



Fitchburg State University

Fitchburg State University Board of Trustees

Board of Trustees Meeting

Published on February 13, 2025 at 11:19 AM EST

Date and Time

Tuesday February 18, 2025 at 1:00 PM EST

Location

Hammond Hall, Main Lounge. The meeting will also be livestreamed.

Notice of a meeting of the Fitchburg State University Board of Trustees on Tuesday, February 18, 2025 at 1:00 p.m.

The meeting will take place in the Main Lounge, Hammond Hall, Fitchburg, MA 01420

Public Live Stream:

<https://www.fitchburgstate.edu/live>

Agenda

	Purpose	Presenter	Time
I. Opening Items			1:00 PM
Opening Items			

	Purpose	Presenter	Time
A. Record Attendance and Guests			
B. Call the Meeting to Order		Michael Fiorentino, Jr.	
C. Public Comment			5 m
II. Board Chair's Report			1:05 PM
A. Approval of Minutes, December 12, 2024 VOTE (10.2024-2025)	Approve Minutes	Michael Fiorentino, Jr.	5 m
III. President's Report			1:10 PM
A. From the President	FYI	President Donna Hodge	15 m
B. Provost and EVP Update	Discuss	Patricia Marshall	10 m
C. Enrollment Management Update	Discuss	Richard Toomey	10 m
D. Housing, Contracts and Real Estate	Discuss	Matt Lechter	10 m
IV. Break			1:55 PM
A. Break			10 m
V. Student Trustee Report			2:05 PM
Presented by Matthew Gill			
A. Student Trustee Report			5 m
VI. Athletics Update			2:10 PM
A. Athletics Update	FYI	Matt Burke	30 m
VII. Marketing Update			2:40 PM
A. Marketing Update	FYI	Richard Toomey	30 m

	Purpose	Presenter	Time
VIII. Academic Affairs Committee Update			3:10 PM
A. Update from Jennifer Flanagan, Chair of the Academic Affairs Committee	FYI	Jennifer Flanagan	5 m
IX. Finance Committee Update			3:15 PM
A. Update from Karen Spinelli, Chair of the Finance Committee	FYI	KAREN Spinelli	10 m
X. Budget Report/Updates			3:25 PM
A. Presented by Dr. Hodge/Heidi Swift	Discuss	President Hodge/Heidi Swift	20 m
B. FY26 Budget Planning Process	Discuss	President Hodge	10 m
XI. Closing Items			3:55 PM
A. Adjourn Meeting Chair Fiorentino	Vote		5 m

Coversheet

Approval of Minutes, December 12, 2024 VOTE (10.2024-2025)

Section: II. Board Chair's Report
Item: A. Approval of Minutes, December 12, 2024 VOTE (10.2024-2025)
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board of Trustees on December 12, 2024
VOTE Minutes December 12 2024.pdf

DRAFT



Fitchburg State University

Minutes

Board of Trustees

Date and Time

Thursday December 12, 2024 at 1:00 PM

Location

Hammond Hall - Main Lounge

Notice of a meeting of the Fitchburg State University Board of Trustees on Tuesday, December 12, 2024 at 1:00 p.m.

The meeting will take place in the Main Lounge, Hammond Hall, Fitchburg, MA 01420

Public Live Stream:

<https://www.fitchburgstate.edu/live>

Trustees Present

C. Stimpson, E. Gregoire, J. Flanagan, K. Spinelli, L. Barrieau, M. Fiorentino, Jr., M. Gill, M. Morris, S. King-Goodwin

Trustees Absent

D. Phillips, D. Tiernan

Ex Officio Members Present

D. Hodge

Non Voting Members Present

D. Hodge

Guests Present

Carin Bullis, K. Lundgren, M. Bruun, Matthew Lechter, Michael Cloutier

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

M. Fiorentino, Jr. called a meeting of the board of trustees of Fitchburg State University to order on Thursday Dec 12, 2024 at 1:04 PM.

C. Public Comment

There were no public comments.

II. Board Chair's Report

A. Approval of Minutes, October 17, 2024 VOTE (04.2024-2025)

L. Barrieau made a motion to approve the minutes from Board of Trustees on 10-17-24.
S. King-Goodwin seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. Approval of minutes, October 28, 2024 VOTE (05.2024-2025)

J. Flanagan made a motion to approve the minutes from Board of Trustees on 10-28-24.
L. Barrieau seconded the motion.
The board **VOTED** unanimously to approve the motion.

III. Academic Affairs Committee Update

A. Update from Jennifer Flanagan, Chair of the Academic Affairs Committee

The academic affairs committee met on Monday, December 2nd. There was an informative presentation by Connie Strittmatter from the library about Open Educational Resources known as OERs. The university has been active in this effort for several years involving the creation and distribution of free teaching, learning and research materials. on this campus, the project aims to reduce the cost of textbooks for students and to promote innovative teaching practices.

Over the past several years, grants spanning every academic department have been awarded to faculty to adopt open educational resources and workshops have been held to educate faculty about the OERs and open pedagogy. the university has seen

significant cost savings for students through the adoption of OERs with over three million saved since 2022. The committee overseeing this work is also exploring the impact of OERs on student learning outcomes particularly for the underrepresented groups. there was also a discussion of the committee's role in reviewing new academic programs, faculty evaluations, and academic planning.

IV. President's Report

A. From the President

Key Discussion Points:

1. New Vice President of Personnel Services and General Counsel:

- Stacy Luster was introduced as the new Vice President of Personnel Services and General Counsel.

2. Campus Updates:

- The university is focused on improving the student experience and engagement.
- Recent events, such as homecoming and the winter dance showcase, were successful.
- The university is preparing for the upcoming winter commencement ceremony.

3. Enrollment Update:

- The university experienced a slight decline in total headcount for fall 2024.
- The university is working to develop a unified enrollment management strategy to address enrollment challenges.
- The university is focusing on retention and persistence efforts to improve student success.

4. Enrollment Challenges and Opportunities:

- The university is working to develop a unified enrollment management strategy to address enrollment challenges.
- The university is focusing on retention and persistence efforts to improve student success.

5. Financial Update:

- The university is working to develop a more transparent and accurate budget and address financial challenges.
- The university is closely monitoring expenses and revenues.
- The university is exploring opportunities to increase revenue and reduce costs while remaining committed to providing a high-quality education.

6. Student Experience and Support:

- The university is focused on improving the overall student experience.
- The university is investing in student support services, such as mental health and academic advising.

- The university is working to create a more inclusive and welcoming campus environment.

Action Items:

- Continue to implement a unified enrollment management strategy.
- Develop a transparent budgeting process.
- Prioritize retention and persistence efforts.
- Leverage opportunities for growth.
- Implement strategies to improve student retention and persistence through student success.

Next Steps:

- The university will continue to work towards its strategic goals.
- The university will continue to focus on student success and engagement.
- The university will monitor enrollment trends and adjust its strategy as needed.
- The university will continue to prioritize fiscal responsibility and financial sustainability.

Upcoming Events:

- Commencement Ceremony on December 20th
- Winter Orientation on January 6th
- Investiture Week planning is underway. Week of April 14.

B. Chief of Police, Michael Cloutier: Annual Fire & Safety Report

Key Discussion Points:

1. Clery Act Compliance:

- The university is compliant with the Clery Act by reporting crime statistics, alerting the campus community of imminent dangers, and publishing an annual security report.
- The reporting of sexual assault incidents has increased, indicating a positive shift in reporting culture.

2. Campus Safety Initiatives:

- The university has a comprehensive approach to campus safety, including:
 - Emergency management planning and drills
 - Training and education for students, faculty, and staff
 - Community policing strategies
 - Partnerships with local law enforcement agencies
- The university police department is committed to building relationships with the campus community to foster trust and encourage reporting.

3. Active Shooter Preparedness:

- The university has implemented active shooter response training for both staff and students.
- The police department is equipped with necessary tools and training to respond to such incidents.

Action Items:

- Continue to promote awareness of campus safety resources and initiatives.
- Review and update emergency response plans as needed.
- Strengthen partnerships with local law enforcement agencies.
- Explore opportunities for further collaboration with the community.

Next Steps:

- The university will continue to prioritize campus safety and work to create a safe and secure environment for all.

C. Executive Director of Housing and Residential Services/Special Assignment to President, Matt Lechter: Real Estate

Key Discussion Points:

1. Housing Challenges and Opportunities:

- The university is facing challenges in maintaining and optimizing its housing portfolio, including budgetary constraints and occupancy rates.
- The university is working to increase occupancy rates and generate more revenue from housing operations.
- The university is exploring opportunities to develop new housing options, such as graduate and family housing.

2. Herlihy Hall Reopening:

- Herlihy Hall is being renovated and will reopen in January 2025 with 14 student beds.
- The renovated hall will offer modern amenities, including wall mounted smart TVs, high-speed internet, and updated common areas.

3. Real Estate Portfolio:

- The university owns a significant amount of real estate, including residential and commercial properties.
- The university is developing a strategic plan to optimize the use of its real estate assets.
- The university is exploring partnerships with external organizations to develop and manage its properties.

Action Items:

- Continue to implement strategies to increase occupancy rates and generate revenue from housing operations.

- Complete the renovation of Herlihy Hall.
- Develop a strategic plan for the university's real estate portfolio.
- Explore opportunities for partnerships and collaborations to optimize the use of real estate assets.
- Continue to work with MSCBA to optimize housing rates and occupancy.
- Improve communication about the value of on-campus housing.

Next Steps:

- The university will continue to monitor housing trends and adjust its strategies as needed.
- The university will work to improve the overall student housing experience.
- The university will explore opportunities to expand its housing offerings to meet the needs of a diverse student population.
- The university will work to create a more attractive and affordable housing experience for students.

Key Discussion Points:

1. University Real Estate Portfolio:

- There is a need to balance the preservation of historic buildings with the need for modern, functional facilities.

1. Housing Costs and Occupancy Rates:

- MSCBA sets housing rates for state universities, including Fitchburg State.
- The university is working to increase occupancy rates and generate more revenue from housing operations.
- The university needs to effectively communicate the value of on-campus housing to potential students.

1. Future Plans:

- The university will continue to develop a comprehensive real estate strategy.
- The university will prioritize the needs of students and faculty in its decision-making process.
- The university will explore innovative solutions to address housing challenges and opportunities.

V. Student Trustee Report

A. Student Trustee Report

Key Discussion Points:

1. Election Results Party:

- SGA hosted a successful election results party, which was well-attended by students. Students were respectful of each other's political opinions.
- The event featured election trivia, food, and live updates.

2. Student Engagement:

- SGA has seen increased student engagement in various campus activities and organizations.
- Over 468 events and meetings were held by student organizations.

3. Homecoming Weekend:

- Homecoming weekend was a success, with a variety of events attracting a large number of students.
- Events included a pep rally, carnival, tailgate, athletic competitions, and a dance/ casino night.

4. Student Performances and Activities:

- The university has hosted successful dance and theater performances.
- SGA is working to increase engagement among graduate students.

5. SGA Initiatives:

- SGA is reviewing budgeting processes for clubs and organizations.
- SGA is working to increase the representation of graduate students.

Action Items:

- Continue to promote student engagement and participation in campus activities.
- Explore opportunities to further support graduate students.
- Review and refine budgeting processes for student organizations.

Next Steps:

- SGA will continue to work with the administration to address student concerns and improve the overall campus experience.
- SGA will focus on building stronger relationships with graduate students and other student groups.
- SGA will continue to advocate for the needs of all students.

VI. Budget Report/Updates

A. Presented by Dr. Hodge

Key Discussion Points:

1. Fiscal Year 25 Working Budget:

- The university has made significant progress in developing a more accurate and transparent budget.
- The budget includes a detailed view of revenues and expenses, including SGOCE.
- The budget is based on historical data and audited financials.
- The university is closely monitoring enrollment, expenses, and revenue.

2. Personnel Costs and Salary Savings:

- The university is closely monitoring personnel costs and salary savings.
- The university is working to balance the need to fill vacant positions with the need to maintain fiscal responsibility.
- The university is committed to addressing equity issues and bringing employee compensation to market rates.

Action Items:

- Continue to monitor the fiscal year 25 budget and make adjustments as needed.
- Develop a comprehensive plan for addressing personnel costs and salary savings.
- Prepare a working draft of the fiscal year 26 budget for review at the February board meeting.

Next Steps:

- The university will continue to work towards financial sustainability.
- The university will prioritize investments in areas that support student success and institutional goals.
- The university will maintain transparency and accountability in its financial operations.

Key Discussion Points:

1. Sabbatical Approvals:

- The board was informed of faculty sabbatical approvals.
- Sabbatical approvals are now handled at the presidential level, with the chair's review.

2. Personnel Changes:

- The board was informed of personnel changes within the university.

3. Student Experience and Engagement:

- The university is focused on improving the student experience and engagement.
- Recent initiatives, such as the renovation of Herlihy Hall and improvements to student billing practices, are aimed at enhancing the student experience.

Next Steps:

- The university will continue to prioritize student success and engagement.
- The university will continue to improve its financial operations and budgeting processes.
- The university will continue to invest in faculty development and research.

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- The university will continue to invest in faculty development and research.

VII. Closing Items

A. Adjourn Meeting

Next Board of Trustees Meeting: February 18, 2025, Fitchburg State University |
Hammond Hall

Chair Fiorentino adjourned Board Meeting at 4:00 p.m.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 4:00 PM.

Respectfully Submitted,
M. Fiorentino, Jr.

**Fitchburg State University
REQUEST FOR BOARD ACTION**

TO: Board of Trustees Meeting	DATE: February 18, 2025
FROM: The President	REQUEST NUMBER: 10-2024-2025
SUBJECT: December 12, 2024 meeting minutes	

It is requested that the Fitchburg State University Board of Trustees vote to approve the minutes from the December 12, 2024 meeting.

Coversheet

From the President

Section: III. President's Report
Item: A. From the President
Purpose: FYI
Submitted by:
Related Material: President's Report to the Board of Trustees_ February 2025.pdf

President's Report to the Board of Trustees: February 2025

1. Enrollment Update

We have received SUCCESS monies (\$1.29 million) from The Commonwealth to fund aggressive and new student success strategies. These funds must be spent by the end of September 2025 and cannot be used to supplant existing salaries or for planning work. Dr. Beth Swartz, Director of TRIO and Student Support Services, is leading efforts to deploy these funds effectively, leveraging proven programmatic expertise learned through TRIO and Upward Bound alongside other student-focused initiatives.

Additionally, our engagement with Fitchburg Public Schools is strengthening through:

- New opportunities to discuss direct admission.
- The planned opening of a mini-admissions center at Fitchburg High School in Summer 2025.
- Expanded efforts to engage and support the McKay teacher population.
- Exploring innovative strategies to grow our already robust international student population.

To support these enrollment efforts, we also strategically reopened two wings of Herlihy Hall in Spring 2025. A comprehensive assessment of our housing portfolio, including off-campus properties, is underway in partnership with MSCBA and DCAMM. This effort aims to modernize accommodations to better meet the needs of adult learners, international students, and potentially families.

As of our most recent data, Fitchburg State's total enrollment for 2025 stands at 5,903, reflecting a continued decline from 6,301 in 2023. This trend is consistent with national and regional higher education shifts. However, we are determined to halt and reverse this decline through:

- Strengthening retention efforts to improve our first-to-second-year retention rate, currently at 73%, via enhanced student support services, academic advising, and engagement initiatives.
- Expanding recruitment initiatives to attract first-generation, Hispanic, and non-traditional students, aligning with our emerging Hispanic-Serving Institution (HSI) status.
- Increasing our focus on graduate, online, and professional education to align with workforce demands in North Central Massachusetts and beyond.

2. University Budget and Financial Standing

The Executive Office of Education (EOE) and the Department of Higher Education (DHE) are collaborating with branding agency C+C to develop a statewide financial aid brand, reflecting Massachusetts' increased investments in college access.

Our \$120 million operating budget is being carefully managed amid shifting enrollment trends. Key financial strategies include:

- Diversifying revenue streams through grants, private donations, and corporate partnerships.
- Increasing fundraising revenue beyond the current \$2.8 million and boosting alumni participation above 3.7%.
- Surpassing the \$4.3 million in grants received in FY2023 through efforts led by the newly established Office of Research and Sponsored Programs.
- Implementing cost-saving measures and efficiency improvements while maintaining academic excellence and student support.

3. Diversity, Equity, and Inclusion (DEI) Initiatives

Despite the challenging national climate surrounding DEI efforts, Fitchburg State remains committed to fostering an inclusive and diverse campus. Our priorities include:

- Achieving formal HSI designation to unlock new funding opportunities for underrepresented students.
- Expanding support structures for first-generation students, adult learners, and students from diverse backgrounds.
- Ensuring compliance with evolving state and federal regulations while reinforcing our institutional values of access, equity, and social justice.
- Offering faculty and staff professional development in inclusive pedagogy and student support strategies.

Just last month, I was selected to join the Presidents for Latino Student Success (P4LSS) network under *Excelencia in Education*—a pivotal step in our commitment to serving Latino and all students. This affiliation provides institutional leaders with curated self-assessment tools, technical assistance, and guidance on earning the Seal of Excelencia—the gold standard for Hispanic-Serving Institutions. Additionally, our participation in the Two-Year Journey to Intentionally SERVE Latino Students will help advance:

- Institutional culture shifts to better serve Latino students.
- Strategies to improve Latino student enrollment, retention, and graduation rates.
- Data collection enhancements to analyze and support student success.
- Cross-institutional collaboration to share best practices and build strategic momentum.

To reinforce broad efforts to further affirm our mission to serve the Commonwealth and beyond, I appointed Josh Dodds as our inaugural [Executive Director of Diversity, Equity and Belonging Programs](#). His experience will help bridge educational gaps across university operations and the broader community.

4. Strengthening Institutional Capacity in Complex Times

To meet evolving higher education challenges, I made the strategic decision not to rehire a Vice President of Human Resources, opting instead to establish a Vice President of Personnel Services and General Counsel—the first for Fitchburg State. This role is critical in navigating legal, compliance, and personnel challenges nationally and within Massachusetts.

For additional resources on immigration policies, campus protocols, and legal guidance, please visit our General Counsel’s home page:

 [Office of General Counsel](#), Stacey Luster

5. Commitment to Radical Transparency

In these rapidly changing times, radical transparency in university organization, structure, and board meetings is more critical than ever. Clear communication fosters trust, collaboration, and institutional stability. All campus communications can now be accessed through the President’s Office webpage:

 [President’s Office Communications](#)

6. Recent and Upcoming Meetings & Advocacy Efforts

- February 10, 2025: Council of Presidents (COP) Meeting at MassArt – discussions on FY26 state budget, FY25 supplemental budget, and higher education bond advocacy.
- February 11, 2025: COP advocacy day at the State House – targeted legislative meetings.
- February 25, 2025: State universities advocacy meetings in Washington, D.C., with congressional staff.
- March 2, 2025: Alumni Event at Wachusett Mountain (8 a.m. - 3 p.m.)
- April 2025: I will join an AASCU delegation in Washington, D.C., for two days of advocacy.

Finally, I invite you to my investiture on April 25, 2025, at 3:30 PM in Weston Auditorium, followed by a fundraising gala on April 26, 2025. Formal invitations will be sent to alumni, donors, and community leaders. More details can be found here:

 [Investiture of President Donna Hodge](#)

Onward!

Dr. Donna Hodge
President, Fitchburg State University

SELECTION: DIVISIONAL UPDATES

ACADEMIC AFFAIRS

Academic Programs and Personnel

Faculty in the Economics program are currently preparing a new Finance Major, together with Business faculty, to send through governance this spring.

The search for the fiscal coordinator in the Office of Research and Sponsored Programs is nearly complete, and a search for the Dean of Business and Technology is currently underway. Twelve tenure-track searches are also currently ongoing to replace vacancies due to resignations and retirements over the past three years.

School of Arts & Sciences (A&S)

A&S signed an articulation agreement with Urban College of Boston for their Associate's Degree in General Studies and hosted the American Moot Court Association Eastern Regional Tournament.

A&S also sponsored numerous campus and community events, including performances by the Concert Band, the Fitchbyrds Jazz Ensemble, the Concert Choir (with the Gateway City Orchestra), and the Fitchburg State Choirs (with the high school choruses of Leominster, Fitchburg, Gardner, and Wachusett Regional). The campus also hosted a screening of FATV's documentary "A Walk through Time: Fitchburg's Rock Walk," edited by Communications Media student, Isaiah Manuel. Dr. Jessica Robey (Humanities), with the North County Land Trust, organized the Hammond Gallery art exhibition, "On the Edge: Nature and Culture in a Time of Crisis." Art faculty continue to collaborate with community artists on an exhibit, "Fitchburg Through Brush and Lens" (Jan.-March), at the Gallery Marquee downtown.

Schools of Health & Natural Sciences (HNS) and Business & Technology (B&T)

Business Administration's mid-term accreditation report was accepted by the International Accreditation Council for Business Education (IACBE). Faculty completed another semester with embedded tutors in fourteen gateway STEM courses, with the assistance of Dr. Daniel Welsh (Biology/Chemistry) and Dr. Kat McLellan (Student Success); almost 90% of students reported that they benefited from their engagement with embedded tutors.

School of Education (SoE)

The SoE received a DHE implementation grant (\$199,999) for the MA Inclusive Concurrent Enrollment Initiative (MAICEI) Program, to support students with severe disabilities in accessing credit and non-credit courses. With earlier MAICEI funding, FSU matriculated our first four MAICEI students last fall in Art, Computer Technology, and Health and Fitness courses. A new Program Coordinator began in January. The first cohort of students in the Paraprofessional-to-Licensure Pathway successfully completed their first semester.

School of Graduate, Online, and Continuing Education (SGOCE)

SGOCE enrollments are tracking higher in comparison with last year. Risepoint enrollments are also slightly stronger in our online accelerated MBA and RN-BS Nursing programs. Registrations are slightly lower in online accelerated graduate education programs.

Library

With funds donated by the Robert Cormier family, Archives & Special Collections hired a student assistant for the spring semester who will digitize documents and help develop materials that can be used by Education students, scholars and professionals in primary and secondary schools.

The library's federally-funded strategic initiative related to [Remixing Open Textbooks through an Equity Lens](#) (ROTEL) continues to promote textbook affordability, inclusion and equity for all, particularly minoritized, students. Four new books by Fitchburg State authors were recently published by Dr. Mary Ann Barbato (Math); Dr. Amy McGlothlin and Jennifer Bill (Music); Drs. Jennie Snow, Elise Takehana and Diego Ubiera (English); and Dr. J.J. Sylvia (Communications Media). Of the [22 books published through the ROTEL](#) project to date, 10 were written by Fitchburg State faculty.

Student Success

Career Services and Advising (CSA) held successful career fairs in the fall (undergraduate internship fair, with the highest attendance at a career event to date; a graduate education fair; a Law Enforcement career fair; and a first-ever Major and Minor Discovery Fair). The Center also successfully piloted Faculty Transfer Advising with the Education, Communications Media/DMI /Game Design, and Exercise and Sports Science departments for Spring 2025 transfer students.

Office of International Education (OIE)

The OIE welcomed 39 new international students in Spring 2025 representing 10 different countries. Three faculty-led study abroad programs will go to Costa Rica, Milan, and Rome over spring break. In summer, students will travel to Germany and Poland, Japan, and Verona.

Office of Institutional Research & Planning

The OIRP is finalizing the contract with Eduventures for the academic portfolio review, previewed at the Board of Trustees meeting in October 2024.

Office of Research and Sponsored Programs (ORSP)

Since November 2024, applications for external funding have been submitted to the MA DHE (MAICEI Program; Support Basic Needs); UMass Lowell (support local Community Broadband Access); and the MA Executive Office of Public Safety and Security (Cyber Security Incident Response Planning).

In FA24, 168 local high school students completed college coursework credits through the externally-funded Early College and Dual Enrollment Programs. Fitchburg State also received preliminary approval of a new Early College Program Designation to serve Clinton High School, with the final review process this spring.

Strategic Initiatives

Academic Affairs hosted a successful Faculty Development Day in January featuring a nationally-recognized speaker, Dr. Meira Levinson of the Harvard Graduate School of Education, who explored the concept of education justice and asset-based, inclusive pedagogies.

STUDENT AFFAIRS

The work of the professionals in the Student Affairs Division continues to play a critical role in attracting, supporting, and retaining students at Fitchburg State University. As the landscape of higher education adapts to new and evolving realities, so too do the demands and challenges associated with ensuring our students' safety, welfare, and success.

Specifically, professionals within the Student Affairs Division are sharing the following emerging and evolving challenges in their work, as well as examples of how the Division has addressed these challenges with intention and innovation.

- ***Our students' needs are broader, and more complex, than ever before.*** As an example, the university's multidisciplinary *CARE Team* assessed and provided case management for 315 referred students in the Fall, 2024 semester. It's noteworthy that for the *entire* 2023-2024 academic year, the *CARE Team* received a *total* of 298 referrals; the Fall, 2023 to Fall, 2024 increase in referrals was 92%. Among the more common reasons for *CARE* referrals were academic concerns, medical concerns, mental health concerns, basic need insecurity, and suicidal ideation. Notably, in Fall, 2024, the *CARE Team* was certified on the implementation of a standardized, evidence-based rubric for the objective classification of student concerns, including concerns involving risk of harm to self or others.

The on-campus food and basic necessities pantry operated by the Office of Student Development, the Falcon Bazaar, had 481 visits in the Fall 2024 semester, demonstrating a 265% increase, and (already) surpassing the total number of visits for the entirety of the 2023-2024 Academic Year.

There were 51 student emergency funding requests in Fall 2024, a 25% increase from the prior fall semester. Additionally, a total of 89 leaves of absence (almost exclusively for "personal" or "medical" reasons) were processed for this most recent semester, an increase of 47% from Fall 2023.

The Disability Services Office set a new record in Fall 2024 for the number of students (437) registered and receiving disability accommodations at the university. Notably, 197 students' primary disability is a mental health diagnosis, and 60 students' primary disability is reported as Autism Spectrum Disorder. To meet this substantial increase in demand, Disability Services launched *Accommodate*, a data management system that has created significant efficiencies in the areas of access, data tracking, measurement of outcomes, and communication with faculty regarding the delivery of appropriate accommodations.

- ***Service models that, historically, have been based on support for students' episodic concerns are often proving inadequate to meet the needs of our current student body, which are often more chronic and systemic than in years past.*** Student demand for on-campus mental health counseling remains at very high levels, with the complexity and acuity of student presentations stressing existing service-delivery models. Counseling Services has responded by expanding the availability of "Urgent Hours," as well as "Evening Hours" of service, to address the 6% increase in student-requested emergency appointments and rise in *CARE* referrals. Additionally, with grant funding from the Commonwealth, the university renewed its partnership with a third-party vendor, Uwill, to provide for 24/7 crisis care, as well as psychopharmacology assessments for students. Through this partnership, care can now be delivered to a wider cross-section of students, including those not taking classes on the Fitchburg campus.

The TRIO Student Support Service Office has shown positive outcomes after evolving towards a model of *holistic advising*, wherein the number and type of touch points with students include proactive check-ins, and include discussions regarding financial aid, classroom success, interpersonal activities, and graduate school and career transitions. This "high touch" approach is paying significant dividends, as evidenced by academic performance and retention metrics which include: 96% of TRIO students retained each year, 95% of TRIO students in good academic standing, and over 80% of TRIO students graduating in the 2020-2025 grant cycle.

It should be noted that several departments within the Student Affairs Division serve (primarily) local high school students, facilitating their transition to Fitchburg State University, as well as other higher education institutions. Fall 2024 was a particularly productive semester for our Upward Bound, and Upward Bound Math and Science programs; among the numerous educational and mentorship programs that occurred, UB, UBMS, and TRIO SSS (see above) collaborated to celebrate *National First Generation Day*, connecting tomorrow's first generation college students with today's.

- ***Our students continue to want, need, and benefit from connection. Historically, fostering connection (to campus, and to one another) has been a fundamental driver of Student Affairs initiatives, however the nature of connection is evolving, rapidly, and our students present with varying levels of skill and experience in creating connection.*** As an example, an interesting trend that has emerged over the past 10 years on the *College Student Inventory* (administered to incoming first-year students) is our students

expressing substantially *more* interest in “getting help making new friends,” and (simultaneously) substantially *less* “receptivity to social engagement.” These data points suggest that the current cohort (of traditionally-aged undergraduates) have rather nuanced needs and desires related to their social experience at the university.

As is typical, Student Affairs departments continue to provide a wide variety of social and co-curricular opportunities, refining offerings and innovating where indicated. Fall 2024 data indicates that clubs and organizations at the university (including cultural and organization events advised and supported by the Center for Diversity and Inclusiveness) hosted 948 events (a 70% increase over Fall 2023). Additionally, and in response to the changing needs of our student body, 7 new clubs were started this fall, including the Indian Student Association, which also opens itself to graduate students as members.

Increasingly, Student Affairs departments are appropriately utilizing social media as a means of connecting with students who might not otherwise connect. As an example, the Counseling Services Office maintains an Instagram page with timely health and wellness information; “followers” of the account increased by 61% from Fall 2023 to Fall 2024. Posts focused on interpersonal skills have reached students that may not readily ask for assistance. The upward trend in virtual connection also applies to student-to-student social media engagement facilitated by highly visible Divisional departments such as OSD, CDI, and Housing and Residential Services.

Programming targeting our resident students continues to be robust, as well. In Fall 2024, Housing and Residential Services hosted a total of 120 events, with 1,419 attendees.

As can be seen in the above discussion, staff in the Student Affairs Division take great pride in the creativity and innovation they demonstrate each day in their efforts to meet our increasingly complex student body “where they are at.” As the challenges that our students experience continue to evolve, Student Affairs departments remain ready to respond, offering the kind of supports and co-curricular experience that add substantially to the Fitchburg State student experience.

ADVANCEMENT

The Division of Institutional Advancement includes three distinct units:

- **Alumni and Family Relations** - special events, communications, and brand identity;
- **Annual Fund and Major Gift Engagement** - focuses on the donor continuum of prospective donor research, identification, cultivation, solicitation, stewardship, gift acknowledgement, and donor database integrity
- **Fitchburg State University Foundation** to encourage voluntary gifts for scholarships and enrichment programs.

Overseen by the Vice President for Institutional Advancement, the team of five employees supports every aspect of Fitchburg State’s mission.

The Foundation office renders financial assistance and aid in the development effort and the educational programs of the university, the Foundation receives and administers gifts to the university and provides support to the students, faculty and staff through its efforts. Assets under management in the foundation have grown to \$33 million. We oversee the Center for Italian Culture as their endowment manager and serve as an ex officio member of the board. Part of the CIC mission is to support students' travel to Italy through faculty-led programs.

- In the fall the scholarship committee for the CIC board awarded 13 students travel scholarships to support their trip to Milan and 10 students to Rome. The trip will happen during spring break in conjunction with their 3-credit spring course.
- The committee will meet again at the end of January to review applicants traveling to Verona this summer.

Our office also reviewed faculty applications for professional development grant awards. The foundation awards come from Jewish Heritage, Women in Today's Society and the Amelia V. Gallucci-Cirio funds for a total of 5 awards for \$14,936.

Work is under way for Convocation, an event on April 17, where students are awarded endowed or departmental scholarships for the following academic year. Typically 250 awards are distributed for almost \$300,000.

As with previous years, the university participates in the Public Higher Education Endowment Incentive Program and is tasked with generating new endowments to be matched with funds to be awarded by the Commonwealth, one dollar from the state for every two dollars per each new endowment created.

Fundraising Highlights

- As of January 15, Fiscal Year 2025 (FY25), \$813,919 was raised from 1,117 gifts.
- The Wilson-O'Connor Family Foundation made a \$100,000 gift to establish a Reading/Literacy Clinic
- Two donors made contributions to supplement existing scholarship endowments: Ed & Barbara Wilson \$25,000 for Education and Dick Fisk donated an additional \$25,000 for Nursing for a total of \$50,000 this fiscal year.
- Secured a new \$30,000 scholarship for nursing students, one time award that the donor may renew in future years.

Alumni Events Highlight

- Twelve alumni joined us for the Alumni Processional at Winter Commencement
- Soliciting for nominations for 2025 Alumni Awards:
 - Leadership
 - Achievement
 - Service

- Young Alumni
- Booster
- Soliciting for nominations for Alumni Board Members - there are a minimum of two seats available
- Continued mailed and electronic communications with alumni (i.e. event communications, e-newsletter, social media posts)
- Planning a full spring schedule of alumni events
 - February 22 - Sigma Pi Founders Day Brunch
 - February 22 - Alumni Ice Hockey Game and Reunion
 - February 23-25 - Atom Moore '05 Residency:
 - February 23 - Private gallery reception with watch collectors
 - February 24 - Photography workshops
 - February 25 - Public forum
 - March 1 - Student Government Association Reunion
 - March 2 - Fitchburg State Date at Wachusett Mountain
 - March 3-4 - Peter Reynolds '83 Residency:
 - March 3 - Reception at Iver Johnson House
 - March 4 - Sessions with elementary students at McKay, lunch with faculty and Fitchburg State students, public forum moderated by President Hodge
 - March 22 - Alumni participation in Future Falcon Day
 - March 29 - Veterans Panel, Resource Fair and Reunion (will include alumni, current students and faculty/staff who are veterans)
 - April 5 - Alumni participation in Future Falcon Day
 - April 12 - Dance Club Reunion
 - April 25-26 - Investiture and Gala
 - May 10 - Nursing Reunion

Annual Fund Highlights

Our calendar year end appeals featured a message from President Hodge and messages highlighting past scholarship recipients.

- We sent 42,153 pieces via mail and emails to approximately 20,466 active email addresses.
- To date we have received \$37,920.03 compared to \$26,887.00 raised via last calendar year end appeals.

The Center for Italian Culture (CIC) appeal was mailed to 395 individuals and 124 active email addresses:

- A second appeal was emailed to 151 alumni recipients of the CIC's travel abroad program.
- FYTD the appeal has raised \$13,850 compared to \$4,420 raised through similar efforts in FY24.

Continued promotion of planned giving programs. Contacted current members of our Saxifrage (planned giving) Society to discuss sharing their stories for this year's planned giving appeals.

Continued to work with Athletics' teams on yearly fundraising. Three sports (Hockey, Baseball and Women's Basketball) have already begun their appeals while both Softball and Cheer are currently getting ready to launch appeals.

Conducted year-end stewardship

- Used new student ambassadors to create a TY video for all 2024 donors
- Continued our practice of including personal notes from either students or staff to gifts from donors at all levels

UNIVERSITY POLICE

Community Engagement and Select Accomplishments

Therapy Dog Support - Skyview Elementary School

Following the tragic passing of a student who attended Skyview Elementary School in Leominster, the Fitchburg State University Police Department's therapy dog, Odin, provided comfort and support to the grieving school community. Along with other K9 teams, Officer Morreale and Odin visited the school, interacted with students, and provided a calming presence, helping children cope with their grief and return to a sense of normalcy.

De-escalation Training for Commencement Volunteers

The University Police Department provided de-escalation training for winter commencement volunteers, equipping them with valuable communication and conflict resolution skills. This proactive step aimed to ensure a safe and positive environment for all attendees during the graduation ceremony.

CPR Training for Counseling Services

The Fitchburg State University Police Department recently provided CPR training to staff members in Counseling Services. This valuable training equipped counselors with the essential skills and knowledge to respond effectively in medical emergencies, potentially saving lives within the campus community.

Additional training sessions are scheduled through the end of the academic year for identified departments and the campus community in general.

CPR and First Responder - In Service Training

The Fitchburg State University Police Department recently conducted CPR and First Responder training for all officers. This comprehensive program equipped officers with the knowledge and skills necessary to provide immediate medical assistance in critical

situations, such as cardiac arrest, respiratory distress, and traumatic injuries. The training emphasized hands-on practice, scenario-based simulations, and the importance of quick and decisive action to maximize the chances of survival for individuals in need.

Electronic Control Weapons - In Service Training

We also recently conducted specialized training on the use of electronic control weapons (ECWs), commonly known as Tasers. The training focused on proper deployment techniques, safety protocols, and de-escalation tactics. Officers practiced using the devices on specialized targets under simulated scenarios to enhance their ability to safely and effectively utilize ECWs when necessary to subdue individuals and protect both the public and law enforcement personnel.

The electronic control weapons will be put into service once our policy is approved by the Executive Officer of Public Safety and Security (EOPSS).

Updates to the University's Emergency Management Plan

The Emergency Management Team has recently undertaken a comprehensive review and update of our emergency management plan. These updates incorporate the latest best practices, address identified vulnerabilities, and enhance our ability to effectively respond to and recover from a wide range of emergencies, including natural disasters, technological failures, and public health crises.

Emergency Operations Center exercise with the City of Fitchburg

The City of Fitchburg recently conducted a successful Emergency Operations Center (EOC) exercise with key city partners, including the Fire Department, Public Works, City Hall, Information Technology, Unitil, MEMA and *representatives from Fitchburg State University (Matt Bruun, Cief Michael Cloutier and Lt. Andrew Lamarche)*.

This collaborative exercise simulated a severe weather event, allowing participants to test communication protocols, coordinate resource allocation, and refine emergency response procedures. The exercise provided valuable insights and identified areas for improvement in interagency coordination and overall emergency preparedness.

Collaborative Crisis Response

The University Police Department, in collaboration with Academic Affairs, the Dean of Students Office and external colleagues, successfully managed a high-risk situation. Through effective communication, coordinated efforts, and a focus on safety and well-being, the situation was de-escalated and resolved without incident.

Challenges

Recruitment and Retention

The University Police Department, like many law enforcement agencies across the country, are facing ongoing challenges with recruitment and retention. Factors contributing to this include increased scrutiny and public pressure, competitive job markets offering higher salaries and better benefits, and concerns about officer safety and well-being. Although we are proactively working to address these issues with President Hodge, these types of challenges can lead to staffing shortages, increased workloads for existing officers, and potential impacts on campus safety.

Hiring new police officers presents several challenges. Attracting qualified candidates in a competitive job market is difficult, as many individuals are deterred by the demanding nature of the work, public scrutiny, and potential risks.

The rigorous hiring process, including extensive background checks and psychological and fitness evaluations, further reduces the pool of eligible applicants. Moreover, the lengthy and intensive police academy training requires significant time and resources, delaying the time it takes for new officers to become operational.

Fleet

The police department is currently facing challenges with an aging fleet of cruisers. Many vehicles are exceeding their recommended service life, leading to increased maintenance costs and potential reliability issues.

Mental Health Emergencies

College campuses face significant challenges related to student mental health. High rates of anxiety, depression, and other mental health conditions are prevalent among students. Factors contributing to this include academic pressure, social isolation, financial stress, and the transition to independence. These challenges can have a profound impact on students' academic performance, social well-being, and overall success in college.

Our officers are often the first responders to mental health emergencies on campus. This necessitates ongoing professional development for officers who respond to mental health emergencies, which is crucial for providing appropriate care for individuals in crisis.

Future Goals and Objectives

Development of a Continuity of Operations Plan (COOP)

A subcommittee of the Emergency Management Team will be working on the development of an institution-wide Continuity of Operations Plan (COOP). This group, composed of representatives from key departments across the institution, is tasked with identifying critical functions, developing alternative operating procedures, and ensuring business continuity in the event of a disruption.

The subcommittee will work diligently to create a robust and comprehensive COOP that safeguards the institution's operations and minimizes the impact of unforeseen events. We anticipate having a draft to review by the end of February 2025.

Updates to the Clery Act Requirements

The Stop Campus Hazing Act was signed into law on December 24, 2024. It is a federal law in the United States that aims to strengthen hazing prevention and reporting on college campuses.

Key Provisions Include:

- Enhanced Reporting - requires colleges and universities to:
 - Collect and disclose statistics on hazing incidents reported to campus security authorities or local police in their Annual Security Report (ASR).
 - Publish a separate Campus Hazing Transparency Report containing specified information related to hazing incidents.
- Hazing Prevention Programs - requires institutions to implement hazing prevention programs that include:
 - Education and awareness campaigns for students, faculty, and staff.
 - Training for individuals involved in student organizations.
 - Clear policies and procedures for reporting and investigating hazing incidents.

We will work with campus stakeholders to address the new requirements of the Stop Campus Hazing Act.

TECHNOLOGY

The Technology Department Winter 2024-2025 Report highlights significant progress across multiple key initiatives, system upgrades, and ongoing projects that enhance the university's technological capabilities and services. Over the winter break, the department capitalized on the reduced campus activity to complete several major infrastructure upgrades and launch new initiatives with minimal disruption to students, faculty, and staff.

This report outlines personnel changes, new projects—including integrating Google Gemini and NotebookLM, the Constituo Slate-to-Banner data automation project, and updates from our Core Services, User Services, Networking and Telecom, and OneCard teams.

As we look forward to 2025, the Technology Department remains committed to fostering innovation, strengthening cybersecurity, and delivering high-quality service to the Fitchburg State University community.

Personnel Changes

The Technology Department has promoted Mike Desmarais to Staff Assistant Server Administrator. His expertise in managing Windows and Linux environments, along with strong problem-solving skills, makes him well-suited for this role. David Niemi, Assistant Director of Technology Services, is mentoring Mike to ensure a smooth transition and continuity in managing the University's server infrastructure. With Mike's promotion, the department is evaluating staffing needs to fill a key Help Desk position and maintain quality support services.

New Initiatives and Challenges

Release of Google Gemini (Base Version) and NotebookLM

The Technology Department has rolled out the base version of Google Gemini to the University's Google Workspace for all faculty, staff, and librarians. This release provides access to AI-driven tools such as a web-based AI chat interface, document and image analysis, mathematical problem-solving, and writing assistance—all within a secure environment managed through our institutional Google Workspace. Importantly, this version offers built-in security benefits, ensuring that users' conversations are not used to train Google's models and that no human review of content occurs. While advanced premium features (such as direct integration with Gmail, Docs, and Meet) are available for purchase, we are not implementing them due to cost considerations.

In addition, Google NotebookLM has been made available to faculty and staff. NotebookLM is an AI-powered research assistant that allows users to summarize documents, generate ideas, and organize information more effectively. This tool is handy for academic research and course development, offering enhanced support for organizing complex information and streamlining research workflows.

This initiative ensures that our community has access to secure, institution-approved AI tools, reducing the risks associated with using external platforms. The Technology Department will continue to provide training, resources, and support as we monitor feedback and explore future AI advancements.

New Project Initiative: Slate to Banner Integration with Constituo

The Technology Department is partnering with the Admissions Office to implement a Slate-to-Banner data integration using Constituo, an automation tool that streamlines the transfer of applicant data into Banner. This project will replace the current manual, labor-intensive process with automated, hourly data transfers, reducing delays, errors, and inefficiencies.

This initiative will improve data accuracy, free up staff to focus on higher-value tasks like recruitment, and provide flexibility to meet evolving data needs and compliance requirements. Scheduled to begin in early 2025, the project will include a collaborative effort between Technology, Admissions, and Constituo, with thorough testing to ensure a smooth deployment.

Core Services Team Project Updates

New Technology Systems Status Webpage

A new Technology Systems Status webpage (status.fitchburgstate.edu) has been developed to provide real-time updates on the status of campus systems and services. This page enhances transparency and keeps the campus community informed about system availability.

Fitchburg State Mobile App Upgrade

The Fitchburg State Mobile App was successfully upgraded to Modo 4 after extensive testing. The upgrade improves app performance, enhances the user experience, and offers new features for students, faculty, and staff.

Financial Value Transparency & Gainful Employment (FVT/GE) Report

The Technology Department collaborated with key campus stakeholders to assist in completing the FVT/GE report in line with new Department of Education regulations. This initiative aims to enhance transparency regarding program costs and outcomes for students. The Technology team played a vital role by facilitating data integration, reporting, and validation, ensuring compliance with federal guidelines.

Banner Database and Server Updates

The Core Services team is actively building new database and job submission servers for Banner PROD. While the complete upgrade may extend into the spring semester, significant progress has been made over winter break, with upcoming cutovers to be scheduled soon.

Explorance Blue Faculty Evaluation System Rollout

In partnership with Academic Affairs, the Technology team assisted with the rollout of the new faculty evaluation system, Explorance Blue. After a successful integration and setup process, the product was launched in December, providing a modern and efficient evaluation tool for faculty.

Automated Enrollment Feed for Blackboard Organizations

A new automated enrollment feed process was developed for Blackboard Organizations to support SGOCE's initiative in providing orientation services to new students. This process can be extended to additional organizations in the future.

Housing.Cloud

Due to the escalating price of the old room management system, the Housing Department recently changed to a new system called Housing.Cloud. The Technology Department was instrumental in the cutover to this new system, preparing data feeds, authentication, and migration help to the new system. Housing.Cloud provides a better experience for students and staff alike, while saving the University money.

Seat List Enhancements

Improvements to seat lists for student registration include the addition of course modality, updated term queries, and modified templates.

User Services Team Project Updates

Herlihy Hall Gaming Room

The Technology Department created a new gaming room in Herlihy Hall, providing students with a fun, collaborative space. This project was completed at a minimal cost by repurposing and recycling equipment from the Game Design studio, making it both budget-friendly and sustainable. The networking and telecom professionals in the technology department enhanced the gaming experience and reduced wifi network traffic by installing wired internet connectivity in less than a week.

Weston Auditorium A/V Equipment Refresh

The Weston Auditorium received a full A/V equipment upgrade, improving sound quality, simplifying controls, and adding modern classroom technology to the stage and back of the auditorium. HD cabling was installed to support high-quality presentations, enhancing the space's flexibility for academic and campus events.

Virtual Desktop Infrastructure (VDI) Upgrades

The team completed major VDI upgrades during the break, including replacing the virtual desktop load balancer appliances, migrating lab VDI hardware to a new management server, and updating operating systems and applications across VDI lab pools.

Wisetrack Inventory Management System Upgrade

The Wisetrack inventory management system was upgraded to resolve a persistent software bug that had previously limited the use of RFID scanning routines. With this upgrade, the Materials Management team can operate more efficiently, especially when performing inventory control tasks.

WXPL Radio Station Upgrades

WXPL Radio Station was significantly upgraded with a new automation system, updated studio speakers and online transmitting computer. Two refurbished game-design computers were integrated with the radio station hardware, saving approximately \$1000. The music library was updated, and six new student-led talk shows were added.

Lab and A/V System Upgrades

Several technology upgrades and refreshes were implemented across multiple locations. Hammond G01 and G01B received a complete A/V system overhaul. The Falcon Hub underwent a tech refresh to resolve persistent technical problems. Hammond S08 was equipped with updated wall plates and upgraded to high-definition signal transmission. Additionally, Hammond S06's A/V system was upgraded to high-definition.

Networking and Telecommunications Team Project Updates

Network Management and Access Control Upgrades

The Networking Team completed a comprehensive upgrade of the Extreme network management systems, access control appliances, and analytics servers. This upgrade was executed with minimal disruption to campus services and enhanced our ability to manage and monitor network performance more effectively.

Authentication Security Certificates Update

To strengthen system security, the team updated authentication certificates across critical systems. These updates help ensure secure and reliable access to campus network resources.

TownHouse One Network Closet Upgrade

The previous two post rack configuration was hindering access to other critical equipment within the workspace. To optimize the layout and improve overall accessibility, the existing two post rack was decommissioned and replaced with a new wall-mount rack system. This upgrade freed up valuable floor space and enhanced the organization and maintainability of the equipment infrastructure.

OneCard Team Project Updates

The OneCard Office worked with the Core Services team, Housing, and Housing.Cloud to integrate access control and meal plan systems with automated data feeds for near real-time updates, improving reliability and the student experience. They also connected Housing.Cloud with Transact for secure, efficient data exchange.

The team is partnering with Transact and Chartwells to integrate payment devices with the new FreedomPay portal for dining credit card transactions, replacing the current provider to avoid cost increases. Their expertise ensures a smooth transition and uninterrupted payment processing.

Security Enhancements and Updates

Ongoing Cybersecurity Training

The university's mandatory annual cybersecurity training is ongoing, with steady progress toward full compliance. The Technology Department continues to work closely with Human Resources and campus leadership to meet the requirements outlined in collective bargaining agreements, including strict communication protocols for MSCA members.

For APA and AFSCME employees, a straightforward process of reminders and escalation remains effective. Participation has increased, and the University remains committed to ensuring completion through continued support and training opportunities, strengthening our overall cybersecurity posture.

- 661 employees have completed the online training. (As of January 9th)
- 94 employees have attended in-person sessions. (As of January 9th)
- 90 employees did not complete the training by the end of the calendar year

ATHLETICS

Athletics & Recreation February 2025 Board Meeting Report

The end of the fall semester brings a short pause to athletic and recreation activity but there is still a lot of important work and things to celebrate in Athletics & Recreation. Some of the most notable achievements include;

- Men's Basketball won three games in a row to open the second half of their season with victories over Medgar Evans, Vermont State Castleton and MCLA.
- Women's Basketball travelled to Daytona Beach and the Florida Sunshine Shootout just after Christmas to compete against York College and Stevens Institute of Technology. The team fundraised for their trip over the last two years and not only competed hard but also gained valuable experience and team bonding opportunities while on the trip.
- The men's ice hockey team completed the first half of their season with an impressive 7-2 record highlighted by victories over MCLA, Framingham State and Worcester State.
- Men's and women's indoor track have started their winter season highlighted by Cam Monette winning the MASCAC field athlete of the week award in December for his performance in weight throw.

The athletic department's focus now turns towards the conclusion of the winter seasons as men's ice hockey, men's basketball, women's basketball, and men's and women's indoor track enter their championships in February and the start of the spring seasons as baseball, softball and women's lacrosse begin practicing indoors on the Landry Arena turf.

On the staffing front, athletics bid farewell to Head Athletic Trainer Todd Souliere after 24 years of service to the university. Our athletic trainers are invaluable to the operations of the department and to the health and welfare of student-athletes. Some of their most vital tasks include; being the first line of medical response during practices and games and providing immediate care during emergencies. Athletic trainers also provide rehabilitation programs for injured athletes, assist in coordinating doctor's appointments and insurance issues, and provide invaluable guidance that helps reduce risk and injury probability.

Todd Souliere was instrumental in establishing new agreements with our team physician that expanded care to athletes, launching several programs related to concussion monitoring and treatment, and navigating the challenges of the Covid-19 pandemic. Most notably, Todd provided tremendous care and mentorship to thousands of student-athletes throughout his tenure and has left a lasting impact on Fitchburg State. We are fortunate to be able to promote Rebecca Shersnow, who also has 24 years of service to Fitchburg State as an athletic trainer, to the Head Athletic Trainer position.

Athletics & Recreation continues to be a consistent and valuable source of student employment. Student employees are vital to the overall operations of both departments. Within athletics, students have an opportunity to work in home game management, sports information, athletic training, equipment management, and office operations.

Some highlights of this work include having several students from the Comm Media major that assist us with shooting video of home games, providing commentary, and creating social media

videos, pictures, and postings. A large number of student-athletes also assist in managing home games, doing PA announcing, running the scoreboard, selling tickets and keeping game statistics. Our athletic trainers also employ several Exercise and Sports Science majors to assist in delivering care to athletes both on and off the fields of play.

Recreation Services employs students in a variety of roles including the staffing and operations of the Recreation Center, running intramural sports, organizing group exercise classes, maintaining social media accounts, greeting members at the front desk and monitoring the fitness center. The students in these positions gain valuable skills in customer service, conflict management, time management, balancing work/school with other demands and multi-tasking.

One particular area of improvement this year has been within social media. Senior Katie Hart (also a member of the women's basketball team) puts in roughly 5 hours each week to keep our campus informed. Her work updating the account as to when facility hours may change, when varsity practices are held and when our group exercise classes are has helped us to maintain roughly 1,200 followers throughout the year. She has also created content for Motivational Mondays, Wellness Wednesdays and personal meet-the-staff postings.

Combined, Athletics & Recreation employs 115 students (79 in athletics and 36 in recreation) providing valuable work experience, life skills and money to support their education.

Lastly, University leadership has been collaborating with FMC, our partner in the management of the Wallace Civic Center, to increase fan satisfaction and experience with the introduction of limited alcohol sales at home ice hockey games. After several meetings we mutually agreed to several parameters which allowed for the sales to move forward during a three home game trial run in December. The results of the trial were very positive and well received by fans and the University and FMC have agreed to continue the sales through the end of the regular season.

ENROLLMENT MANAGEMENT

Summary

For the purpose of this update, EM includes the Office of Admissions, the Office of Student Financial Aid Services, the Office of Marketing and Integrated Communication, and Print Services.

Office of Admissions

Staffing

- The office has been focused on three (3) simultaneous staff searches. The positions filled include; Administrative Assistant I (front desk receptionist); Assistant Director (recruiter and counselor role); Assistant Director (event planning and management).
- A new position has been created in partnership with Fitchburg Public Schools. This search process will begin in January and with the goal of establishing a full time staff member to be physically housed at a satellite office within Fitchburg High School effective summer 2025.

Data

Current data for fall 25 (*reflective of admission year to date (YTD) funnel; snapshot 1/16/2025*)

Total year to date Fall 2025

Metric	Total Apps	Apps Not Submitted	Incomplete Apps	Ready for Review	Awaiting Confirmation	Accept	Deny	Net Deposits
Fall 2025	3010	83	645	327	145	1699	97	57
FR	2918	74	594	326	144	1674	94	56
T	92	9	51	1	1	25	3	1

Total year to date Fall 2024

Metric	Total Apps	Apps Not Submitted	Incomplete Apps	Ready for Review	Awaiting Confirmation	Accept	Deny	Net Deposits
Fall 2024	3676	127	3456	7		2234	161	37
FR	3520	98	3332	7		2218	161	34
T	156	29	124			16		3

Events

- Saturday Information Session (SIS); Saturday, December 7, 2024; 57 guests
- Honors Program Information Session; Saturday, December 7, 2024; 39 guests
- Saturday Information Session (SIS); Saturday, February 22, 2025; 21 reserved
- Recruitment events for winter 2025
 - Twilight Tours (campus visits offered after 5pm weekdays)
 - Department visits; smaller academic focused tours, meetings with faculty and class shadow opportunities throughout the month of January and February.

Office of Student Financial Aid Services

Staffing

- Submitted proposals for additional staff resources with the plan to eventually assume roles for SAP (Satisfactory Academic Progress; federally mandated and coordinated process) appeals process, currently led by Student Affairs, and Scholarships, currently led by Advancement.
- Participated in more than 15 regional financial aid information sessions

Data

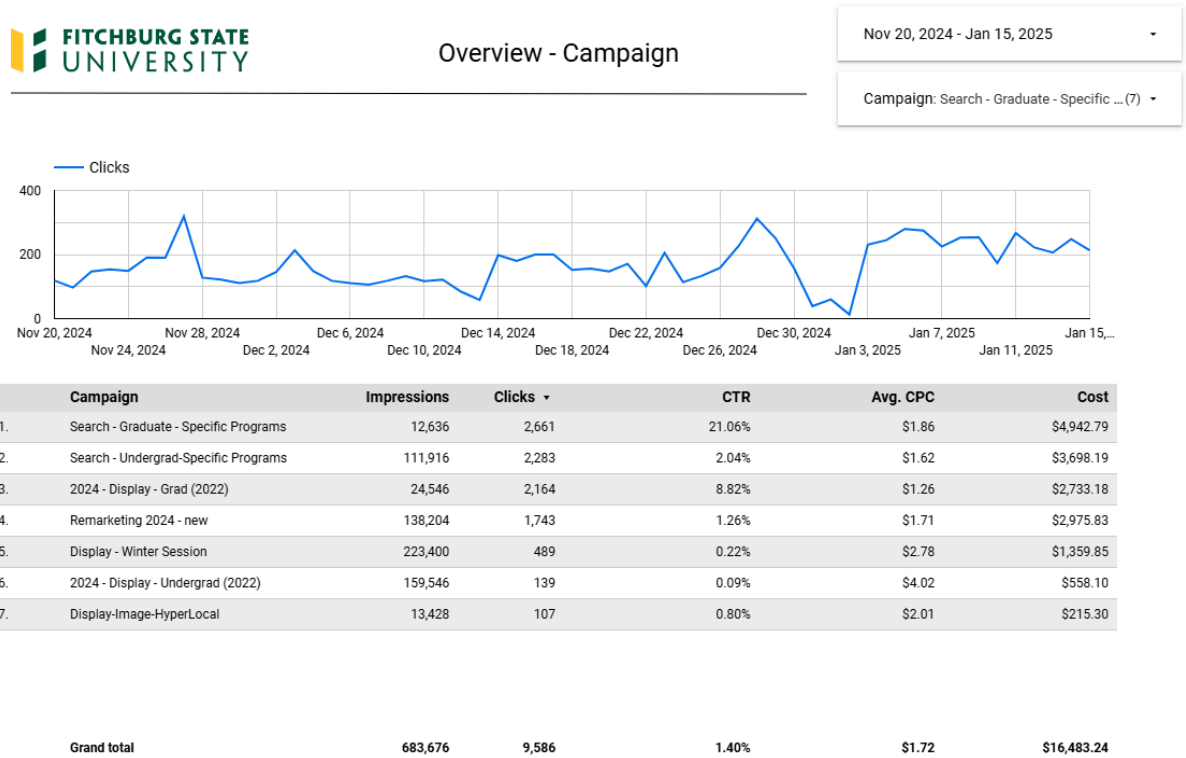
- Began downloads of ISIR documents and data for the fall 2025 financial aid awarding cycle.
- Participated in a university committee to complete and submit federal required reporting for Financial Value Transparency and Gainful Employment (FVT/GE).

Office of Marketing & Integrated Communication

Provide support to the social/new media efforts (currently managing 15+ different accounts)

Data

- [Social Media Analytics](#) ; as of 1/16/25; a breakdown of most recent social media platforms and marketing impact; **We have over 10K views on many videos on Instagram reels and some on TikTok as well organically.**
 - President Hodge social media followers: (*Accounts started in July 2024*)
 - Instagram: 724
 - Facebook: 248
 - Threads: 46
 - University Accounts
 - Facebook: 14,373
 - Instagram: 6,913
 - Twitter (X): 4,888
 - LinkedIn: 35,635
 - YouTube: 1,040
 - TikTok: 2,580
 - Threads: 1,101
 - School of Graduate, Online and Continuing Education Accounts
 - Facebook: 3,011
 - Twitter (X): 316
 - LinkedIn: 2,221
- Marketing Campaign Analytics for November 2024 to January 2025



- 58 blogs published - <https://blog.fitchburgstate.edu/>

- Added 17 new podcasts and reorganized the podcast page
<https://www.fitchburgstate.edu/about/perseverantia-fitchburg-state-university-podcast-net-work>

Events

- Conducted in-person meetings during the month of January with university colleagues for Social Media Advisory Board
- Launched an interview with university staff member, Lourdes Ramirez, on a Spanish Radio group, promoting the university and further positioning the university to strive for HSI status.
- Expanded production of 'One Minute Major' series; most recent is the 4+1 police Program
- Blogs - 92 blogs posted since October 1 - <https://blog.fitchburgstate.edu/all>
- Website - Academic Program pages (undergraduate and graduate) - all catalog links edited and page content reviewed and updated

Print Services

Staffing

- Four (4) staff; plus two (2) graphic designers realigned with Marketing

Veterans Services

New priority on serving this population. Collaboration between FSUPD and EM to review, evaluate, and make proposals regarding staffing, services offered and programmatic offerings.

Staffing

- Launched search for Director of Military & Veterans Affairs; 17 candidates
- Search Committee formed
 - Rich Toomey (Chair)
 - Barbara Cormier
 - William Cortezia
 - Michael Cloutier (Supervisor)

Data

- Current enrollment data indicates 129 students have been identified as having a status of 'veteran'. This data reflects responses to specific questions about past military status, and may not reflect active duty student personnel. This data also does NOT include spouses and/or family members who may have either active duty or veteran status.
- Additional consideration needs to be conducted by incoming staff to determine appropriate data collection and surveying of students to best align service offerings with the student population.

Events

- Several informal meetings with 6+ student staff (paid via the VA program) who support the Veterans Resource Center.

- Repurposing of existing space for both expansion of student workroom; upgrade and inclusion of new computer terminals for student usage
- New television and game console added to the shared space of Veterans Center space
- Planning timeline with on-campus interviews for mid-February. Proposed start time is March 3, 2025.

COMMUNICATIONS AND PUBLIC AFFAIRS

Programming surrounding the end of the Fall semester occupied a great deal of this office's bandwidth for this period, including the planning and execution of the Winter Commencement ceremony on Friday, Dec. 20. This office composes and compiles elements for the script of the ceremony itself, as well as the creation of the event program. This year we created a two-sided print program with a link to a fully designed digital program, both of which were organized by this office.

A number of press releases around late-semester events were also produced, including commencement and upcoming cultural events. This office also assists campus departments with coordinating messaging to larger student audiences, and remains the primary officer for responding and collating public records requests.

As a member of the university's Emergency Management team, this office participates in our team's regular meetings and also supported a citywide tabletop exercise in December.

In close collaboration with the Office of the President, this office supports university outreach efforts and partnerships with external organizations. Ongoing discussions with municipal and community stakeholders were facilitated during this period.

This office serves as a liaison between the university's new Presidential Ambassadors and Presidential Fellows. During this period there have been numerous discussions about the service projects being formulated by members of these groups.

Beyond those high-profile efforts, this office also developed and disseminated a variety of internal communications, including operational updates and holiday themed messaging.

Media links

- FSU welcomes jazz singer Vanessa Racci for Valentine's Day show, Sentinel & Enterprise, Jan. 11, 2025:
<https://www.sentinelandenterprise.com/2025/01/11/fsu-welcomes-jazz-singer-vanessa-racci-for-valentines-day-show/>
- FSU writing contest theme focuses on unexpected connections, Lowell Sun, Jan. 1, 2025:
<https://www.lowellsun.com/2025/01/01/fsu-writing-contest-theme-focuses-on-unexpected-connections/>

- FSU professors publish open textbooks on music, language, math, Sentinel & Enterprise, Dec. 31, 2024:
<https://www.sentinelandenterprise.com/2024/12/31/fsu-professors-publish-open-textbooks-on-music-language-math/>
- FSU grads sent out to ‘transform the world,’ Lowell Sun, Dec. 25, 2024:
<https://www.lowellsun.com/2024/12/25/fsu-grads-sent-out-to-transform-the-world/>
- FSU Students create collateral for safe driving campaign for Worcester DA, Sentinel & Enterprise, Dec. 24, 2024:
<https://www.sentinelandenterprise.com/2024/12/24/fsu-students-create-collateral-safe-driving-campaign-for-worcester-da/>
- Fitchburg State appoints first executive director of diversity, Worcester Business Journal, Dec. 10, 2024:
<https://www.wbjournal.com/article/fitchburg-state-appoints-first-executive-director-of-diversity>
 - Sentinel & Enterprise, Dec. 10, 2024:
<https://www.sentinelandenterprise.com/2024/12/10/fsu-welcomes-the-first-executive-director-of-dei-programs/>
- Rollstone Bank donates ‘kindness kits’ for international students at FSU, Sentinel & Enterprise, Dec. 7, 2024:
<https://www.sentinelandenterprise.com/2024/12/07/rollstone-bank-donates-kindness-kits-for-international-students-at-fsu/>

This office also coordinates stories for the digital [Fitchburg State Magazine](#), including a feature published in December about alumnus Timothy Vernon ‘06:
<https://www.fitchburgstate.edu/magazine/article/changing-minds>

Coversheet

Enrollment Management Update

Section: III. President's Report
Item: C. Enrollment Management Update
Purpose: Discuss
Submitted by:
Related Material: Enrollment Projections 2025 - BoT.pdf



Forecasting Enrollment

Division of Enrollment Management
Presented to the University Board of Trustees
February 2025



Fitchburg State enrollment goals and plans are *institutional goals*. All programs, services, and supports will be aligned and directed to achieve these goals.

Collaborative efforts between all student serving areas is necessary to ensure the recruitment, initial enrollment, matriculation, retention, and graduation of each student.

Directives and institutional goals will provide a framework in which identified faculty and staff can enact tactics and practices intended to achieve successful enrollment.



New initiatives and efforts enacted to address historic recruitment and marketing efforts, as well as target new supports and services to further enhance the retention of current students, the offices charged with enrollment management shall endeavor to achieve a 2% increase in overall enrollments within the UG Day populations.



UG Day Overall

Fall 2024 **2,229 FTE**

Fall 2025 **2,273 FTE *(projected)***

Fall 2026 **2,318 FTE *(projected)***



Enrollment Goal - New Students

Stabilize UG day new student enrollments; target a nominal 5% increase in FTFTF for fall 2025 while planning for a flat enrollment of new UG day transfer students. In addition, a 5% increase in both populations for fall 2026 is targeted to incorporate the forecasted increases from community college transfers.

Fall 2025 567 first-time full-time UG

Fall 2025 204 new transfer students

Fall 2026 595 first-time full-time UG

Fall 2026 214 new transfer students



Questions?

Coversheet

Housing, Contracts and Real Estate

Section: III. President's Report
Item: D. Housing, Contracts and Real Estate
Purpose: Discuss
Submitted by:
Related Material: Housing and Real Property Feb BOT Report.pdf



FITCHBURG STATE UNIVERSITY

HOUSING AND REAL PROPERTY **BOARD OF TRUSTEES REPORT** FEBRUARY 2025

WELCOME TO
HERLIHY HALL
FITCHBURG STATE UNIVERSITY

HERLIHY HALL UPDATE

- 64 Applications Received: Interest for the original 13 beds in our re-imagined Herlihy Hall.
 - 8 Commuters moved to campus, some within Herlihy others around campus.
- Feedback & Interest: Open house feedback revealed high demand, prompting us to expand the project into Phase 2, transforming an additional section of the first floor in just one month.
- Phase 2 Developments:
 - Creation of 13 Premium Singles.
 - IT-Sponsored Gaming Lab added to the space.
- Key Collaboration: Successful partnership between campus departments and Capital Planning and Maintenance (CPM), marking a significant achievement in the project.
- Department Moves as we phase into the future and expand this desired housing option.



SPRING OCCUPANCY

Spring Occupancy vs. Fall Occupancy:

- **Spring 2025: 927**
- **Fall 2024: 1,022**
- **Change: Decrease of 95 (Fall to Spring)**

While we see a decrease from Fall 2024 to Spring 2025 (as expected with the transition to the spring semester), the reduction is smaller compared to previous years. In Fall 2023, the Spring 2024 occupancy dropped by 131 (1,058 in Fall 2023 to 927 in Spring 2024).

Spring 2025 vs. Spring 2024:

- **Spring 2025: 927**
- **Spring 2024: 927**
- **Change: No change in total occupancy**

This stability in the total occupancy between Spring 2024 and Spring 2025 indicates that the overall number of students opting to stay on campus has remained steady, despite some fluctuations in other areas as well as we have allowed for more commuters and graduate students to see the value of becoming a resident.

PROPERTIES

- As the university assumes stewardship of properties held by the supporting organization, it is essential to evaluate and plan for their future use.
- **Current Properties:**
 - Residential: Ongoing management and potential redevelopment.
 - Commercial: Exploring opportunities for growth and sustainability.
 - Properties in Poor Condition: Addressing urgent repairs and long-term solutions for those in need of updates.
 - Enhancements to meet needs of our community.

EXPLORING UNIVERSITY PROPERTIES UNDER NEW LEADERSHIP

PLANNING FOR THE FUTURE.

Coversheet

Student Trustee Report

Section: V. Student Trustee Report
Item: A. Student Trustee Report
Purpose:
Submitted by:
Related Material: Student Trustee Board Report - 01_18_25.pdf

Good afternoon everyone,

In our last meeting, I announced that I was going to be attempting to elevate the role of Student Trustee. I want to expand the representation that this role holds, and focus on other groups on campus that have not received as much attention in the past.

To accomplish this goal, I have begun to reach out to different offices and departments on campus to start to develop connections and establish collaborative objectives to support our student populations that I would like to achieve with them.

In my first steps of reaching these goals, I have reached out to: **Veterans Affairs, International Education, and The School of Graduate and Online Continuing Education (SGOCE).**

When I first started out in my meetings, I just began with the simple question of *“What can I, as the Student Trustee, and as a member of the Student Government Association do to help support your office?”* As these meetings progressed though, I began to realize that my role here was going to be essential this upcoming semester.

Veterans Affairs

I met with Chief Cloutier, the Fitchburg State University Chief of Police, on behalf of the Veterans Affairs department here at FSU.

Currently, there are about 140 students at Fitchburg State who fall under Military and Veterans services on campus. With such an amount of students in this area, the university is in the process of hiring a Director of Veterans Affairs, who will then report to Chief Cloutier. With a strong applicant pool, we seek to find someone who is going to create a stronger support system for veterans here, as well as participate in outreach initiatives, highlighting Fitchburg State as a university that actively supports veterans.

There is also going to be an Alumni and Student Veterans Event on March 29th, 2025 that includes social activities as well as a guest speaker.

As Chief and I were bouncing ideas off of each other, the topic of creating an official club or organization on campus that represents Veterans could be essential to include in our campus culture.

International Education

I also met with Nelly Wadsworth, the Director of International Education. Nelly and I had an enlightening conversation about international education, but more specifically, the experience that international students receive who are living at FSU.

One aspect of the international student experience that we focused on was the opportunities that are intended for these students, and how we can improve upon them. As of right now, there are some activities on campus that are not as easily accessible for international graduate students.

Nelly and I are going to be working together to see if we can come up with a solution to these problems and try to create a better experience for our international undergraduate and graduate students.

Michael Kennedy, Shane Franzen, and the Office of Student Development are working on certain programming that is intended for internal and graduate students.

The School of Graduate and Online Continuing Education (SGOCE)

Lastly, I met with Peter August, the Dean of Enrollment from the School of Graduate and Online Continuing Education. As many of our graduate students are online, there are still some who are on campus and would like to experience the activities that we offer mainly to our undergraduate students. Even though students in the SGOCE program do not pay the Student Activity Fee, Peter and I are forming ideas on how to overcome these challenges and create a better experience for all of our students.

Undergraduate Day Students

Even though our Spring Semester is just starting up, we have had some great events on campus so far.

Rock the Lounge, an event hosted in the Hammond Building where all clubs and organizations can showcase themselves, happened on **January 21st, 2025**.

Our Fitchburg Activities Board hosted their “Big Bingo Blowout” on **January 16th, 2025**. I attended this event and our Holmes Dining Commons was packed.

The Office of Student Development is also having their Emotional Intelligence Workshop on **January 24th, 2025**.

The Commuter Lounge has also been successful in allowing commuters to have a place to go during their days on campus.

Here is a breakdown of Fall Commuter Lounge Access:

- September: 448
- October: 539
- November: 419
- December: 297

Student Government Association

The Student Government Association had their Spring Retreat on January 19th, 2025, focusing on encouraging long-term change, effective advocacy within higher education, leading with purpose, and setting impactful goals that align with university priorities. In order to hone in on these topics, SGA brought in a guest speaker, Adam Keyes, a past Fitchburg State Student Government EBoard member, who was able to bring in his own experiences here and apply them to our needs today.

Coversheet

Athletics Update

Section: VI. Athletics Update
Item: A. Athletics Update
Purpose: FYI
Submitted by:
Related Material: Athletics Presentation.pdf

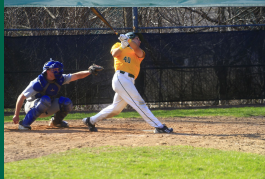
Falcon Athletics

Presentation to the Board of Trustees

February 18, 2024

Presentation Overview

- Who We Are
- NCAA Division III
- MASCAC
- Student-Athlete Achievements
- Future Opportunities



Fitchburg State Varsity Athletics 17 Sports...1 Team

Women's Sports (9);
Field Hockey, Soccer, Cross Country, Volleyball, Indoor Track, Outdoor Track, Basketball, Softball, Lacrosse.

Men's Sports (8);
Football, Soccer, Cross Country, Indoor Track, Outdoor Track, Ice Hockey, Basketball, Baseball.



Fitchburg State Athletics Mission

It is the mission of the Department of Athletics and Recreation to provide high quality athletic and recreation programs that challenge our students to achieve their potential and support their academic endeavors. We extend education beyond the classrooms and foster student engagement, leadership and development. Our inclusive programs positively impact the physical, social and emotional well-being of all participants and encourage a lifelong commitment to health and wellness.



Cam Monette - MASCAC Football
Defensive Player of the Year
Senior - Business Management

What is NCAA Division III



- Participation in a highly competitive athletics program while retaining the full spectrum of college life.
- Opportunities to be a multi-sport athlete.
- Reasonable practice and playing season and regional competition minimize time away from academics.
- Student-athletes are integrated on campus and treated like all other members of the student body.
- No financial aid based on athletic participation or athletic ability.

NCAA Division III Facts & Figures

- 429 total members
 - Largest division of the NCAA
- 80% of active D3 institutions are private, 20% public.
- Average undergraduate enrollment of D3 members is 2,426.
- 19 is the average number of sports D3 schools sponsor.
- On average, student-athletes comprise 31% of the student body at D3 institutions.

MASCAC Overview



- The primary sport conference our teams compete in.
- The MASCAC is the nation's oldest Division III men's and women's playing conference.
- 8 members; Fitchburg, Salem, Framingham, Worcester, Westfield, MCLA, Mass Maritime, Bridgewater.
- Anna Maria College is joining the MASCAC as our 9th member in 2025-2026.
- Our teams compete primarily against our conference opponents but also play other Division III schools throughout New England.

Student-Athletes by the Numbers

- Approximately 360 student-athletes in 2024-2025.
 - 223 male student-athletes.
 - 137 female student-athletes.
- 194 live in on campus housing.
- Athletes hail from 28 states.
 - 70% of athletes are from Massachusetts
 - International student-athletes from Canada & France



Justin Job - MASCAC Men's Soccer
Rookie of the Year
Freshman - Business

Student-Athletes by the Numbers



Sophia Yates - MASCAC Field Hockey
Offensive Player of the Year
Junior - Environment & Earth Science

- Student-Athlete Ethnicity
 - 64% White
 - 15% Hispanic
 - 13% Black
- Student-Athlete Majors
 - Business Administration - 83
 - Exercise & Sports Science - 53
 - Criminal Justice - 36
 - Comm Media - 24
 - Engineering Technology - 19

Student-Athlete Recruitment

- Head & Assistant Coaches actively identify and recruit student-athletes based on their academic profile, athletic ability, and fit for Fitchburg State University.
 - Work in coordination with admissions.
 - While tryout and walk-on opportunities exist, there are very few athletes that were not recruited on our rosters.
- 2023-2024 Student-Athlete Satisfaction Survey Data (first year student-athletes)

How influential was athletics and participating on a team in your decision to attend Fitchburg State?

- 57% Very influential, the most important reason.
- 42% Somewhat influential, but there were other factors.
- <1% Not influential at all.



Kayla Quinn - 2024 MASCAC Field Hockey Coach of the Year

Student-Athletes Academics & Retention



Liam Bourassa - 2-time NCAA
Division III All-American - Javelin
Junior - Exercise & Sports Science

- Academic Performance
 - Average cumulative gpa for full-time undergraduates after Spring 2024 semester;
 - 3.10 non student-athletes
 - 3.04 student-athletes
- Student Retention
 - First year fall to second year fall.
 - FA23 cohort;
 - Student-athletes 75.2%
 - Non student-athletes 71%

Student-Athlete Participation

- Student-Athlete Satisfaction Survey Data (final year student-athletes)

What life or professional skills did you learn through your participation on an athletic team;

- Leadership
- Time Management
- Communication
- Teamwork
- Accountability



Nicole Orlowski - 2023-2024
Fitchburg State Female Athlete of
the Year
Senior - Criminal Justice

Individual & Team Athletics Success

(2024-2025 so far....)



- **Team Highlights**
 - Field Hockey - Regular Season MASCAC Champions
 - Men's Soccer - MASCAC Semifinalist
 - Women's Soccer - MASCAC Semifinalist
- **Individual Highlights**
 - Field Hockey
 - Coach of the Year Kayla Quinn
 - Offensive Player of the Year Sophia Yates
 - Co-Rookie of the Year Samantha Jones
 - Men's Soccer
 - Rookie of the Year Justin Job
 - Defensive Player of the Year Zachariah Foster
 - Football
 - Defensive Player of the Year Cam Monette

Future Opportunities

- Continue to maximize the roster sizes of our existing sports to support overall university enrollment.
- Explore new athletic opportunities for female student-athletes which supports our compliance with Title IX gender equity.

Women's Ice Hockey

- Explore the creation of a varsity women's ice hockey program.
 - Currently a first-year student-run club sport.
 - Utilizes an existing campus facility.
 - Fast-growing and emerging sport;
 - The number of girls playing hockey in Massachusetts in 2023 is up 21 percent compared to 2013 and up 15 percent in all of New England (New England Hockey Journal)
 - MASCAC is sponsoring women's ice hockey for the first time this year and is looking for more membership to support the sport.
 - Assists with Title IX Compliance.



GO FALCONS!

Coversheet

Marketing Update

Section: VII. Marketing Update
Item: A. Marketing Update
Purpose: FYI
Submitted by:
Related Material: Marketing Presentation 02_18_25.pdf

Marketing & Integrated Communications

We're telling the university's story in print and online.

February 18, 2025

Meet the Staff

Pamela Boudreau
Senior Graphic Designer



Caroline Lanni
New Media



Bonnie McCullough
Graphic Arts Technician II



Andrew Cunningham
Visual Elements



Kimberly McCoy-Blouser
Web Content Specialist



Kelly Norris
Director of Marketing



Guidelines and Forms

Guidelines *(available on our website!)*

- [University Branding and Visual Identity](#)
- [Social Media](#)
- [Web Content](#)
- [Branded Assets](#)
- [University Logos](#)

Forms

- [Marketing Request](#)
- [Web Content Request](#)
- [Public Relations: Request for Publicity](#)
- Tell Us Your Story - [landing page](#) and [form](#)

Social Media Marketing

- Curating, scheduling and posting content for **13** accounts: SGOCE (3), University (7), President (3)
- Social Media Ambassadors (32 volunteers/10 active)
- Content Creators (2 new student positions a/o FA24)
- Social Media Advisory Group (collaboration with 20 university departments)

Platforms and Followers

Undergraduate

Facebook:	14,388
Instagram:	6,943
Twitter: (X)	4,888
LinkedIn:	35,761
YouTube:	1,040
TikTok:	2,617
Threads:	1,102

SGOCE

Facebook:	3,007
Twitter: (X)	313
LinkedIn:	2,221

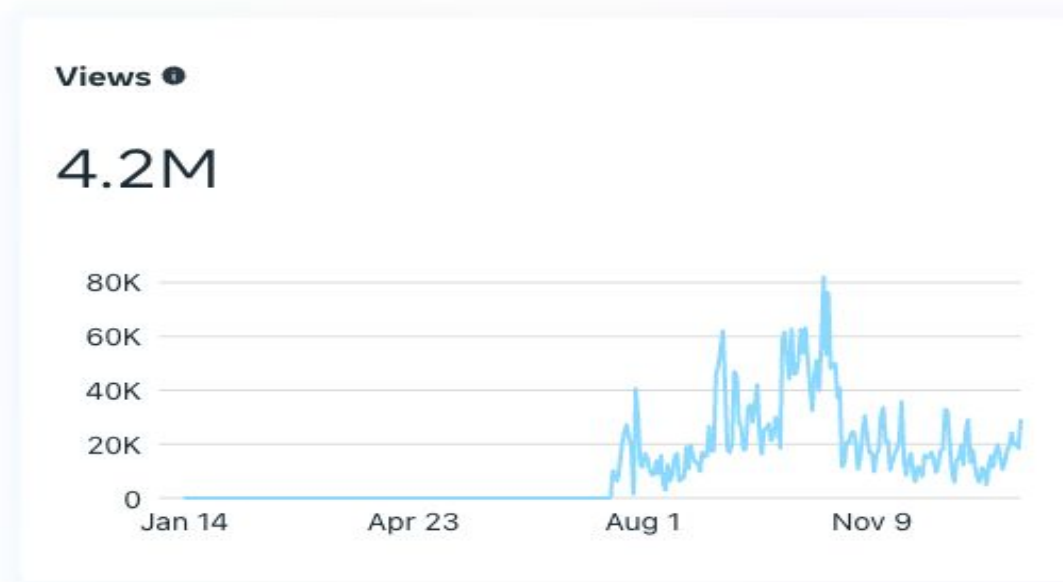
Social Media Marketing (cont)

President Hodge's Accounts (started July 2024)

[Facebook](#): 255

[Instagram](#): 742

[Threads](#): 46



4.2M [Instagram](#) views for the main university account from July 2024 - January 2025 (new tool implemented by META in July 2024)

Social Media Marketing (cont)

Instagram Sample Videos

- Welcome to Fitchburg State
- We're Fitchburg State Tour Guides
- This is your sign to apply to Fitchburg State
- Brand new spaces in Herlihy Hall
- Sign up for summer courses today
- Why did you choose Fitchburg State University

Alumni Donation Videos

- Men's Ice Hockey
- Men's Baseball
- Women's Basketball



The screenshot shows a Facebook post from the 'Graduate, Online and Continuing Education, Fitchburg State University' page, dated Dec 12, 2024. The post text reads: 'Register for a winter course today! ❄️ Catch up or get ahead with a winter course! All of our winter courses are offered online and are delivered in a three-week interim semester. 💚💛❄️ Register here: <https://ow.ly/QZml50TWElo>. #fitchburgstate'.



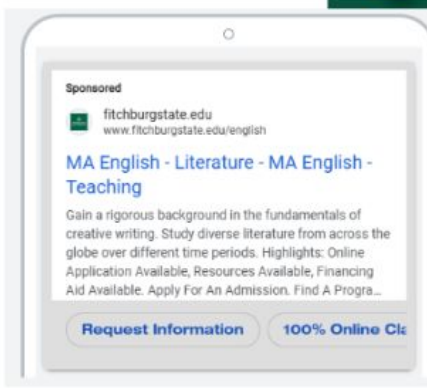
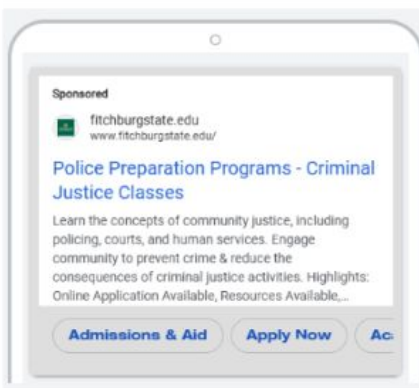
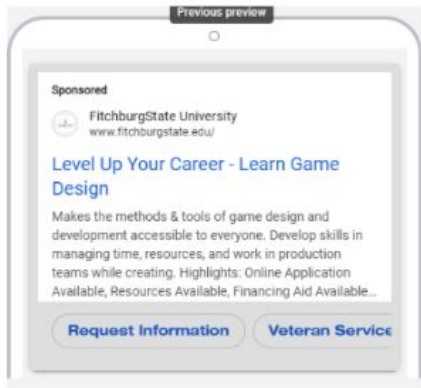
Sample SGOCE Facebook ad

Major Advertising Campaigns

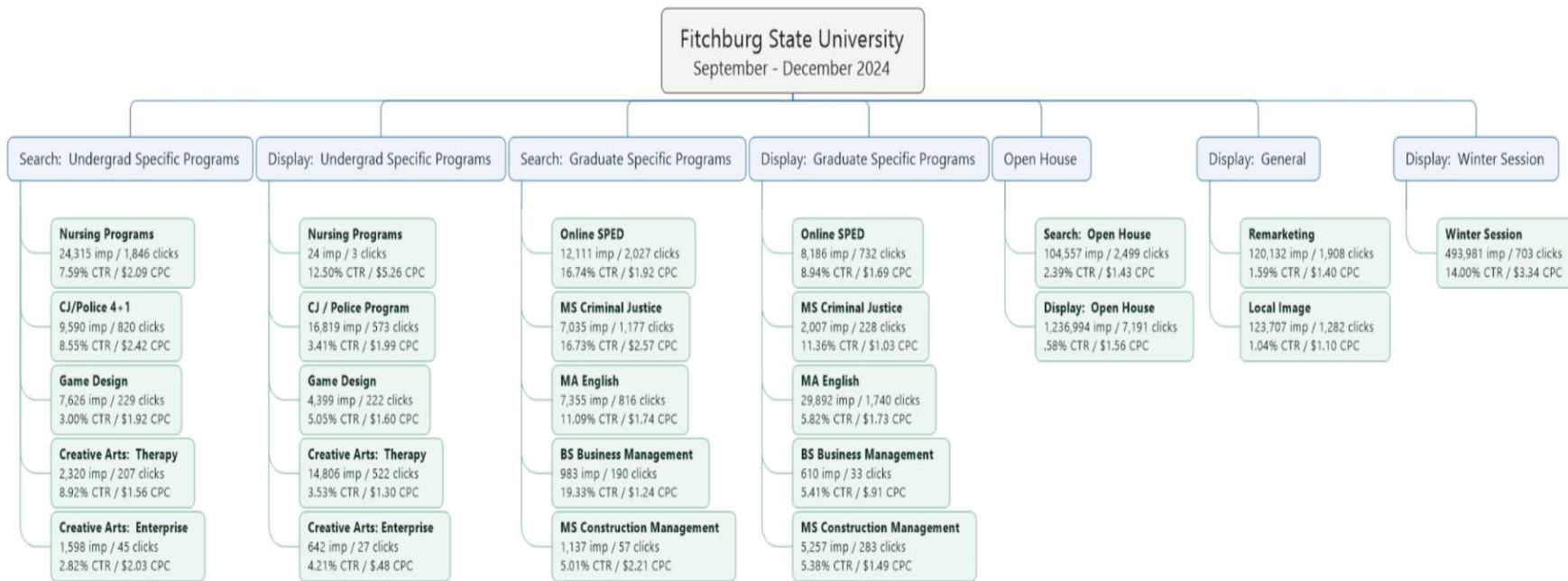
Mass Media

- Google Ads - search, display, remarketing - priority programs (both UG day and SGOCE)
- SGOCE audience match brand awareness (SGOCE) - **Similar/Look Alike** segment targeting is based on your Customer Match segments and targets users who match the characteristics of the Customer Match list.

Overview of Google Ads Campaigns: Fall 2024



Overview of Google Ads Campaigns: Fall 2024



imp = impressions - a count of each time an ad is shown on a Google Network site or search result page
 CTR = click thru rate - the percentage of people who click on an ad compared to the total number of people who see it
 CPC = cost per click - the amount of money you pay for each click on your ad

SGOCE Audience Match Google Ads

LEADER in Online Education
Graduate • Undergraduate • Professional Development



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- ▶ flexible, accessible learning opportunities
- ▶ tailored support for working professionals
- ▶ convenience of online learning formats



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Major Advertising Campaigns (cont)

Davis Advertising

- Open House Campaigns (day)
(CTV - streamed video content, Display, Instagram, SnapChat, Spotify, TikTok, Video, YouTube, Facebook, Spanish radio)



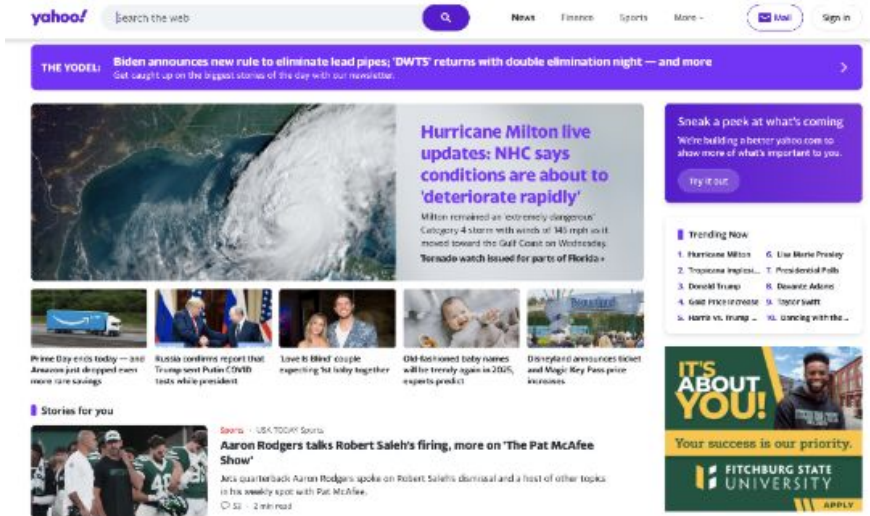
[Open House video](#)



Major Advertising Campaigns (cont)

Q1 Media 10/1-11/30

- Apply Campaign - Geofencing high schools (TikTok, SnapChat, Facebook, Instagram)
[TikTok video](#)



Additional Marketing

Journals, Associations, Community Newspapers

Council for Exceptional Children sample ad



Advance your career in education  **FITCHBURG STATE UNIVERSITY**

100% ONLINE SPECIAL EDUCATION DEGREE AND CERTIFICATE OPTIONS [LEARN MORE](#)

MTA (Massachusetts Teachers Association) sample ad



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Education and Special Education

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Collateral Creation

Davis Advertising

- [Admissions collateral](#) (viewbook)

On-campus Designers (2 staff)

- Academic YTD - 450 jobs completed
- 24 jobs in process

Marketing Assistant, New Media - image and video creation for social

Marketing Assistant, Visual Elements - image and video creation for major campaigns, website header, blogs, and program specific content videos



Website Management

fitchburgstate.edu and fitchburgstate.edu/magazine

1,348,571: Visits to website 7/1/24 - 1/9/25

10,280: Media items maintained on the website (images, doc files, PDFs, etc)

1,667: Pages maintained on main website and magazine (content updates, spelling checks, broken links, etc.)

500: Number of tickets academic year (7/1/24 - 1/9/25)
Turnaround time for tickets 1 - 24 hours

226: Catalog link updates to all program pages every fall

Accessibility score

84% (*benchmark score for higher ed sites - 70% or higher*)

Photography and Videography

- [BurgBlog](#) - 558 blogs published, July 1, 2024 - January 9, 2025
- [SmugMug](#) - 165,080 assets added since 2022
July 1, 2024 - January 9, 2025 - 1,956,144 views
Fun fact, from January 9, 2024 to January 9, 2025 there have been 3,987,680 views in SmugMug.
[SmugMug Video Tutorial](#)
- [Header video on homepage](#) - swapped out every four months
- [One Minute Majors](#) - highlighted on academic pages and a landing page
- [Program Specific Videos](#)
- Subject Specific Slideshows - [Creative Arts, BA](#), [Faculty-Led Study Abroad Programs](#)
- [Fitchburg State Magazine](#)

Community Engagement

Collaborations

- [Wachusett Mountain](#)
- [Game On](#)
- [Fitchburg Art Museum](#)
- [OneCard Discounts](#)

Social Media Contests

- Back to School Giveaway: <https://www.instagram.com/p/C--uhrmum-l/>
- Open House Giveaway: <https://www.instagram.com/p/DAtWUuctjOA/>
- Spring Registration Giveaway: <https://www.instagram.com/p/DDsgsOqzEYq/>
- Flat Freddy Challenge:
https://www.instagram.com/p/DAI-NPQO9VU/?img_index=1
- Winter Registration Giveaway: <https://www.instagram.com/p/DCj5o22vFb3/>
- Summer Registration Giveaway: <https://www.instagram.com/p/C5YbUwTLqQ9/>

Initiatives to Move the University Forward

- International students - targeting India and Ghana in social boosts
- Transfer students - digital displays at Cape Cod and Northern Essex Community Colleges
- Halda AI Forms
- Wachusett Mountain Partnership
- Magazine

Locker signage at
Wachusett Mountain



Initiatives to Move the University Forward

Bus signage at
Wachusett Mountain



Initiatives to Move the University Forward

Trail map signage at Wachusett Mountain



Rotating Digital Signage - Wachusett Mountain



Plan your visit today,
in person or online.

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UNIVERSITY**

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admissions@fitchburgstate.edu

800-705-9692



Rotating Digital Signage - Wachusett Mountain

LEADER in Online Education

Graduate, undergraduate, and professional development programs

- ▶ flexible, accessible learning opportunities
- ▶ tailored support for working professionals
- ▶ convenience of online learning formats



**FITCHBURG STATE
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School of GRADUATE, ONLINE
AND CONTINUING EDUCATION



Opportunities

- Staffing deficit
- Brand integrity - consistency of representing the brand across all departments
- Collaboration between departments - specifically with respect to social media

Coversheet

Presented by Dr. Hodge/Heidi Swift

Section: X. Budget Report/Updates
Item: A. Presented by Dr. Hodge/Heidi Swift
Purpose: Discuss
Submitted by:
Related Material: FY25 Q2 BOT Doc.pdf
FY24_FSUFSO_990_draft_audited.pdf
FY24-FSU Foundation 990 draft_audited.pdf



	FY 2025 Working Budget	FY 2025 Actuals Qtr 2	% of Spend	FY 2024 BOT Approved Budget	FY 2024 Actuals Qtr 2	% of Spend
REVENUE						
State Maintenance	44,430,193	27,994,703	63.01%	37,687,632	29,623,004	78.60%
Fringe Total Costs	19,296,347	12,160,899	63.02%	16,281,057	12,797,138	78.60%
State Funded Fringe Benefits	(19,296,347)	(12,160,899)	63.02%	(16,281,057)	(12,797,138)	78.60%
Collective Bargaining Funds	-	-	0.00%	3,156,863	-	0.00%
Performance Funding	-	-	0.00%	1,149,474	-	0.00%
Total State Revenue	44,430,193	27,994,703	63.01%	41,993,969	29,623,004	70.54%
Tuition/ Non state Support	875,000	-	0.00%	875,000	-	0.00%
Tuition/ Out of State Undergraduate	1,375,000	1,295,534	94.22%	1,376,407	1,419,841	103.16%
Total Tuition	2,250,000	1,295,534	57.58%	2,251,407	1,419,841	63.06%
UG Day Division Fees	20,380,729	18,300,464	89.79%	21,063,192	18,376,122	87.24%
Capital Debt Fee	4,561,850	3,878,192	85.01%	4,561,850	3,963,306	86.88%
Ed Serv Fee Transfer (SGOCE/AP)	6,490,098	3,419,482	52.69%	7,779,110	4,670,677	60.04%
Total Fees	31,432,677	25,598,138	81.44%	33,404,152	27,010,106	80.86%
Net Tuition & Fees	33,682,677	26,893,672	79.84%	35,655,559	28,429,946	79.73%
Sales & Service Income/Other	2,191,100	1,205,335	55.01%	2,428,773	918,111	37.80%
Investments -Dividends/Interest	1,402,500	782,079	55.76%	1,402,500	639,850	45.62%
Grants	1,896,181	1,952,441	102.97%	1,596,181	1,402,538	87.87%
Financial Aid	7,250,343	4,161,683	57.40%	7,250,343	3,247,834	44.80%
Dorm Authority - Housing	9,419,856	9,207,830	97.75%	8,772,203	8,798,421	100.30%
Food Services	3,540,000	3,844,609	108.60%	3,200,000	3,648,242	114.01%
Reserve from Fund Balance	1,442,190		0.00%	1,336,502		0.00%
Sch of Grad and Continuing Educ	9,900,190	6,577,446	66.44%	9,912,009	6,914,081	69.75%
Center for Professional Studies	571,011	410,936	71.97%	486,696	327,559	67.30%
Accelerated Programs	9,397,415	6,942,820	73.88%	11,099,805	7,043,781	63.46%
Ed Service Fee xfr to University	(6,490,098)	(3,419,482)	52.69%	(7,779,110)	(4,670,677)	60.04%
Total Operating Revenue	\$ 118,633,558	\$ 86,554,072	72.96%	\$ 117,355,430	\$ 86,322,691	73.56%
EXPENDITURES						
Personnel Costs (Day)	50,083,635	21,944,333	43.82%	49,635,208	20,414,654	41.13%
Operations (Day)	27,816,213	16,237,853	58.38%	26,364,328	16,177,534	61.36%
<i>Utilities</i>	<i>5,075,847</i>	<i>1,755,621</i>	<i>34.59%</i>	<i>5,130,874</i>	<i>1,573,600</i>	<i>30.67%</i>
Housing	9,643,490	3,168,431	32.86%	9,142,741	2,747,638	30.05%
<i>Utilities</i>	<i>1,190,700</i>	<i>590,235</i>	<i>49.57%</i>	<i>1,071,700</i>	<i>479,043</i>	<i>44.70%</i>
Food Service	3,370,000	1,497,904	44.45%	3,200,000	1,464,589	45.77%
Capital (Operations-Funded)	7,500,000	1,660,301	22.14%	4,725,000	2,520,632	53.35%
School of Graduate Online						
Continuing Education	6,290,462	3,236,371	51.45%	5,970,628	2,542,038	42.58%
Center for Professional Studies	\$ 570,917	\$ 269,938	47.28%	\$ 486,696	\$ 269,241	55.32%
Accelerated Programs	\$ 6,441,367	\$ 3,293,498	51.13%	\$ 6,854,305	\$ 3,322,867	48.48%
Operating Budget Expenses	\$ 117,982,631	\$ 53,654,485	45.48%	\$ 112,581,480	\$ 51,511,836	45.76%
NET TOTAL	\$ 650,927	\$ 32,899,587		\$ 4,773,950	\$ 34,810,855	

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

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

2023

Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

A For the 2023 calendar year, or tax year beginning , 2023, and ending , 20

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization Doing business as		D Employer identification number
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	E Telephone number
	City or town, state or province, country, and ZIP or foreign postal code		G Gross receipts \$
	F Name and address of principal officer:		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions.

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

J Website: **H(c)** Group exemption number

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

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: _____		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	
	5	Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	
	6	Total number of volunteers (estimate if necessary)	6	
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b		
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)		
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)		
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)		
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)		
	14	Benefits paid to or for members (Part IX, column (A), line 4)		
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)		
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		
	b	Total fundraising expenses (Part IX, column (D), line 25) _____		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)		
	18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)		
Net Assets or Fund Balances	19	Revenue less expenses. Subtract line 18 from line 12		
	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21	Total liabilities (Part X, line 26)		
22	Net assets or fund balances. Subtract line 21 from line 20			

Part II Signature Block

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

Sign Here	Signature of officer	Date
	Type or print name and title	

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

May the IRS discuss this return with the preparer shown above? See instructions Yes No

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	1	
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	3	
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	4	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>	5	
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	6	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	7	
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	8	
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	9	
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	10	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	11a	
b Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	11b	
c Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	11c	
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	11d	
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	11e	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	11f	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	12a	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	12b	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	13	
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	14b	
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	15	
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	16	
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>	17	
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	19	
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	20a	
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21	

Part IV Checklist of Required Schedules *(continued)*

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	

Part V Statements Regarding Other IRS Filings and Tax Compliance <i>(continued)</i>		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	
b	If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>	3b	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	
b	If "Yes," enter the name of the foreign country _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	
b	If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	
17	Section 501(c)(21) organizations. Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? If "Yes," complete Form 6069.	17	

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

Section A. Governing Body and Management

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

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

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

Section C. Disclosure

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

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1)										
(2)										
(3)										
(4)										
(5)										
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15)										
(16)										
(17)										
(18)										
(19)										
(20)										
(21)										
(22)										
(23)										
(24)										
(25)										
1b Subtotal										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)										

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

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation

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

Part VIII Statement of Revenue

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants, and Other Similar Amounts	1a	Federated campaigns	1a					
	b	Membership dues	1b					
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f					
	g	Noncash contributions included in lines 1a-1f	1g \$					
	h	Total. Add lines 1a-1f						
	Program Service Revenue	2a	----- Business Code					
b		-----						
c		-----						
d		-----						
e		-----						
f		All other program service revenue . . .						
g		Total. Add lines 2a-2f						
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)						
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
	6a	Gross rents	(i) Real	(ii) Personal				
			6a					
			6b					
	c	Less: rental expenses	6c					
	d	Rental income or (loss)						
	e	Net rental income or (loss)						
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
			7a					
			7b					
	b	Less: cost or other basis and sales expenses	7c					
	c	Gain or (loss)						
	d	Net gain or (loss)						
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18						
			8a					
8b								
b	Less: direct expenses							
c	Net income or (loss) from fundraising events							
9a	Gross income from gaming activities. See Part IV, line 19							
		9a						
		9b						
b	Less: direct expenses							
c	Net income or (loss) from gaming activities							
10a	Gross sales of inventory, less returns and allowances							
		10a						
		10b						
b	Less: cost of goods sold							
c	Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11a	----- Business Code						
	b	-----						
	c	-----						
	d	All other revenue						
	e	Total. Add lines 11a-11d						
12	Total revenue. See instructions							

Part IX Statement of Functional Expenses

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

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

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

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion				
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a -----				
b -----				
c -----				
d -----				
e All other expenses -----				
25 Total functional expenses. Add lines 1 through 24e				
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

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

		(A) Beginning of year	(B) End of year
Assets	1 Cash—non-interest-bearing		1
	2 Savings and temporary cash investments		2
	3 Pledges and grants receivable, net		3
	4 Accounts receivable, net		4
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6
	7 Notes and loans receivable, net		7
	8 Inventories for sale or use		8
	9 Prepaid expenses and deferred charges		9
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	
	b Less: accumulated depreciation	10b	10c
	11 Investments—publicly traded securities		11
	12 Investments—other securities. See Part IV, line 11		12
	13 Investments—program-related. See Part IV, line 11		13
	14 Intangible assets		14
	15 Other assets. See Part IV, line 11		15
16 Total assets. Add lines 1 through 15 (must equal line 33)		16	
Liabilities	17 Accounts payable and accrued expenses		17
	18 Grants payable		18
	19 Deferred revenue		19
	20 Tax-exempt bond liabilities		20
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22
	23 Secured mortgages and notes payable to unrelated third parties		23
	24 Unsecured notes and loans payable to unrelated third parties		24
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D		25
	26 Total liabilities. Add lines 17 through 25		26
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 27, 28, 32, and 33.		
	27 Net assets without donor restrictions		27
	28 Net assets with donor restrictions		28
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.		
	29 Capital stock or trust principal, or current funds		29
	30 Paid-in or capital surplus, or land, building, or equipment fund		30
	31 Retained earnings, endowment, accumulated income, or other funds		31
	32 Total net assets or fund balances		32
33 Total liabilities and net assets/fund balances		33	

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	
2	Total expenses (must equal Part IX, column (A), line 25)	2	
3	Revenue less expenses. Subtract line 2 from line 1	3	
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	

Part XII Financial Statements and Reporting

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

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? . . . If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both. <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both. <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits .		

**SCHEDULE A
(Form 990)**

Public Charity Status and Public Support

OMB No. 1545-0047

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

Employer identification number

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

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

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vii)**. (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:
- 10 An organization that normally receives (1) more than 33¹/₃% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33¹/₃% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations
- g Provide the following information about the supported organization(s).

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	%
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test—2023. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test—2022. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10%-facts-and-circumstances test—2023. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2022 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2022 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests—2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests—2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

		Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
3b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
3c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
4b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
4c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
5b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
5c	Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
9b	Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
9c	Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
10b	Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

		Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?		
a	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
	11a		
b	A family member of a person described on line 11a above?		
	11b		
c	A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		
	11c		

Section B. Type I Supporting Organizations

		Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
	1		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
	2		

Section C. Type II Supporting Organizations

		Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
	1		

Section D. All Type III Supporting Organizations

		Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s), or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
	2		
3	By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
	3		

Section E. Type III Functionally Integrated Supporting Organizations

1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a	<input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b	<input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c	<input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2	Activities Test. Answer lines 2a and 2b below.		
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
	2a		
b	Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
	2b		
3	Parent of Supported Organizations. Answer lines 3a and 3b below.		
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .		
	3a		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		
	3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A—Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B—Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C—Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2023

Open to Public Inspection

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

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

Name of the organization

Employer identification number

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

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

Table with 3 columns: Line number, (a) Donor advised funds, (b) Funds and other accounts. Includes rows for total number, aggregate value, and compliance questions.

Part II Conservation Easements

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

Table with 3 columns: Line number, Description, Held at the End of the Tax Year. Includes rows for purpose, acreage, and monitoring details.

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

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

Table with 3 columns: Line number, Description, Amount. Includes rows for art collection reporting and revenue/assets.

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

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

- a** Public exhibition
- b** Scholarly research
- c** Preservation for future generations
- d** Loan or exchange program
- e** Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? **Yes** **No**

Part IV Escrow and Custodial Arrangements

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

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? **Yes** **No**

b If "Yes," explain the arrangement in Part XIII and complete the following table.

	Amount
1c Beginning balance	
1d Additions during the year	
1e Distributions during the year	
1f Ending balance	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? **Yes** **No**

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

Part V Endowment Funds

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a** Board designated or quasi-endowment _____%
- b** Permanent endowment _____%
- c** Term endowment _____%

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i)** Unrelated organizations? **Yes** **No**
- (ii)** Related organizations? **Yes** **No**

	Yes	No
3a(i)		
3a(ii)		
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))

Part VII Investments—Other Securities

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

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

Part VIII Investments—Program Related

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

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

Part IX Other Assets

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

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

Part X Other Liabilities

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	

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

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Employer identification number

Part I Questions Regarding Compensation

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

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

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

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

	(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1		(i)						
		(ii)						
2		(i)						
		(ii)						
3		(i)						
		(ii)						
4		(i)						
		(ii)						
5		(i)						
		(ii)						
6		(i)						
		(ii)						
7		(i)						
		(ii)						
8		(i)						
		(ii)						
9		(i)						
		(ii)						
10		(i)						
		(ii)						
11		(i)						
		(ii)						
12		(i)						
		(ii)						
13		(i)						
		(ii)						
14		(i)						
		(ii)						
15		(i)						
		(ii)						
16		(i)						
		(ii)						

**SCHEDULE O
(Form 990)**

Supplemental Information to Form 990 or 990-EZ
 Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information. Attach to Form 990 or Form 990-EZ.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the Organization
FSU FOUNDATION SUPPORTING ORGANIZATION INC

EIN
04-3491990

Part and Line Number: Part VI Line 11b

Yearly a copy of the 990 is provided to all board members via email before submitting to the federal government and before a regular board meeting where the report can be discussed.

Part and Line Number: Part VI Line 12c

Yearly the board of directors receive a conflict of interest questionnaire from Human Resources which they are required to complete if they want to continue their board of director duties.

Part and Line Number: Part VI Line 19

FSU Foundation Supporting Org financial statements are not available online per se but the combined report with the Fitchburg State University Foundation are available online along with the conflict of interest policy, and the governing documents and are available upon request.

Part and Line Number: Part VIII - Line 2

a Lessors of Nonresidential Buildings (except Miniwarehouses)

Part and Line Number: Part VIII - Line 2

b & c Other Activities Related to Real Estate

**SCHEDULE R
(Form 990)**

Department of the Treasury
Internal Revenue Service
Name of the organization

Related Organizations and Unrelated Partnerships

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

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Employer identification number

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							

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

Cat. No. 50135Y

Schedule R (Form 990) 2023

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

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

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

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

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

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

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	1a	
b Gift, grant, or capital contribution to related organization(s)	1b	
c Gift, grant, or capital contribution from related organization(s)	1c	
d Loans or loan guarantees to or for related organization(s)	1d	
e Loans or loan guarantees by related organization(s)	1e	
f Dividends from related organization(s)	1f	
g Sale of assets to related organization(s)	1g	
h Purchase of assets from related organization(s)	1h	
i Exchange of assets with related organization(s)	1i	
j Lease of facilities, equipment, or other assets to related organization(s)	1j	
k Lease of facilities, equipment, or other assets from related organization(s)	1k	
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	
o Sharing of paid employees with related organization(s)	1o	
p Reimbursement paid to related organization(s) for expenses	1p	
q Reimbursement paid by related organization(s) for expenses	1q	
r Other transfer of cash or property to related organization(s)	1r	
s Other transfer of cash or property from related organization(s)	1s	

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

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

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

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

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1).....													
(2).....													
(3).....													
(4).....													
(5).....													
(6).....													
(7).....													
(8).....													
(9).....													
(10).....													
(11).....													
(12).....													
(13).....													
(14).....													
(15).....													
(16).....													

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2023 calendar year, or tax year beginning July 01, 2023, and ending June 30, 2024

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return/terminated
 Amended return
 Application pending

C Name of organization FITCHBURG STATE UNIVERSITY FOUNDATION INC
 Doing business as _____
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite
160 PEARL ST,
 City or town, state or province, country, and ZIP or foreign postal code
FITCHBURG, MA 01420-2631

D Employer identification number 04-2661048

E Telephone number 978-665-3457

F Name and address of principal officer: Donna Hodge
160 PEARL ST, FITCHBURG, MA 01420-2631

G Gross receipts \$ 8,757,269

H(a) Is this a group return for subordinates? Yes No
H(b) Are all subordinates included? Yes No
 If "No," attach a list. See instructions.
H(c) Group exemption number _____

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

J Website: _____

K Form of organization: Corporation Trust Association Other

L Year of formation: 1978

M State of legal domicile: MA

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: <u>To support the educational endeavors of Fitchburg State University</u>		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	<u>16</u>
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	<u>13</u>
	5	Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	<u>0</u>
	6	Total number of volunteers (estimate if necessary)	6	<u>63</u>
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	<u>0</u>
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	<u>0</u>	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	<u>3,403,626</u>	<u>2,942,690</u>
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<u>70,042</u>	<u>31,122</u>
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<u>845,690</u>	<u>1,330,733</u>
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<u>28,937</u>	<u>30,368</u>
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	<u>4,348,295</u>	<u>4,334,913</u>
	14	Benefits paid to or for members (Part IX, column (A), line 4)	<u>1,180,580</u>	<u>1,207,060</u>
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	<u>0</u>	<u>0</u>
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	<u>0</u>	<u>0</u>
	b	Total fundraising expenses (Part IX, column (D), line 25) <u>2,236</u>		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	<u>349,824</u>	<u>561,639</u>
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	<u>1,530,404</u>	<u>1,768,699</u>	
19	Revenue less expenses. Subtract line 18 from line 12	<u>2,817,891</u>	<u>2,566,214</u>	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21	Total liabilities (Part X, line 26)	<u>31,285,087</u>	<u>36,292,559</u>
	22	Net assets or fund balances. Subtract line 21 from line 20	<u>383,915</u>	<u>428,592</u>
			<u>30,901,172</u>	<u>35,863,967</u>

Part II Signature Block

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

Sign Here

Signature of officer _____ Date 01/17/2025
Donna Hodge, President Fitchburg State Universi
 Type or print name and title

Paid Preparer Use Only

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

May the IRS discuss this return with the preparer shown above? See instructions Yes No

Part III Statement of Program Service Accomplishments

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

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

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

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

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

4a (Code:) (Expenses \$ 872,638 including grants of \$ 845,060) (Revenue \$ 23,386)
Support the education endeavors of FSU

4b (Code:) (Expenses \$ 731,747 including grants of \$ 362,000) (Revenue \$ 0)
support of academic departments

4c (Code:) (Expenses \$ 63,471 including grants of \$ 0) (Revenue \$ 7,736)
Alumni Events and Cultural Programs

4d Other program services (Describe on Schedule O.)
(Expenses \$ 0 including grants of \$ 0) (Revenue \$ 0)

4e Total program service expenses 1,667,856

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14a Did the organization maintain an office, employees, or agents outside of the United States?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Part IV Checklist of Required Schedules *(continued)*

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Part V Statements Regarding Other IRS Filings and Tax Compliance <i>(continued)</i>		Yes	No		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	0		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	<input type="checkbox"/>	<input type="checkbox"/>	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b	If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>	3b	<input type="checkbox"/>	<input type="checkbox"/>	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b	If "Yes," enter the name of the foreign country _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	<input type="checkbox"/>	<input type="checkbox"/>	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	<input type="checkbox"/>	<input type="checkbox"/>	
7	Organizations that may receive deductible contributions under section 170(c).				
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	<input type="checkbox"/>	<input type="checkbox"/>	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	<input type="checkbox"/>	<input type="checkbox"/>	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	<input type="checkbox"/>	<input type="checkbox"/>	
9	Sponsoring organizations maintaining donor advised funds.				
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	<input type="checkbox"/>	<input type="checkbox"/>	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	<input type="checkbox"/>	<input type="checkbox"/>	
10	Section 501(c)(7) organizations. Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	Section 501(c)(12) organizations. Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	<input type="checkbox"/>	<input type="checkbox"/>	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.				
a	Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a	<input type="checkbox"/>	<input type="checkbox"/>	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b	If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>	14b	<input type="checkbox"/>	<input type="checkbox"/>	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
17	Section 501(c)(21) organizations. Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? If "Yes," complete Form 6069.	17	<input type="checkbox"/>	<input type="checkbox"/>	

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

Section A. Governing Body and Management

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

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

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

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed CA,FL,HI,IL,KS,KY,MD,MA,MI,MN,MS,NH,NJ,NY,ND,OR
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records.
Donna Hodge, 160 PEARL ST, FITCHBURG, MA, 01420-2631, (978) 665-3101

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Nicholas D. Smith Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(2) John T Garten Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(3) Donata Martin Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(4) Barbara Mahoney Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(5) Lorie Martiska Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(6) Mark Lambert Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(7) Mary Beth Jokela Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(8) Marc Dohan Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(9) Anthony J Mercadante Treasurer/Audit Chair	0.50 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(10) John P Mahan Clerk	0.50 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(11) Anna M Clementi Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(12) Eric Gregoire Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(13) Patricia Pistone Director	0.20 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
(14) Richard S Lapidus President	10.00 30.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	273,255	24,148

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) Jay D. Bry V.P. of Finance & Administration	10.00 30.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	201,371	15,125
(16) Jeffrey Wolfman v.P. Advancement	10.00 30.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	168,487	34,312
(17) Patricia Marshall VP Academic Affairs Provost	0.20 39.80	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	197,597	24,148
(18) Laura Bayless V.P. Student Affairs	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	163,388	34,312
(19) Nadimpalli Mahadev Professor	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	198,657	34,312
(20) Paul Weizer Professor	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	170,137	29,596
(21) Jessica Murdoch VP of HR Payroll	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	158,077	24,148
(22) Natalia Kourtonina Professor	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	190,649	15,479
(23) Xuzhou Chen Professor	0.00 40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	205,981	0
(24)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(25)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
1b Subtotal								0	1,927,599	235,580
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								0	1,927,599	235,580

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0**

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
Angela Batista, 12122 Grand Oak Lane, Oxford, FL 34484	Consulting	120,000

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **1**

Part VIII Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants, and Other Similar Amounts	1a	Federated campaigns					
	1b	Membership dues					
	1c	Fundraising events	1,925				
	1d	Related organizations	0				
	1e	Government grants (contributions)	555,555				
	1f	All other contributions, gifts, grants, and similar amounts not included above	2,385,210				
	1g	Noncash contributions included in lines 1a-1f	\$ 0				
	1h	Total. Add lines 1a-1f	2,942,690				
	Program Service Revenue	2a	See Schedule O Business Code				
		713990	31,122	31,122			
b							
c							
d							
e							
2f		All other program service revenue . . .					
2g	Total. Add lines 2a-2f	31,122					
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)	621,821			621,821	
	4	Income from investment of tax-exempt bond proceeds					
	5	Royalties					
	6a	Gross rents	(i) Real				
			(ii) Personal				
	6b	Less: rental expenses					
	6c	Rental income or (loss)	0	0			
	6d	Net rental income or (loss)	0				
	7a	Gross amount from sales of assets other than inventory	(i) Securities	5,098,095			
			(ii) Other				
	7b	Less: cost or other basis and sales expenses	4,389,183				
	7c	Gain or (loss)	708,912	0			
	7d	Net gain or (loss)	708,912			708,912	
	8a	Gross income from fundraising events (not including \$ 1,925 of contributions reported on line 1c). See Part IV, line 18	31,720				
	8b	Less: direct expenses	26,791				
8c	Net income or (loss) from fundraising events	4,929			4,929		
9a	Gross income from gaming activities. See Part IV, line 19	31,821					
9b	Less: direct expenses	6,382					
9c	Net income or (loss) from gaming activities	25,439			25,439		
10a	Gross sales of inventory, less returns and allowances						
10b	Less: cost of goods sold						
10c	Net income or (loss) from sales of inventory	0					
Miscellaneous Revenue	11a	Business Code					
	b						
	c						
	d	All other revenue					
	11e	Total. Add lines 11a-11d	0				
12	Total revenue. See instructions	4,334,913	31,122	0	1,361,101		

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	626,284	626,284		
2	Grants and other assistance to domestic individuals. See Part IV, line 22	580,776	580,776		
3	Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees				
6	Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages				
8	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9	Other employee benefits				
10	Payroll taxes				
11	Fees for services (nonemployees):				
a	Management				
b	Legal				
c	Accounting	19,000		19,000	
d	Lobbying				
e	Professional fundraising services. See Part IV, line 17				
f	Investment management fees				
g	Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)				
12	Advertising and promotion				
13	Office expenses	75,528	53,908	19,384	2,236
14	Information technology	127,802	127,802		
15	Royalties				
16	Occupancy				
17	Travel	10,817	10,817		
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	37,410	37,410		
20	Interest	12,626		12,626	
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	23,639	12,369	11,270	
23	Insurance	36,327		36,327	
24	Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a	Community Services	27,578	27,578		
b	Speakers and cultural programs	157,602	157,602		
c	Outside Services	33,310	33,310		
d					
e	All other expenses				
25	Total functional expenses. Add lines 1 through 24e	1,768,699	1,667,856	98,607	2,236
26	Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

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

		(A)		(B)
		Beginning of year		End of year
Assets	1 Cash—non-interest-bearing	1,454	1	200
	2 Savings and temporary cash investments	2,888,621	2	4,422,153
	3 Pledges and grants receivable, net	1,563,577	3	689,332
	4 Accounts receivable, net	57,736	4	74,743
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	27,793	9	5,544
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 1,454,320		
	b Less: accumulated depreciation	10b 1,011,652	466,307	10c 442,668
	11 Investments—publicly traded securities	25,615,426	11	30,043,044
	12 Investments—other securities. See Part IV, line 11		12	
	13 Investments—program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	664,173	15	614,875
16 Total assets. Add lines 1 through 15 (must equal line 33)	31,285,087	16	36,292,559	
Liabilities	17 Accounts payable and accrued expenses	60,554	17	41,626
	18 Grants payable		18	
	19 Deferred revenue		19	80,000
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	297,981	23	281,176
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D	25,380	25	25,790
	26 Total liabilities. Add lines 17 through 25	383,915	26	428,592
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	2,852,882	27	3,110,104
	28 Net assets with donor restrictions	28,048,290	28	32,753,863
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	30,901,172	32	35,863,967
33 Total liabilities and net assets/fund balances	31,285,087	33	36,292,559	

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,334,913
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,768,699
3	Revenue less expenses. Subtract line 2 from line 1	3	2,566,214
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	30,901,172
5	Net unrealized gains (losses) on investments	5	2,568,784
6	Donated services and use of facilities	6	
7	Investment expenses	7	(172,203)
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	35,863,967

Part XII Financial Statements and Reporting

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

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both. <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both. <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input checked="" type="checkbox"/> Both consolidated and separate basis	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits.	<input type="checkbox"/>	<input type="checkbox"/>

**SCHEDULE A
(Form 990)**

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization FITCHBURG STATE UNIVERSITY FOUNDATION INC	Employer identification number 04-2661048
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Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

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

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:
- 10 An organization that normally receives (1) more than 33¹/₃% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33¹/₃% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations 0
- g Provide the following information about the supported organization(s).

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	2,234,681	887,376	1,664,400	3,403,626	2,942,690	11,132,773
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	2,234,681	887,376	1,664,400	3,403,626	2,942,690	11,132,773
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						2,277,665
6 Public support. Subtract line 5 from line 4						8,855,108

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4	2,234,681	887,376	1,664,400	3,403,626	2,942,690	11,132,773
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	356,710	354,624	407,412	482,818	621,821	2,223,385
9 Net income from unrelated business activities, whether or not the business is regularly carried on	39,002	46,904	48,721	32,990		167,617
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						13,523,775
12 Gross receipts from related activities, etc. (see instructions)					12	94,663
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	65.48 %
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	66.70 %
16a 33 1/3% support test—2023. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input checked="" type="checkbox"/>		
b 33 1/3% support test—2022. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2023. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2022 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2022 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests—2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization . . .

b 33 1/3% support tests—2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization . .

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . .

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

		Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.	<input type="checkbox"/>	<input type="checkbox"/>
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).	<input type="checkbox"/>	<input type="checkbox"/>
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.	<input type="checkbox"/>	<input type="checkbox"/>
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.	<input type="checkbox"/>	<input type="checkbox"/>
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.	<input type="checkbox"/>	<input type="checkbox"/>
4a	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.	<input type="checkbox"/>	<input type="checkbox"/>
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.	<input type="checkbox"/>	<input type="checkbox"/>
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.	<input type="checkbox"/>	<input type="checkbox"/>
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).	<input type="checkbox"/>	<input type="checkbox"/>
b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	<input type="checkbox"/>	<input type="checkbox"/>
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?	<input type="checkbox"/>	<input type="checkbox"/>
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .	<input type="checkbox"/>	<input type="checkbox"/>
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).	<input type="checkbox"/>	<input type="checkbox"/>
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).	<input type="checkbox"/>	<input type="checkbox"/>
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .	<input type="checkbox"/>	<input type="checkbox"/>
b	Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .	<input type="checkbox"/>	<input type="checkbox"/>
c	Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .	<input type="checkbox"/>	<input type="checkbox"/>
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.	<input type="checkbox"/>	<input type="checkbox"/>
b	Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)	<input type="checkbox"/>	<input type="checkbox"/>

Part IV Supporting Organizations *(continued)*

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?	<input type="checkbox"/>	<input type="checkbox"/>
b A family member of a person described on line 11a above?	<input type="checkbox"/>	<input type="checkbox"/>
c A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>	<input type="checkbox"/>	<input type="checkbox"/>
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>	<input type="checkbox"/>	<input type="checkbox"/>

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	<input type="checkbox"/>	<input type="checkbox"/>
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s), or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>	<input type="checkbox"/>	<input type="checkbox"/>
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	<input type="checkbox"/>	<input type="checkbox"/>
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>	<input type="checkbox"/>	<input type="checkbox"/>
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No," provide details in Part VI.</i>	<input type="checkbox"/>	<input type="checkbox"/>
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A—Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B—Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C—Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D—Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required—provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2023 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E—Distribution Allocations (see instructions)		(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
1	Distributable amount for 2023 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2023 (reasonable cause required—explain in Part VI). See instructions.			
3	Excess distributions carryover, if any, to 2023			
a	From 2018			
b	From 2019			
c	From 2020			
d	From 2021			
e	From 2022			
f	Total of lines 3a through 3e			
g	Applied to underdistributions of prior years			
h	Applied to 2023 distributable amount			
i	Carryover from 2018 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4	Distributions for 2023 from Section D, line 7: \$			
a	Applied to underdistributions of prior years			
b	Applied to 2023 distributable amount			
c	Remainder. Subtract lines 4a and 4b from line 4.			
5	Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI . See instructions.			
6	Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI . See instructions.			
7	Excess distributions carryover to 2024. Add lines 3j and 4c.			
8	Breakdown of line 7:			
a	Excess from 2019			
b	Excess from 2020			
c	Excess from 2021			
d	Excess from 2022			
e	Excess from 2023			

Schedule B (Form 990)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

Attach to Form 990, 990-EZ, or 990-PF. Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Table with 2 columns: Name of the organization (FITCHBURG STATE UNIVERSITY FOUNDATION INC) and Employer identification number (04-2661048)

Organization type (check one):

Filers of:

Section:

- Form 990 or 990-EZ: [x] 501(c)(3) (enter number) organization, [] 4947(a)(1) nonexempt charitable trust not treated as a private foundation, [] 527 political organization
Form 990-PF: [] 501(c)(3) exempt private foundation, [] 4947(a)(1) nonexempt charitable trust treated as a private foundation, [] 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

- [x] For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test...
[] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor...
[] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor... \$ 0

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

Name of organization FITCHBURG STATE UNIVERSITY FOUNDATION INC	Employer identification number 04-2661048
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Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	All One Credit Union ----- 20 Adams St ----- Leominster, MA 01453 -----	\$ 5,500	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	BNY Mellon Community Partnership ----- PO Box 8499 ----- Princeton, NJ 08543-8499 -----	\$ 219,455	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	Stephen Boisvert ----- 2402 Golf Links Cir ----- Santa Clara, CA 95050-7019 -----	\$ 88,853	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
4	Eileen M Budri ----- 29 Prospect St ----- Newton, MA 02465-2228 -----	\$ 10,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	Chartwells College & University Dining Services ----- 2 Holbrook St ----- Medway, MA 02053-2270 -----	\$ 7,500	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	Community Foundation of North Central Massachusetts ----- 649 John Fitch Hwy ----- Fitchburg, MA 01420-3689 -----	\$ 89,294	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of the Organization FITCHBURG STATE UNIVERSITY FOUNDATION INC	EIN 04-2661048
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Part 1 Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	William F Cuddy 125 Coolidge Ave Apt 804, Watertown,MA 02472-2875	\$50,850.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	Douglas And Isabelle Crocker Foundation PO Box 8208, Fitchburg,MA 01420-8208	\$20,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	Elaine N Marieb Charitable Foundation 2645 Davis Blvd, Naples,FL 34104-4332	\$575,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
10	Enterprise Holdings Foundation 600 Corporate Park Dr., Saint Louis,MO 63105-4204	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
11	Enterprise Wealth Management 222 Merrimack St,	\$25,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>

	Lowell, MA 01852-5913		(Complete Part II for noncash contributions.)
12	Estate Of Marcia A Palo 4 Pearl St, Dedham, MA 02026	\$33,750.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
13	Facility Management Corporation 100 Schoosett St., Building 3, Pembroke, MA 02359-1856	\$7,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
14	Fidelity Charitable Gift Fund PO Box 770001, Cincinnati, OH 45277-0001	\$16,200.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
15	Donald Irving 6021 Silver King Blvd Unit 304, Cape Coral, FL 33914-8077	\$11,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
16	James Family Charitable Fund Schwab Charitable, 211 Main St, San Francisco, CA 94105	\$24,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input checked="" type="checkbox"/>

17	Mary F & Mary Frances Burnham Trust 205 Spring St, Winchendon, MA 01475-1753	\$421,349.00	Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
18	Risepoint 600 N Pearl St Ste 900, Dallas, TX 75201-2872	\$13,080.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
19	Rollstone Bank & Trust 24 Monument Sq, Leominster, MA 01453-5712	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
20	Schwab Charitable 211 Main St, San Francisco, CA 94105-1905	\$31,500.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
21	Todd Smith 12364 Conway Rd, Creve Coeur, MO 63141-8627	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
22	Jim J Todd 12 Mountain Laurels Dr Apt 106, Nashua, NH 03062-2229	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

23	Unitil 357 Electric Ave, Lunenburg, MA 01462-2246	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
24	Barbara A Wilson PO Box 870, New Castle, NH 03854-0870	\$25,250.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
25	Stephen C And Ann Chapdelaine 111 High St., North Attleboro, MA 02760-1617	\$27,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
26	Estate Of Virginia A Gaffey 12 Careswell St, Green Harbor, MA 02041-0011	\$529,412.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
27	Lloyd G Balfour Foundation 225 Franklin St, Boston, MA 02110	\$80,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
28	Robert A Salvatore 212 Granite St,	\$5,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>

	Leominster, MA 01453-2543		(Complete Part II for noncash contributions.)
29	Robert Stowe Jr Living Trust 4009 Cannon Brook Way, Charlottesville, VA 22901-5114	\$108,256.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
30	The George R Wallace Foundation Goodwin Proctor LLP, Exchange Place, Boston, MA 02109-2881	\$100,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
31	US Charitable Trust 8888 Keystone Xing Ste 1200, Indianapolis, IN 46240-4621	\$20,000.00	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization FITCHBURG STATE UNIVERSITY FOUNDATION INC	Employer identification number 04-2661048
--	---

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
3	100 Shares of NVIDIA	\$ 88,853	04/12/2024
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----
-----	-----	\$ -----	-----

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Name of the organization FITCHBURG STATE UNIVERSITY FOUNDATION INC	Employer identification number 04-2661048
--	---

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

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

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

Part II Conservation Easements

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

1 Purpose(s) of conservation easements held by the organization (check all that apply). <input type="checkbox"/> Preservation of land for public use (for example, recreation or education) <input type="checkbox"/> Preservation of a historically important land area <input type="checkbox"/> Protection of natural habitat <input type="checkbox"/> Preservation of a certified historic structure <input type="checkbox"/> Preservation of open space	
2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.	
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included on line 2a	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d
3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year _____	
4 Number of states where property subject to conservation easement is located _____	
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____	
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____	
8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.	

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

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

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.	
b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.	
(i) Revenue included on Form 990, Part VIII, line 1	\$ _____
(ii) Assets included in Form 990, Part X	\$ 39,025
2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items.	
a Revenue included on Form 990, Part VIII, line 1	\$ _____
b Assets included in Form 990, Part X	\$ _____

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

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

Part IV Escrow and Custodial Arrangements

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

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

Part V Endowment Funds

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	25,503,543	21,944,575	24,644,108	19,911,466	17,524,346
b Contributions	1,835,005	1,961,834	1,069,085	339,104	1,731,167
c Net investment earnings, gains, and losses	3,216,072	2,116,864	(3,083,179)	4,780,860	1,121,611
d Grants or scholarships					
e Other expenditures for facilities and programs	101,724	399,843	558,671	267,739	380,664
f Administrative expenses	142,053	119,887	126,768	117,583	84,994
g End of year balance	30,323,639	25,503,543	21,944,575	24,644,108	19,911,466

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment 0.28%
 - b** Permanent endowment 60.53%
 - c** Term endowment 39.19%
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|---|--------------------------|-------------------------------------|
| (i) Unrelated organizations? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| (ii) Related organizations? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | <input type="checkbox"/> | <input type="checkbox"/> |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		134,290		134,290
b Buildings		466,943	202,472	264,471
c Leasehold improvements				
d Equipment		853,087	809,180	43,907
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				442,668

Part VII Investments—Other Securities

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

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

Part VIII Investments—Program Related

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

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

Part IX Other Assets

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

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

Part X Other Liabilities

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) Due to related organization	25,790
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	25,790

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

Part XIII Supplemental Information (continued)

Part V Line 4 : The Foundation has over 100 donor restricted funds that are primarily for student scholarships, education departments and cultural events.

Part XI Line 2d : Income from FSU Foundation Supporting Org - \$1,124,507 and Golf expenses - \$33,173

Part XII Line 2d : Expenses for FSU Foundation Supporting Org - \$703,153 plus fundraising event and gaming expenses of \$33,173

**SCHEDULE G
(Form 990)**

Supplemental Information Regarding Fundraising or Gaming Activities

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

2023

Department of the Treasury
Internal Revenue Service

Attach to Form 990 or Form 990-EZ.

Open to Public Inspection

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

Employer identification number

FITCHBURG STATE UNIVERSITY FOUNDATION INC

04-2661048

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
- a Mail solicitations
 - b Internet and email solicitations
 - c Phone solicitations
 - d In-person solicitations
 - e Solicitation of non-government grants
 - f Solicitation of government grants
 - g Special fundraising events
- 2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? Yes No
- b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1		<input type="checkbox"/>	<input type="checkbox"/>			
2		<input type="checkbox"/>	<input type="checkbox"/>			
3		<input type="checkbox"/>	<input type="checkbox"/>			
4		<input type="checkbox"/>	<input type="checkbox"/>			
5		<input type="checkbox"/>	<input type="checkbox"/>			
6		<input type="checkbox"/>	<input type="checkbox"/>			
7		<input type="checkbox"/>	<input type="checkbox"/>			
8		<input type="checkbox"/>	<input type="checkbox"/>			
9		<input type="checkbox"/>	<input type="checkbox"/>			
10		<input type="checkbox"/>	<input type="checkbox"/>			
Total						

- 3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

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

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
		tbball Golf Tourn (event type)	Hockey Golf Tour (event type)	(total number)	(add col. (a) through col. (c))
Revenue	1 Gross receipts	21,325	12,320		33,645
	2 Less: Contributions		1,925		1,925
	3 Gross income (line 1 minus line 2)	21,325	10,395	0	31,720
Direct Expenses	4 Cash prizes				0
	5 Noncash prizes				0
	6 Rent/facility costs	9,520	6,900		16,420
	7 Food and beverages	5,616	2,981		8,597
	8 Entertainment				0
	9 Other direct expenses	1,774			1,774
	10 Direct expense summary. Add lines 4 through 9 in column (d)				26,791
11 Net income summary. Subtract line 10 from line 3, column (d)				4,929	

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

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
		1 Gross revenue	0	0	31,821
Direct Expenses	2 Cash prizes	0	0	5,000	5,000
	3 Noncash prizes	0	0	0	0
	4 Rent/facility costs	0	0	0	0
	5 Other direct expenses	0	0	1,382	1,382
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes 80 % <input type="checkbox"/> No	
7 Direct expense summary. Add lines 2 through 5 in column (d)				6,382	
8 Net gaming income summary. Subtract line 7 from line 1, column (d)				25,439	

9 Enter the state(s) in which the organization conducts gaming activities: MA

a Is the organization licensed to conduct gaming activities in each of these states? Yes No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? Yes No

b If "Yes," explain: _____

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

Part and Line Number: Part III Line 16

Compile participants and prepare and submit state tax

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

Attach to Form 990.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Name of the organization

Employer identification number

Part I General Information on Grants and Assistance

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

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1)	04		\$	\$	n/		
(2)	04		\$1	\$0	n/		
(3)	04		\$2	\$0	n/		
(4)	04		\$5	\$0	n/		
(5)	04		\$3	\$0	n/		
(6)	04		\$1	\$0	n/		
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

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

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

Cat. No. 50055P

Schedule I (Form 990) 2023

NOT FOR FILING

Schedule I Form 990 (2023)

Part IV

Supplemental Information

Part and Line Number: Part I - Line 2

The Fitchburg State University Foundation operates within the internal policy guidelines of Fitchburg State University and as such all expenditures have a multi-layer approval process before disbursement.

Part and Line Number: Part III Column b Line 1

Ran a report from Financial Aid office

Part and Line Number: Part III Column b Line 2

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 3

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 4

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 5

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 6

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 7

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 8

Ran a report of recipients from the FA office

Part and Line Number: Part III Column b Line 9

Ran a report of recipients from the FA office

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

FITCHBURG STATE UNIVERSITY FOUNDATION INC

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Employer identification number

04-2661048

Part I Questions Regarding Compensation

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

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)–(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
2	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
3	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
4	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
5	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
6	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
7	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
8	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
9	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
10	(i)	0	0	0	0	0	0	0
	(ii)	\$ 0	0	0	0	\$ 0	\$ 0	0
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

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**SCHEDULE O
(Form 990)**

Supplemental Information to Form 990 or 990-EZ
 Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information. Attach to Form 990 or Form 990-EZ.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the Organization
FITCHBURG STATE UNIVERSITY FOUNDATION INC

EIN
04-2661048

Part and Line Number: Part VI Line 1a

The form 990 is presented to the Board of Directors in their budget package a week before the board meeting and prior to submission to the IRS.

Part and Line Number: Part VI Line 11b

The 990 is prepared by the accounting department and reviewed by the external auditor and then presented to the Board of Directors prior to submission to the Internal Revenue Services.

Part and Line Number: Part VI Line 12c

Yearly, each officer, director, and trustee is given a copy of the conflict of interest policy. They are required to complete and sign the policy. This signed document is returned and kept at the Fitchburg State University Human Resources office.

Part and Line Number: Part VI Line 19

The conflict of interest policy are available upon request. The governing documents and financial statements are available on the Fitchburg State University website.

Part and Line Number: Part VI - General

The form 990 is emailed electronically to the Board of Trustees and submitted in the package sent to them and posted online a week before the board meeting prior to submission to the IRS.

Part and Line Number: Part VIII - Line 2

All Other Amusement and Recreation Industries

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

Employer identification number

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) -----						<input type="checkbox"/>	<input checked="" type="checkbox"/>
(2) -----						<input type="checkbox"/>	<input checked="" type="checkbox"/>
(3) -----						<input type="checkbox"/>	<input type="checkbox"/>
(4) -----						<input type="checkbox"/>	<input type="checkbox"/>
(5) -----						<input type="checkbox"/>	<input type="checkbox"/>
(6) -----						<input type="checkbox"/>	<input type="checkbox"/>
(7) -----						<input type="checkbox"/>	<input type="checkbox"/>

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

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

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

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

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

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

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

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

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)			\$19	
(2)			\$33	
(3)			\$25	
(4)			\$27	
(5)				
(6)				

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

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

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512–514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(2)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(3)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(4)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(5)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(6)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(7)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(8)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(9)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(10)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(11)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(12)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(13)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(14)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(15)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
(16)-----				<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	

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