



# University of Massachusetts

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To: Lisa Calise

From: LeeAnn Pasquini, Joe Skrzek, Eric Gregoire

Date: March 1, 2023

Re: FY24 Governor’s Budget Recommendation Summary

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**Purpose:** The purpose of this memorandum is to provide an overview of the University line items included in the Governor’s [FY24 budget](#) recommendation released on March 1<sup>st</sup> including:

- UMass Appropriation
- Campus Specific Appropriations
- Fair Share Amendment
- Scholarship / Waivers and Other Line Items
- Outside Sections
- State Universities & Community Colleges

The Administration prepared a [Budget Brief](#) document to outline further details on the historic investments in public higher education. Utilize the link to read more.

**UMass Appropriation:**

The Governor’s FY24 recommendation funds the University’s appropriation at **\$683.4 million**. The appropriation includes a 3% increase above the current year. Compared to the University’s request this partially funds key initiatives while providing discretion of use by not including earmarked language.

	FY23 GAA	FY24: Governor	\$ Change from FY23 GAA	% Change from FY23 GAA
University of Massachusetts	664,121,000	683,436,930	19,315,930	3%

- **Line item language:** simply states “For the Operation of the University of Massachusetts” and does not include earmarks, reporting or other initiatives.
- **Collective Bargaining:** There is no funding included for collective bargaining increases as the new contract period begins in FY24. The administration has not released economic parameters for the new period, but they are anticipated within the next few months. Once parameters have been established, the University will request funding for the State’s obligation of the FY24 cost through supplemental appropriations.

**Campus Specific Appropriations:**

The following table shows line items that support certain campus specific operations:

Line Item	FY23 GAA	FY24: Governor	\$ Change from FY23 GAA	% Change from FY23 GAA
7100-0700 MA Office of Public Collaboration (UMB)	2,713,465	2,713,465	-	0%
7100-0701 Center for Portuguese Studies and Culture (UMD)	250,000	250,000	-	0%
7100-0702 Institute for Asian American Studies (UMB)	300,000	300,000	-	0%
1599-7104 Star Store (UMD)	2,700,000	2,700,000	-	0%
1599-7114 Springfield Satellite Center (UMA)	250,000	250,000	-	100%
1599-4417 Collins Center (UMB)	250,000	250,000	-	0%

- MA Office of Public Collaboration (UMB) – \$2.7 million for MOPC operations consistent with FY23.
- Center for Portuguese Studies & Culture (UMD) - \$250K consistent with FY23 (Senate Initiative).
- Institute for Asian American Studies (UMB) - \$300K consistent with FY23 (Senate Initiative).
- Star Store at Dartmouth (UMD) – \$2.7 million included which allows the campus to make this monthly lease payment consistent with FY23.
- Springfield Satellite Center – \$250K consistent with FY23.
- Collins Center (UMB) – \$250K consistent with FY23 (Senate Initiative).
- Earmarks - Other line items across the budget included earmarks for UMass:

Earmarks	FY23: GAA	FY24: Gov
0330-0300 UMass Law Community Legal Assistance	75,000	-
0511-0270 US Census Technical Assistance (Donahue)	1,000,001	1,000,000
2200-0100 DEP Ops - UMass Environmental Research	Language	Language
2210-0106 Toxic Use Reduction Institute (UML)	1,629,860	-
2330-0100 Division of Marine Fisheries (UMD)	550,000	Language
4510-3010 Down Syndrome Program (UMMS)	150,000	-
4513-1112 Cranberry Research Center (UMD)	100,000	-
2511-0100 Lab Services for Dept. of Ag Resources (UMA)	Language	Language
4401-1000 DTA Learning Disability Assessments (UMass)	170,000	-
0950-0030 Opioid Use on Families Study	269,322	269,322
5911-1003 Autism and Neurodevelopmental Disorders (UMMS)	50,000	-
7003-0100 Leduc Center (UMD)	50,000	-
7007-0800 Small Business Development Center (UMA)	1,426,222	1,426,222
7010-1193 JFK - EMKI Civics Education	1,000,000	-
7061-9041 Center for Collaborative Education (UML)	550,000	-
7070-0066 In Demand Professions Student Scholarships	2,000,000	-
7100-0700 MOPC Prisoner Re-entry Mediation Program	200,000	-
8100-1005 Narcotic Analysis for State Police (UMMS)	393,554	393,554

**Fair Share Amendment**

The Governor’s budget proposal includes \$1 billion in Fair Share revenue divided between education and transportation. The following table summarizes the Governor’s proposed initiatives:

<b>Transportation Investments</b>	<b>FY24 Governor</b>		
Municipal Partnership Programs	100,000,000		
Federal Matching Funds	50,000,000		
Highway & Roadside Projects	114,000,000		
MBTA & RTA Investments	211,000,000		
Rail & Water Transportation	15,000,000		
<b>Total</b>	<b>490,000,000</b>		

  

<b>Education Investments</b>	<b>FY24 Governor</b>	<b>Impact</b>	<b>UMass Portion</b>
Early Education & Care Programs	140,000,000	Early Education	
Early College and Innovation Pathways	10,000,000	Public Higher Ed	TBD
Financial Aid Expansion	93,000,000	Public Higher Ed	TBD
Student Support Services	30,000,000	Public Higher Ed	TBD
Higher Education Capital Funding	140,000,000	Public Higher Ed	TBD
MassReconnect	20,000,000	Community Colleges	
Higher Ed Fee Stabilization	59,000,000	Public Higher Ed	24,000,000*
Diversity, Equity, and Inclusion Initiatives	18,000,000	State U's & UMass	10,000,000
<b>Total</b>	<b>510,000,000</b>		<b>10,000,000</b>

\*Estimate based on internal analysis, language included does not specifically earmark UMass funds.

The Administration prepared a [Budget Brief](#) document to outline further details. Utilize the link to read more.

Several initiatives were included that align with the university’s annual report to the Legislature and referenced during the annual State of the University address last week:

- In State Tuition Price Lock (DHE) – (Total line item = \$59 million; University portion (estimated) = \$24 million) new in-state undergraduate students would enjoy a locked-in tuition rate for four years of education at the university’s Amherst, Boston, Dartmouth, and Lowell campuses. The estimated University portion was not earmarked and while the line item falls under the Department of Higher Education, reporting is required to A&F in order to receive a transfer of the funds. It is also not clear if these new funds will support fringe related costs like the University’s main appropriation.

*“For recurring expenses for a reserve to provide funds to community colleges, state universities and the University of Massachusetts for innovative strategies that support cost predictability and transparency for students and families, encourage timely degree completion, protect students from economic uncertainties and promote financial planning for college including, but not limited to, price locks and other strategies; provided, that tuition and fees will continue to be set by each respective board per chapters 15A and 75 of the General Laws and that such innovative strategies are supported by and voted on by the respective board; and provided further, that the vote of the respective boards shall be provided to the executive office for administration and finance to ensure a timely transfer of funds in support of such strategies”*

- Diversity, Equity & Inclusion Programs (UMass) – (\$10 million) This is a University specific line item for grants for innovative programs focused on diversity, equity, and inclusion.

*“For recurring expenses for grants to the University of Massachusetts for innovative programs focused on diversity, equity and inclusion; provided, that grants shall support funding for innovative campus initiatives targeted at improving student, faculty and staff equity”*

In addition, several initiatives were funded under the Executive Office of Education or Department of Higher Education that the University is expected to benefit from; the amounts reflected are in total and the line item language does not specify how much the University may be eligible to receive:

- Early College & Innovation Pathways (EOE) (\$10 million) – *For recurring expenses for the expansion of early college, workforce, technical and innovation pathway programs; provided, that such programs shall incorporate the guiding principles of designated pathways; and provided further, that appropriated funds may be expended for programs or activities during the summer months*
- Financial Aid Expansion (DHE) (\$93 million) – *For recurring expenses for a scholarship program to provide financial assistance to Massachusetts students enrolled in and pursuing a program of higher education in any public institutions of higher education; provided, that funds from this item may be expended on the administration of the scholarship program; and provided further, that the commissioner of higher education, in coordination with the Massachusetts state scholarship office, shall adopt regulations governing the eligibility and the awarding of financial assistance*
- Student Support Services (DHE) (\$30 million) – *For recurring expenses for grants to the University of Massachusetts, state universities or community colleges for comprehensive student success initiatives and supports; provided, that funds shall be allocated based on the relative share of Pell Grant-eligible students enrolled at the institution*
- High Education Capital Funding (DHE) (\$140 million) - *For one-time expenses for the study, design and construction of campus instructional lab facilities, infrastructure modernization, decarbonization or critical repair administered by the division of capital asset management and maintenance in collaboration with the executive office of education*

**Scholarship / Waivers and Other Items:**

The chart below summarizes some additional line items that are of interest to UMass but not direct appropriations to the University.

Line Item	FY23 GAA	FY24: Governor	\$ Change from FY23 GAA	% Change from FY23 GAA
7002-1518 Innovation Commercialization Seed Fund	400,000	400,000	-	0%
7002-1519 Innovation Voucher Program Fund (UMA)	2,000,000	2,000,000	-	0%
7009-6600 Early College Programs	10,000,000	13,000,000	3,000,000	30%
7066-0016 Foster Care Financial Aid	1,485,000	1,485,000	-	0%
7066-0019 Dual Enrollment Grants	9,000,000	10,000,000	1,000,000	11%
7066-0021 Foster Care & Adopted Fee Waivers	7,294,911	7,294,911	-	0%
7066-0115 Endowment Match Incentive Program	20,000,000	-	(20,000,000)	-100%
7066-1123 State U. & Community College Mental Health	4,228,000	4,428,000	200,000	5%
7066-9600 Concurrent Inclusive Enrollment	4,000,000	4,000,000	-	0%
7070-0065 Scholarships	175,150,000	175,150,000	-	0%
8700-1150 National Guard Fee Waivers	10,432,009	10,432,009	-	0%

- Increased investments in early college programming through the DHE:
  - Early College Programs – \$3 million increase for development and implementation of early college programs.
  - Dual Enrollment Grants - \$1 million increase to support dual enrollment programs.
- Endowment Match Incentive Program – Governor’s budget does not include new funding for the program.
- State University & Community College Mental Health – \$200K increased funding for student behavioral health services.

**Outside Sections:**

There are no outside sections impacting the University.

**State Universities & Community Colleges:**

The Governor’s FY24 recommendation provided 3 percent increases to base funding at the other segments consistent with the University’s main appropriation. As part of the proposed increases the Governor provided increased funding to the State Universities and Community Colleges incentive funding line items.

	FY23: GAA	FY24: Governor	Change from GAA
University of Massachusetts	664,121,000	683,436,930	19,315,930
<i>% Change (from FY22)</i>	<i>10.8%</i>		<i>3%</i>
State Universities	327,748,539	337,418,994	9,670,455
<i>% Change (from FY22)</i>	<i>9.8%</i>		<i>3%</i>
Community Colleges	338,055,196	347,823,297	9,768,101
<i>% Change (from FY22)</i>	<i>4.7%</i>		<i>3%</i>