To: Matthew Cole
From: LeeAnn Pasquini
Cc: Emma Shultz, Molly Bench, Matthew Gorzkowicz
Re: FY15 Maintenance Request – University of Massachusetts
Date: November 8, 2013

**Purpose:** The purpose of this memorandum is to provide the FY15 Maintenance funding level for the University of Massachusetts line items. The following topics are included:

1. FY15 Maintenance – University of Massachusetts Line Items
2. FY15 Other Line Items and Initiatives
3. Collective Bargaining
4. FY15 Revenue
5. Attachments
   a. Tuition Retention Language
   b. University Internships Language
   c. Matching Endowment Funds Language

Massachusetts has built a public university system that is a source of great pride for the citizens of the Commonwealth. UMass educates more than 76,000 students and employs more than 16,000 people. Nearly 80% of these students are Massachusetts residents and most will remain in Massachusetts after graduation. Nearly 260,000 UMass graduates live in Massachusetts. Applications and enrollment are up on all five campuses. UMass has an annual operating budget of $2.9 billion for FY14 with research expenditures approaching $600 million and has generated intellectual property earnings of $36.5 million in 2011. It has a five-year capital plan estimated at over $5 billion. The University’s distance education program, UMass Online, has won national acclaim and generated $65.2 million in revenue last year. UMass won its first Nobel Prize in 2006. An economic impact study shows that UMass is responsible for $4.8 billion in economic activity in Massachusetts. UMass is a major state-wide institution with a strategic presence and impact in every region of the state and we are the top option for an affordable, high-quality higher education for Massachusetts citizens.

1. **FY15 Budget Request (Maintenance):**
   At the September meeting of the University Board of Trustees, the Board voted to authorize the President to submit the FY15 State budget request. Typically, the University seeks this authorization at the December board meeting; however, we wanted to have the Board vote earlier in order to better align with the Administration’s budget process. In addition, we want to begin the discussion of the implementation of the second year of the 50:50 funding model that is required per section 162 of the FY14 GAA.
Summary of University of Massachusetts Line Items FY15 Maintenance Request:

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<tr>
<th>Dept</th>
<th>Line Item</th>
<th>FY14 GAA</th>
<th>FY15 Maintenance</th>
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<tbody>
<tr>
<td>UMS</td>
<td>7100-0200 University of Massachusetts</td>
<td>478,891,873</td>
<td>518,755,373</td>
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<tr>
<td>ANF</td>
<td>1599-7104 Star Store and Overcrowding</td>
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<td>ANF</td>
<td>1599-3857 Advanced Manufacturing &amp; Tech. Ctr</td>
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<td>300,000</td>
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<tr>
<td>UMS</td>
<td>7100-0500 Commonwealth Honors College</td>
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<td>3,630,000</td>
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**7100-0200 The University of Massachusetts appropriation and the 50:50 Initiative:**
**Request = $518.8 million**

The FY14 State budget, starting with the Governor’s recommendations and with support from Legislative leaders, included a new funding model that would have the State assume 50% of the cost to educate a Massachusetts student at the University. The 50:50 funding proposal adopted requires an investment of approximately $50 million in Fiscal Year’s 2014 and 2015. The increase in the appropriation (7100-0200) along with the additional fringe support gained from the increase in the State appropriation will provide the University with $100 million in new dollars over FY14 and FY15. The FY14 GAA also included language (outside section 162) providing for the second year commitment toward the goal of 50:50. This initiative has had an immediate and meaningful impact on thousands of Massachusetts residents who have not had an increase in their tuition and mandatory curriculum fees for the current academic year. It also provides them with more long-term relief by allowing them to graduate and enter the workforce with less student debt. The table below shows the total increase in the University’s State appropriation and the additional fringe benefits that will be realized in this fiscal year along with the maintenance request in support of the 50:50 plan for FY15. Without the second installment of the 50:50 funding for FY15 the University would not be able to follow through with its plan to freeze tuition and mandatory curriculum fees for the second straight academic year.
Summary of the 50:50 Funding as Required by Section 162 of the FY14 GAA:

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<td>$518,755,373</td>
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<td><strong>TOTAL INCREASE:</strong></td>
<td><strong>$100,845,302</strong></td>
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Exert from FY14 GAA: SECTION 162, “and if, upon the University of Massachusetts receiving the full allotment of their base appropriation in line item 7100-0200, in an amount not less than $518,755,373 for fiscal year 2015, the University of Massachusetts shall not increase mandatory curriculum fees for students at the University of Massachusetts for the school year beginning in the fall of 2014.”

**Other University Line Items**

In addition to the main appropriation for the University, there are several additional line items included in the State budget that provide direct support to our campuses and fund specific programs. Below is a description of each of these important line items and the FY15 Maintenance level of funding request:

**1599-7104 – Star Store and Alleviation of Overcrowding ($5.2 million)** - The Star Store facility is a state-of-the-art facility home to hundreds of artists working in a variety of disciplines and has developed strategic partnerships with New Bedford arts organizations. The Star Store is also home to a number of impressive exhibition spaces, which features exhibitions of local, national, and international renown. The facility includes administrative and academic office space, provides learning spaces for Bristol Community College, and provides quality meeting space for community organizations.

In addition to the star store, this line item funds the operational costs, such as leases, associated with the continuation and expansion of outreach programs.

**1599-3857 – Advanced Manufacturing & Technology Center ($1.6 million)** – The ATMC provides infrastructure for early-stage and transition companies as they grow and mature. The primary objective of the ATMC is to provide an environment where technology companies will

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develop into employers located in Southeastern Massachusetts. By attracting these companies to the ATMC, the University facilitates the economic growth of the region. Participating companies benefit from an environment that includes quality space, complete facilities and support services, technical and business expertise, and proximity to other companies facing similar challenges. Access to UMass Dartmouth faculty and staff, as well as the fully-equipped research laboratories, is one of the most beneficial resources. Additionally, business and technical support is available from the UMass Dartmouth. The services include strategic and business planning, financial and capital planning as well as market research. The University will also help with legal and intellectual property issues as needed. The Center has established commercial alliances with accounting, legal, human resources and funding organizations. The ATMC also provides a wide array of intern and work experiences for UMass Dartmouth students.

1599-4417 – Edward J. Collins Institute ($541K) - The Edward J. Collins, Jr. Center for Public Management at the University of Massachusetts at Boston’s McCormack Graduate School of Policy Studies provides Massachusetts state and local governments with cost-saving, revenue-enhancing, and performance-improving services. These services include assistance to Massachusetts municipalities to achieve savings through consolidated purchasing, service exchanges, governance reforms, cost-saving technologies, and incentive programs, as well as revenue-enhancement support.

In the five years since its founding, the Center has provided services to scores of the Commonwealth’s cities and towns, as well as to numerous state agencies. The support from the Commonwealth allows the Center to provide specialized services and expertise to public sector clients that would not otherwise be available and to provide these services at a reduced cost.

2210-0105 – Toxic Use Reduction Institute ($1.7 million) - The Massachusetts Toxics Use Reduction Institute (TURI) at the Lowell campus was created to promote reduction in the use of toxic chemicals and the generation of toxic by-products in industry and commerce in the Commonwealth of Massachusetts.
7100-0700 – Massachusetts Office of Public Collaboration ($940K) - The MA Office of Public Collaboration state-wide mission is the state’s dispute resolution office pursuant to G.L. Ch. 75, Section 46. The office’s public mandate is to assist the three branches of government (executive, judicial and legislative), municipalities and public authorities with the design and administration of dispute resolution programs, mediation of public policy disputes, and facilitation of collaborative problem-solving and community involvement on contentious public issues. In addition, the Massachusetts Community Mediation Center Grant Program, administered by the Massachusetts Office of Public Collaboration under G. L. Ch. 75, Section 47 promotes community mediation as an affordable public service.

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<tr>
<td>UMS</td>
<td>7100-0700</td>
<td>Massachusetts Office of Public Collaboration For the operation of the community mediation center grant program administered by the office of dispute resolution at the University of Massachusetts at Boston under section 47 of chapter 75 of the General Laws</td>
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<td>940,000</td>
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7100-0500 – Commonwealth Honors College ($3.6 million) - Commonwealth Honors College mission is to provide an excellent and affordable education to academically talented students from all backgrounds and to prepare them for responsible engagement in society by fostering intellectual curiosity, interdisciplinary analysis, and academic rigor within a supportive, socially-just community.

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<tr>
<td>UMS</td>
<td>7100-0500</td>
<td>Commonwealth Honors College For the operation of the Commonwealth Honors College</td>
<td>-</td>
<td>3,630,000</td>
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Lastly, even though we have been working closely with you on the 50/50 initiative, we are required to file a request based on the statutory formula. We are currently working with our campuses to complete the statutory formula requirement for submission in November for your review.

2. Other Line Items and Initiatives for FY15
In addition to the line items described above, the University is seeking your assistance in approving the following line items and initiatives in FY15.

**Affordable Care Act (ACA)**  
**Request: Any additional cost to the University should be budgeted by the State**  
Over the course of the last year, we have been working with you to determine those additional employees that may be eligible for health insurance under the ACA. Based on a recent analysis provided to you, the University has determined that we provide health insurance to approximately 96% of our employees who would be deemed to be eligible under the ACA. The remaining 4% or just over 600 employees may need to be considered for eligibility therefore we will continue to work with you on appropriately identifying those eligible along with projecting a cost. We are requesting that any additional costs for implementing ACA and expanding health insurance eligibility will be budgeted by the State. It also important to understand that a large percentage of our employees are not funded from the State appropriation, therefore, the mechanism that is used to fund ACA cost need to cover all of our employees that are deemed eligible.
Tuition Retention
Request: For language in Attachment A to be supported along with the 50:50 proposal for FY15 – see Attachment A

During the FY14 budget process the Senate advanced language to allow for full tuition retention which is supported by the University. This idea was first suggested nearly 24 years ago by the Saxon Commission and would allow the University to join nearly every other state in the nation by giving the public university the authority to retain tuition. The proposal is also an important step toward making the University more transparent to our students and their families by allowing them to see student charges in a way that alleviates much of the confusion that currently exists between tuition and mandatory fees. This dynamic is unique to Massachusetts and does not exist in other public universities. This proposal is also in line with President Obama’s call to make Higher Education more transparent and is consistent with the Patrick’s Administration’s proposal for increased transparency across State government. (http://www.whitehouse.gov/issues/education/higher-education).

This proposal has no additional cost to the Commonwealth’s budget as the State appropriation to the University would be reduced to account for the additional revenue being retained by the University. This proposal also compliments the 50:50 funding model by ensuring that all tuition and fees along with the State appropriation will be fully supporting the cost of educating a student.

Additional Context for Tuition Retention

The university has the unusual distinction of having mandatory fees, rather than tuition, make up the bulk of the cost of attending its campuses. Tuition is set by the Massachusetts Board of Higher Education, is generally remitted to the state as a user fee, and has not increased in more than a decade. Fees are set by the UMass Board of Trustees, are retained by the University, and in most years increase at a rate comparable to inflation and total amount of State support provided in annual budget. This has led to a high fee, low tuition billing model that is antiquated in today’s higher education world. Most would agree that the current model is confusing and should be changed to conform to best practices that provide greater transparency to students and their families and to avoid confusion around existing tuition waivers.

Tuition retention would allow the University of Massachusetts to join the overwhelming majority of other states in retaining all tuition. This would allow UMass to be more transparent in its billing. A simple bill would be given to students and parents that more accurately reflects the cost of education and separate out what is tuition, the cost of core education services, versus fees paid on other services such as, housing, food, health care, certain programs, etc. that should be fee based. The bill would also show in state students and parents the discount they receive through the legislature and Governor’s commitment to public higher education. The requested language would accomplish the following:

- Tuition and Fee Setting Authority - Currently the UMass Board sets fees and the Board of Higher Education sets tuition. The proposed language would give the UMass Board the authority to set all student charges.
- Tuition Retention and State Appropriations - As of the start of FY12, the University was given the ability to retain all non-resident tuition. Resident tuition still be remitted to the state and was worth approximately $35.1 million in FY13. Normalizing our tuition and fee structure would logically include eliminating tuition remission. In return for retaining tuition, past practice suggests the University’s base appropriation would be reduced in a commensurate manner. The calculation of this is fairly straightforward, except for the complicating factors of the fringe benefit and collective bargaining obligations associated with state funding. The legislation addresses this issue by putting in place the same
safeguards that were used effectively when we were given the authority to retain non-resident tuition. Specifically, legislation would ensure that any University employee paid from retained tuition would be treated as though they were funded from the State appropriation as it related to fringe and collective bargaining. (See subsection (c) of proposed section 1B of chapter 75 as was provided when the campuses were allowed to keep out of state tuition). Again, this legislation follows the same provision currently in place for out-of-state tuition retention.

- Waivers - the legislature has enacted numerous tuition waiver programs to address the needs of different groups of Massachusetts residents. Since resident tuition is remitted to the state, the costs of the waivers have been born by the state and are limited by the relatively low value of tuition. Were the University to shift to a more traditional tuition and fee model, the costs would shift to the University and would greatly increase commensurate with the re-sizing of tuition as a proportion of student charges. The solution provided in this legislation would be to freeze the value of the waivers at the current level, and make any expansion of waiver programs subject to appropriation. In addition, if the University is to be successful in developing a more rational approach to setting tuition and fees, it needs to have authority over a select few waivers that only apply to the University and impact how it sets tuition and fees. The legislation proposes that the University’s Board shall administer these select waivers.

**State Matching Endowment Incentive Program**
**Request: $10 million – see Attachment C**

State matching funds programs serve as powerful incentives for public universities to raise funds from private sources. Public colleges and universities that fully utilize state matching funds programs maintain a considerable competitive advantage over their peer institutions. The availability of matching funds from state appropriations is a major factor in the fundraising success of many public universities. In the past, the Commonwealth’s Public Higher Education Endowment Incentive Program matched 50 percent of gifts to the University’s endowment, funds that can be designated for academic purposes, including scholarships, facility construction or named faculty chairs. Endowment giving for faculty support, faculty-led research programs and financial aid provide opportunities for positive press and the building of a donor base.

For public universities with modest fundraising histories, matching funds provide a strong incentive to flag the important role that the endowment can play in supporting University operations. The use of matching funds to encourage endowment giving has produced dramatic results. The last endowment match program sponsored by the Commonwealth was funded at $20 million and helped the University to raise over $92 million in private funds and added $142 million to the University’s endowment. This fueled the establishment of more than 70 endowed professorships and chairs and numerous scholarships for students.

**University Internships Funding from the Department of Higher Education**
**Request: $1 million - see Attachment B**

The Department of Higher Education currently operates a $1 million internship program for the State Universities. The purpose of the internship program funded by DHE is to increase student participation in employer internships which will raise awareness and interest in career opportunities related to the student’s academic program of study. The FY15 requests allows for the University of Massachusetts to partake in the current program administered and funded by DHE that is offered to the State Universities.
3. Collective Bargaining Agreements and Funding
All of the University’s collective bargaining contracts expire at the end of FY14 and negotiations for successor contracts will commence this year in collaboration with the Executive Office for Administration and Finance and the State’s Human Resources Division. It is our intention to meet with ANF and HRD to discuss the parameters of the new contracts and begin the process of costing them out. Funding of the University contracts is a significant issue for the University and complicated by the fact that we have employees funded from the State appropriation and from University non-appropriated funds. Annually, only 60% of the total cost of the contracts is funded by the State leaving the University to absorb the remainder.

Since FY14 is the last year of the contracts any new contracts negotiated will need to be funded through a collective bargaining reserve per Chapter 150E of the MGL and would be in addition to the second installment of the 50:50 funding formula.

4. FY15 Revenue Projections:
The Commonwealth includes several source codes for revenue generated by the University of Massachusetts. They include Fringe paid on employees not supported by the State appropriation and Remitted Tuition. We are working to provide you with the most recent projection on these revenues and will send them in a separate communication.

Other Appropriations that Benefit UMass Students
In addition to the line items that provide direct support to the University, the following line items provide indirect support through several different departments across the Commonwealth. Appropriate funding of these line items, albeit outside of the University as a department, are critical to the University. Any additional support in these programs would go a long way to helping Massachusetts students and families access to affordable education and help reduce the amount of debt they will have after graduating.

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<td>8700-1150 National Guard Fee Waivers</td>
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SECTION 1. Chapter 75 of the General Laws is hereby amended by inserting after section 1A the following section:-

Section IB. (a) For the purposes of this section, the following words shall have the following meanings:- “student charges” in-state and out-of-state tuition and fees that are charged to students for general attendance at the university, but shall not include any fee or other charge established by the university that is specific to a particular course, program or activity, and shall not include any charges for room, board or student health insurance; “student tuition credit” a reduction in student charges for an eligible student.

(b) The University of Massachusetts shall retain all student charges and shall fix and establish student charges for the university. In-state tuition and mandatory student charges shall preserve affordability for residents of the commonwealth. Out-of-state student charges shall appropriately balance the financial needs of the university with the need to be competitive with peer institutions and, to the extent possible, cover, at minimum, the actual cost of the student’s education. Tuition shall comprise the majority portion of student charges. In establishing student charges the board of trustees shall consider factors including, but not limited to, the Consumer Price Index, the Higher Education Price Index, tuition and fee rates at peer institutions, collective bargaining costs and total support from the commonwealth including direct appropriations along with other relevant data and measures.

(c) All student charges received by the university under this section shall be retained by the university in a revolving trust fund and shall be expended as the board of trustees may direct for the operation and support of the institution. Any balance in a trust fund at the end of a fiscal year shall continue to be held in the trust fund, shall remain available for expenditure in subsequent fiscal years and shall not revert to the General Fund. All such trust funds shall be subject to audit by the state auditor. The university shall provide a statement of charges to students that include all student charges. The statement of charges, in a form approved by the board of trustees, shall specifically break down the student charges and factor a discount rate for in-state students and a discount for any student tuition credit for which a student is eligible.

(d) For employees of the University who are paid from tuition retained under subsection (b) and (c), fringe benefits and collective bargaining shall be funded as if those employees’ salaries were supported by state appropriations and such funds shall not be assessed fringe. This section shall apply only to fringe benefits and collective bargaining costs associated with salaries paid from retained tuition.

(e) All tuition waivers, grants and scholarships identified in chapter 15A, other statutes and reductions collectively bargained that are in the form of a tuition or fee waiver shall be student tuition credits. Student charges shall be reduced by any student tuition credits for which a student is eligible.

(f) The board of trustees shall not recognize any future tuition waivers, grants or scholarships identified in chapter 15A, other statutes or reductions collectively bargained that are in the form of a tuition or fee waiver unless the reduction is accompanied with an appropriation that fully supports them or the reduction is approved by the board of trustees.

SECTION 2. Subsection (i) of section 9 of chapter 15A of the General Laws is hereby amended by striking out the words “In the case of the University, the council shall review the
recommendations of the board of trustees relative to tuition rates at said university and its campuses. Said tuition rates shall be subject to the approval of the council” and inserting in place thereof the following words:- Tuition rates shall be subject to the approval of the council; provided, however, that tuition rates at the University of Massachusetts shall be set subject to sections 1A and 1B of chapter 75 and shall not require the approval of the council.

SECTION 3. Section 1A of chapter 75 of the General Laws is hereby amended in the fifth paragraph by striking out subparagraph (p).

SECTION 4. (a) Notwithstanding any general or special law to the contrary, the University of Massachusetts shall consider all tuition waivers, grants and scholarships identified in chapter 15A of the General Laws, other statutes and reductions collectively bargained that are in the form of a tuition or fee waiver available to students as student tuition credits as defined in section 1B of chapter 75 of the General Laws.

(b) On July 1, 2014 the University of Massachusetts shall calculate the value of all existing tuition waivers in said section 19 of said chapter 15A or reductions collectively bargained.

(c) The calculated value of the tuition waivers, grants and scholarships identified in chapter 15A of the General Laws, other statutes and reductions collectively bargained that are in the form of a tuition or fee waiver calculated in subsection (b) shall be credited to the eligible student as a student tuition credit on their statement of charges of student charges as defined by said section 1B of said chapter 75.

(d) The University of Massachusetts shall report to the senate and house committee on ways and means, the joint committee on higher education and the board of higher education the existence and the calculated value of all tuition waivers tuition waivers, grants and scholarships identified in chapter 15A of the General Laws, other statutes and reductions collectively bargained that are in the form of a tuition or fee waiver at the University of Massachusetts.

SECTION 5. [NOTE: This section was already included in the FY13 Budget along with the 50:50 funding language in section 162] Notwithstanding and general or special law to the contrary the University of Massachusetts shall annually report to the senate and house committee on ways and means, the joint committee on higher education, the secretary of administration and finance and the secretary of education: (1) the status of the percentage of student education costs placed upon the student and subsidized by the commonwealth with the goal of providing education costs to students at an equal 50/50 share between the commonwealth and the students; (2) a comprehensive document articulating the efficiencies and effectiveness of initiatives and programs at the University that save the commonwealth and students money and make the 5 campus system more efficient.

SECTION 6. Notwithstanding any general or special law to the contrary all tuition and fee waivers that are exclusive to the University of Massachusetts shall only require the approval by the board of trustees of the University of Massachusetts.

SECTION 7. Sections 1 to 6, inclusive, shall take effect on July 1, 2014.
7066-0000 "provided further, $1,000,000 shall be made available for an Internship Incentive Program for the University of Massachusetts and State Universities; provided further, the commonwealth shall contribute funds to each institution in an amount necessary to match private contributions in the current fiscal year to the institutions internship incentive program; provided further, that the commonwealth's contribution shall be equal to $1 for every $1 privately contributed to each university's board of trustees or foundation; provided further, that the maximum total contributions from the commonwealth shall be no greater than $1,000,000; provided further, that funds from this program shall not result in direct or indirect reduction in the commonwealth's appropriations to the institutions for operations, scholarships, financial aid or any state appropriation and the department shall promulgate regulations and criteria for said program"
Attachment C
Higher Ed Endowment Matching Funds

7066-0115. For the purposes of implementing section 15E of chapter 15A of the General Laws to encourage private fundraising by the commonwealth’s public institutions of higher education for the endowments and capital outlay programs of those institutions; provided, that the board of higher education shall implement this program in a manner which ensures that each institution shall have an equal opportunity to secure matching funds from this item; provided further, that $10,000,000 shall be allocated to University of Massachusetts campuses; provided further, that $5,000,000 shall be allocated to state college campuses; provided further, that $5,000,000 shall be allocated to community college campuses; provided further, that if any funds allocated herein for disbursement to state and community college campuses shall be unused, the remaining funds shall be made available to University of Massachusetts’ campuses.......................... $10,000,000 ($20,000,000 was done last time funding was provided)