

Phase 2

Financial Sustainability Task Force:

Student Services

Final Report

December 15, 2023

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Working Group Members

Co-chairs: Matt Burke, Katherine Jewell

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

Ex Officio coordinator: Pamela McCafferty

Meeting Schedule and Tasks Accomplished

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

Overview

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

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

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

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

Priorities

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

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

Focus Area 1: Housing and Dining Services

Focus Area 2: Athletics and Recreation

Focus Area 3: On-Campus Entertainment and Engagement

Data Collection

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

Summary of Findings

Recommendations for Focus Area 1: Housing and Dining Services

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

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

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

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

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

Recommendation 1

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

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

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

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

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

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

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

Implementation

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

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

Participants: Director of Housing

Recommendation 2

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

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

² Lecter, October 25, 2023.

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

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

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

Implementation

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

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

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

Recommendation 3

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

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

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

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

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

Implementation

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

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

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

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

Recommendation 4

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

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

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

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

See Appendix A: Item 5.

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

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

Implementation

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

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

Participants: Dining Services, Board of Trustees, Executive Cabinet

Recommendation 5

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

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

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

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

⁷ Appendix A: Item 5.

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

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

Implementation

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

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

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

Recommendations for Focus Area 2: Athletics and Recreation

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

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

Recommendation 6

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

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

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

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

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

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

Implementation

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

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

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

Participants: Athletics and Recreation; Capital Planning and Maintenance

Recommendation 7

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

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

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

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

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

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

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

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

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

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

Implementation

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

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

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

¹³

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

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

Recommendations for Focus Area 3: Student Entertainment and Engagement

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

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

Recommendation 8

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

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

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

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

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

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

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

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

Implementation

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

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

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

Recommendation 9

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

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

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

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

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

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

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

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

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

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

Implementation

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

¹⁷ Appendix C: Item 4.

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

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

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

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

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

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

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

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

Recommendation 10

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

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

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

Implementation

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

Recommendation 11

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

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

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

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

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

Implementation

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

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

Importance

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

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

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

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

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

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

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

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

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

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

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

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

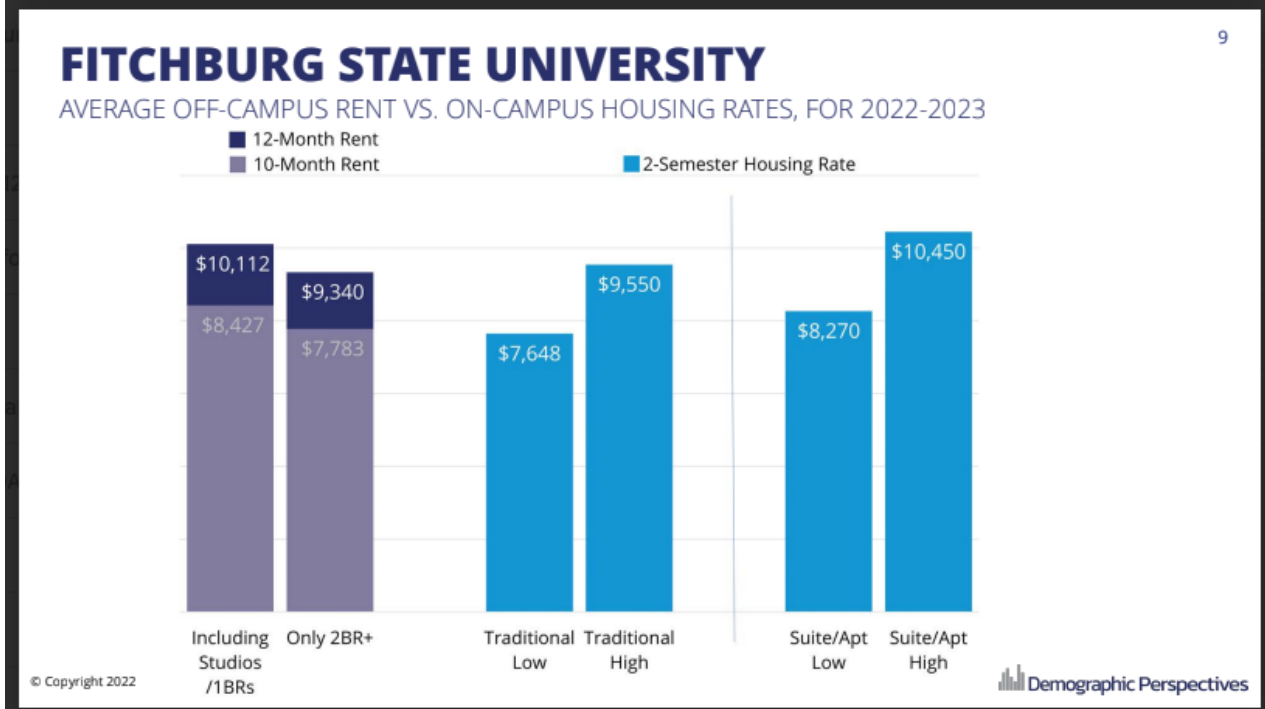
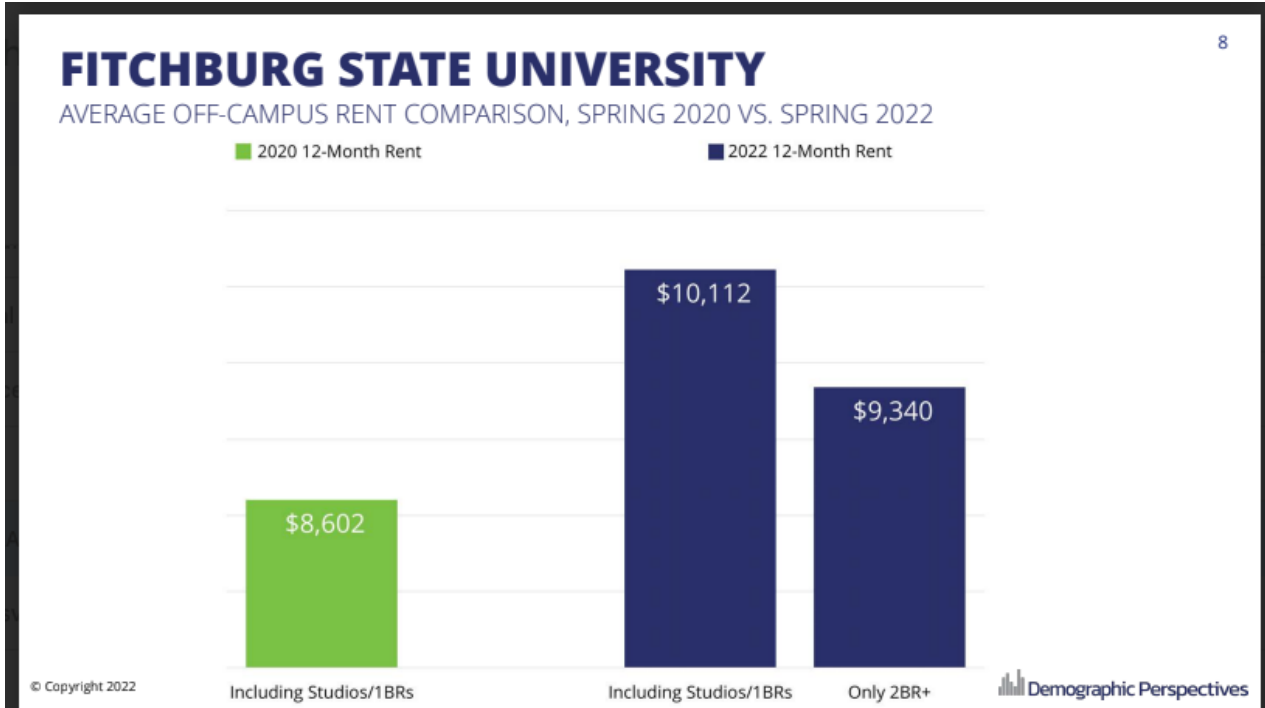
Future Considerations

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

Appendix A - Housing and Dining

Item 1. Average Off-Campus Rent Comparison

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



OFF-CAMPUS VS. ON CAMPUS RENTAL ANALYSIS: 2022

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

Note: Off-campus rent includes all unit types.

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

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

Item 2. Residence Hall Room Rents Fall 2022

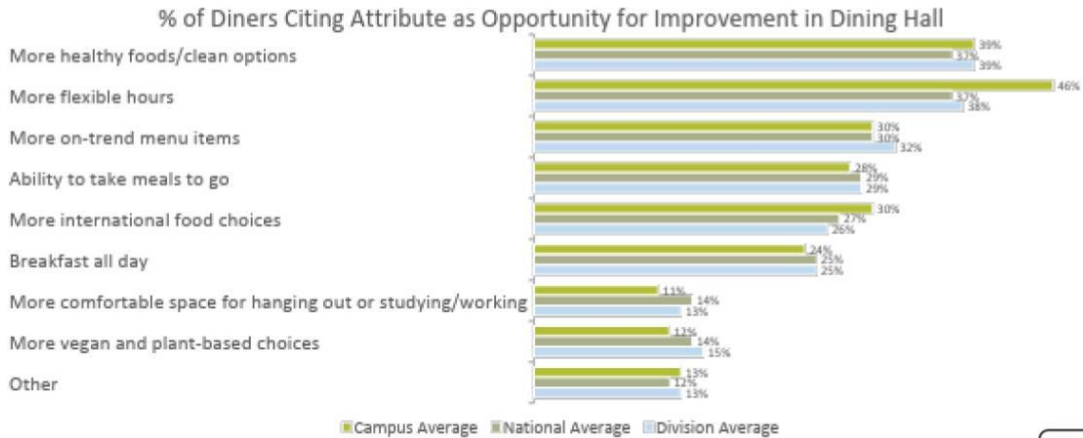
Massachusetts State College Building Authority Schedule 4: Residence Halls Room Rents

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

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

Item 3. Survey data informing Chartwells proposal.

Opportunities of campus dining halls



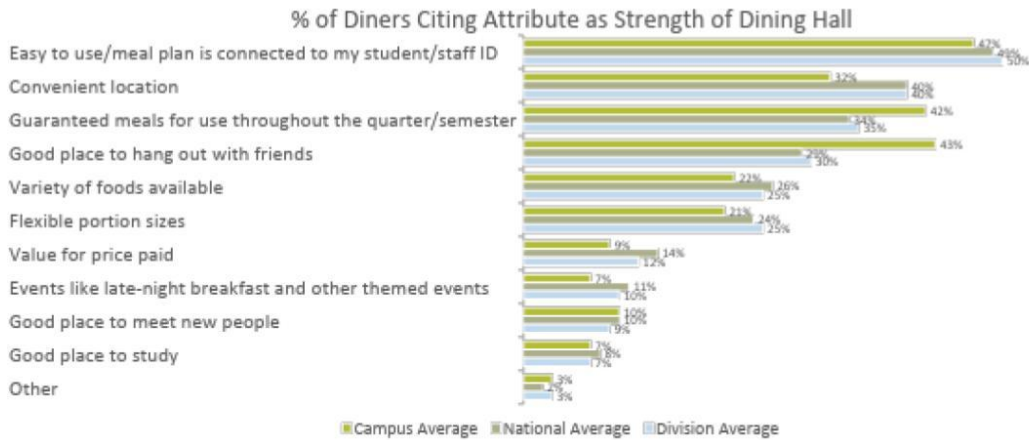
Base: 122 Campus; 56378 National; 11114 Division
 Q: What improvements would you like to see in your all-you-care-to-eat dining hall? Select up to three.



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Strengths of campus dining halls



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



6

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Item 4. Commuter Meal Plan Proposal and Commission Percentage Changes

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

Item 5. Excerpts from Amendment 5 to Chartwells Contract

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

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

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

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

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

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

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

section.

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

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



Mary Beth McKenzie
May 22, 2023

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

From imported document

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

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

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

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

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

Subject: Re: FA Gap

To: Jay Bry <jbry@fitchburgstate.edu>

CC: Richard Toomey <rtoomey1@fitchburgstate.edu>

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

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

Best,
Denise

Appendix B - Athletics and Recreation Services

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

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

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

Item 2. Calculations of Return on Investment for Athletic Programs

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

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


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

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

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

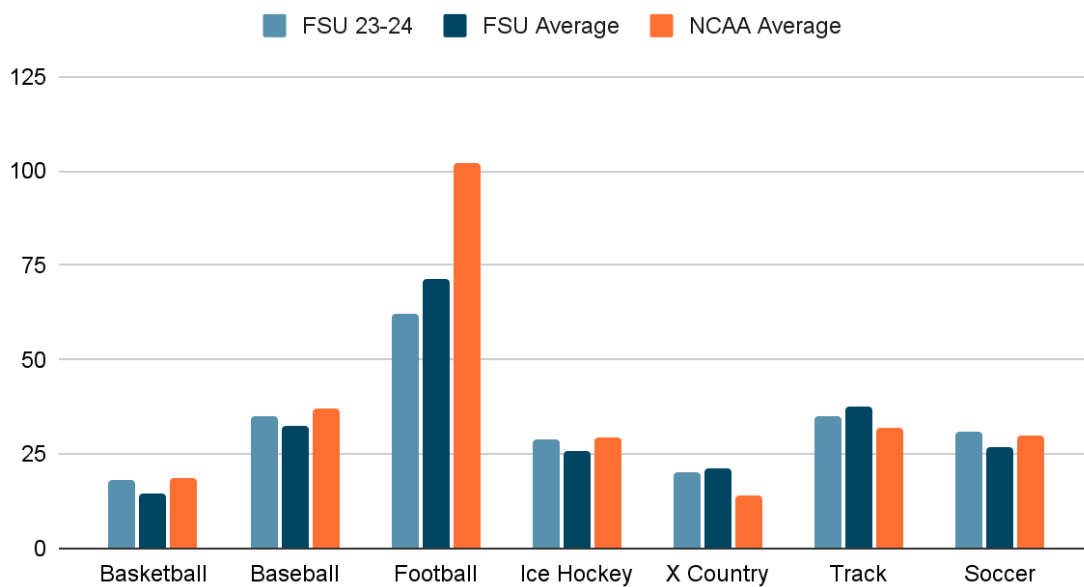
Athletics Staffing - MASCAC Comparison

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

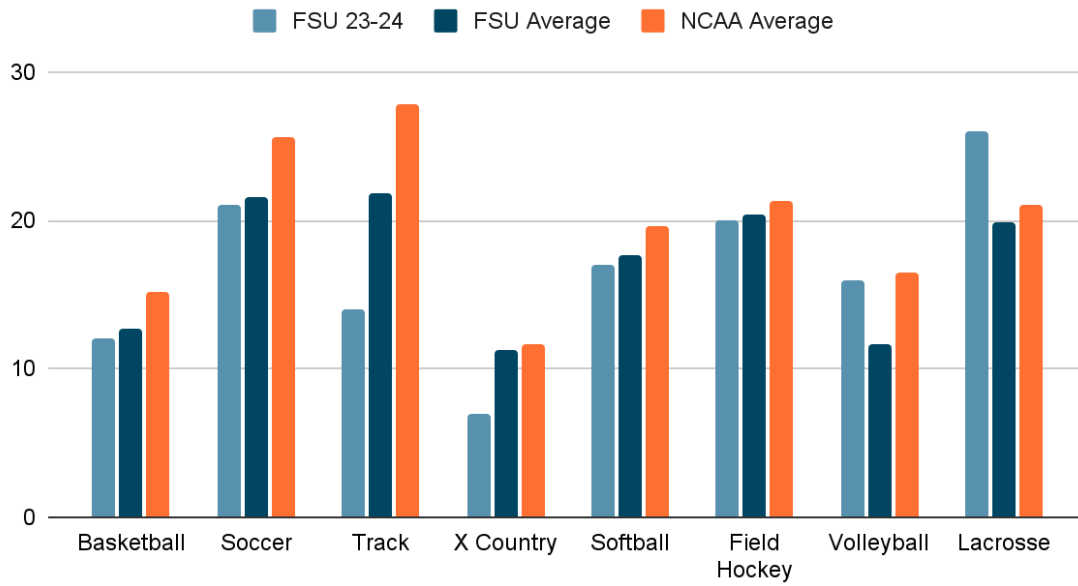
 FITCHBURG STATE UNIVERSITY

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

Men's Sports Roster Sizes



Women's Sports Roster Sizes



Appendix C - Student Engagement and Entertainment

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Item 5. Academic Innovation Fund Application Questions

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

Application asks for a detailed timeline below.

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

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

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

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

Another request for a timeline, with slightly more detail.

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

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

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

Criterion is the singular of criteria

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

Asked for above in two places.

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

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

Another request for a timeline (#4).