45            | \$ 138           | \$ 60     | n/a        | n/a                  | \$ 3,200 | 6.8%       | \$ 6,400       | \$ 408       |
| Academic Year 09-10 (250 per ser | \$ 485  | \$ 2,722       | \$ 45            | \$ 138           | \$ 60     | n/a        | n/a                  | \$ 3,450 | 7.8%       | \$ 6,900       | \$ 500       |
| Academic Year 10-11 (450 per Ser | \$ 485  | \$ 3,172       | \$ 45            | \$ 138           | \$ 60     | n/a        | n/a                  | \$ 3,900 | 13.0%      | \$ 7,800       | \$ 900       |
| Academic Year 11-12 (250 per sen | \$ 485  | \$ 3,297       | \$ 45            | \$ 263           | \$ 60     | n/a        | n/a                  | \$ 4,150 | 6.4%       | \$ 8,300       | \$ 500       |
| Academic Year 12-13              | \$ 485  | \$ 3,412       | \$ 45            | \$ 348           | \$ 65     | n/a        | n/a                  | \$ 4,355 | 4.9%       | \$ 8,710       | \$ 410       |
| Academic Year 13-14              | \$ 485  | \$ 3,412       | \$ 45            | \$ 486           | \$ 65     | n/a        | n/a                  | \$ 4,493 | 3.2%       | \$ 8,985       | \$ 275       |
| Academic Year 14-15              | \$ 485  | \$ 3,412       | \$ 45            | \$ 623           | \$ 65     | n/a        | n/a                  | \$ 4,630 | 3.1%       | \$ 9,260       | \$ 275       |
| Academic Year 15-16              | \$ 485  | \$ 3,637       | \$ 45            | \$ 736           | \$ 65     | n/a        | n/a                  | \$ 4,968 | 7.3%       | \$ 9,935       | \$ 675       |
| Academic Year 16-17              | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 65     | n/a        | n/a                  | \$ 5,068 | 2.0%       | \$ 10,135      | \$ 200       |
| Academic Year 17-18              | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 75     | n/a        | n/a                  | \$ 5,078 | 0.2%       | \$ 10,155      | \$ 20        |
| Academic Year 18-19              | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 175    | n/a        | n/a                  | \$ 5,178 | 2.0%       | \$ 10,355      | \$ 200       |
| Academic Year 19-20              | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 175    | n/a        | n/a                  | \$ 5,253 | 1.4%       | \$ 10,505      | \$ 150       |
| Academic Year 20-21              | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 250    | n/a        | n/a                  | \$ 5,328 | 1.4%       | \$ 10,655      | \$ 150       |
| Academic Year 21-22              | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 250    | n/a        | n/a                  | \$ 5,328 | 0.0%       | \$ 10,655      | \$ -         |
| Academic Year 22-23              | \$ 485  | \$ 3,945       | \$ 45            | \$ 736           | \$ 250    | n/a        | n/a                  | \$ 5,461 | 2.5%       | \$ 10,921      | \$ 266       |
| Academic Year 23-24              | \$ 485  | \$ 3,945       | \$ 45            | \$ 736           | \$ 313    | n/a        | n/a                  | \$ 5,524 | 1.2%       | \$ 11,047      | \$ 126       |
|                                  |         |                |                  |                  |           |            |                      |          | 1.34%      | 8 year average |              |

### Comparison of Costs for a Full Time Day Residential Student - Mandatory Cost Only

| Per Semester Charges | Tuition | University Fee | Student Activity | Capital Projects | Tech. Fee | Room (Aud) | Board (Freedom Plan) | Total     | % Increase | Annual Cost | Annual Incr. |
|----------------------|---------|----------------|------------------|------------------|-----------|------------|----------------------|-----------|------------|-------------|--------------|
| Academic Year 97-98  | \$ 635  | \$ 930         | \$ 24            | \$ 84            |           | \$ 1,295   | \$ 910               | \$ 3,878  |            | \$ 7,756    |              |
| Academic Year 98-99  | \$ 605  | \$ 880         | \$ 30            | \$ 84            |           | \$ 1,295   | \$ 925               | \$ 3,819  | -1.5%      | \$ 7,638    | \$ (118)     |
| Academic Year 99-00  | \$ 545  | \$ 850         | \$ 30            | \$ 84            |           | \$ 1,295   | \$ 975               | \$ 3,779  | -1.0%      | \$ 7,558    | \$ (80)      |
| Academic Year 00-01  | \$ 515  | \$ 880         | \$ 30            | \$ 84            |           | \$ 1,333   | \$ 1,007             | \$ 3,849  | 1.9%       | \$ 7,698    | \$ 140       |
| Academic Year 01-02  | \$ 485  | \$ 880         | \$ 45            | \$ 84            |           | \$ 1,374   | \$ 1,045             | \$ 3,913  | 1.7%       | \$ 7,826    | \$ 128       |
| Academic Year 02-03  | \$ 485  | \$ 1,230       | \$ 45            | \$ 84            |           | \$ 1,472   | \$ 1,090             | \$ 4,406  | 12.6%      | \$ 8,812    | \$ 986       |
| Academic Year 03-04  | \$ 485  | \$ 1,479       | \$ 45            | \$ 84            |           | \$ 1,603   | \$ 1,115             | \$ 4,811  | 9.2%       | \$ 9,622    | \$ 810       |
| Academic Year 04-05  | \$ 485  | \$ 1,680       | \$ 45            | \$ 84            |           | \$ 1,741   | \$ 1,140             | \$ 5,175  | 7.6%       | \$ 10,350   | \$ 728       |
| Academic Year 05-06  | \$ 485  | \$ 1,887       | \$ 45            | \$ 84            |           | \$ 1,937   | \$ 1,200             | \$ 5,638  | 8.9%       | \$ 11,276   | \$ 926       |
| Academic Year 06-07  | \$ 485  | \$ 2,043       | \$ 45            | \$ 138           | \$ 60     | \$ 2,106   | \$ 1,230             | \$ 6,107  | 8.3%       | \$ 12,214   | \$ 938       |
| Academic Year 07-08  | \$ 485  | \$ 2,268       | \$ 45            | \$ 138           | \$ 60     | \$ 2,148   | \$ 1,265             | \$ 6,409  | 4.9%       | \$ 12,818   | \$ 604       |
| Academic Year 08-09  | \$ 485  | \$ 2,472       | \$ 45            | \$ 138           | \$ 60     | \$ 2,330   | \$ 1,350             | \$ 6,880  | 7.3%       | \$ 13,760   | \$ 942       |
| Academic Year 09-10  | \$ 485  | \$ 2,722       | \$ 45            | \$ 138           | \$ 60     | \$ 2,585   | \$ 1,350             | \$ 7,385  | 7.3%       | \$ 14,770   | \$ 1,010     |
| Academic Year 10-11  | \$ 485  | \$ 3,172       | \$ 45            | \$ 138           | \$ 60     | \$ 2,658   | \$ 1,395             | \$ 7,953  | 7.7%       | \$ 15,906   | \$ 1,136     |
| Academic Year 11-12  | \$ 485  | \$ 3,297       | \$ 45            | \$ 263           | \$ 60     | \$ 2,735   | \$ 1,435             | \$ 8,320  | 4.6%       | \$ 16,640   | \$ 734       |
| Academic Year 12-13  | \$ 485  | \$ 3,412       | \$ 45            | \$ 348           | \$ 65     | \$ 2,826   | \$ 1,475             | \$ 8,656  | 4.0%       | \$ 17,312   | \$ 672       |
| Academic Year 13-14  | \$ 485  | \$ 3,412       | \$ 45            | \$ 486           | \$ 65     | \$ 2,930   | \$ 1,525             | \$ 8,948  | 3.4%       | \$ 17,895   | \$ 583       |
| Academic Year 14-15  | \$ 485  | \$ 3,412       | \$ 45            | \$ 623           | \$ 65     | \$ 2,985   | \$ 1,525             | \$ 9,140  | 2.2%       | \$ 18,280   | \$ 385       |
| Academic Year 15-16  | \$ 485  | \$ 3,637       | \$ 45            | \$ 736           | \$ 65     | \$ 3,040   | \$ 1,565             | \$ 9,573  | 4.7%       | \$ 19,145   | \$ 865       |
| Academic Year 16-17  | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 65     | \$ 3,465   | \$ 1,665             | \$ 10,198 | 6.5%       | \$ 20,395   | \$ 1,250     |
| Academic Year 17-18  | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 75     | \$ 3,611   | \$ 1,705             | \$ 10,394 | 1.9%       | \$ 20,787   | \$ 392       |
| Academic Year 18-19  | \$ 485  | \$ 3,737       | \$ 45            | \$ 736           | \$ 175    | \$ 3,764   | \$ 1,745             | \$ 10,687 | 2.8%       | \$ 21,373   | \$ 586       |
| Academic Year 19-20  | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 175    | \$ 3,907   | \$ 1,790             | \$ 10,950 | 2.5%       | \$ 21,899   | \$ 526       |
| Academic Year 20-21  | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 250    | \$ 3,995   | \$ 1,836             | \$ 11,159 | 1.9%       | \$ 22,317   | \$ 418       |
| Academic Year 21-22  | \$ 485  | \$ 3,812       | \$ 45            | \$ 736           | \$ 250    | \$ 3,995   | \$ 1,885             | \$ 11,208 | 0.4%       | \$ 22,415   | \$ 98        |
| Academic Year 22-23  | \$ 485  | \$ 3,945       | \$ 45            | \$ 736           | \$ 250    | \$ 4,135   | \$ 1,975             | \$ 11,571 | 3.2%       | \$ 23,141   | \$ 726       |
| Academic Year 23-24  | \$ 485  | \$ 3,945       | \$ 45            | \$ 736           | \$ 313    | \$ 4,135   | \$ 2,080             | \$ 11,738 | 1.4%       | \$ 23,476   | \$ 335       |

2.60% 8 year average w/ room & board

## Appendix 5

### State Universities Tuition and Fee History

| Tuition and Mandatory Fees at Massachusetts Public Colleges and Universities<br>(Based on Fall Resident Undergraduate State-Supported Rates) |  |          |          |          |          |          |          |          |          |          |          |            |
|--|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------|
| Segment  | Institution                                | FY-2015  | FY-2016  | FY-2017  | FY-2018  | FY-2019  | FY-2020  | FY-2021  | FY-2022  | FY-2023  | FY-2024  | 1 Yr % Chg |
| University of Massachusetts  | University of Massachusetts Amherst        | \$13,260 | \$14,174 | \$14,972 | \$15,412 | \$15,888 | \$16,390 | \$16,440 | \$16,440 | \$16,952 | \$17,356 | 2%         |
| University of Massachusetts  | University of Massachusetts Boston         | \$11,968 | \$12,684 | \$13,436 | \$13,828 | \$14,168 | \$14,654 | \$14,698 | \$14,718 | \$15,172 | \$15,536 | 2%         |
| University of Massachusetts  | University of Massachusetts Dartmouth      | \$11,686 | \$12,592 | \$13,190 | \$13,572 | \$13,922 | \$14,360 | \$14,410 | \$14,410 | \$14,854 | \$15,208 | 2%         |
| University of Massachusetts  | University of Massachusetts Lowell         | \$12,448 | \$13,428 | \$14,308 | \$14,800 | \$15,180 | \$15,648 | \$15,698 | \$15,698 | \$16,182 | \$16,570 | 2%         |
| State Universities   | Massachusetts College of Art and Design    | \$11,224 | \$11,724 | \$12,200 | \$12,700 | \$13,200 | \$13,700 | \$14,200 | \$14,200 | \$14,570 | \$14,960 | 3%         |
| State Universities   | Salem State University                     | \$8,646  | \$9,246  | \$9,736  | \$10,278 | \$10,882 | \$11,284 | \$11,674 | \$11,674 | \$11,978 | \$11,978 | 0%         |
| State Universities   | Massachusetts College of Liberal Arts      | \$8,976  | \$9,476  | \$9,876  | \$10,136 | \$10,560 | \$10,930 | \$11,306 | \$11,306 | \$11,590 | \$11,884 | 3%         |
| State Universities   | Westfield State University                 | \$8,682  | \$8,816  | \$9,276  | \$9,716  | \$10,430 | \$10,850 | \$11,140 | \$11,140 | \$11,500 | \$11,882 | 3%         |
| State Universities   | Framingham State University                | \$8,324  | \$8,704  | \$9,344  | \$9,920  | \$10,520 | \$11,100 | \$11,380 | \$11,380 | \$11,380 | \$11,630 | 2%         |
| State Universities   | Bridgewater State University               | \$8,354  | \$8,928  | \$9,628  | \$10,012 | \$10,368 | \$10,732 | \$10,732 | \$10,732 | \$11,056 | \$11,390 | 3%         |
| State Universities   | Worcester State University                 | \$8,558  | \$8,858  | \$9,202  | \$9,532  | \$10,162 | \$10,162 | \$10,586 | \$10,586 | \$10,786 | \$11,286 | 5%         |
| State Universities   | Massachusetts Maritime Academy             | \$7,258  | \$7,630  | \$8,006  | \$8,398  | \$9,728  | \$10,018 | \$10,314 | \$10,516 | \$10,776 | \$11,092 | 3%         |
| State Universities   | Fitchburg State University                 | \$9,260  | \$9,934  | \$10,134 | \$10,154 | \$10,354 | \$10,504 | \$10,654 | \$10,654 | \$10,920 | \$11,044 | 1%         |
| Weighted Average   | University of Massachusetts*               | \$12,618 | \$13,501 | \$14,286 | \$14,734 | \$15,151 | \$15,629 | \$15,699 | \$15,703 | \$16,205 | \$16,607 | 2%         |
| Weighted Average   | State Universities*                        | \$8,681  | \$9,128  | \$9,613  | \$10,009 | \$10,562 | \$10,895 | \$11,149 | \$11,150 | \$11,439 | \$11,732 | 3%         |
| Weighted Average   | State Universities excludes MCAD and MMA** | \$8,607  | \$9,064  | \$9,567  | \$9,962  | \$10,470 | \$10,795 | \$11,026 | \$11,017 | \$11,283 | \$11,552 | 2%         |

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Source: Massachusetts Department of Higher Education

Weighted data calculated based on % Undergraduate FTE of total Segment and overall. (FTE figures used for calculation are one year in arrears due to reporting schedules.)

Mass Maritime and Mass College of Art and Design are reported separately because they are specialty schools and for purpose of Performance Measurement are not compared to other MA state colleges.



Attachment B - FY25 Proposed Budget

| FITCHBURG STATE UNIVERSITY            | BOT APPROVED BUDGETS              |                          |                       |                       |                       | PROJECTED BUDGETS     |                       | ACTUALS               |                       |
|---------------------------------------|-----------------------------------|--------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|                                       | FY23 Budget                       | FY23 Updated Spring 2023 | FY24 Budget           | FY24 Updated          | FY25 Budget           | FY26 Projected        | FY27 Projected        | FY23 Actuals          | FY24 Actuals          |
| <b>REVENUE SOURCES</b>                | <b>Day Revenue</b>                |                          |                       |                       |                       |                       |                       |                       |                       |
| General Appropriations Act            | \$ 35,938,368                     | \$ 36,759,280            | \$ 37,687,632         | \$ 37,687,632         | \$ 41,993,969         | \$ 43,143,443         | \$ 44,292,917         | \$ 36,634,034         | \$ 34,420,237         |
| Collective Bargaining (CBA) funding   | \$ -                              | \$ -                     | \$ 833,676            | \$ 3,189,947          | \$ 1,287,474          | \$ 1,294,303          | \$ 1,328,788          | \$ -                  | \$ -                  |
| PF State Appropriation                | \$ 900,000                        | \$ 1,053,598             | \$ 1,053,598          | \$ 1,149,474          | \$ 1,149,474          | \$ 1,149,474          | \$ 1,149,474          | \$ 1,053,598          | \$ 1,149,474          |
| DCAMM                                 | \$ -                              | \$ -                     | \$ -                  | \$ -                  | \$ -                  | \$ -                  | \$ -                  | \$ 2,137,688          | \$ -                  |
| Tuition and Fees - Day                | \$ 29,131,044                     | \$ 24,301,121            | \$ 24,585,815         | \$ 25,625,042         | \$ 24,960,579         | \$ 24,951,719         | \$ 24,654,903         | \$ 24,773,303         | \$ 23,752,175         |
| Retained Out-of-State Tuition         | \$ 1,250,000                      | \$ 1,223,051             | \$ 1,250,000          | \$ 1,376,407          | \$ 1,375,000          | \$ 1,375,000          | \$ 1,375,000          | \$ 1,223,051          | \$ 1,472,688          |
| Non-State Supported Tuition           | \$ 875,000                        | \$ 875,000               | \$ 875,000            | \$ 875,000            | \$ 875,000            | \$ 875,000            | \$ 875,000            | \$ 632,971            | \$ -                  |
| Financial Aid                         | \$ 7,300,000                      | \$ 7,300,000             | \$ 7,250,343          | \$ 7,250,343          | \$ 7,250,343          | \$ 7,250,343          | \$ 7,250,343          | \$ 5,432,268          | \$ 5,807,952          |
| Grants                                | \$ 1,492,410                      | \$ 2,914,949             | \$ 1,596,181          | \$ 1,596,181          | \$ 1,896,181          | \$ 1,896,181          | \$ 1,896,181          | \$ 2,914,949          | \$ 2,189,919          |
| Investment Income                     | \$ 1,650,000                      | \$ 1,650,000             | \$ 1,402,500          | \$ 1,402,500          | \$ 1,402,500          | \$ 1,430,550          | \$ 1,459,161          | \$ 1,574,448          | \$ 794,632            |
| Sales, Service, & Other Income        | \$ 1,853,100                      | \$ 1,853,100             | \$ 1,853,100          | \$ 2,086,773          | \$ 1,853,100          | \$ 2,107,641          | \$ 2,128,717          | \$ 2,407,882          | \$ 1,424,906          |
| Reserve from Fund Balance             | \$ 640,986                        | \$ 640,986               | \$ 1,336,502          | \$ 1,336,502          | \$ 1,442,190          | \$ 1,442,190          | \$ 1,442,190          | \$ 1,073,640          | \$ 891,193            |
| Transfer - Foundation, etc.           | \$ 266,000                        | \$ 266,000               | \$ 342,000            | \$ 342,000            | \$ 338,000            | \$ 342,000            | \$ 342,000            | \$ 533,436            | \$ 248,787            |
| <b>Subtotal Day</b>                   | <b>\$ 81,296,908</b>              | <b>\$ 78,837,085</b>     | <b>\$ 80,066,347</b>  | <b>\$ 83,917,801</b>  | <b>\$ 85,823,810</b>  | <b>\$ 87,257,844</b>  | <b>\$ 88,194,674</b>  | <b>\$ 80,391,268</b>  | <b>\$ 72,151,962</b>  |
|                                       | <b>Auxillary Revenue</b>          |                          |                       |                       |                       |                       |                       |                       |                       |
| Dorm Authority - Housing              | \$ 9,169,871                      | \$ 8,322,539             | \$ 8,772,203          | \$ 8,772,203          | \$ 9,401,856          | \$ 10,108,066         | \$ 10,385,114         | \$ 7,642,650          | \$ 8,456,398          |
| Food Service                          | \$ 3,200,000                      | \$ 3,200,000             | \$ 3,200,000          | \$ 3,200,000          | \$ 3,540,000          | \$ 3,540,000          | \$ 3,540,000          | \$ 2,917,451          | \$ 3,467,311          |
| <b>Subtotal Auxillary</b>             | <b>\$ 12,369,871</b>              | <b>\$ 11,522,539</b>     | <b>\$ 11,972,203</b>  | <b>\$ 11,972,203</b>  | <b>\$ 12,941,856</b>  | <b>\$ 13,648,066</b>  | <b>\$ 13,925,114</b>  | <b>\$ 10,560,101</b>  | <b>\$ 11,923,709</b>  |
|                                       | <b>GCE + CPS &amp; AP Revenue</b> |                          |                       |                       |                       |                       |                       |                       |                       |
| Graduate & Continuing Ed (GCE)        | \$ 9,021,419                      | \$ 9,579,638             | \$ 9,912,009          | \$ 9,912,009          | \$ 9,861,190          | \$ 9,861,190          | \$ 9,861,190          | \$ 9,784,528          | \$ 8,480,289          |
| Center for Professional Studies (CPS) | \$ 420,994                        | \$ 420,994               | \$ 486,696            | \$ 486,696            | \$ 571,011            | \$ 511,031            | \$ 511,031            | \$ 289,674            | \$ 338,428            |
| Accelerated Programs (AP)             | \$ 11,005,881                     | \$ 10,394,692            | \$ 11,099,805         | \$ 11,099,805         | \$ 9,397,415          | \$ 8,927,544          | \$ 8,927,544          | \$ 9,851,120          | \$ 7,985,559          |
| <b>Subtotal GCE &amp; AP</b>          | <b>\$ 20,448,294</b>              | <b>\$ 20,395,324</b>     | <b>\$ 21,498,510</b>  | <b>\$ 21,498,510</b>  | <b>\$ 19,829,616</b>  | <b>\$ 19,299,765</b>  | <b>\$ 19,299,765</b>  | <b>\$ 19,925,322</b>  | <b>\$ 16,804,275</b>  |
| <b>Total Revenue</b>                  | <b>\$ 114,115,073</b>             | <b>\$ 110,754,948</b>    | <b>\$ 113,537,060</b> | <b>\$ 117,388,514</b> | <b>\$ 118,595,282</b> | <b>\$ 120,205,675</b> | <b>\$ 121,419,553</b> | <b>\$ 110,876,690</b> | <b>\$ 100,879,946</b> |

| FITCHBURG STATE UNIVERSITY            | BOT APPROVED BUDGETS      |                          |                       |                       |                       | PROJECTED BUDGETS     |                       | ACTUALS               |                      |
|---------------------------------------|---------------------------|--------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------|
|                                       | FY23 Budget               | FY23 Updated Spring 2023 | FY24 Budget           | FY24 Updated 1/2/24   | FY25 Budget           | FY26 Projected        | FY27 Projected        | FY23 Actuals          | FY24 Actuals         |
| <b>OPERATING EXPENSES</b>             | <b>Day Expenses</b>       |                          |                       |                       |                       |                       |                       |                       |                      |
| Day Salaries                          | \$ 42,849,950             | \$ 42,849,950            | \$ 45,694,430         | \$ 45,694,430         | \$ 47,156,336         | \$ 48,099,463         | \$ 49,061,452         | \$ 40,585,436         | \$ 25,839,672        |
| University Fringe                     | \$ 3,288,361              | \$ 3,288,361             | \$ 3,940,778          | \$ 3,940,778          | \$ 2,927,299          | \$ 4,019,594          | \$ 4,099,986          | \$ 1,655,449          | \$ 811,367           |
| University Operating                  | \$ 31,172,267             | \$ 30,123,423            | \$ 29,564,328         | \$ 29,564,328         | \$ 31,186,213         | \$ 31,186,213         | \$ 31,186,213         | \$ 29,954,685         | \$ 23,180,059        |
| Utilities                             | \$ 3,807,186              | \$ 3,807,186             | \$ 5,130,874          | \$ 5,130,874          | \$ 5,075,847          | \$ 5,126,605          | \$ 5,177,872          | \$ 4,149,465          | \$ 3,192,535         |
| Capital                               | \$ 4,725,000              | \$ 4,725,000             | \$ 4,725,000          | \$ 4,725,000          | \$ 4,725,000          | \$ 4,725,000          | \$ 4,725,000          | \$ 9,070,672          | \$ 3,408,980         |
| <b>Subtotal Day</b>                   | <b>\$ 85,842,764</b>      | <b>\$ 84,793,920</b>     | <b>\$ 89,055,411</b>  | <b>\$ 89,055,411</b>  | <b>\$ 91,070,696</b>  | <b>\$ 93,156,876</b>  | <b>\$ 94,250,523</b>  | <b>\$ 85,415,707</b>  | <b>\$ 56,432,613</b> |
|                                       | <b>Housing Expenses</b>   |                          |                       |                       |                       |                       |                       |                       |                      |
| Housing Salaries                      | \$ 1,225,518              | \$ 1,225,518             | \$ 1,333,994          | \$ 1,333,994          | \$ 1,448,274          | \$ 1,477,239          | \$ 1,506,784          | \$ 1,219,804          | \$ 866,534           |
| Housing Fringe                        | \$ 483,222                | \$ 483,222               | \$ 611,103            | \$ 611,103            | \$ 663,454            | \$ 676,723            | \$ 690,258            | \$ 447,234            | \$ 326,092           |
| Housing Utilities                     | \$ 913,500                | \$ 913,500               | \$ 1,071,700          | \$ 1,071,700          | \$ 1,190,700          | \$ 1,214,514          | \$ 1,214,514          | \$ 1,069,509          | \$ 618,452           |
| Housing Operating                     | \$ 7,365,945              | \$ 7,482,751             | \$ 7,197,644          | \$ 7,197,644          | \$ 7,531,762          | \$ 7,869,535          | \$ 7,966,942          | \$ 7,315,498          | \$ 6,509,036         |
| <b>Subtotal Housing</b>               | <b>\$ 9,988,185</b>       | <b>\$ 10,104,991</b>     | <b>\$ 10,214,441</b>  | <b>\$ 10,214,441</b>  | <b>\$ 10,834,190</b>  | <b>\$ 11,238,012</b>  | <b>\$ 11,378,498</b>  | <b>\$ 10,052,046</b>  | <b>\$ 8,320,115</b>  |
|                                       | <b>GCE + CPS Expenses</b> |                          |                       |                       |                       |                       |                       |                       |                      |
| GCE + CPS Salaries                    | \$ 1,452,667              | \$ 1,330,971             | \$ 1,511,115          | \$ 1,511,115          | \$ 1,542,372          | \$ 1,573,219          | \$ 1,604,684          | \$ 1,272,052          | \$ 877,899           |
| GCE + CPS Fringe                      | \$ 622,809                | \$ 622,809               | \$ 763,541            | \$ 763,541            | \$ 761,522            | \$ 776,752            | \$ 792,287            | \$ 597,988            | \$ 405,576           |
| GCE + CPS Operating                   | \$ 3,925,276              | \$ 3,925,276             | \$ 4,182,668          | \$ 4,182,668          | \$ 4,557,485          | \$ 4,557,485          | \$ 4,557,485          | \$ 4,398,900          | \$ 3,122,000         |
| Ed Service Fee Transfer to University | \$ 3,031,274              | \$ 3,100,000             | \$ 3,533,610          | \$ 3,533,610          | \$ 3,534,050          | \$ 3,534,050          | \$ 3,534,050          | \$ 3,172,679          | \$ 2,331,054         |
| <b>Subtotal GCE + CPS</b>             | <b>\$ 9,032,026</b>       | <b>\$ 8,979,056</b>      | <b>\$ 9,990,934</b>   | <b>\$ 9,990,934</b>   | <b>\$ 10,395,429</b>  | <b>\$ 10,441,507</b>  | <b>\$ 10,488,506</b>  | <b>\$ 9,441,620</b>   | <b>\$ 6,736,529</b>  |
|                                       | <b>AP Expenses</b>        |                          |                       |                       |                       |                       |                       |                       |                      |
| AP Salaries                           | \$ 454,097                | \$ 454,097               | \$ 490,469            | \$ 490,469            | \$ 447,833            | \$ 456,790            | \$ 465,925            | \$ 377,947            | \$ 257,594           |
| AP Fringe                             | \$ 202,724                | \$ 202,724               | \$ 253,203            | \$ 253,203            | \$ 229,545            | \$ 234,136            | \$ 238,819            | \$ 188,341            | \$ 124,361           |
| AP Operating                          | \$ 6,107,822              | \$ 6,107,822             | \$ 6,110,633          | \$ 6,110,633          | \$ 5,763,989          | \$ 5,475,790          | \$ 5,475,790          | \$ 6,571,254          | \$ 4,058,365         |
| Ed Service Fee Transfer to University | \$ 3,553,546              | \$ 3,553,546             | \$ 4,245,500          | \$ 4,245,500          | \$ 2,956,048          | \$ 2,808,246          | \$ 2,667,833          | \$ 3,325,720          | \$ 2,374,815         |
| <b>Subtotal AP</b>                    | <b>\$ 10,318,189</b>      | <b>\$ 10,318,189</b>     | <b>\$ 11,099,805</b>  | <b>\$ 11,099,805</b>  | <b>\$ 9,397,415</b>   | <b>\$ 8,974,961</b>   | <b>\$ 8,848,367</b>   | <b>\$ 10,463,261</b>  | <b>\$ 6,815,135</b>  |
| <b>Total Expense</b>                  | <b>\$ 115,181,164</b>     | <b>\$ 114,196,156</b>    | <b>\$ 120,360,591</b> | <b>\$ 120,360,591</b> | <b>\$ 121,697,730</b> | <b>\$ 123,811,355</b> | <b>\$ 124,965,894</b> | <b>\$ 115,372,634</b> | <b>\$ 78,304,392</b> |

| Summary                         | BUDGETED Net Surplus/(Loss) |                       |                       |                       |                       | PROJECTED Net Surplus / Loss |                       | ACTUAL Net Surplus / Loss |                      |
|---------------------------------|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|------------------------------|-----------------------|---------------------------|----------------------|
| Day Operations                  | \$ (1,345,856)              | \$ (2,756,835)        | \$ (5,789,064)        | \$ (1,937,610)        | \$ (1,706,886)        | \$ (2,359,032)               | \$ (2,515,849)        | \$ (2,092,212)            | \$ 19,201,436        |
| Housing                         | \$ (818,314)                | \$ (1,782,452)        | \$ (1,442,238)        | \$ (1,442,238)        | \$ (1,432,334)        | \$ (1,129,946)               | \$ (993,384)          | \$ (2,409,396)            | \$ 136,283           |
| COVID Expenses                  | \$ -                        | \$ -                  | \$ -                  | \$ -                  | \$ -                  | \$ -                         | \$ -                  | \$ (14,777)               | \$ (14,777)          |
| <b>Day Subtotal</b>             | <b>\$ (2,164,170)</b>       | <b>\$ (4,539,287)</b> | <b>\$ (7,231,302)</b> | <b>\$ (3,379,848)</b> | <b>\$ (3,139,220)</b> | <b>\$ (3,488,978)</b>        | <b>\$ (3,509,233)</b> | <b>\$ (4,516,385)</b>     | <b>\$ 19,322,942</b> |
| 3 Month Hiring Freeze           |                             |                       | \$ 750,000            | \$ 750,000            | \$ 250,000            | \$ 250,000                   | \$ 250,000            |                           |                      |
| Open Position Savings           |                             |                       | \$ 1,750,000          | \$ 1,750,000          | \$ 1,250,000          | \$ 1,250,000                 | \$ 1,250,000          |                           |                      |
| Staff Reduction/Attrition       |                             |                       |                       |                       | \$ 1,000,000          | \$ 1,000,000                 | \$ 1,000,000          |                           |                      |
| Operating Savings               |                             |                       |                       |                       | \$ -                  | \$ 125,000                   | \$ 125,000            |                           |                      |
| <b>Day Subtotal - Savings</b>   | <b>\$ (2,164,170)</b>       | <b>\$ (4,539,287)</b> | <b>\$ (4,731,302)</b> | <b>\$ (879,848)</b>   | <b>\$ (639,220)</b>   | <b>\$ (863,978)</b>          | <b>\$ (884,233)</b>   | <b>\$ (4,516,385)</b>     | <b>\$ 19,322,942</b> |
| GCE & CPS                       | \$ 410,387                  | \$ 1,021,576          | \$ 407,771            | \$ 407,771            | \$ 36,772             | \$ (69,286)                  | \$ (116,286)          | \$ 632,582                | \$ 2,082,188         |
| AP                              | \$ 687,692                  | \$ 76,503             | \$ -                  | \$ -                  | \$ -                  | \$ -                         | \$ -                  | \$ (612,142)              | \$ 1,170,423         |
| <b>SGOCE Subtotal</b>           | <b>\$ 1,098,079</b>         | <b>\$ 1,098,079</b>   | <b>\$ 407,771</b>     | <b>\$ 407,771</b>     | <b>\$ 36,772</b>      | <b>\$ (69,286)</b>           | <b>\$ (116,286)</b>   | <b>\$ 20,441</b>          | <b>\$ 3,252,611</b>  |
| <b>Total Net Surplus/(Loss)</b> | <b>\$ (1,066,091)</b>       | <b>\$ (3,441,208)</b> | <b>\$ (4,323,531)</b> | <b>\$ (472,077)</b>   | <b>\$ (602,448)</b>   | <b>\$ (933,264)</b>          | <b>\$ (1,000,519)</b> | <b>\$ (4,495,944)</b>     | <b>\$ 22,575,554</b> |

### FY25 Budget Delta Highlights

| <u>Savings</u>                         | Amount       |
|--|--------------|
| 1 Reduce television cable service      | \$ 54,000    |
| 2 Reduce property expenses             | \$ 135,000   |
| 3 EAB Global and APS not renewed       | \$ 363,028   |
| 4 Academic Affairs -Divisional Cut     | \$ 29,137    |
| 5 Enrollment- Divisional Cut           | \$ 4,000     |
| 6 Student Affairs- Divisional Cut      | \$ 25,390    |
| 7 Admin & Finance -Divisional Cut      | \$ 23,932    |
| 8 Development- Divisional Cut          | \$ 2,908     |
| 9 President-Divisional Cut             | \$ 39,582    |
| 10 Adjunct Budget -Day                 | \$ 188,021   |
| 11 Print services reduction            | \$ 40,000    |
| 12 Innovation Funding reduction        | \$ 125,000   |
| 13 Personnel Savings -FY25 identified* | \$ 1,047,595 |
| 14 Adjunct Budget -GCE                 | \$ 61,379    |

|                      |                     |
|----------------------|---------------------|
| <b>Total Savings</b> | <b>\$ 2,138,972</b> |
|----------------------|---------------------|

| <u>Increases</u>  |              |
|-------------------|--------------|
| 1 Utility Costs   | \$ 125,000   |
| 2 Housing Subsidy | \$ 1,360,000 |
| 3 CBA Increases   | \$ 1,444,561 |
| 4 Housing Debt    | \$ 334,000   |

|                       |                     |
|-----------------------|---------------------|
| <b>Total Increase</b> | <b>\$ 3,263,561</b> |
|-----------------------|---------------------|

\* See attached sheet for details



## Attachment D – Supplemental Materials

- FY25 Proposed Fund Budgets
- FY25 Proposed Department Budget Comparison
- Enrollment Actuals and Projections











| FY24                                  |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               |   |
|---------------------------------------|------|---------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|---------------|---|
| Marketing & Integrated Communications | 6700 | Depts         | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Serv  | TOTAL                                       |
|                                       |      |               | Academic Affairs | Facilities       | Materials Mgmt   | Finance          | IT               | Print Services   | Financial Aid    | President        |               |   |
|                                       |      |               | 9100             | 9200             | 9270             | 9400             | 9430             | 9432             | 9460             | 9600             |               |   |
|                                       |      | \$ 195,992    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 195,992                                  |
| \$ 1,000                              |      | \$ 316,695    |                  |                  |                  |                  |                  |                  |                  | \$ 300           | \$ 300        | \$ 316,995                                  |
|                                       |      | \$ 3,071,115  |                  |                  |                  | \$ 59,500        |                  |                  |                  |                  | \$ 59,500     | \$ 3,122,615                                |
|                                       |      | \$ 13,796     |                  |                  |                  |                  |                  |                  |                  | \$ 322,000       | \$ 322,000    | \$ 335,796                                  |
| \$ 205,099                            |      | \$ 985,518    | \$ 7,800         |                  | \$ 85,000        |                  | \$ 58,000        | \$ 40,000        |                  | \$ 68,000        | \$ 258,800    | \$ 1,244,318                                |
|                                       |      | \$ 1,009,551  |                  |                  |                  |                  |                  |                  |                  | \$ 1,000         | \$ 1,000      | \$ 1,010,551                                |
|                                       |      | \$ 69,320     |                  | \$ 4,164,333     |                  |                  |                  |                  |                  | \$ 848,886       | \$ 5,013,219  | \$ 5,082,539                                |
|                                       |      | \$ 18,925     |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 18,925                                   |
| \$ 99,000                             |      | \$ 668,048    |                  |                  |                  | \$ 90,000        |                  |                  |                  | \$ 535,528       | \$ 625,528    | \$ 1,293,576                                |
| \$ 15,000                             |      | \$ 611,006    |                  |                  |                  | \$ 190,000       |                  |                  |                  | \$ 20,000        | \$ 210,000    | \$ 821,006                                  |
| \$ 1,000                              |      | \$ 137,425    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 137,425                                  |
|                                       |      | \$ 503,426    |                  |                  | \$ 8,000         |                  |                  | \$ 150,000       |                  | \$ 37,800        | \$ 195,800    | \$ 699,226                                  |
|                                       |      | \$ 118,678    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 118,678                                  |
|                                       |      | \$ 892,952    |                  | \$ 80,000        |                  |                  |                  |                  |                  |                  | \$ 80,000     | \$ 972,952                                  |
|                                       |      | \$ 16,702     |                  |                  |                  | \$ 100,000       |                  |                  | \$ 2,999,309     |                  | \$ 3,099,309  | \$ 3,116,011                                |
|                                       |      | \$ 619,256    | \$ 200,000       |                  |                  | \$ 210,000       |                  |                  |                  | \$ 1,625,831     | \$ 2,035,831  | \$ 2,655,087                                |
| \$ 14,000                             |      | \$ 985,977    |                  |                  |                  |                  | \$ 2,332,060     |                  |                  | \$ 101,400       | \$ 2,433,460  | \$ 3,419,437                                |
|                                       |      | \$ -          |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ -  |
| \$ 335,099                            |      | \$ 10,234,382 | \$ 207,800       | \$ 4,244,333     | \$ 93,000        | \$ 649,500       | \$ 2,390,060     | \$ 190,000       | \$ 2,999,309     | \$ 3,560,745     | \$ 14,334,747 | \$ 24,569,129                               |
| \$ 335,099                            |      | \$ 10,234,382 | \$ 207,800       | \$ 4,244,333     | \$ 93,000        | \$ 649,500       | \$ 2,390,060     | \$ 190,000       | \$ 2,999,309     | \$ 3,560,745     | \$ 14,334,747 | \$ 24,569,129                               |
| \$ -                                  |      | \$ -          |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 28,760                                   |
|                                       |      | \$ 185,786    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ (865,141) *increased \$45K for Marketing |
|                                       |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 4,725,000                                |
|                                       |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 28,457,748 T65 TOTAL                     |

| FY25                                  |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               |   |
|---------------------------------------|------|---------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|---------------|---|
| Marketing & Integrated Communications | 6700 | Depts         | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Services | Central Serv  | TOTAL                                       |
|                                       |      |               | Academic Affairs | Facilities       | Materials Mgmt   | Finance          | IT               | Print Services   | Financial Aid    | President        |               |   |
|                                       |      |               | 9100             | 9200             | 9270             | 9400             | 9430             | 9432             | 9460             | 9600             |               |   |
|                                       |      | \$ 22,840     |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 22,840                                   |
| \$ 1,000                              |      | \$ 295,607    |                  |                  |                  |                  |                  |                  |                  | \$ 300           | \$ 300        | \$ 295,907                                  |
| \$ 5,000                              |      | \$ 3,124,476  |                  |                  |                  | \$ 59,500        |                  |                  |                  |                  | \$ 59,500     | \$ 3,175,976                                |
|                                       |      | \$ 17,188     |                  |                  |                  |                  |                  |                  |                  | \$ 322,000       | \$ 322,000    | \$ 339,188                                  |
| \$ 209,099                            |      | \$ 1,223,132  | \$ 7,800         |                  | \$ 85,000        |                  | \$ 1,300         |                  |                  | \$ 68,000        | \$ 162,100    | \$ 1,385,232                                |
|                                       |      | \$ 963,446    |                  |                  |                  |                  |                  |                  |                  | \$ 1,000         | \$ 1,000      | \$ 964,446                                  |
|                                       |      | \$ 89,320     |                  | \$ 4,285,000     |                  |                  |                  |                  |                  | \$ 663,886       | \$ 4,948,886  | \$ 5,038,206                                |
|                                       |      | \$ 13,500     |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 13,500                                   |
| \$ 99,000                             |      | \$ 871,324    |                  |                  |                  | \$ 90,000        |                  |                  |                  | \$ 172,500       | \$ 262,500    | \$ 1,133,824                                |
| \$ 3,000                              |      | \$ 547,210    |                  |                  |                  | \$ 190,000       |                  |                  |                  | \$ 20,000        | \$ 210,000    | \$ 757,210                                  |
| \$ 1,000                              |      | \$ 131,590    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 131,590                                  |
| \$ 1,000                              |      | \$ 627,484    |                  |                  | \$ 8,000         |                  |                  | \$ 150,000       |                  | \$ 37,800        | \$ 195,800    | \$ 823,284                                  |
|                                       |      | \$ 113,465    |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 113,465                                  |
|                                       |      | \$ 1,119,652  |                  | \$ 85,000        |                  |                  |                  |                  |                  |                  | \$ 85,000     | \$ 1,204,652                                |
|                                       |      | \$ 11,622     |                  |                  |                  | \$ 100,000       |                  |                  | \$ 2,999,309     |                  | \$ 3,099,309  | \$ 3,110,931                                |
|                                       |      | \$ 346,868    | \$ 187,500       |                  |                  | \$ 210,000       |                  |                  |                  | \$ 1,613,331     | \$ 2,010,831  | \$ 2,357,699                                |
| \$ 14,000                             |      | \$ 1,006,490  |                  |                  |                  |                  | \$ 2,107,574     |                  |                  | \$ 101,400       | \$ 2,208,974  | \$ 3,215,464                                |
|                                       |      | \$ -          |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ -  |
| \$ 333,099                            |      | \$ 10,525,214 | \$ 195,300       | \$ 4,370,000     | \$ 93,000        | \$ 649,500       | \$ 2,108,874     | \$ 150,000       | \$ 2,999,309     | \$ 3,000,217     | \$ 13,566,200 | \$ 24,091,414                               |
| \$ 333,099                            |      | \$ 10,525,214 | \$ 195,300       | \$ 4,370,000     | \$ 93,000        | \$ 649,500       | \$ 2,108,874     | \$ 150,000       | \$ 2,999,309     | \$ 3,000,217     | \$ 13,566,200 | \$ 24,091,414                               |
| \$ -                                  |      | \$ -          |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ -  |
|                                       |      | \$ 41,994,983 |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ (865,141) *increased \$45K for Marketing |
|                                       |      | \$ 2,000.00   | \$ 12,500.00     | \$ (125,667.00)  | \$ -             | \$ -             | \$ 281,186.00    | \$ 40,000.00     | \$ -             | \$ 560,528.00    | \$ 768,547.00 | \$ 4725000 Capital                          |
|                                       |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 27,951,273 T65 TOTAL                     |
|                                       |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ 28,095,950 BOT Sheet bal                 |
|                                       |      |               |                  |                  |                  |                  |                  |                  |                  |                  |               | \$ (144,677) diff                           |

Divisional cut      INVA reduction      Utility Increase      Moved expense to T16      Print Services Reduction      EAB Reduction & Property Expense Reduction

# Enrollment Actuals and Projections

| Enrollment #s           | FY20               | FY21      | FY22      | FY23      | FY24      | FY25      | FY24        | FY24        | FY25      | FY25        | FY26      | FY26        | FY27      | FY27        | FY28      | FY28        |
|-------------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-------------|-------------|-----------|-------------|-----------|-------------|-----------|-------------|-----------|-------------|
|                         | IR Actual Data [1] |           |           |           |           |           | PREDICTIONS |             |           |             |           |             |           |             |           |             |
|                         | fall 2019          | fall 2020 | fall 2021 | fall 2022 | fall 2023 | fall 2024 | fall 2023   | spring 2024 | fall 2024 | spring 2025 | fall 2025 | spring 2026 | fall 2026 | spring 2027 | fall 2027 | spring 2028 |
| UG Day FTE              | 3,170              | 2,865     | 2,489     | 2,295     | 2,317     |           | 2,187       | 2,001       | 2,212     | 1,964       | 2,210     | 1,964       | 2,143     | 1,964       | 2,143     | 1,964       |
| UG Headcount            | 3,435              | 3,203     | 2,804     | 2,626     | 2,637     |           | 2450        | 2241        | 2478      | 2200        | 2475      | 2200        | 2400      | 2200        | 2400      | 2200        |
| UG FFTE                 | 3,240              | 2,962     | 2,607     | 2,370     | 2384      |           | 2224        | 2065        | 2238      | 1987        | 2236      | 1987        | 2168      | 1987        | 2168      | 1987        |
| UG Evening (non-AP) FTE | 194                | 186       | 168       | 162       | 164       |           |             |             |           |             |           |             |           |             |           |             |
| UG Evening AP           | 64                 | 96        | 88        | 87        | 72.4      |           |             |             |           |             |           |             |           |             |           |             |
| GR (non-AP) FTE         | 808                | 661       | 715       | 876       | 760.25    |           |             |             |           |             |           |             |           |             |           |             |
| GR AP FTE               | 484                | 707       | 754       | 670       | 610.75    |           |             |             |           |             |           |             |           |             |           |             |

| change from Last Fall | change from fall 2020 | change from fall 2015 |
|-----------------------|-----------------------|-----------------------|
| 1%                    | -19%                  | -32.65%               |
| 0%                    | -18%                  | -32.38%               |
| 1%                    | -20%                  | -32.83%               |
| 1%                    | -12%                  | -24.77%               |
| -17%                  | -24%                  |                       |
| -13%                  | 15%                   |                       |
| -9%                   | -14%                  |                       |

# Coversheet

## FY25 Proposed Fee Presentation and Discussion

**Section:** IV. Budget, Finance and Facilities Committee Report  
**Item:** B. FY25 Proposed Fee Presentation and Discussion  
**Purpose:**  
**Submitted by:**  
**Related Material:** Attachment E - Proposed Day Fee Projections.pdf  
Attachment F - Optional Training (OPT) Fee Proposal.pdf  
Attachment G - Financial Aid Overview.pdf





Proposal:

# Optional Practical Training (OPT) Fee for F-1 International Graduate Students



Academic Affairs  
Spring 2024

# OUTLINE

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|  |   |  |
|--|---|--|
| <p><b>1. UNPRECEDENTED GROWTH</b> in<br/>number of international students</p> <p>Volume of student traffic and OPT-participation has spiked in the last three years.</p> | <p><b>2. WORKLOAD INCREASE</b><br/>associated with growth</p> <p>absorbs the time of OIE staff, creating pressure to keep up with federal compliance requirements and routine office administrative tasks</p> | <p><b>3. OPTIONAL PRACTICAL TRAINING (OPT)<br/>FEE proposal</b></p> <p>to support our students and the effective operation of the OIE, which are central to our institutional mission.</p> |
|--|---|--|



# GUIDING PRINCIPLES

To promote International Engagement, Global Citizenship, and Diversity

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## University Mission:


*Our comprehensive public university prepares students to lead, serve, and succeed by fostering lifelong learning and civic and global responsibility.*

## Core Value:

*...Offering equitable access to high-quality programs and services to people of varying cultural backgrounds living within and beyond our diverse community of North Central Massachusetts.*

## Academic Plan:

*Internationalizing the curriculum... [through] exchange programs and international student recruitment:*



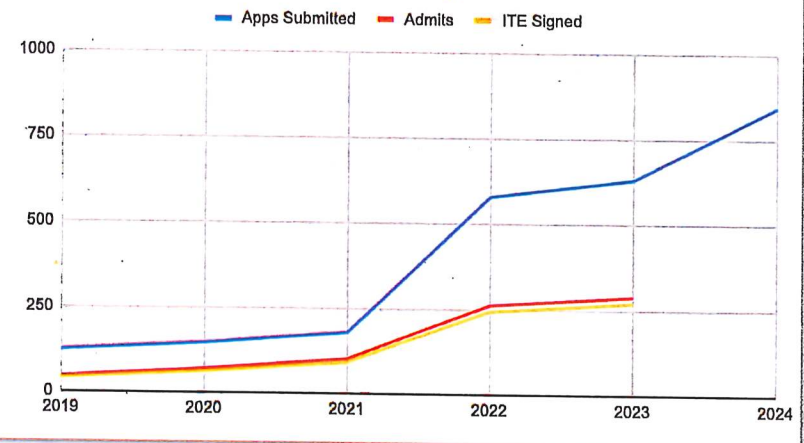
International  
Students  
on campus  
contribute to global  
learning  
experiences for all  
students & help to  
influence civic and  
global diversity.

# 1. UNPRECEDENTED GROWTH

International students at Fitchburg State by number

|                | GRADUATE APPLICATIONS SUBMITTED | ADMITS                | ITEs SIGNED (Intent to Enroll) | % Yield  |
|----------------|---------------------------------|-----------------------|--------------------------------|----------|
| 2019 (FA & SP) | 126                             | 45                    | 41                             | 32%      |
| 2020 (FA & SP) | 148                             | 68                    | 61                             | 41%      |
| 2021 (FA & SP) | 180                             | 99                    | 89                             | 49%      |
| 2022 (FA & SP) | 581                             | 261                   | 343                            | 59%      |
| 2023 (FA & SP) | 631                             | 288                   | 270                            | 42%      |
| 2024           | 844                             | IN PROGRESS: est. 380 |                                | Avg. 45% |

Apps Submitted, Admits and ITE Signed





# 1. UNPRECEDENTED GROWTH

## Financial Snapshot: Tuition

| YEAR  | INT'L STUDENT ENROLLMENT | AVERAGE COURSE LOAD PER TERM | AVERAGE TERMS TO DEGREE | AVERAGE TERM TUITION COST         | REVENUE GENERATED FOR 3 TERMS |
|---|--------------------------|------------------------------|-------------------------|-----------------------------------|-------------------------------|
| <b>AY 2021-2022</b><br>Spring, Summer, Fall | > 120                    | 3 courses (9 credits)        | 3                       | \$3123/student<br>(\$1041/course) | ~ \$1.1 million               |
| <b>AY 2022-2023</b><br>Spring, Summer, Fall | > 200                    | 3 courses (9 credits)        | 3                       | \$3123/student<br>(\$1041/course) | ~ \$1.9 million               |

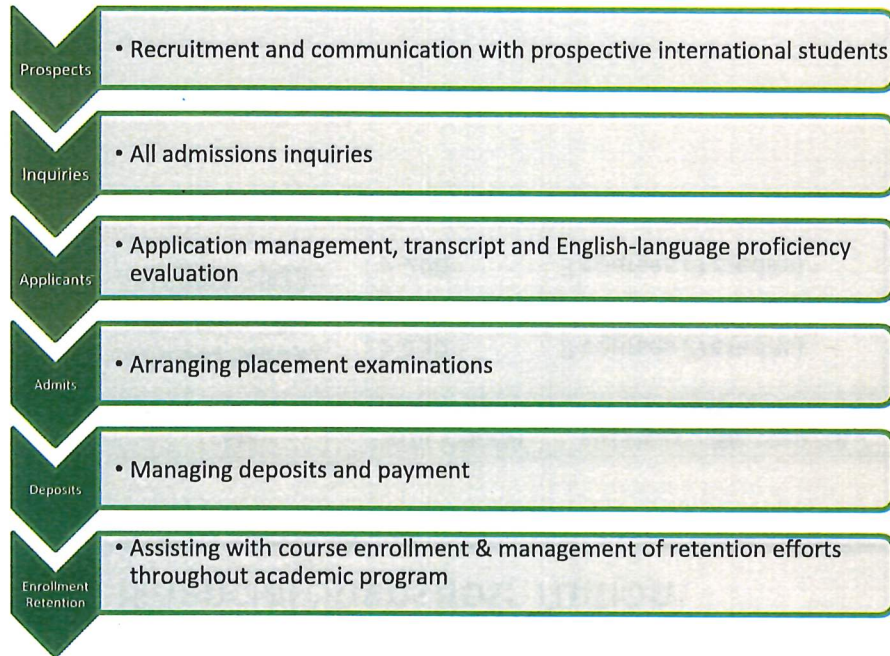


## 2. WORKLOAD Associated with Building an International Student Body

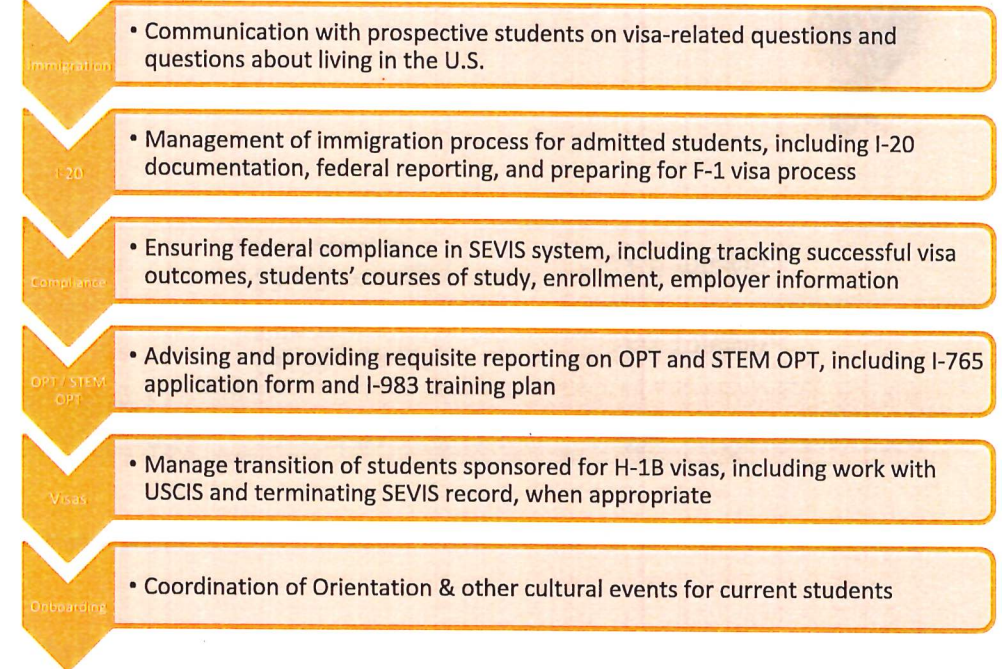
### SGOCE:

### OIE:

#### Student Recruitment & Admission



#### Immigration, Federal Compliance & Matriculation



## 2. WORKLOAD INCREASE

### Current Staff Dedicated to International Student Enrollment & Matriculation

| SGOCE        |   |   |
|--------------|---|---|
| Name         | Title   | Role  |
| Mary Gowdy   | International Coordinator / Associate Director of Graduate Admissions | Coordinator for international recruitment, applications & admissions                    |
| Peter August | Assistant Director of Graduate Admissions                             | Manages graduate admissions, including the MS in Computer Science and the on-campus MBA |

| Office of International Education |                                   |   |
|-----------------------------------|-----------------------------------|---|
| Name                              | Title                             | Role                                      |
| Nelly Wadsworth                   | Director                          | Primary Designated School Official (PDSO) |
| Sandy Yu                          | International Student Coordinator | Designated School Official (DSO)          |
| NhuPhuong Trieu-Hindle            | Part-Time Assistant               | 12.5 hours/week                           |



## 2. WORKLOAD INCREASE

### F-1 Visa Students: Optional Professional Training (OPT) Requirements

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Eligible students can apply for up to 12 months of OPT before or after completing their academic studies.

Students who earn a degree in certain STEM fields can apply for a 24-month extension of post-completion OPT, called STEM OPT.



F1-issuing institution is required to **advise, provide services for, and submit SEVIS tracking** on international students engaged in OPT/ STEM OPT for **up to 3 years after graduation.**



## 2. WORKLOAD INCREASE

### Campus comparisons of OPT Enrollment


| Institution       | Fall 2023:                  |                        |
|-------------------|-----------------------------|------------------------|
|                   | # of International students | # of OPT Registrations |
| Framingham State  | 72                          | 17                     |
| Worcester State   | 100                         | 15                     |
| Salem State       | 181                         | 23                     |
| Bridgewater State | 115                         | 25                     |
| Fitchburg State   | 220                         | 187*                   |
| Westfield State   | 67                          | 14                     |
| Mass Art          | 117                         | 31                     |

\* Majority Computer Science students pursuing professional training

### 3. INTERNATIONAL STUDENT FEE Proposal

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Introduce a \$250.00/semester International Student fee in for all international graduate students.



International student fees are a common practice across institutions of higher education.



Fees offset cost of processing, tracking & assisting students in federal documentation required for OPT and STEM OPT, including I-20, I-983 and SEVIS documentation, reporting changes, updates, job tasks, and H-1B preparation.

### 3. INTERNATIONAL STUDENT FEE

#### Campus comparisons

| Institution  | Fee          | Fee Term | Student Population                  |
|--|--------------|----------|-------------------------------------|
| Framingham State                                   | \$1,355      | Semester | All international graduate Students |
| Worcester State                                    | \$250        | Semester | All international students          |
|  | \$125        | Summer   |                                     |
| Westfield State                                    | \$500        | Semester | All International students          |
| UMass-Lowell                                       | \$500        | Semester | All international students          |
| Southern New Hampshire<br>Campus-based<br>Programs | \$500        | Semester | All international students          |
| Fitchburg State                                    | <b>\$250</b> | Semester | All international graduate students |

### 3. INTERNATIONAL STUDENT FEE

Support FT Administrative Assistance in the OIE

#### Proposal

| INTERNATIONAL GRADUATE STUDENTS | PROPOSED FEE   |
|---------------------------------|----------------|
| > 200                           | \$250/semester |
| Total                           | > \$50,000     |

| CURRENT                         | CURRENTLY BUDGETED COST | PROPOSED   |
|---------------------------------|-------------------------|--|
| 12.5 hours/week<br>at \$26/hour | \$16,900                | Full-time Administrative Assistant to support processing and tracking students in federal documentation required for OPT and STEM OPT, including I-20, I-983 and SEVIS documentation, reporting changes, updates, job tasks, and H-1B preparation. |



### 3. INTERNATIONAL STUDENT FEE

How will a full-time Administrative Assistant benefit students?

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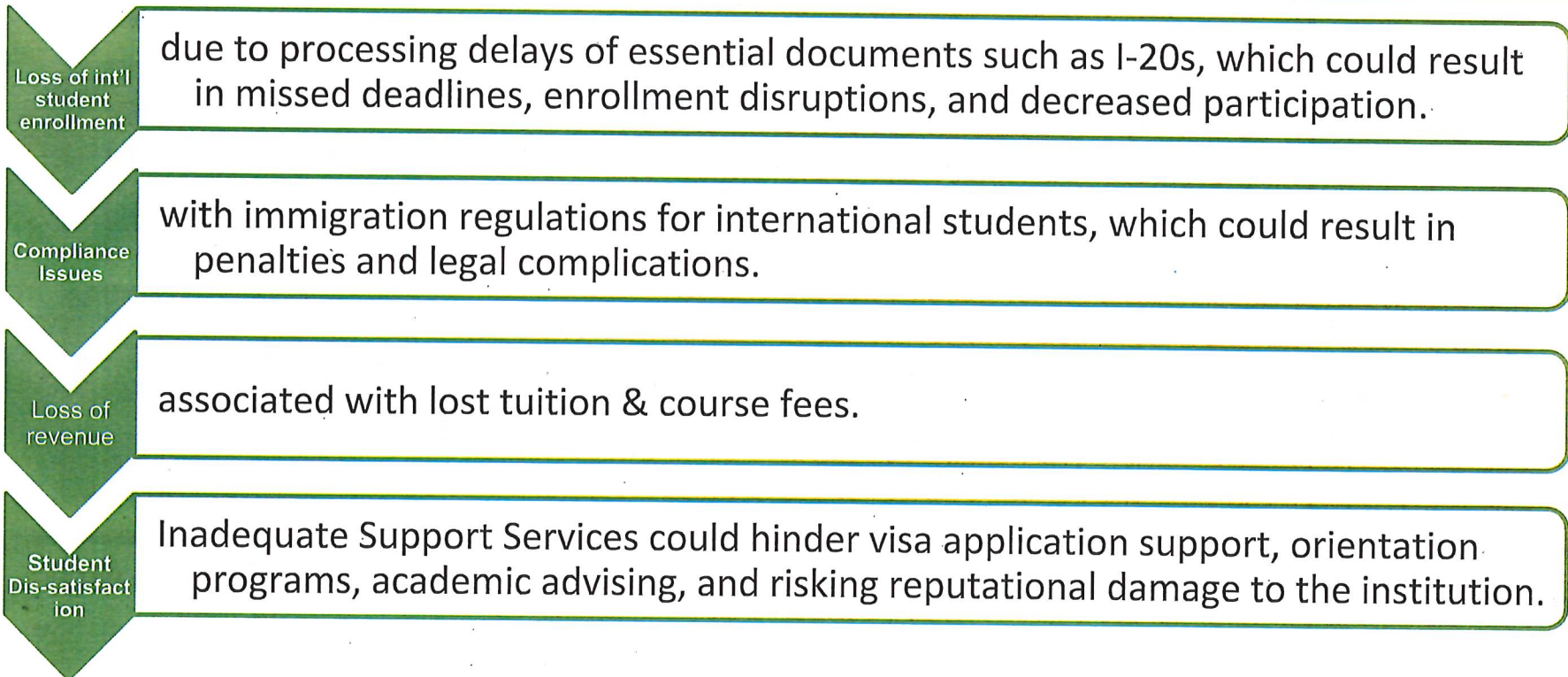
Will allow the OIE to absorb growth in I-20 processing, track missing SEVIS documentation, enter updates to SEVIS, and verify federal record accuracy in a more timely manner.

Will allow the OIE to respond to increased telephone, email & in-person inquiries and keep up with critical tasks delayed by workload increase associated with int'l enrollment growth.

Will enhance overall responsiveness and excellence of service, critical for this growing population of students for whom interpersonal influence has long been noted as a primary motivator for studying abroad (Mourali *et al*, 2005).

### 3. INTERNATIONAL STUDENT FEE

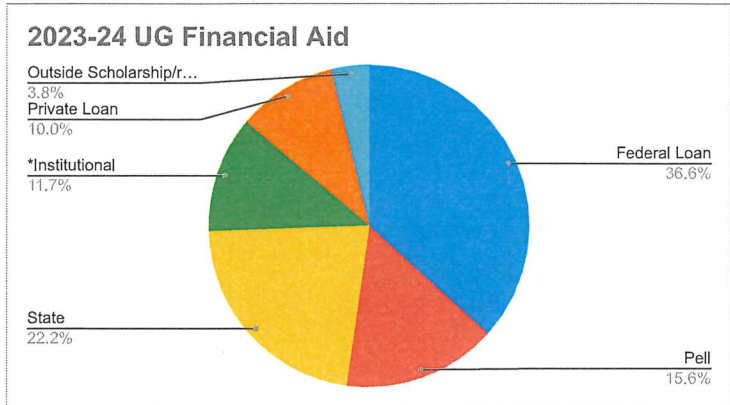
#### Risk of not funding a FT Administrative Assistant in the OIE?



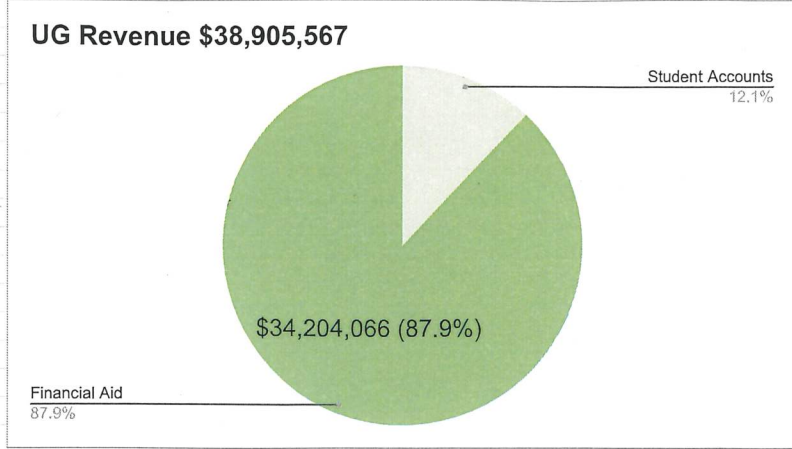
### Financial Aid Overview

| 2324 financial aid           | UG amount           | # UG students | % UG | # Grad     | GA amount          | Total Aid           |
|------------------------------|---------------------|---------------|------|------------|--------------------|---------------------|
| <b>Total Aid</b>             | <b>\$34,204,066</b> | <b>2,754</b>  |      | <b>590</b> | <b>\$7,497,730</b> | <b>\$41,701,796</b> |
| Federal Loan                 | \$12,532,053        | 2,112         | 76   | 551        | \$7,062,368        | \$19,594,421        |
| Pell                         | \$5,340,658         | 1,092         | 40   |            |                    |                     |
| State                        | \$7,584,289         | 1,693         | 61   |            |                    |                     |
| *Institutional               | \$4,010,225         | 1,371         | 50   |            |                    |                     |
| Private Loan                 | \$3,425,949         | 305           | 11   | 43         | \$435,362          | \$3,861,311         |
| Outside Scholarship/resource | \$1,310,892         | 212           | 8    |            |                    |                     |

\*REDI and Falcon out of state



|  |     |
|--|-----|
| Percent of UG eligible for MassGrant+ @ \$110K AGI | 72% |
| Percent of UG students that receive "free monies"  | 73% |
| Percent of UG students that receive financial aid  | 91% |



| Revenue               |                     | Total Financial Aid |            |
|-----------------------|---------------------|---------------------|------------|
| UG tuition and fe     | 26,407,459          |                     |            |
| Housing and foo       | <u>12,498,108</u>   |                     |            |
| <b>Undergrad Tota</b> | <b>38,905,567</b>   | <b>\$34,204,066</b> | <b>88%</b> |
| SGOCE (not incl       | 5,979,435           |                     |            |
| AP                    | 7,196,209           |                     |            |
| Extended Camp         | 833,095             |                     |            |
| CPS                   | <u>198989</u>       |                     |            |
| <b>Graduate Total</b> | <b>\$14,008,739</b> | <b>\$7,497,730</b>  | <b>54%</b> |
|                       | <b>\$52,914,306</b> | <b>\$41,701,796</b> | <b>79%</b> |

# Coversheet

## FY25 Budget - VOTE (40-23/24)

**Section:** V. FY25 Budget Votes  
**Item:** A. FY25 Budget - VOTE (40-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - FY2025 Budget.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                        |                      |
|------------------------|----------------------|
| TO: Board of Trustees  | DATE:<br>May 9, 2024 |
| FROM: The President    | REQUEST NUMBER:      |
| SUBJECT: FY2025 Budget | 40-23/24             |

It is requested that the Fitchburg State University Board of Trustees vote to approve the FY2025 Budget as presented by the President.

# Coversheet

## Day Undergrad Fee Increase - VOTE (41-23/24)

**Section:** V. FY25 Budget Votes  
**Item:** B. Day Undergrad Fee Increase - VOTE (41-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Day Undergraduate Fee Increase.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|   |                                 |
|---|---------------------------------|
| TO: Board of Trustees                   | DATE:<br>May 9, 2024            |
| FROM: The President                     | REQUEST NUMBER:<br><br>41-23/24 |
| SUBJECT: DAY Undergraduate Fee Increase |                                 |

It is requested that the Fitchburg State University Board of Trustees vote to approve the following day undergraduate fee increase.

- Day Undergraduate University Fee \$150 per semester

This fee increase represents a three percent (3.0%) increase across all undergraduate day mandatory fees. This fee increase will be effective for the fall semester 2024.

# Coversheet

## Optional Practical Training (OPT) Fee - VOTE (42-23/24)

**Section:** V. FY25 Budget Votes  
**Item:** C. Optional Practical Training (OPT) Fee - VOTE (42-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Optional Practical Training (OPT) Fee.pdf



**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|  |                      |
|--|----------------------|
| TO: Board of Trustees                          | DATE:<br>May 9, 2024 |
| FROM: The President                            | REQUEST NUMBER:      |
| SUBJECT: Optional Practical Training (OPT) Fee | 42-23/24             |

It is requested that the Fitchburg State University Board of Trustees vote to approve the creation of the Optional Practical Training (OPT) fee.

- Optional Practical Training (OPT) fee - \$250 per semester

This new fee will be effective for the fall semester 2024 for both day and SGOCE International students.

# Coversheet

## Roll Forward of Funds - VOTE (43-23/24)

**Section:** V. FY25 Budget Votes  
**Item:** D. Roll Forward of Funds - VOTE (43-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Roll Forward of Funds.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|   |                             |
|---|-----------------------------|
| TO: Board of Trustees                           | DATE:<br>May 9, 2024        |
| FROM: The President                             | REQUEST NUMBER:<br>43-23/24 |
| SUBJECT: Roll Forward of Funds to FY2025 Budget |                             |

It is requested that the Fitchburg State University Board of Trustees vote to approve that ongoing capital projects roll forward into the FY2025 University Budget.

# Coversheet

## Required Commuter Meal Plan - VOTE (44-23/24)

**Section:** VI. Food Service Discussion  
**Item:** A. Required Commuter Meal Plan - VOTE (44-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Required Commuter Meal Plan.pdf  
Chartwells Proposal Feedback Board Presentation Spring 2024.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                                      |                             |
|--------------------------------------|-----------------------------|
| TO: Board of Trustees                | DATE:<br>May 9, 2024        |
| FROM: The President                  | REQUEST NUMBER:<br>44-23/24 |
| SUBJECT: Required Commuter Meal Plan |                             |

It is requested that the Fitchburg State University Board of Trustees vote to approve a required commuter meal plan, effective for the fall semester 2025.

# Student Feedback on Chartwells Proposal

Spring 2024

# Methods to Gather Additional Student Feedback

## Tabling

39 commuter students  
in Percival and McKay

Incentive: \$5 Dunkin  
Donuts Gift Card and  
Food

## Focus Groups

13 commuter students

Incentive: \$20  
Visa/Mastercard Gift  
Card and Food

## Survey

566 completed the survey

February 13 - March 2,  
2024

Incentives:  
5 \$100 Visa/Mastercard  
Gift Cards  
7 \$50 Visa/Mastercard  
Gift Cards

# Themes Across Modalities

## Attractive Proposal

Virtually all students responded very positively to the proposal

## Addresses Concerns

Freshness and Made-to-Order  
Variety and Cultural Mix  
Hours  
Mobile Ordering

## Want to Be in the Space

96% undergrad survey respondents  
92% tabling respondents

## Want Financial Aid to Pay

85% undergrad survey respondents

- 87% residential
- 84% commuter



# More Details from Survey

## Respondents

60% residential undergrad  
30% commuter undergrad  
10% commuter graduate student

18% of undergraduates

First year: 30%

Sophomore: 18%

Junior: 23%

Senior: 21%

Graduate Student: 9%

*\* No statistically significant differences between residential undergrads and commuter undergrads \**

## Response to Proposal

**Very Positive/Positive: 91%**

- Residential undergrad: 89%
- Commuter undergrad: 93%

**Neutral: 6%**

- Residential undergrad: 5%
- Commuter undergrad: 7%

**Negative/Very Negative: 4%**

- Residential undergrad: 6%
- Commuter undergrad: 1%

## Would you use it?

**Yes: 96%**

- Residential undergrad: 95%
- Commuter undergrad: 96%

**No: 5%**

- Residential undergrad: 5%
- Commuter undergrad: 5%

## Would you be more likely to want a meal plan if your financial aid paid?

**Yes: 85%**

- Residential undergrad: 87%
- Commuter undergrad: 84%

**No: 9%**

- Residential undergrad: 6%
- Commuter undergrad: 11%

**Other: 6%**

- Residential undergrad: 7%
- Commuter undergrad: 5%

Comments are almost entirely that the responder does not have financial aid.

# Qualitative Comments

## Positive Comments

Lots of positive energy around the idea, most stemming from the proposal and some stemming from students articulating a need for change.

## Critical Comments

These comments were almost all suggestions about how to make this great. A few were students pleading not to raise prices.

# Examples of How to Make This Great

My concern is about the hours that the dining hall would be open. On weekends, students may want to hang out in the dining hall especially with all the new features. It can't be closed too early, even though not too late.

Secondly, the seating must be made enough as a lot of people would be in the dining hall for various reasons, especially if most of them at a time go in groups. Aside [from] these, I think it's a very good renovation and it's very innovative to create income and entertainment while students relax to eat.

The main thing I'd hope this upgrade brings Holmes is consistent hi speed internet, since currently it is pretty slow and sometimes doesn't work in any way shape or form

The size of the area where you can get food seems extremely small in comparison to the amount of seating available. Long lines seem like they would be an issue at every popular meal time. Though the large variety in seating types is a huge improvement.

# Examples of Positive Feedback

I believe that if my financial aid will cover the cost of my commuter dining plan, then many more commuters on campus will want to utilize the Holmes Social Hall as well.

*Do it the dining hall sucks*

This plan to re-innovate the campus is amazing. It's amazing because having an increased variety of food options means there's something for everyone's taste buds. And the mix of table lounge and setting creates a more relaxed and comfortable dining experience. Plus, extended hours allow for more flexibility in meal times. Overall, these additions make the dining hall a more enjoyable and convenient place to eat!

This video had me excited for the new and upcoming renovations that could be happening in Holmes Dining. I pray and hope this is possible for new year as its my last year at Fitchburg State University. Overall I am excited to see this come to campus because I have been asking for this type of change since my Sophomore year.

I'm a commuter so I don't really go to Holmes dining but this makes me want to go there

This is great please do this quickly

# Take Aways

**01**

Overwhelming support  
from all respondents

**02**

No statistical difference  
between commuter and  
residential students

**03**

Support for the mandate  
in that then, financial  
aid can pay for it for a  
large number of students

**04**

Even the criticisms  
assumed the project  
should go forward - just  
wanted us to avoid  
mistakes

# Feedback from SGA

- Almost all of the comments were very positive, wanting us to move forward
- One student expressed concern about ensuring that the quality improved
- One student expressed concern about students with limited means but no financial aid being able to afford it

# Meal Plan Revenue

|   | <b>Residents</b> | <b>Commuters</b> | <b>Total</b> |
|---|------------------|------------------|--------------|
| <b>Estimated Numbers of Subscribers</b> | 1,004            | 1,300            |              |
| <b>FY26 Sales</b>                       | \$3.7M           | \$317,000        | \$4M         |
| <b>FY27 Sales</b>                       | \$3.9M           | \$329,000        | \$4.2M       |



# Chartwells Investment

| <b>Investment</b>         | <b>No Commuter Plan</b> | <b>With Commuter Plan</b> |
|---------------------------|-------------------------|---------------------------|
| <b>Capital Investment</b> | <b>\$4.3M</b>           | <b>\$5.8M</b>             |
| <b>Innovation Fund</b>    | <b>\$488,000</b>        | <b>\$519,000</b>          |

# Coversheet

## Chartwell's Contract Renewal - VOTE (45-23/24)

**Section:** VI. Food Service Discussion  
**Item:** B. Chartwell's Contract Renewal - VOTE (45-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** VOTE - Chartwells Renewal.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                             |                                 |
|-----------------------------|---------------------------------|
| TO: Board of Trustees       | DATE:<br>May 9, 2024            |
| FROM: The President         | REQUEST NUMBER:<br><br>45-23/24 |
| SUBJECT: Chartwells Renewal |                                 |

It is requested that the Fitchburg State University Board of Trustees authorize negotiations of a ten-year contract renewal with Chartwells, Inc. Included as part of the renewal investment package, Chartwells will invest 4.8 million dollars toward the renovation of Holmes Dining Hall.

# Coversheet

## VOTE (46-23/24)

**Section:** VII. Nominating Committee Report  
**Item:** A. VOTE (46-23/24)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Slate of Officers VOTE.pdf

**Fitchburg State University  
REQUEST FOR BOARD ACTION**

|                         |                                 |
|-------------------------|---------------------------------|
| TO: Board of Trustees   | DATE:<br>May 9, 2024            |
| FROM: The President     | REQUEST NUMBER:<br><br>46-23/24 |
| SUBJECT: Board Officers |                                 |

It is requested that the Fitchburg State University Board of Trustees vote to recommend the following slate of officers effective July 1, 2024:

Chairman – Michael Fiorentino, Jr.  
 Vice Chairman – Lynn Barrieau  
 Clerk – David Tiernan

# Coversheet

## Personnel Actions (N11-23/24)

**Section:** VIII. Notifications  
**Item:** A. Personnel Actions (N11-23/24)  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Personnel Actions May 9, 2024.pdf

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

DATE: May 9, 2024  
 NOTIFICATION NUMBER: N11-23/24

**Hires**

|   |  |             |
|---|--|-------------|
| Israel (Izzy) Abraham, BA<br>Effective: 4/29/2024 | Staff Assistant, Athletics Recruiter and Head Football Coach<br>Athletics<br><i>Replacement Position - Budgeted line</i> | \$65,000.00 |
|---|--|-------------|

**Separations**

|  |   |             |
|--|---|-------------|
| Angela Cruz-Guzman<br>Effective: 4/19/2024 | Staff Associate, Event Operations Manager<br>Capital Planning and Maintenance<br><i>Resignation</i> | \$80,600.00 |
|--|---|-------------|

|  |  |             |
|--|--|-------------|
| Sarah (Sally) Moore<br>Effective: 9/4/2024 | Professor<br>Humanities<br><i>Retirement</i> | \$93,981.09 |
|--|--|-------------|

|                                  |   |             |
|----------------------------------|---|-------------|
| Zach Shaw<br>Effective: 4/5/2024 | Staff Assistant, Athletics Recruiter and Head Football Coach<br>Athletics<br><i>Resignation</i> | \$64,896.00 |
|----------------------------------|---|-------------|

|                                      |   |             |
|--------------------------------------|---|-------------|
| Kayla Thomas<br>Effective: 8/31/2024 | Instructor<br>Nursing<br><i>Resignation</i> | \$70,720.00 |
|--------------------------------------|---|-------------|

**Promotions**

|                                       |   |                                      |
|---------------------------------------|---|--------------------------------------|
| Nermin Bayazit<br>Effective: 9/1/2024 | From: Associate Professor<br>To: Professor<br>Mathematics | From: \$84,234.80<br>To: \$89,211.80 |
|---------------------------------------|---|--------------------------------------|

|  |   |                                       |
|--|---|---------------------------------------|
| DeMisty Bellinger-Delfeld<br>Effective: 9/1/2024 | From: Associate Professor<br>To: Professor<br>English Studies   | From: \$83,229.59<br>To: \$88,206.59  |
| Kimberly Boivin<br>Effective: 4/22/2024          | From: Accountant III (AFSCME Union)<br>To: Staff Associate, Budget Analyst (APA Union)<br>Financial Services<br><i>Restructured, budgeted Non-Unit position</i> | From: \$65,590.46<br>To: \$75,000.00  |
| Amber Deschenes<br>Effective: 5/6/2024           | From: Assistant Director<br>To: Director of Operations, SGOCE<br>SGOCE<br><i>Budgeted replacement of Elena Arranz Alonso (resignation)</i>                      | From: \$68,126.209<br>To: \$76,000.00 |
| David Heikkinen<br>Effective: 9/1/2024           | From: Associate Professor<br>To: Professor<br>Exercise & Sports Science   | From: \$84,372.23<br>To: \$89,349.23  |
| Wendy Keyser<br>Effective: 9/1/2024              | From: Associate Professor<br>To: Professor<br>English Studies   | From: \$99,273.71<br>To: \$104,250.71 |
| Kevin McCarthy<br>Effective: 9/1/2024            | From: Associate Professor<br>To: Professor<br>Communications Media  | From: \$85,093.76<br>To: \$90,070.76  |
| Sarah (Sally) Moore<br>Effective: 9/1/2024       | From: Associate Professor<br>To: Professor<br>Humanities  | From: \$93,981.09<br>To: \$98,958.09  |

**Leave Without Pay**

|  |   |             |
|--|---|-------------|
| Nicole Salerno<br>Effective: 5/23/2024<br>End: 8/16/2024 | Assistant Director, International Education<br>International Education<br><i>BOT approved Educational Leave per the APA CBA</i> | \$58,897.07 |
|--|---|-------------|



**Out of Title**

|  |  |  |
|--|--|--|
| <p>Nathan Corbett<br/>Effective: 4/15/2024</p> | <p>From: Staff Associate, Building Services Manager<br/>To: Staff Associate, Building Services Manager/Events<br/>Capital Planning and Maintenance<br/><i>** Covering for Events due to the Events Manager resignation</i></p> | <p>From \$77,521.34<br/>To \$85,321.34</p> |
|--|--|--|

**Tenure with Promotion**

|   |  |  |
|---|--|--|
| <p>Lilian Bobea<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Behavioral Sciences</p> | <p>From: \$74,653.04<br/>To: \$79,115.04</p> |
|---|--|--|

|  |  |  |
|--|--|--|
| <p>Elyse Clark<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Earth, Geographic, and Public Health Sciences</p> | <p>From: \$74,010.23<br/>To: \$78,472.23</p> |
|--|--|--|

|   |  |  |
|---|--|--|
| <p>Karen Keenan<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Exercise &amp; Sports Science</p> | <p>From: \$75,241.29<br/>To: \$79,703.29</p> |
|---|--|--|

|   |   |  |
|---|---|--|
| <p>Amy McGlothlin<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Humanities</p> | <p>From: \$70,480.73<br/>To: \$74,942.73</p> |
|---|---|--|

|  |   |  |
|--|---|--|
| <p>Andrea Olmstead<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Humanities</p> | <p>From: \$74,010.23<br/>To: \$78,472.23</p> |
|--|---|--|

|  |  |  |
|--|--|--|
| <p>Wafa Unus<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>English Studies</p> | <p>From: \$74,010.23<br/>To: \$78,472.23</p> |
|--|--|--|

|  |   |  |
|--|---|--|
| <p>Mary Vreeland<br/>Effective: 9/1/2024</p> | <p>From: Assistant Professor<br/>To: Associate Professor<br/>Communications Media</p> | <p>From: \$79,060.60<br/>To: \$83,522.60</p> |
|--|---|--|

Hong Yu  
Effective: 9/1/2024

From: Assistant Professor  
To: Associate Professor  
Engineering Technology

From: \$82,354.85  
To: \$86,816.85

# Coversheet

## Financial Statements (N12-23/24)

**Section:** VIII. Notifications  
**Item:** B. Financial Statements (N12-23/24)  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Financial Statements.pdf

**FITCHBURG STATE UNIVERSITY**

**Board of Trustees**

**NOTIFICATIONS**

|  |                                       |
|--|---------------------------------------|
| <b>TO:</b> Budget, Finance & Facilities<br>Committee | <b>DATE:</b> May 9, 2024              |
| <b>FROM:</b> The President                           | <b>NOTIFICATION NUMBER:</b> N12-23/24 |
| <b>SUBJECT:</b> Financials                           |                                       |

**FITCHBURG STATE UNIVERSITY  
FINANCIAL STATEMENTS  
FOR THE NINE MONTHS ENDED  
MARCH 31, 2024, 2023 AND 2022**

**Fitchburg State University**  
**Executive Summary**  
**Financial Statements for the Nine Months Ended**  
**March 31, 2024, 2023 and 2022**

**Statements of Net Assets (pages 4-6):**

- Total assets decreased by approximately \$6.6 million between fiscal years 24-23 while total assets increased by \$52 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 \$2.4 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 \$2.4 million in fiscal year 24 after a \$1.5 million loss in fiscal year 23.
- Current liabilities increased by \$4.8 million between fiscal years 23-24 and increased by \$1.5 million between fiscal years 22-23. The increase in fiscal year 24 was due primarily to an increase of \$3.7 million in deferred revenue, most of which is related to state appropriations received and not yet expended. Other liabilities also increased in fiscal year 24. Accounts payable and accrued liabilities increased by \$1.1 million and this increase was mainly due to \$800K tuition and fee payment due to the state for non-state supported day classes.
- 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 \$11 million in fiscal year 24 was due to a reduction of \$8 million in Pension and OPEB liabilities and a \$5 million reduction in long-term payables. The \$25.7 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 and Pension liabilities.
- Total net assets decreased by \$3 million between fiscal year 23-24, unrestricted net assets increased by \$1 million and debt service decreased by \$0.8 million and capital projects decreased by \$2.1 million.

**Statements of Revenues, Expenses and Changes in Net Assets (pages 7-8):**

- Net Tuition and fee revenue have decreased insignificantly over the last 3 years while most of the other operating revenue increased slightly between fiscal year 23-24. Fiscal year 22 federal grant income is an outlier as that amount was because of COVID-related HEERF funds.
- Total operating expenses increased by \$2.5 million between fiscal years 24-23. Payroll accounted for \$4.1 million increase in fiscal year 24-23 and \$2.3 million of this increase was due to increase in benefits expenses. Electricity cost increased by 21.4% in fiscal year 24, which caused a utilities expense increase of \$0.7 million. The decrease in loans and special payments and IT expenditure of \$4.2 million is related to ROUA and SBITA expenses, which are credited to these accounts and debited to their respective liability accounts and interest expense.
- The increase in interest expense on capital assets is due to ROUA and SBITA interest expenses.

**Fitchburg State University**  
**Executive Summary**  
**Financial Statements for the Nine Months Ended**  
**March 31, 2024, 2023 and 2022**

**Statements of Cash Flows (page 9)**

- Total cash at March 2024 decreased by \$1.9 million to \$45.2 million but had a net increase in cash for the period of \$9 million.
- Net cash provided from operations increased by \$4.5 million in fiscal year 24. This increase was mainly due to a \$6 million increase in deferred state appropriation revenue and an increase in accounts payable and other liabilities of \$1.7 million.
- Net cash used by investing activities, increase was mainly due to a reduction of approximately \$7 million in acquisition of property and plant expenditure.

**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF NET ASSETS  
MARCH 31, 2024, 2023 AND 2022**

**ASSETS**

|  | <u>2024</u>        | <u>2023</u>        | <u>2022</u>        |
|--|--------------------|--------------------|--------------------|
| <b><u>Current Assets</u></b>                               |                    |                    |                    |
| Cash and cash equivalents                                  | 30,521,476         | 30,242,691         | 38,327,855         |
| Cash and cash equivalents, restricted                      | 5,623,362          | 7,500,231          | 11,483,627         |
| Accounts receivable, net                                   | 3,509,014          | 2,637,074          | 2,751,583          |
| Loans receivable, net                                      | 680                | 3,018              | 380                |
| Other Assets (prepaid expenses)                            | 128,358            | 308,847            | 370,476            |
| <b>Total current assets</b>                                | <b>39,782,891</b>  | <b>40,691,860</b>  | <b>52,933,921</b>  |
| <b><u>Noncurrent Assets</u></b>                            |                    |                    |                    |
| Restricted cash and cash equivalents                       | 9,043,742          | 9,319,652          | 9,546,440          |
| Endowment Investments                                      | 1,102,591          | 963,864            | 1,062,206          |
| Other Investments  | 20,531,312         | 18,286,861         | 19,700,737         |
| Loans receivable, net                                      | 80,157             | 104,736            | 912,186            |
| Other non current assets                                   | 277,300            | 13,327             | 199,102            |
| Capital assets, net  | 188,683,867        | 194,332,985        | 180,238,300        |
| Right of use assets, net                                   | 48,385,517         | 52,885,750         | -                  |
| SBITA assets, net  | 2,115,585          | -                  | -                  |
| <b>Total noncurrent assets</b>                             | <b>270,220,071</b> | <b>275,907,174</b> | <b>211,658,971</b> |
| <b>Total Assets</b>  | <b>310,002,962</b> | <b>316,599,034</b> | <b>264,592,892</b> |
| Deferred outflow-OPEB                                      | 1,576,035          | 3,275,872          | 5,802,040          |
| Deferred outflow-Pension                                   | 2,786,519          | 4,122,377          | 7,386,093          |
| <b>Total assets and Deferred<br/>Outflows of Resources</b> | <b>314,365,515</b> | <b>323,997,284</b> | <b>277,781,025</b> |

For those charged with governance and internal management use only



**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF NET ASSETS  
MARCH 31, 2024, 2023 AND 2022**

**LIABILITIES AND NET ASSETS**

|  | <u>2024</u>        | <u>2023</u>        | <u>2022</u>        |
|--|--------------------|--------------------|--------------------|
| <b><u>Current Liabilities</u></b>              |                    |                    |                    |
| Bond payable - current portion                 | \$ 3,871,372       | \$ 4,848,620       | \$ 4,436,978       |
| Lease Liability - current portion              | 3,092,349          | 3,914,664          | -                  |
| SBITA Liability - current portion              | 1,029,041          | -                  | -                  |
| Account payable and accrued liabilities        | 2,266,942          | 1,106,361          | 2,148,436          |
| Salaries & benefits payable                    | 1,513,322          | 1,246,218          | 2,962,337          |
| Account payable - construction                 | 249                | 159,778            | -                  |
| Accrued workers compensation - current portion | 175,952            | 137,942            | 131,181            |
| Compensated absences - current portion         | 3,919,052          | 3,595,589          | 3,538,000          |
| Faculty payroll accrual                        | 5,068,489          | 4,914,367          | 4,637,291          |
| Deferred revenue - current portion             | 5,125,248          | 1,456,814          | 2,252,285          |
| Deposits - current portion                     | 158,550            | 151,800            | -                  |
| Other liabilities - current portion            | 1,043,721          | 935,101            | 821,106            |
| <b>Total current liabilities</b>               | <b>27,264,287</b>  | <b>22,467,253</b>  | <b>20,927,614</b>  |
| <b><u>Noncurrent liabilities</u></b>           |                    |                    |                    |
| Bond payable                                   | 40,318,696         | 42,842,622         | 48,066,312         |
| Lease liability -Right of use asset            | 54,832,807         | 57,644,508         | -                  |
| SBITA -Subs Based IT Agreement                 | 1,043,229          | -                  | -                  |
| Accrued workers compensation                   | 944,571            | 1,006,311          | 957,244            |
| Compensated absences                           | 2,402,000          | 2,397,059          | 2,262,000          |
| Deferred revenue                               | 3,143,059          | 1,966,863          | 4,103,353          |
| Due to federal loan programs-Perkins           | -                  | 33,280             | 796,098            |
| Due to federal loan programs-Nursing           | -                  | -                  | 136,311            |
| Unfunded pension liability                     | 6,326,084          | 8,015,299          | 20,091,153         |
| Unfunded opeb liability                        | 7,961,317          | 14,073,004         | 25,852,605         |
| <b>Total noncurrent liabilities</b>            | <b>116,971,763</b> | <b>127,978,946</b> | <b>102,265,076</b> |
| <b>Total liabilities</b>                       | <b>144,236,050</b> | <b>150,446,199</b> | <b>123,192,690</b> |
| Service concession agreement                   | -                  | 252,918            | 505,836            |
| Deferred inflow-debt refunding                 | 1,970,526          | 2,192,025          | 2,014,723          |
| Deferred inflows-opeb                          | 15,583,682         | 14,142,424         | 6,269,569          |
| Deferred inflows-pension                       | 7,628,785          | 8,917,207          | 779,813            |
| <b>Total Deferred Inflows of Resources</b>     | <b>25,182,993</b>  | <b>25,504,574</b>  | <b>9,569,941</b>   |

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF NET ASSETS  
MARCH 31, 2024, 2023 AND 2022**

**NET ASSETS**

|   | <u>2024</u>               | <u>2023</u>               | <u>2022</u>               |
|---|---------------------------|---------------------------|---------------------------|
| Invested in capital assets, net of related debt | 129,406,973               | 131,506,434               | 125,241,892               |
| <b>Restricted for:</b>                          | -                         | -                         | -                         |
| Non-expendable                                  | -                         | -                         | -                         |
| Scholarships and fellowships                    | 555,865                   | 522,598                   | 567,362                   |
| Research  | -                         | -                         | -                         |
| Expendable                                      | -                         | -                         | -                         |
| Scholarships and fellowships                    | 352,228                   | 279,840                   | 400,861                   |
| Research  | -                         | -                         | -                         |
| Instructional department uses                   | -                         | -                         | -                         |
| Loans   | 116,330                   | 219,264                   | 145,027                   |
| Capital projects                                | 1,440,523                 | 2,571,980                 | 84,072                    |
| Debt service                                    | 15,111,940                | 15,952,474                | 12,685,282                |
| Other   | 196,172                   | 215,664                   | 202,341                   |
|   | -                         | -                         | -                         |
| Unrestricted                                    | <u>(2,233,558)</u>        | <u>(3,221,743)</u>        | <u>5,691,557</u>          |
| <b>Total net assets</b>                         | <b><u>144,946,472</u></b> | <b><u>148,046,511</u></b> | <b><u>145,018,394</u></b> |
| <b>LIABILITIES and NET ASSETS</b>               | <b><u>314,365,515</u></b> | <b><u>323,997,284</u></b> | <b><u>277,781,025</u></b> |

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY**  
**STATEMENTS OF REVENUES, EXPENSES & CHANGES IN NET ASSETS**  
**FOR PERIOD ENDED MARCH 31, 2024, 2023 and 2022.**

|   | 2024                | 2023                | 2022                |
|---|---------------------|---------------------|---------------------|
| <b>Operating Revenues</b>                     |                     |                     |                     |
| Student tuition and fees                      | 43,234,710          | 44,023,415          | 44,587,913          |
| Waivers and exemptions                        | (767,056)           | (820,611)           | (919,340)           |
| <b>Net student tuition and fees</b>           | <u>42,467,654</u>   | <u>43,202,805</u>   | <u>43,668,573</u>   |
| Federal grants and contracts                  | 6,784,593           | 6,215,658           | 18,218,623          |
| State and local grants and contracts          | 1,140,074           | 864,304             | 579,698             |
| Nongovernmental grants and contracts          | 1,298,932           | 562,441             | 394,020             |
| Sales and services of educational departments | 1,038,442           | 1,202,046           | 901,263             |
| Auxiliary enterprises                         |                     |                     |                     |
| Auxiliary enterprises - Res Life              | 8,282,150           | 7,996,298           | 8,799,132           |
| Auxiliary enterprises - Dining Hall           | 3,447,269           | 2,941,024           | 2,975,941           |
| Other operating revenues                      | 389,764             | 455,630             | 511,056             |
| <b>Total Operating Revenues</b>               | <u>64,848,878</u>   | <u>63,440,206</u>   | <u>76,048,306</u>   |
| <b>Operating Expenses</b>                     |                     |                     |                     |
| <b>Salaries:</b>                              |                     |                     |                     |
| Faculty                                       | 20,273,958          | 19,657,468          | 18,549,162          |
| Exempt wages                                  | 3,812,786           | 3,524,134           | 3,101,981           |
| Non-exempt wages                              | 16,913,134          | 15,938,124          | 14,946,316          |
| Benefits                                      | 15,028,347          | 12,759,652          | 11,305,471          |
| <b>Other Operating Expenses</b>               |                     |                     |                     |
| Employee related travel                       | 261,939             | 223,623             | 105,510             |
| Administrative expense                        | 1,625,033           | 1,476,297           | 1,690,475           |
| Facility operational supplies                 | 1,241,262           | 1,102,133           | 1,175,803           |
| Utilities                                     | 3,357,524           | 2,639,778           | 3,050,931           |
| Consultant services                           | 1,757,003           | 1,769,514           | 1,541,022           |
| Operational expenses                          | 3,917,852           | 4,162,617           | 5,445,663           |
| Equipment purchases                           | 602,613             | 328,506             | 277,815             |
| Equipment maintenance and repairs             | 591,855             | 541,976             | 512,523             |
| Purchased client services-program             | 281,890             | 270,298             | 168,831             |
| Construction and building improvement         | 1,527,633           | 1,601,690           | 1,520,994           |
| Grant and Subsidies                           | 53,522              | 70,090              | 33,900              |
| Scholarships                                  | 8,923,554           | 8,084,884           | 14,068,624          |
| Loans & special payments                      | (3,345,880)         | 197,627             | 1,007,437           |
| IT expenditures                               | 3,592,467           | 4,283,464           | 4,102,271           |
| Amortization Expense                          | 4,070,362           | 3,617,082           | -                   |
| Depreciation                                  | 9,050,595           | 8,882,905           | 8,959,951           |
| Bad debt expense                              | (46,168)            | (104,911)           | (54,751)            |
| <b>Auxiliary enterprises:</b>                 | -                   | -                   |                     |
| Residential life - Housing                    | 8,868,865           | 9,059,706           | 8,423,042           |
| Residential life - Dining                     | 2,434,239           | 2,118,511           | 2,154,894           |
| <b>Total Operating Expenses</b>               | <u>104,794,384</u>  | <u>102,205,166</u>  | <u>102,087,865</u>  |
| <b>Operating profit/(loss)</b>                | <u>(39,945,506)</u> | <u>(38,764,961)</u> | <u>(26,039,559)</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 MARCH 31, 2024, 2023 and 2022.**

|   | 2024               | 2023               | 2022               |
|---|--------------------|--------------------|--------------------|
| <b>Nonoperating Revenues (Expenses)</b>                     |                    |                    |                    |
| State appropriations  | 41,668,865         | 39,876,218         | 36,149,151         |
| Investment income (net of investment expenses)              | 1,384,752          | 1,254,219          | 720,960            |
| Unrealized gain/(loss)                                      | 962,661            | 202,433            | (1,504,716)        |
| Interest expense on capital asset                           | (2,819,073)        | 963,957            | (824,553)          |
| <b>Total Nonoperating Revenues (Expenses)</b>               | <b>41,197,205</b>  | <b>42,296,828</b>  | <b>34,540,842</b>  |
| <br>  |                    |                    |                    |
| <b>Income (loss) before Capital and Endowment Additions</b> | <b>1,251,698</b>   | <b>3,531,867</b>   | <b>8,501,283</b>   |
| <br>  |                    |                    |                    |
| Capital appropriations                                      | (170,015)          | 1,664,415          | 1,089,214          |
| Capital grants and gifts                                    | 189,689            | 189,689            | 189,688            |
| <b>Total Capital and Endowment Additions</b>                | <b>19,674</b>      | <b>1,854,104</b>   | <b>1,278,902</b>   |
| <br>  |                    |                    |                    |
| <b>Increase in net assets</b>                               | <b>1,271,372</b>   | <b>5,385,971</b>   | <b>9,780,185</b>   |
| <br>  |                    |                    |                    |
| <b>Net Assets - beginning of year</b>                       | <b>143,675,100</b> | <b>142,660,540</b> | <b>135,238,209</b> |
| <b>Net Assets - end of period</b>                           | <b>144,946,472</b> | <b>148,046,511</b> | <b>145,018,394</b> |

For those charged with governance and internal management use only

**FITCHBURG STATE UNIVERSITY  
STATEMENTS OF CASH FLOW  
MARCH 31, 2024, 2023 AND 2022**

|   | <u>2024</u>          | <u>2023</u>          | <u>2022</u>          |
|---|----------------------|----------------------|----------------------|
| <b>CASH FLOWS FROM OPERATING ACTIVITIES</b>   |                      |                      |                      |
| <b>Increase in net assets</b>   | 1,271,372            | 5,385,971            | 9,780,186            |
| Adjustments to reconcile increase to cash Provided by (Used by) operating activities: | -                    | -                    |                      |
| (Gain)/loss on marketable securities  | (349,689)            | (202,433)            | 1,504,811            |
| Depreciation  | 9,050,595            | 8,882,905            | 8,959,951            |
| Amortization-Right of use asset /SBITA  | 4,070,362            | 3,617,082            | -                    |
| <b>(Increase) decrease in assets:</b>   |                      |                      |                      |
| Accounts receivable   | (50,134)             | (475,804)            | 9,917,211            |
| Loans receivable  | 19,137               | 778,830              | 128,469              |
| Other Assets  | (73,253)             | 30,272               | (291,104)            |
| <b>Increase (decrease) in liabilities</b>   |                      |                      |                      |
| Accounts payable and accrued liabilities  | (1,765,696)          | (3,469,010)          | (910,519)            |
| Compensated absences  | 515,941              | 178,428              | 438,601              |
| Accrued faculty payroll   | 830,343              | 738,811              | 760,963              |
| Deferred revenue  | 4,742,521            | (1,210,107)          | (3,060,275)          |
| Other liabilities   | 654,481              | 157,465              | 511,053              |
| <b>Net Cash Provided by operating activities</b>                                      | <u>18,915,979</u>    | <u>14,412,410</u>    | <u>27,739,347</u>    |
| <b>CASH FLOWS FROM INVESTING ACTIVITIES</b>   |                      |                      |                      |
| Unrealized gain on investments  | (962,661)            | (373,368)            | (454,236)            |
| Purchase of investments   | (4,933,661)          | (3,669,976)          | (3,706,218)          |
| Proceeds from the sale of investments   | 4,223,133            | 3,593,253            | 3,431,473            |
| Acquisition of property, plant and equipment  | (2,007,692)          | (9,174,038)          | (3,668,225)          |
| <b>Net Cash (used by) investing activities</b>  | <u>(3,680,882)</u>   | <u>(9,624,130)</u>   | <u>(4,397,206)</u>   |
| <b>CASH FLOWS FROM FINANCING ACTIVITIES</b>   |                      |                      |                      |
| Federal loan program  | (33,542)             | (761,689)            | (222,383)            |
| Payments of capital leases  | -                    | -                    | (131,295)            |
| Payments of capital debt  | (3,243,802)          | (4,020,584)          | (2,519,169)          |
| Amortization of bond premiums/ROUA/SBITO  | (3,011,056)          | (2,191,816)          | -                    |
| <b>Net Cash (used by) financing activities</b>  | <u>(6,288,400)</u>   | <u>(6,974,089)</u>   | <u>(2,872,847)</u>   |
| <b>Net increase in cash</b>   | 8,946,697            | (2,185,809)          | 20,469,294           |
| <b>Cash and cash equivalents - beginning of period</b>                                | <u>36,241,884</u>    | <u>49,248,381</u>    | <u>38,888,628</u>    |
| <b>Cash and cash equivalents - end of period</b>                                      | <u>\$ 45,188,581</u> | <u>\$ 47,062,573</u> | <u>\$ 59,357,922</u> |

For those charged with governance and internal management use only

# Coversheet

## News Articles

**Section:** XI. President's Report  
**Item:** F. News Articles  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** News Clips for May 2024.pdf



FSU announces honorees for commencement ceremonies  
Local News » A3

# Sentinel & Enterprise

Tuesday, April 30, 2024

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[sentinelandenterprise.com](http://sentinelandenterprise.com)

## FITCHBURG STATE UNIVERSITY

# FSU announces honorees for commencement ceremonies

*Submitted Article*

**FITCHBURG** » The University will be welcoming back alumna Yla Eason, who founded a multiracial toy company dedicated to fighting the racial imbalance in toys and superheroes, to deliver the address at the undergraduate commencement ceremony on Saturday, May 18.

Eason, a 1971 graduate of Fitchburg State, is an accomplished marketing professional based in the Greater New York City area and currently serves

as an assistant professor of professional practice at the Rutgers University Business School in New Jersey, where her focus is business communications and marketing.

“Yla Eason’s inspirational story of activism and entrepreneurship sends a powerful message for the Class of 2024,” said Fitchburg State President Richard S. Lapidus. “We are honored to welcome her back to campus to continue our tradition of presenting accomplished alumni as our commencement speakers.”

Lapidus will also address graduates and guests at the ceremony, which will be his final commencement as president of Fitchburg State. He is retiring from his post in June.

Eason is the founder of Olmec Toys, which has reached over \$5 million in sales, and is nationally recognized for pioneering a new market in the toy industry while also promoting racial diversity. In addition to her Bachelor of Arts degree from Fitchburg State, Eason received an MBA from Harvard Busi-

ness School.

Eason will be presented the President’s Medal at the undergraduate ceremony.

Reinaldo “Rey” Lopez is the founder of Resource Management Inc., one of the nation’s largest Hispanic-owned businesses, will also be presented the President’s Medal at the undergraduate ceremony.

Born in Puerto Rico, he migrated to the mainland United States with his mother in 1962 and soon joined her working in the tobacco fields to help sup-

**HONOREES » PAGE 5**



COURTESY FITCHBURG STATE UNIVERSITY

Alumna and accomplished marketing professional Yla Eason will be the keynote speaker at the Fitchburg State University undergraduate commencement ceremony on May 18.

## Honorees

**FROM PAGE 3**

port the family. His mother’s tireless work ethic and commitment to family proved a solid foundation upon which Lopez would build for the rest of his career.

Honorees at the undergraduate ceremony will also include valedictorian Jyy Rose Liang of Lunenburg, majoring in educational studies.

Fitchburg State will hold its graduate commencement ceremony at 6:30 p.m. Thursday, May 16 at the Athletics and Recreation Center. That ceremony will include the presentation of the Graduate Student Leadership Award to Ali Raza, who is completing a master’s degree in computer science.

Additional information on the ceremony and honorees may be found at [fitchburgstate.edu/commencement](http://fitchburgstate.edu/commencement).

— *Fitchburg State University*

## FITCHBURG STATE UNIVERSITY

# Finalists named in FSU presidential search

## Submitted Article

**FITCHBURG** » Three finalists have been named for Fitchburg State University's next president. The candidates, selected in a nationwide search, will visit the university campus in the coming weeks to meet with campus constituencies including open forums with the general public.

The university's Board of Trustees will vote on the next presidential appointment and submit the name to the state Department of Higher Education for final approval.

The next president will succeed Dr. Richard S. Lapidus, Fitchburg State's 11th president, who has led the institution since 2015.

The finalists will each spend two days on campus meeting with students, faculty, staff and alumni, as well as open sessions for external constituents. The finalists, in order of their scheduled campus visits, are:

- Dr. Karim Ismaili, Executive Vice President and Provost at Bridgewater State University. The public forum for Dr. Ismaili will be at 2 p.m. Thursday, April 11 in Ellis White Lecture Hall in Hammond Hall.

- Dr. Mark Overmyer-Velázquez, Dean and Chief Administrative Officer at the University of Connecticut Hartford. The public forum for Dr. Over-



COURTESY FITCHBURG STATE UNIVERSITY

Fitchburg State University has decided on three finalists in the nationwide search to replace President Richard Lapidus, who is retiring at the end of the academic year. From left, Vice President of Operations & Advancement at Colorado State University Dr. Donna Souder Hodge, Dean and Chief Administrative Officer at the University of Connecticut Hartford Dr. Mark Overmyer-Velázquez, and Executive Vice President and Provost at Bridgewater State University Dr. Karim Ismaili.

myer-Velázquez will be at 1:45 p.m. Wednesday, April 17 in Ellis White Lecture Hall in Hammond Hall.

- Dr. Donna Souder Hodge, Vice President of Operations & Advancement at Colorado State University, Pueblo. The public forum for Dr. Souder Hodge will be at 2:15 p.m. Tuesday, April 23 in Ellis White Lecture Hall in Hammond Hall.

The national search was led by a committee appointed by the Board of Trustees earlier this year, chaired by Trustee Eric A. Gregoire, himself a 2011 graduate of the university. The search committee in-

cluded representation from the campus and community and worked with executive search firm WitKieffer to identify candidates for the post.

"The opportunity to lead Fitchburg State generated substantial interest and today I'm proud to report the recommended finalists each embody the characteristics required of our next president," Gregoire said. "These accomplished academic leaders come from diverse backgrounds and impressive experiences that distinguish themselves and with an understanding of our special role as a regional com-

prehensive university prepared to lead Fitchburg State to a dynamic and bright future. There are substantial opportunities and significant challenges the next president will contend with but they will be forging ahead with a campus and broader community energized by the opportunity to work together ensuring Fitchburg State will flourish for the benefit of our students present and future."

Additional information on the search may be found at [fitchburgstate.edu/presidential-search](http://fitchburgstate.edu/presidential-search).

-Fitchburg State University



# Sentinel & Enterprise

Tuesday, April 2, 2024

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## FITCHBURG STATE UNIVERSITY

# FSU celebrating launch of Biotech Research Lab

Ribbon cutting on April 10

*Submitted Article*

**FITCHBURG** » The ribbon cutting for the new Biotechnology Research Laboratory at Fitchburg State University is scheduled for next week and, with it, the University is hosting a panel

discussion on the present and future of the life sciences in Massachusetts.

The ribbon cutting has been scheduled for Wednesday, April 10, 2 p.m. at the University's Antonucci Science Complex, with the panel discussion following at 3:15 p.m.

The biology and chemistry laboratory investments were made possible

by a \$750,000 grant from the Massachusetts Life Sciences Center.

The event will include poster presentations by undergraduate students who have engaged in research sponsored by the Moderna Charitable Foundation. The day's programs will conclude with a MassBioEd network-

FSU | PAGE 4



COURTESY FITCHBURG STATE UNIVERSITY

The Fitchburg State University campus.

TUESDAY, APRIL 2, 2024

## FSU

FROM PAGE 1

ing event for undergraduate students and industry professionals.

All programs will be held in the University's Antonucci Science Complex at 333 North St.

"We are excited to celebrate the opening of this new laboratory space and to share the research performed by our undergraduate students," said University President Richard S. Lapidus. "These life-changing opportunities and resources were made possible by generous support from our partners, and we are thrilled to show them

the impact of their gifts."

The grant-funded laboratory equipment will serve all biology and chemistry students, as it will be incorporated into all aspects of the curriculum, from introductory core classes to upper-level electives and independent research. The modernized equipment will give faculty the ability to train students in some of the most sought-after biotechnology skills.

Students will also be better prepared for workplace experiences, including internships. In addition, the grant will also serve students taking the newly formed data analytics minor, allowing Fitchburg State to develop new coursework to diversify its offer-

ings and attract more students to this growing field.

The research grant, facilitated by the university's Biology and Chemistry Department, targets traditionally underserved populations to engage students in mentorship and high-impact practices as an undergraduate research community.

The program is designed to help students navigate a post-COVID higher education landscape by increasing the retention and graduation rates of traditionally underserved populations.

Receiving a stipend and academic credit, the student research fellows will work 10 hours per week, receiving one-on-one mentorship and instruction on

cutting-edge techniques in their fields of interest.

Participating students are paired with faculty mentors to conduct credit-bearing research. The students in the program are paid for all aspects of their work, including performing experiments in the lab, analyzing data, preparing for weekly presentations, and career development activities.

At the end of the Spring 2024 semester, the 12 students in the inaugural cohort will present their work at the university's annual Undergraduate Conference for Research and Creative Practice on April 18, as well as a statewide research conference.

— Fitchburg State University

# B1 SPORTS

Tuesday, April 9, 2024 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://www.facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

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## NHL COMES TO FITCHBURG

# Thornton tells his story at FSU

## Former Bruins enforcer shares experiences at Weston Auditorium

By Nick Mallard

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

**FITCHBURG** » There was a time not too terribly long ago that when Shawn Thornton dropped his gloves, it spelled trouble for someone wearing an opposing sweater.

With his mitts off Monday, what the former Boston Bruins enforcer brought to Fitchburg State University wasn't a physical altercation, but rather a candid and honest look into the mindset that drove Thornton through adversity and to success in the NHL.

Appearing at the school's Weston Auditorium, the Bruins

fan favorite served up his trademark humor, but intertwined it with moments of insight and vulnerability in his "Fighting My Way to the Top" talk.

Thornton spoke openly of the grind of his journey from AHL stalwart to two-time Stanley Cup champion with Fitchburg State hockey players Sam Rennick, Toivo Kramer and Trenton Skaggs moderating before an attentive audience.

"I wasn't the most skilled guy, but I always found a way," Thornton said.

A rugged forward, Thornton won a Stanley Cup with the Ana-

heim Ducks in 2007 before coming to Boston. His never-say-die attitude on the ice and his work ethic was a microcosm of the Bruins' philosophy in 2011 as Boston claimed its first Stanley Cup in nearly 40 years.

Playing on the fourth line with Daniel Paille and Gregory Campbell, the "Merlot Line" as it came to be known played valuable minutes in the Cup run, earning the trust of head coach Claude Julien and the admiration of hockey fans across New England.

It fulfilled a promise made to Thornton by Bruins president

**THORNTON** » PAGE 2



SENTINEL & ENTERPRISE / NICK MALLARD

Former Boston Bruins Shawn Thornton, right, speaks with Fitchburg State hockey players, from left, Trenton Skaggs, Sam Rennick and Toivo Kramer at Weston Auditorium on Monday.

## Thornton

FROM PAGE 1

Cam Neely prior to the winger signing a three-year deal in Boston.

"I had three or four offers (in free agency). ... (Neely) was like 'I know you have multiple options, but I've seen players like you come

through this town and the appreciation this town has for guys like you is really special.' It was the understatement of my career," said Thornton, who ended up spending seven years with the Bruins. "The way Boston fans came to embracing and supporting me in my career. ... It still amazes me."

The Oshawa, Ontario,

native finished his career as the only player to have played in 600 or more AHL contests before taking part in 700-plus NHL games. He admitted to thinking about hanging up the skates to pursue a career in law enforcement as he neared 30 and was still languishing in the AHL, but Thornton eventually caught a break

in Anaheim and stuck as a full-time NHL skater.

"It was always a dream of mine to play in the NHL, even if it wasn't a realistic one, to be honest" Thornton said. "It's not easy. It was miserable some days, not knowing if you're going to make it. My mindset was I don't want to go back to the steel mill. I was playing

at the second highest level in the world and enjoying my teammates and the lifestyle and everything about it. That's what kept me going."

The transition from NHL enforcer to a member of the front office presented new challenges to Thornton, now the chief revenue officer for the Florida Panthers. But as he did on the

ice, he embraced the grind and is doing all he can to be successful in his new position.

"You get out of it what you put into it. I won't be outworked," Thornton said. "I take a lot of pride in it. It's a completely different world, but I still work just as hard. ... I'm blessed, but I put a lot of work into it."

# LOCAL NEWS

Friday, April 19, 2024 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://www.facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

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## LIVE SHOWS

# Fitchburg State presents absurdist short plays in April

### *Submitted Article*

**FITCHBURG** » Two one-act plays that point out the bizarre, delightful and surreal nature of life will be presented as Fitchburg State University's spring theater productions in April.

The performances, collectively known as "Absurdist Alert!" will be held next week in the Wallace Theater for the Performing Arts in the McKay Complex at 67 Rindge Road. Admission is free and open to the public.

"The Zoo Story," written by Edward Albee and directed by Jo Nazro, is absurdist in mood and ex-

plores different themes of existentialism, isolation, loneliness, social disparity, and dehumanization in a materialistic American society. Scattered with suspense and provocative humor, the piece is a study of human behavior.

"A Game," written by Dennis E. Noble and directed by student Allison Thompson, is the story of three individuals who agree to participate in an experiment in which they are locked in a small room divided into three "equal" sections. Each section is given to one of the subjects and possesses a unique quality. Whenever the

lights turn on, they must complete their only given task: stating ownership of their land. With every flick of the light switch, the subjects fight over their land. As they descend to madness, they showcase how far people are willing to go to be better than those around them.

The plays will be performed at 7 p.m. Thursday, April 25 and Friday, April 26; 2 and 7 p.m. Saturday, April 27; and 2 p.m. Sunday, April 28.

"Absurdist Alert!" is presented by the Communications Media Department.

*-Fitchburg State University*



COURTESY FITCHBURG STATE UNIVERSITY



# LOCAL NEWS

Saturday, April 6, 2024 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

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## FITCHBURG STATE UNIVERSITY

# Renowned author Fred Plotkin guides tasting tour

## Special dinner this coming Friday, April 12

**By Cheryl A. Cuddahy**  
*Correspondent*

**FITCHBURG** » Author and connoisseur of fine food Fred Plotkin — well known to be a lover of all things Italian — is excited to guide a dinner and tasting tour of the scambio, the exchange of food between Italy and America, here in North Central Mass.

The special dinner event, hosted by Fitchburg State University's Center for Italian Culture, is being held at 5:30 p.m. Friday, April 12, in Hammond Hall, Fitchburg State University, 160 Pearl St. The program is presented as part of the center's yearlong series *Nuovo Mondo*, exploring a century of migrations to and from Italy.

Fred Plotkin, co-author of Rick Steves' "Italy for Food Lovers", will discuss how American corn made its way into Italian polenta and how a popular sandwich on the streets of Palermo turned into a classic of New Orleans.

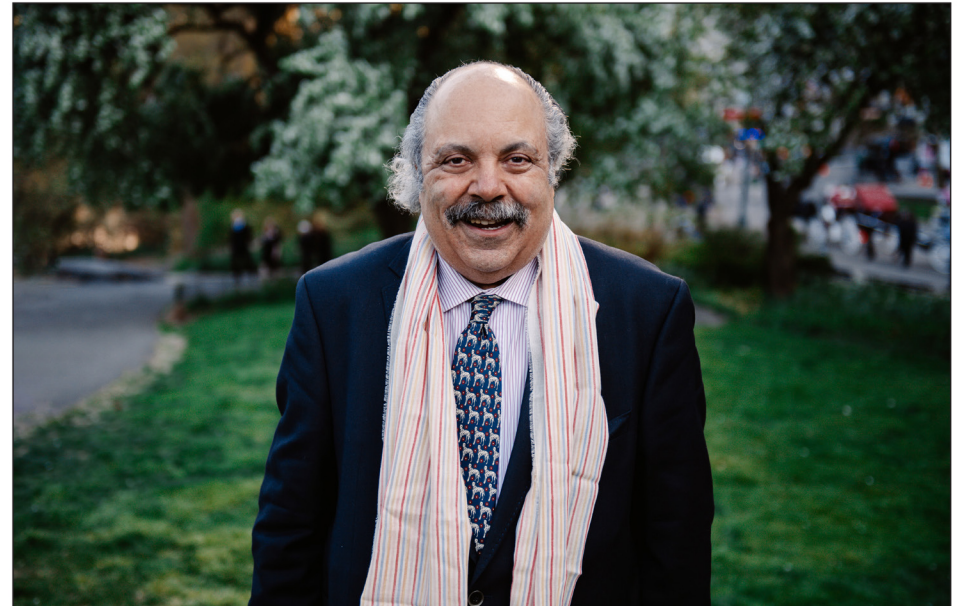
Guests will savor classic food and wine pairings as they learn about the cross-cultural influences of food.

Plotkin has long been a Fitchburg State favorite, appearing in person and online to curate and lead appetizing and entertaining tasting tours of Italian regions and traditions.

He will be remote for this event but will be guiding the discussion and tasting in real-time.

"I'm looking forward to speaking to one of my favorite audiences at Fitchburg State to explore another way that Italy has changed the world for the better," said Plotkin. "The scambio (exchange) of food products with the Americas radically changed for the better the way Italians eat and, at the same time, improved what people eat elsewhere. The Fitchburg audience will get to sample some dishes that are the result of this exchange."

Tickets are \$55 — including the lecture, food, and paired wine — and may be purchased online at [fitchburgstate.edu/nuovo-mondo](https://fitchburgstate.edu/nuovo-mondo). Additional wine and beer will be available for purchase at the event.



COURTESY FITCHBURG STATE UNIVERSITY

Fred Plotkin, co-author of Rick Steves' "Italy for Food Lovers", will discuss how American corn made its way into Italian polenta and how a popular sandwich on the streets of Palermo turned into a classic of New Orleans.

**FITCHBURG STATE UNIVERSITY**

# CHEERS TO ITALY!



COURTESY OF VIN IALENTI

Vin Ialenti, president of Fitchburg State University's Center for Italian Culture, is pictured with his wife, Sharon Ialenti, enjoying an Aperol Spritz in beautiful Portofino, Italy, where they visited this past October.

## Learn how to become an Italian citizen at Fitchburg State

**By Cheryl A. Cuddahy**  
*Correspondent*

**FITCHBURG** » The Center for Italian Culture at Fitchburg State University is serving what they see as a growing population of U.S. citizens looking to make their love for Italy official. Next, Tuesday, April 16, the University is offering a free online course at 6 p.m. called "Introduction to

Obtaining Italian Citizenship."

Vin Ialenti, president of the Center for Italian Culture, believes there is a strong movement of Italian Americans who are interested in being recognized as Italian citizens.

"We are fortunate that the United States allows its citizens to have dual citizenship without renouncing their US citizenship," he said.

The custom webinar program, hosted by genealogists and members of the Vermont Italian Cultural Association, Lisa DeNatale (President), Mark D'Ambrosi, and Jerry Carbone, is free and open to the public. Attendees are asked to register in advance at [fitchburgstate.edu/nuovo-mondo](http://fitchburgstate.edu/nuovo-mondo)

Ialenti adds that there are at least four Facebook sites that

deal with the questions and issues of how to be recognized as Italian Citizens.

"I received my dual citizenship in 2017," said Ialenti. "I have seen the presentation that the Vermont team is doing, and it will be a great start for folks thinking about if they can obtain their Italian citizenship. After viewing it, I thought how

**ITALY** » PAGE 8



COURTESY OF VIN IALENTI

Vin Ialenti is checking out a map of Abruzzo, historically known as Abruzzi, is a region of Southern Italy, where his ancestors came from.

## Italy

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helpful it would have been if I had this resource before I started my quest. I did this before the Facebook support sites existed, so today if you are interested in exploring the process, there are lots of places to go to for support.”

Last fall, the Center for Italian Culture sponsored a presentation with Rhonda McClure of the New England Historical Society that dealt with the quest of gathering information on your Italian ancestors, when and where they were born and immigrated to the United States.

Ialenti says this was a good preface for the April 16 webinar.

“There are various paths to gain access to dual citizenship,” Ialenti added. “The most common and perhaps simplest is through the Line of Sanguinity (Jure Sanguinis). In my case, my grandfather was an Italian citizen who came to the United

States in 1895 and did not become a U.S. citizen until 1935 long after when my father was born. Technically, my father was an Italian citizen, so when I was born, the citizenship was passed on to me. I had to provide detailed proof of my lineage to the Italian Consulate General in Boston who then sent the information packet on to Rome to get final approval. Once you are recognized you can apply for an Italian passport.”

The challenge, says Ialenti, is documenting birth certificates, naturalization papers, family records from Italy, marriage certificates, etc.

“Some people do all the research on their own, others hire agents in Italy to gather the data. Seeking the records in Italy is a good excuse for some to take a vacation there,” Ialenti said with a smile.

The April 16 webinar will also outline the other paths to citizenship and what they involve.

“It is a fascinating process with things changing all the time,” he said. For ex-

ample, a woman could not pass on her citizenship before 1948. I have to laugh that when I received my citizenship, I did not need to speak Italian or pass a cultural exam. Since then, if my wife wants to get her Italian citizenship through me, she now will have to pass a language exam.”

Ialenti says that people often ask him why he went through the effort of receiving dual citizenship.

“I did it primarily to honor my ancestors, and it gives me a great sense of pride,” he said. “Among the benefits of having an Italian passport is the ability to travel easily in European Union countries without visas, to have extended stays in the countries, and it can facilitate buying property and living in Italy.”

The Italian Citizenship webinar is virtual so there is no limit on the number of attendees.

“I hope to ‘see’ you at the presentation,” Ialenti said. “I am convinced that it will energize you and give you the tools to begin your dual citizen journey.”



COURTESY OF VIN IALENTI

Pictured are members of the Risio family, in Quincy. Immigrants may be able to give their descendants the gift of Italian citizenship.



# LOCAL NEWS

Tuesday, April 23, 2024 » MORE AT [FACEBOOK.COM/SENTINELANDENTERPRISE](https://facebook.com/sentinelandenterprise) AND [TWITTER.COM/SENTANDENT](https://twitter.com/sentandent)

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## FITCHBURG STATE UNIVERSITY

# FSU to feature guest trumpeter Jay Daly

By **Cheryl A. Cuddahy**  
*Correspondent*

**FITCHBURG** » The Concert Band and Community Orchestra at Fitchburg State University will present a free concert featuring guest trumpeter Jay Daly at 7:30 p.m. Thursday, April 25, in Weston Auditorium, 353 North St. Admission is free and open to the public.

Jay Daly is one of the premier trumpeters in the Northeast,” said Peter Mansfield, orchestrator and arranger with the Boston Pops Orchestra. “His virtuosity is matched by his stylistic versatility and he’s a consummate professional.”

The concert will showcase Daly in a 12-minute featured medley consisting of popular music tunes from the 20th century that

feature the trumpet as a solo instrument. Music from the Great American Songbook and chart-toppers of the 20th century will be featured.

“If you’re a fan of Louis Armstrong, Hoagy Carmichael, Herb Alpert, Chuck Mangione, the Beatles, or Maynard Ferguson you’ll be in heaven,” said Assistant Professor Amy McGlothlin, who leads the Concert Band. “And if

you’ve never experienced this music you are guaranteed a heart-touching experience that will leave you wanting more.”

The Fitchburg State Community Orchestra is composed of students, faculty members, and other musicians who live in the Greater Fitchburg community. The orchestra performs at numerous campus and community events.

The Concert Band is

open to all people with experience playing a band instrument. Its members include students, alumni, faculty and surrounding community members. The band performs twice per semester in Weston Auditorium. Anyone from any major is welcome.

To learn more about Fitchburg State’s instrumental and choral programs, please visit [fitchburgstate.edu/music](https://fitchburgstate.edu/music).



COURTESY FITCHBURG STATE UNIVERSITY

On Thursday, a concert at Fitchburg State University will showcase trumpeter Jay Daly in a 12-minute featured medley consisting of popular music tunes from the 20th century that feature the trumpet as a solo instrument.

# Sentinel & Enterprise

Sunday, April 28, 2024

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## FITCHBURG STATE UNIVERSITY

# FSU welcomes Grammy-winning jazz drummer Neal Smith

### *Submitted Article*

**FITCHBURG »** The Twin Cities high school jazz bands, along with Fitchburg State University's Fitchbyrds, will be putting on a free performance that will feature Grammy-winning jazz drummer Neal Smith.

The concert will be held at 7 p.m. Wednesday, May 1, at Kent Recital Hall in the Conlon Fine Arts Building, 367 North St. Admission is free and the community is welcomed.

Smith will also be giving a mas-

ter class for university and high school students the afternoon of the performance.

Assistant Professor Amy McGlothlin of the university's Humanities Department leads the Fitchbyrds Modern Jazz Band and organized the visit.

"We are excited to present this masterclass and concert with such an amazing guest artist," McGlothlin said. "We hope to make this an annual event."

The Fitchbyrds Modern Jazz Band includes Thomas Adler-Mandile, Ronan Cords, Jack

Dancause, Rala Diakite, Joshua Leaffer, Joshua Lancaster, and director Amy McGlothlin. The Leominster High School Jazz Band is led by Robert Bergeron, and the Fitchburg High School Jazz Band is led by Nat Blankenship.

The event is a collaboration between Fitchburg State's music program and the Fitchburg Cultural Council, Mass Cultural Council, El Toro Promotions, and Fitchburg High School and Leominster High School.

— *Fitchburg State University*

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The free concert is scheduled for 7 p.m. Wednesday, May 1, at Kent Recital Hall in the Conlon Fine Arts Building, 367 North St., Fitchburg. Grammy-winning jazz drummer Neal Smith.

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