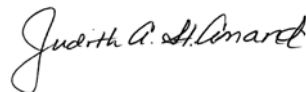


June 7<sup>th</sup> Nominating Committee Meeting

## NOTICE

THE NOMINATING COMMITTEE OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL MEET AT 3:00 P.M. ON TUESDAY, JUNE 7, 2016 IN THE PRESIDENT'S CONFERENCE ROOM OF THE HELEN G. SHAUGHNESSY ADMINISTRATION BUILDING.

1. CALL TO ORDER
2. SLATE OF OFFICERS FOR 2016/2017\*
3. ADJOURNMENT



---

Judith A. St. Amand  
May 31, 2016

### **NOMINATING COMMITTEE**

Trustee George Albro, Chair  
Trustee Maryanne Hammond  
Trustee Stephen Madaus

\*Attachment

NOMINATING COMMITTEE

Upon a motion made and seconded, it was unanimously

**VOTED:**        to recommend approval to the full Board the following slate of officers for 2016-2017:

Chair	_____
(2) Vice Chairs	_____
Secretary	_____
Assistant Secretary	_____
(2) Foundation Board	_____
Executive Committee and Alternate	_____
	_____ (alternate)
MA State College Presidents/	_____
Trustees Association and (2) alternates	_____ (alternate)
	_____ (alternate)

---

Upon a motion made and seconded, it was

**VOTED:**        to adjourn the meeting at

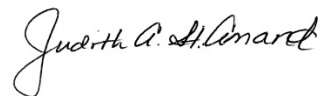
June 7<sup>th</sup> Academic Affairs /Student Development Sub Committee Meeting



## NOTICE

A MEETING OF THE ACADEMIC AFFAIRS/STUDENT DEVELOPMENT COMMITTEE OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL BE HELD ON TUESDAY, JUNE 7, 2016 AT 3:15 P.M. IN THE PRESIDENT'S CONFERENCE ROOM IN THE HELEN G. SHAUGHNESSY ADMINISTRATION BUILDING.

1. CALL TO ORDER
2. VOTES\*
3. APPROVAL OF MINUTES – April 12, 2016\*
4. APPROVAL OF A MASTER'S IN PUBLIC MANAGEMENT PROGRAM (MPM)  
AND A MASTER'S IN PUBLIC ADMINISTRATION AND POLICY (MPAP)\*
5. OTHER BUSINESS
6. ADJOURNMENT



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Judith A. St. Amand  
May 31, 2016

### **ACADEMIC/STUDENT DEVELOPMENT COMMITTEE**

Trustee Shirley Steele, Chair

Trustee Karen LaFond

Trustee Stephen Madaus

Trustee Ronald Valerio, Ex-Officio Voting Member

President Maloney, Ex-Officio Non-Voting Member

All trustees are welcome at any committee meeting

\*Attachment

WSU Board of Trustees  
June 7, 2016

**Academic Affairs/Student Development - Votes**

Upon a motion made and seconded, it was

**VOTED:**       **to approve the minutes of April 12, 2016 as submitted.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to recommend approval of a Master's in Public Management Program as presented.**

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Upon a motion made and seconded, it was

**VOTED:**       **to recommend approval of a Master's in Public Administration and Policy as presented.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to adjourn the meeting at**

**WORCESTER STATE UNIVERSITY  
BOARD OF TRUSTEES**

**April 12, 2016**

**Academic Affairs & Student Development Committee**

**PRESENT:** Trustee Shirley Steele, Chair  
Trustee Kurt Correia  
Trustee Karen LaFond  
Trustee Maryanne Hammond, Non-Voting Member  
Trustee Stephen Madaus, Non-Voting Member  
President Barry Maloney, Ex-Officio Non-Voting Member  
Ms. Judith St. Amand, Assistant Secretary  
Ms. Nikki Kapurch, Special Assistant to the President

**ABSENT:** Trustee Ronald Valerio, Ex-Officio Voting Member

The provisions of General Laws, Chapter 30A having been complied with, and a quorum present, a meeting of the Academic Affairs & Student Development Committee of the Worcester State University Board of Trustees was held on Tuesday, April 12, 2016, in the Multi-Purpose Room in Sheehan Hall. Trustee Steele called the meeting to order at 4:35 p.m.

**AWARDING OF TENURE AND PROMOTION**

Dr. Lois Wims, Provost and Vice President for Academic Affairs, provided a very informative presentation regarding the process for the awarding of tenure and promotion.

- *“The granting of tenure is the single most important type of decision made in an educational institution...Tenure has its place in the academic community as the principal means through which academic freedom is preserved.”* (MSCA contract p. 154)
- The power point presentation highlighted the process for both tenure and promotion, and included a brief summary of each candidate’s educational background and scholarly activities. (A copy of the presentation attached for information)
- No set number for awarding of tenure – depends on time of hires and how many reach their 6<sup>th</sup> year
- If a faculty member is hired with extensive experience, may decide to apply for tenure prior to 6<sup>th</sup> year
- Dr. Wims stressed that should a faculty member not be granted tenure, they have one additional year of employment at WSU
- No monetary cost for granting of tenure other than the long-term cost of employing the faculty member
- For promotion, there is an approximate cost of \$7,000 per member per promotion

- Dr. Wims noted that there are volumes and volumes of material that is stored for each candidate seeking promotion or tenure. Available to any trustee who might be interested in reviewing
- Trustee Steele commended Provost Wims on the very informative and thorough presentation of promotions and tenure. She especially appreciated the summary of each candidate's education background and scholarly activities.

Following extensive discussion, a motion was made by Trustee LaFond and seconded by Trustee Correia, it was

**VOTED:** to recommend approval to the full Board the following promotions:

<b><u>Promotion to Associate Professor</u></b>	<b><u>Effective September 1, 2016</u></b>
Patricia Donovan	Occupational Therapy
<b><u>Promotion to Professor</u></b>	<b><u>Effective September 1, 2016</u></b>
Daron Barnard	Biology
Keith Darrow	Communication Sciences & Disorders
Peter Holloran	History & Political Sciences
Matthew Johnsen	Sociology

Upon a motion by Trustee LaFond and seconded by Trustee Correia, it was

**VOTED:** to recommend approval of the following promotions with tenure:

<b><u>Promotion to Associate Professor with Tenure</u></b>	<b><u>Effective September 1, 2016</u></b>
Tanya Mears	History & Political Sciences
Sam O'Connell	Visual & Performing Arts
Christina Bebas	Education
Hye-Sun Kim	Criminal Justice

Upon a motion by Trustee LaFond and seconded by Trustee Correia, it was

**VOTED:** to recommend approval of the following for the awarding of tenure:

<b><u>Tenure</u></b>	<b><u>Effective September 1, 2016</u></b>
Sara Young	Education
Denise Foley	Education
Charles Fox	Psychology
Jennifer Hood-De-Grenier	Biology
William Shakalis	Librar

**MASTER'S IN PUBLIC MANAGEMENT (MPM) AND MASTER'S IN PUBLIC ADMINISTRATION AND POLICY (MPAP)**

- Trustee Steele reported that following discussion with Provost Wims and additional conversations with members of the department, it was agreed that additional information is needed before acting on the two proposals

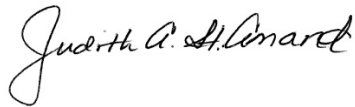
Upon a motion by Trustee LaFond and seconded by Trustee Correia, it was

**VOTED: to table action on the two programs, Master's In Public Management (MPM) and Master's In Public Administration and Policy (MPAP) and ask that they be resubmitted to Committee for review and recommendation to the full Board in June.**

Having no other business to come before the Committee, a motion was made by Trustee LaFond and seconded by Trustee Correia, and it was

**VOTED: to adjourn the meeting at 5:20 p.m.**

Respectfully submitted,

A handwritten signature in cursive script, reading "Judith A. St. Amand".

Judith St. Amand  
Assistant Secretary



**WORCESTER  
STATE  
UNIVERSITY**

# **Masters in Public Administration & Policy (MPAP)**

# **Masters in Public Management (MPM)**



Proposal for New Masters Degrees  
Department of Urban Studies  
Graduate Program in Non Profit Management

# Masters in Public Administration & Policy (MPAP)

The Master's in Public Administration and Policy (MPAP) will be offered to students interested in careers in public administration. Specifically, the program is targeted at local POLICY MAKERS - legislative aides, and municipal, regional, and state policy and planning staff. It is anticipated that the program would be a blended one, combining classroom and online classes.





# Masters in Public Management (MPM)

The Master's in Public Management (MPM) will be offered to students interested in careers in public management. Specifically, the program is targeted at local POLICY IMPLEMENTERS and municipal, regional, and state management staff. It is anticipated that the program would be a blended one, combining classroom and online classes.





# Rationale for Two New Graduate Degrees

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- In solely offering a Master's in Nonprofit Management, WSU does itself a disservice by losing out on those students who are interested in public management and administration.
- Increased competition in nonprofit education. Nationally, there are at least 292 colleges and universities that offer such programs. In the immediate vicinity of WSU, Clark University offers a nonprofit concentration within an MBA, an MBA in social change, and an MBA/MA in community development and planning. Anna Maria College offers an MPA program with a “nonprofit strategy area.”
- The nonprofit education is offered in a variety of programs that combine public administration, public policy, public management and business. Indeed, many books on nonprofit management also include public management e.g. Financial Management for Public and Nonprofit Organizations; Strategic Planning for Nonprofit and Public Organizations.

# Rationale for Two New Graduate Degrees

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These new degrees provide:

- **External Program Positioning:** Where is WSU situated (positioned) in the Nonprofit Education marketplace? By offering differentiated degrees, students will have diplomas that best reflect their career paths.
- **Internal Efficiency:** The new degrees will be built from the existing Non Profit Management curriculum. The offering of a common core will make better use of the resources already being utilized to run the current program.
- **University-Wide Interdisciplinary Collaboration:** Students in various disciplines across the university will have the opportunity to enter the two new degrees through 4+1 tracks. This is especially true for the MPM whereby students in disciplines such as Geography, History and Fine Art can prepare for careers in the management of discipline-specific institutions such as Public Parks, Eco-centers and Museums.



# Support for the 2015-2020 Strategic Plan

Strategic Goal	MPAP/MPM Degrees support...
1. Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.	<ul style="list-style-type: none"> <li>• Growth in graduate offerings and enrollments.</li> <li>• Develop and offer distinctive, integrative programs.</li> </ul>
2. Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world.	<ul style="list-style-type: none"> <li>• Capitalize WSU's urban location.</li> <li>• Articulate relationship between academics and workforce alignment.</li> <li>• Encourage development of leadership potential.</li> </ul>
3. Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success.	<ul style="list-style-type: none"> <li>• A path for current undergraduates to complete BA/BS and continue on to graduate programs (4+ program).</li> <li>• Program design provides underserved groups the opportunity to enter public service in management positions.</li> </ul>
5. Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value.	<ul style="list-style-type: none"> <li>• Program design aligns curriculum, with many classes shared, thus mitigating the need for new resources.</li> <li>• Growing new streams of revenue.</li> </ul>



# Summary of Master's Degree Requirements

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- All three degrees (**Non Profit Management, Public Administration & Policy** and **Public Management**) require a minimum of 36 semester credits.
- Five Classes (15 credits) are shared among the three programs.
- Two Courses (6 credits) are shared between **Public Administration & Policy** and **Public Management**.
- All three degrees allow for 6 credits of electives which are shared across the three programs. Further, students may take core courses, as electives, from the other two degrees, thus ensuring a wide array of choices.
- All three degrees provide a thesis, capstone or fieldwork component to allow for synthesis and evaluation.



# Curriculum (showing shared resources)

Non Profit Management	Public Administration & Policy	Public Management
NM 901 The Nonprofit World: NGOs, the State & Civil Society (3 cr)	MPAP 901 Policy Analysis (3 cr)	MPM 901 Project Management (3 cr)
NM 942 Organizational Theory (3 cr)	MPAP 942 Organizational Theory (3 cr)	MPM 942 Organizational Theory (3 cr)
NM 945 Financial Management (3 cr)	MPAP 945 Public Budgeting & Financial Management (3 cr)	MPM 945 Public Budgeting & Financial Management (3 cr)
NM 949 Strategic Leadership & Planning (3 cr)	MPAP 949 Strategic Leadership & Planning for Public Organizations (3 cr)	MPM 949 Strategic Leadership & Planning for Public Organizations (3 cr)
NM 993 Marketing & Resource Development (3 cr)	MPAP 951 Negotiation & Conflict Resolution for Public Organizations (3 cr)	MPM 951 Negotiation & Conflict Resolution for Public Organizations (3 cr)
NM 951 Grant Writing (4 cr)	MPAP 903 Economics for Policy Analysis (3 cr)	MPM 903 Economics for Policy Analysis (3 cr)
NM 934 Ethics & Management of Human Resources (3 cr)	MPAP 934 Ethics & Management of Human Resources (3 cr)	MPM 934 Ethics & Management of Human Resources (3 cr)
NM 990 Action Research (3 cr)	MPAP 990 Action Research (3 cr)	MPM 990 Action Research (3 cr)
NM 980 Thesis (1 cr)	MPAP 980 Capstone Fieldwork I (2 cr)	MPM 980 Management Project Fieldwork I (2 cr)
NM 981 Thesis II (4 cr)	MPAP 981 Capstone Fieldwork II (4 cr)	MPM 981 Management project Fieldwork II (4 cr)
ELECTIVES (6 credits)	ELECTIVES (6 credits)	ELECTIVES (6 credits)

# Program Electives (shared across three degrees)

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- Legal, Regulatory & Ethical Issues in Healthcare
- Leadership Skills & Group Dynamics
- Seminar in Program Analysis & Evaluation
- Unions & the Public Sector
- Politics & Public Policy
- Public Law
- Assigned Readings
- Internship



# Interest in MPAP/MPM Degrees among *likely* applicants at WSU

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- An online survey was conducted among both undergraduate and graduate students in November 2015 with a sample of  $n=148$ .
- The aim of the survey was to gather information regarding students' interest in the proposed new degrees. The demographic profile roughly mirrors the student body. (Raw results are available if needed).

**The following is a summary of the results:**

# Survey Results

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**1) The majority of the students completing the survey indicated interest in pursuing a master's degree:** A total of 316 students completed the survey. Eighty-six percent (86%) indicated that they were likely or somewhat likely to pursue a master degree. (Those who indicated that they were unlikely to pursue a master's degree were screened out of the survey)

**2) There was considerable interest in public administration and public policy degrees:** About half (47%) of those responding indicated interest in pursuing a master's degree in public administration, public policy or public management. (Those who indicated that they had no interest in those degrees were screened out of the survey, even if they indicated interest in pursuing a master's degree).



# Survey Results

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**3) A big majority would like to pursue the degrees at Worcester State:** Of those likely to pursue public policy, administration and public management degrees, 70% and 69% indicated that they would be very interested or interested in pursuing the MPAP and the MPM degrees, respectively, at Worcester State.

**4) Leadership/Management is the major curriculum area of interest:** Seventy four percent (74%) indicated that their major area of interest was leadership/management while 51% indicated that they were interested in strategic planning. Public finance and fiscal policy was the least attractive area, with only 24% indicating interest.

# Survey Results

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**5) Worcester State is attractive as a cost-effective school:** Seventy five percent (75%) of respondents said that Worcester State was attractive to them because of cost. A sizeable majority (61%) indicated that the continuity in a familiar academic environment would attract them to a master's degree at Worcester State. Fifty-three percent (53%) and 54% indicated that the convenience in the graduate school application process and continuity in a familiar social environment made Worcester State attractive for a master's degree, respectively.

**6) Worcester State offers a further advantage in potential 4+1 programs:** Sixty percent of the respondents indicated that they would be interested in a combined five-year degree.



# Survey Results

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## **7) A notable number of students are interested in public service:**

About half (49%) of the respondents said they were interested in running for public office or working as legislative aides. Sixty-eight percent (68%) indicated that they would be interested in working as managers for the city, state or federal governments.

**8) The majority want to stay and serve in Massachusetts:** Sixty-five percent (65%) said they were very interested or interested in working for the city of Worcester, in Central Massachusetts or for the Commonwealth of Massachusetts.

# Program Enrollment Projection

## Master of Public Administration & Policy (MPAP) Master of Public Management (MPM)

	# of Students Year 1	# of Students Year 2	# of Students Year 3	# of Students Year 4*
New Full Time	8	10	15	20+***
Continuing Full Time	-	6	10	21
New Part Time	4	8	16**	20+***
Continuing Part Time	-	4	12	23
Totals	12	28	63	84+

# Program Development & Collaboration

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This program was developed by the director of the Non-Profit Management Program, **Dr. Shiko Gathuo**, with assistance from Urban Studies Chair **Dr. Thomas Conroy**.

Assistance was provided from two provosts, **Dr. Charles Cullum** and **Dr. David Caruso**, our acting AVP and Dean of the Graduate School, **Dr. Roberta Kyle**, Interim Dean **Dr. Lisa Krissoff Boehm**, and **Ms. Sara Grady** of DGCE.

Consultation was made with **Dr. Steve Morreale** of the Criminal Justice Department.

The proposal had the unanimous support of the Department of Urban Studies and went to the Graduate Education Council, where it was enthusiastically approved.

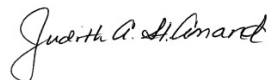
Dr. Shiko Gathuo will direct the new programs, and is currently the director of the Non-Profit Management Degree.

June 7<sup>th</sup> Finance & Facilities Sub Committee

## NOTICE

THE FINANCE & FACILITIES COMMITTEE OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL MEET AT 4:30 P.M. ON TUESDAY, JUNE 7, 2016 IN THE PRESIDENT'S CONFERENCE ROOM, 2nd FLOOR OF THE HELEN G. SHAUGHNESSY ADMINISTRATION BUILDING.

1. CALL TO ORDER
2. VOTES\*
3. APPROVAL OF MINUTES – April 4, 2016\*
4. FY 2017 COMPREHENSIVE UNIVERSITY BUDGET\*
5. ADJOURNMENT



Judith St. Amand  
Ma7 31, 2016

### **FINANCE & FACILITIES COMMITTEE**

Trustee Craig Blais, Chair  
Trustee George Albro  
Trustee Aleta Fazzone  
Trustee Stephen Madaus  
Trustee Shirley Steele  
Trustee Marina Taylor  
Trustee Ronald Valerio, Ex-Officio Voting Member  
President Barry Maloney, Ex-Officio Non-Voting Member

All trustees are welcome at committee meetings.

\*Attachment

WSU Board of Trustees  
June 7, 2016

**Finance & Facilities Votes**

Upon a motion made and seconded, it was

**VOTED: to approve the minutes of April 4, 2016 as submitted.**

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Upon a motion made and seconded, it was

**VOTED: to recommend approval to the full Board the FY 2017 Comprehensive University Budget as presented.**

---

Upon a motion made and seconded, it was

**VOTED: to adjourn the meeting at**



**WORCESTER STATE UNIVERSITY  
BOARD OF TRUSTEES**

**FINANCE & FACILITIES COMMITTEE**

**April 4, 2016**

**PRESENT:** Trustee Craig Blais, Chair  
Trustee George Albro  
Trustee Aleta Fazzone  
Trustee Stephen Madaus  
Trustee Shirley Steele, participated via conference call  
Trustee Marina Taylor  
Trustee Maryanne Hammond, Non-Voting  
President Barry Maloney, Ex-Officio Non-Voting  
Ms. Judith St. Amand, Assistant Secretary

**ABSENT:** Trustee Ronald Valerio, Ex-Officio Voting Member

**REMOTE ACCESS PARTICIPATION**

Vice Chairman Blais reported that Chairman Valerio received a request from Trustee Shirley Steele to participate by remote access in today's meeting. Chairman Valerio approved her request and cited geographical location and inclement weather for her participation by remote access. Trustee Blais reminded everyone that all votes during this meeting will be by recorded roll call as required by the regulations governing remote participation of the Commonwealth, 940 CMR29.10.

The provisions of General Laws, Chapter 30A having been complied with, and a quorum present, a meeting of the Finance & Facilities Committee was held on Tuesday, April 4, 2016 in the President's Conference Room in the Helen G. Shaughnessy Building. Trustee Blais called the meeting to order at 3:10 p.m.

**WSU INVESTMENT ACCOUNT PRESENTATION**

- Due to the inclement weather, the formal presentation was postponed until the June meeting.
- VP Eichelroth provided the following summary of why the presentation had been requested.
- Purpose of the presentation was to provide members of the Finance Committee with information relative to the policy for investing, what investments do we have and what is the amount of investments.
- A change occurred in the investment firm that the University had been with since the 1980s. University had no choice but to seek bids for a new firm.
- Trustee Blais inquired what, if any, is the fiduciary responsibility of the Finance Committee and the Board of Trustees as a whole for investments.
- Chapter 29 of the General Laws is specific regarding what a public university can invest in – very limited. Section 14 of Chapter 73 provides additional information and both will be provided to the Board.
- Foundation has an Investment Committee that oversees their investments and reports to the full Foundation Board.
- Board of Trustees has three members who serve on the Foundation Board and have access to that information.
- Same accounting firm is used for auditing the University, the Foundation and the Craft Center and all are provided to the Board of Trustees.

- The following items will be provided to the members for future reference: Investment Policy, Spending Rules, State Laws governing investments, MOU between WSU and the Foundation and any other information trustees may request.
- Foundation provides an avenue for creative financing that the University could not provide. Examples are the Craft Center and purchase of the Temple property.
- Trustee Madaus suggested that a legal opinion be sought and filed to answer questions of the Board of Trustees fiduciary responsibilities.
- Need to look at the role to be played working with the Foundation Board.
- Is it one of “guidance and advice” and should the Board receive periodic reports/updates on all investments, both University and Foundation.
- Once an opinion is received, the Finance Committee will review all documents and determine how to proceed in the future.
- Administration is happy to provide whatever documents that the Board would like to receive.
- Will be reviewed at a Finance Meeting in June.

#### **UNDERGRADUATE FEE APPROVAL**

VP Kathy Eichelroth provided the following presentation regarding proposed fee increase.

- Budget process is in full swing and focuses on the opening of the new Wellness Center.
- Budget managers have prepared their requests for FY 2017 and forwarded to their division head.
- A prioritized list of requests has been prepared by each division.
- Requests will be discussed in the President’s Direct report meeting and further ranked and prioritized at the campus level.
- Requests are being evaluated with regard to need as a foundational request to support core University operations or as a request linked to the overarching goals and strategies of the strategic plan.
- A reconciliation of operating expenses and revenues will be finalized during the month of April
- Reconciliation is relied upon to identify resources available to fund new initiatives in the coming year once all non-discretionary costs have been identified.
- Available net resources will be offset from the list of campus wide prioritized requests and a determination will be made of the level of resources that may be committed to the stabilization of unrestricted reserves.
- The result will be presented to the Finance and Facilities Committee prior to the June Board meeting.
- Since the budget process is not complete, consideration and approval of changes in the fee structure for undergraduate students in early April provides incoming students with official tuition and fee information for the coming year and allows the Financial Aid Office to prepare financial aid awards based on actual costs of attendance for the coming year.
  - Seeking Board approval of a \$345.25 per year general fee increase for FY 2017
  - The portion of the increase that relates to new programming in the Wellness Center is \$115.25 per year, not \$155.25. This is a mandatory fee for ALL students, both graduate and undergraduate.
- As in the past, seeking approval of a general fee increase to fund collective bargaining costs should the Commonwealth not fund this obligation.
- The fee increase associated with collective bargaining costs is \$230.00 a year.
- The fee will not be assessed to students should the Commonwealth provide funds to cover this obligation at the conclusion of the FY 2017 budget process, but prior to the University’s distribution of fall semester invoices during the second week of July.

- General Fee is currently set at \$7,189 per year, with cumulative mandatory fees set at \$7,887 and in-state tuition of \$970 per year.
- An approved increase in the General Fee will set that rate at \$7,534.25 per year, with a total annual cost of tuition and fees of \$9,202.24 for the 2016/2017 academic year.
- University just learned that an increase in the fringe benefits cost has been approved from 29.17% to 35.4%.
- Graduate school had a previous 8% increase in the fee and a future increase may be requested once accounting of new programs is completed to determine revenue gains. Any projected increase will be based on present enrollment figures.

Upon a motion by Trustee Albro and seconded by Trustee Fazzone, it was

**VOTED:**        **by recorded roll call to recommend approval of a \$345.25 per year general fee increase for FY 2017 as described and presented in the March 28<sup>th</sup> memo from VP Eichelroth to President Maloney with correction on page 2, bullet 2 should read \$115.25 and not \$155.25.**

<u>Voting in Favor (6)</u>	<u>Opposed (0)</u>
Trustee Fazzone	
Trustee Taylor	
Trustee Madaus	
Trustee Steele	
Trustee Albro	
Trustee Blais	

**OTHER BUSINESS**

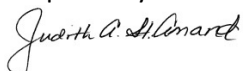
- President Maloney was pleased to report that Wellness Center is on schedule and within budget.
- Should have keys by end of June
- Athletic Department move is scheduled for week of July 4<sup>th</sup>
- Athletes arrive on campus mid-August and will have access to new building
- Ribbon Cutting will be held on September 13<sup>th</sup> – same day as Tri-Board dinner.

Upon a motion by Trustee Madaus and seconded by Trustee Taylor, it was

**VOTED:**        **by recorded roll call to adjourn the meeting at 4:05 p.m.**

<u>Voting in Favor (6)</u>	<u>Opposed (0)</u>
Trustee Fazzone	
Trustee Taylor	
Trustee Madaus	
Trustee Steele	
Trustee Albro	
Trustee Blais	

Respectfully submitted,



Judith A. St. Amand  
Assistant Secretary



**WORCESTER**  
STATE  
**UNIVERSITY**

**FY 2017**

**Comprehensive  
University Budget**

**Worcester State University**  
**FY 2017 Budget Package**

**I        Fiscal Year 2017 Budget Overview**

**II        Fiscal Year 2017 Budget**

- 1 Summary FY2017 Budget - Sources and Uses of Funds
- 2 FY 2017 Summary of Sources of Funds
- 3 Pie Chart: Summary of Sources
- 4 Summary FY2017 Trust Fund Budgets
- 5 Bar Chart - Use of Funds - All Sources and Trust Funds
- 6 Operating Revenue Budget

**III       Individual Fund Budgets compared with FY2017 Budget**

- 7 General Operating Budget (111 & 400 Combined)
- 8 General Operating Budget - Expenditures by Division
- 9 State Maintenance Appropriation (111)
- 10 General Trust Fund (400)
- 11 Capital Improvement Trust Fund (405)
- 12 Parking Garage Operating Fund (408)
- 13 Federal Grants/Program Overhead Fund (433)
- 14 Parking Fines Scholarship Fund (439)
- 15 Health Services Trust Fund (442)
- 16 Residence Halls Trust Fund (445)
- 17 Student Activities Trust Fund (446)
- 18 Residence Hall Technology and Equipment Trust Fund (448)

**IV       Appendix**

- A Capital Adaptation and Renewal spending plan
- B FY 2017 Tuition and Fee Schedule
- C Mandatory Fees at Massachusetts Universities
- D FY 2017 Funded Initiatives
- E Wellness Center Draft Budget
- F Wellness Center and Reserve Stabilization Narratives
- G FY 2017 Fee Increase Memo

## **Memorandum**

**DATE:** MAY 24, 2016  
**TO:** Barry M. Maloney, President  
**FROM:** Kathleen Eichelroth, Vice President for Administration and Finance  
**RE:** PRESENTATION OF COMPREHENSIVE FY 2017 BUDGET

Enclosed is the comprehensive budget for FY 2017. The \$105,787,755 budget includes state appropriations and state funded fringe benefits, in addition to nine trust funds. An annual payroll budget of \$40,240,881 supports 568 full time employee positions. The campus is further supported by an \$8,230,319 budget to fund part-time non-benefitted faculty and staff who support core functions of the University. The University budget supports activities in seven functional areas; President, Administration and Finance, University Advancement, Academic Affairs, Student Affairs, Enrollment Management, and Institutional Expense. The functional areas are comprised of 111 active budget units, each overseen by a designated budget manager.

Trust Fund revenue generated locally represents 58% of the total budget. Student financial aid from state and federal sources represents 8% of the budget, state operating appropriation is 25% of the budget, and state funded fringe benefits make up the remaining 9%.

The FY 2017 budget process began early with planning for the opening of the Wellness Center beginning in October. A draft budget proposal for the operation of the Wellness Center was presented to the Board on February 11<sup>th</sup>. This proposal is included in this package in Appendix E. The budget process began prior to reconciling various elements of the FY 2016 budget. The reconciliation process identifies funding gaps that needed to be addressed in the coming budget cycle. In February we were hopeful that there would be enough resources to fund not only the \$1.2M increase in the Wellness Center budget, but have resources remaining to fund a reserve stabilization plan and direct resources towards prioritized requests that would have a direct impact on achieving the goals of the strategic plan.

At the March 8<sup>th</sup> board meeting a detailed narrative describing the Wellness Center budget and an analysis of the reserve stabilization plan were presented. Those documents can be found in Appendix F.

On April 12<sup>th</sup> the Board of Trustees approved a request to increase student fees \$345 annually. A portion of the increase, \$115 per year, was previously presented as part of the Wellness Center budget. The fee provides for an expansion of offerings with regard to fitness and recreational programming when the Wellness Center opens in the fall. The remaining increase of \$230 per year funds collective bargaining costs along with related fringe benefit costs. This portion of the fee increase will be rescinded should the Commonwealth fund FY 2017 collective bargaining costs through the state budget process. The documents presented to the board on April 12<sup>th</sup> can be found in Appendix G.

During the month of April a reconciliation of operating expenses and revenues was finalized. The reconciliation process was more elaborate this year. The existing athletic department budget was analyzed and reconciled to ensure there was no duplication and funding matched the new operational plan. The success of the early retirement plan brought opportunity for the re-allocation of resources requiring a thorough reconciliation of incentive payouts, allotted salaries for backfill of positions and net savings to be driven toward other needs on campus. The culmination of this process resulted in \$1.4M of resources that could be re-allocated to fund campus needs in FY 2017. An additional \$674,308 is expected to be generated by the increase in fees earmarked to fund new programming in the Wellness Center. A planned increase in the cost of Graduate courses and Undergraduate evening/summer courses provides \$182,000 of new resources. Combined new fee revenue of \$856,308 added to the \$1.4M of resources gleaned from the early retirement program, provides \$2.3M of resources to fund prioritized initiatives.

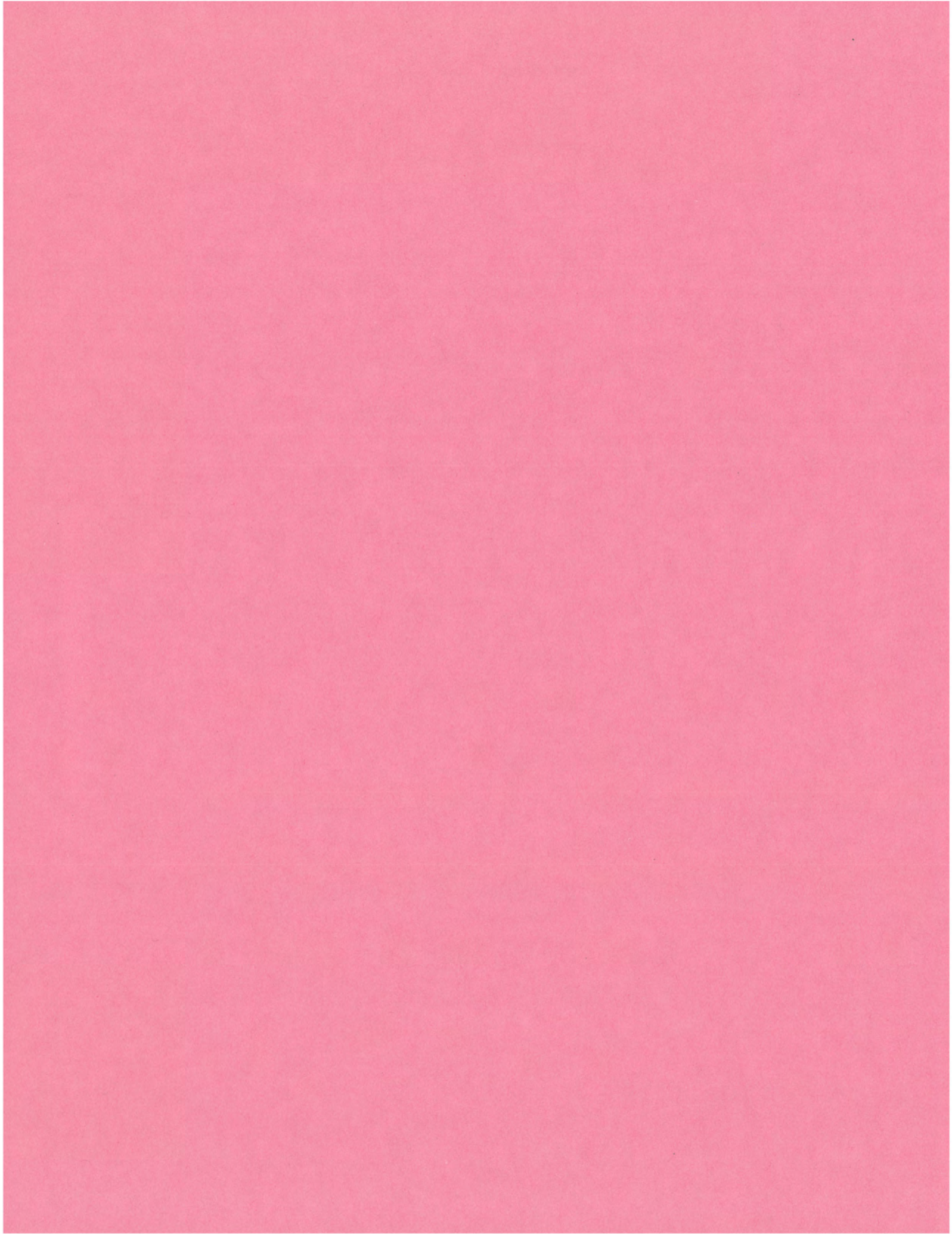
At the end of April the President and his direct reports met to discuss and prioritize the top budget requests from each area. All requests linked directly to the Strategic Plan or fit the criteria of a “foundation level investment”. Discussions during that meeting lead to the development of the list of initiatives funded for FY 2017 that can be found in Appendix D. There was an extensive list of division priorities that deserved funding and attention, and behind that list are many other requests that could have been further prioritized.

One of the items that was considered early on in the budget process but fell off the final list is a contribution to the Capital Improvement Trust Fund. An analysis of the University's unrestricted reserves was presented to the Board at the March meeting. The analysis can be found in Appendix H. The analysis indicates that planned contributions should be made to the Capital Improvement Trust Fund, in addition to an increase in the Capital Improvement Fee in FY18, to increase the base of unrestricted resources that can be purposefully leveraged for, or invested in, infrastructure improvements on campus. Due to many competing needs demonstrated by the prioritization of funding requests, the alignment of requests to the Strategic Plan and the goals set by the DHE for future retention and graduation rates, stabilizing the University reserves was not identified as a top priority. In the event the University receives an increase in state operating appropriations for FY 2017, a contribution to the Capital Improvement Trust fund in line with the stabilization plan would be considered.

The situation with state funding is not any clearer now than it was back in April when the Board approved the \$345 fee increase. We will continue to monitor the state budget situation up until the fall semester bills are issued during the second week of July. In the event we receive additional state operating appropriations we will proportionally reduce the planned annual fee increase as we have in the past.

The budget as currently presented results in the attendance cost for an in-state commuter student to be set at \$9,202 per year, the cost for an in-state resident student starts at \$20,597 per year, and the cost for an out-of-state resident student starts at \$26,677 per year.





**Worcester State University**  
Summary of Sources and Uses of Funds  
FY 2017 - All Sources and Trust Funds

**Sources of Funds:**

State Appropriation	\$ 26,368,898
State Supported Fringe Benefits	\$ 8,833,581
Other State Revenues	1,007,262
Federal Student Aid	6,975,482
Institutional Sources	62,602,532
Total Sources	<u><u>\$ 105,787,755</u></u>

**Uses of Funds:**

AA	Regular Employees	\$ 40,240,881
BB	Employee Related Expenses	866,366
CC	Temporary Part-Time Employees	8,230,319
DD	Staff Benefit Expenses	13,857,072
EE	Administrative Expenses	3,094,806
FF	Facility Operation Supplies	2,047,464
GG	Energy/Space Rental	11,831,138
HH	Professional Services	1,800,683
JJ	Operational Services	947,564
KK	Equipment Purchase	262,001
LL	Equipment Lease, Maintenance, Repair	1,454,629
NN	Infrastructure & Building Improvements	5,246,744
RR	Educational Assistance	10,721,063
SS	Debt Service	1,094,813
UU	Information Technology	2,092,158
	Transfer Out	2,000,054
	Transfer to Reserves	-
	Total Uses	<u><u>\$ 105,787,755</u></u>

**Worcester State University**  
Summary of Sources  
FY 2017 - All Sources and Trust Funds

**State Sources**

Annual State Maintenance Appropriation		\$	26,368,898
State Supported Fringe Benefits	8,833,581		
Student Aid Program (Cash Grant & PT Student)	1,007,262		
Total Other State Sources			9,840,843
Total State Sources			36,209,741

**Federal Sources**

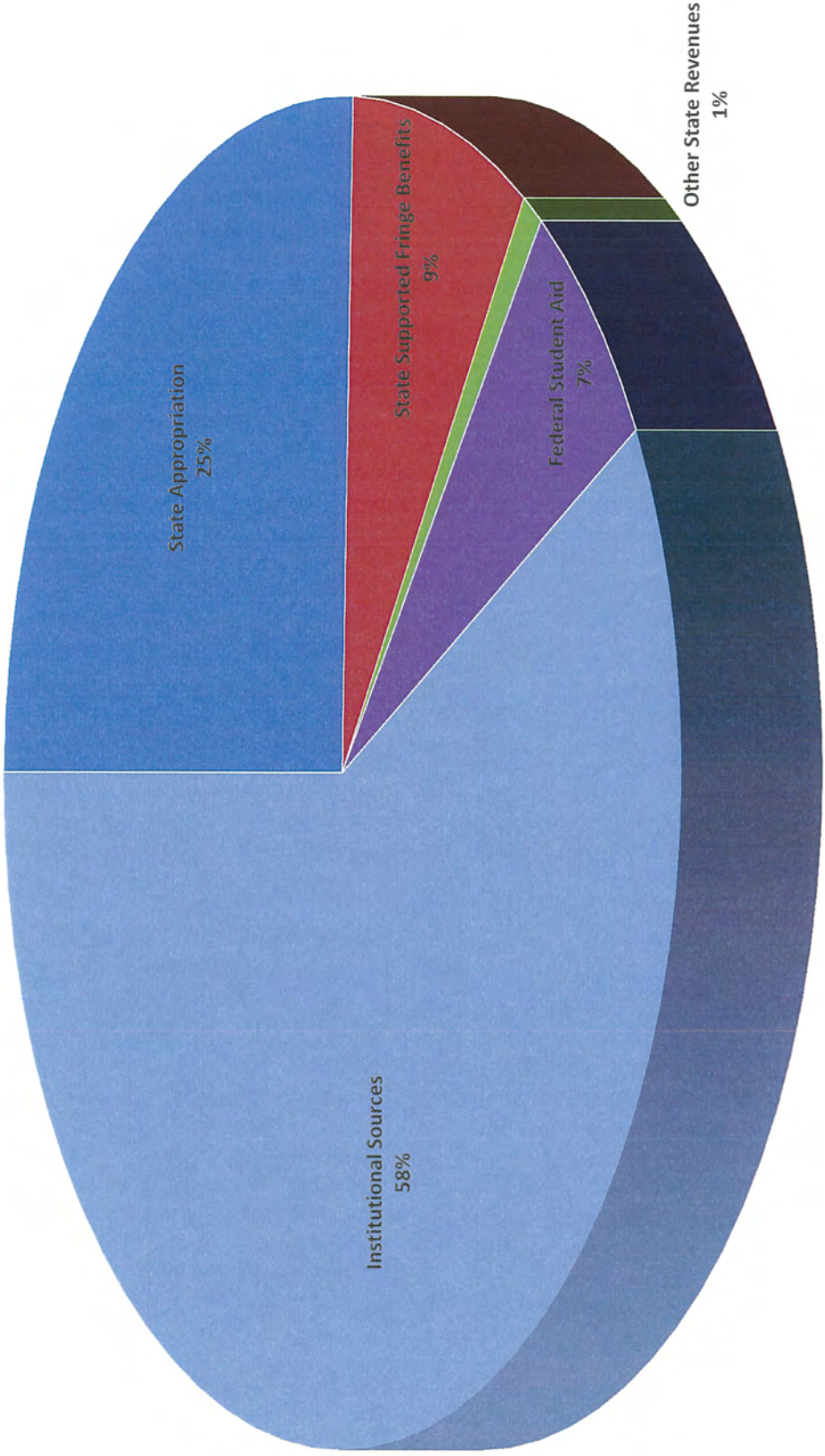
SEOG Program	225,237		
College Work Study Program	127,686		
Pell Grants	6,500,000		
Local match (Transfer from General Trust Fund Reserve)	122,559		
Total Federal Sources			6,975,482

**Institutional Sources**

Revenue			
General Fund	45,131,514		
Parking Fines Scholarship Fund	78,000		
Health Services Fund	445,000		
Residence Halls Fund	12,451,780		
Student Activities Fund	285,000		
Residence Hall Technology and Equip. Fund	320,000		
Capital Improvement Fund	2,787,854		
Transfers In			
*Transfer In from Federal funds	9,010		
*Transfer from Federal Grant Fund Reserve	37,691		
*Transfer from Parking Fines Scholarship Fund Reserve	13,000		
*Transfer from Health Services Fund Reserve	100,218		
*Transfer from Student Activities Trust Fund Reserve	104,100		
*Transfer from Residence Hall Technology and Equip. Fund	39,365		
*Transfer from Capital Improvement Trust Fund	800,000		
Total Institutional Sources			62,602,532
Total Sources		\$	105,787,755



Worcester State University  
Summary of Budget Sources  
FY2017 Budget



**Worcester State University**Trust Fund Summary  
FY 2017 Requested Budget

	Budget FY 2017	
	Sources	Uses
General Fund (400)	\$45,131,514	\$ 45,131,514
Federal Overhead (433)	46,701	46,701
Parking Fines Scholarship (439)	91,000	91,000
Health Services (442)	545,218	545,218
Residence Hall (445)	12,451,780	12,451,780
Student Activities (446)	389,100	389,100
Residence Hall Technology and Equip. Fund (448)	359,365	359,365
Capital Improvement Fund (405)	2,787,854	2,787,854
Parking Garage Operating Fund (408)	800,000	800,000
Total Trust Fund Budget	<u>\$62,602,532</u>	<u>\$ 62,602,532</u>

Worcester State University  
All Sources & Trust Fund  
FY 2017 Budget

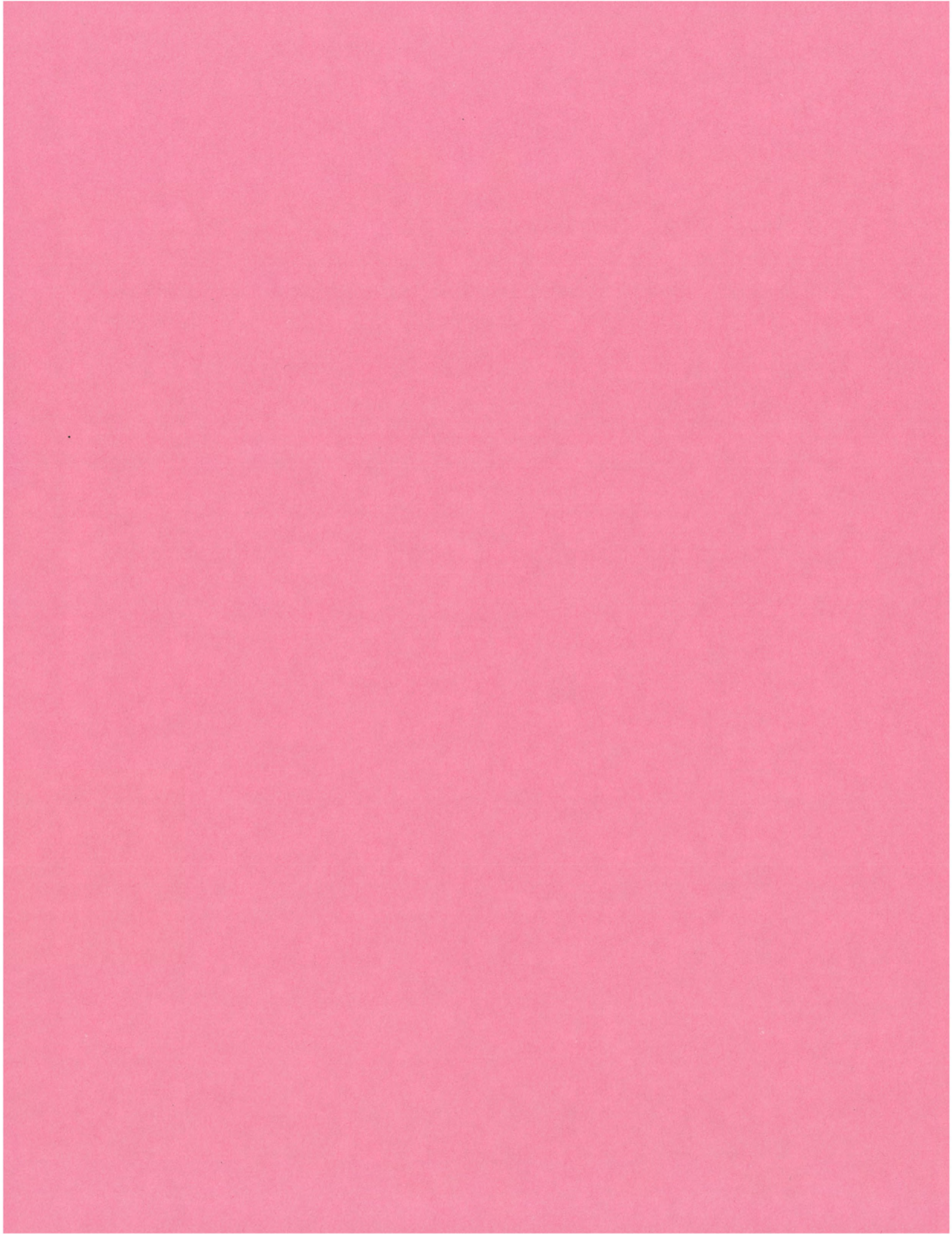




**Worcester State University**  
**Operating Revenue**

	Requested FY2017 Budget	Final FY2016 Budget
<i>State Sources</i>		
State Maintenance	35,202,479	33,804,153
<b>Total State Sources</b>	<b>35,202,479</b>	<b>33,804,153</b>
<i>Institutional Sources</i>		
<i>General Trust Fund</i>		
Tuition/ In state Undergraduate	5,100,000	5,300,000
Tuition/ Graduate	1,410,000	1,400,000
Tuition/ Out of State Undergraduate	1,200,000	1,200,000
<b>Total Tuition</b>	<b>7,710,000</b>	<b>7,900,000</b>
Waivers/Undergraduate	(260,000)	(348,201)
Waivers/Graduate	(200,000)	(160,724)
Total Tuition Waivers	(460,000)	(508,925)
<b>Net Tuition</b>	<b>7,250,000</b>	<b>7,391,075</b>
Undergraduate Day Division	31,261,010	29,735,100
Undergraduate Eve/Summer Programs	3,249,894	3,263,398
Graduate School	1,161,487	970,000
<b>Total Fees</b>	<b>35,672,391</b>	<b>33,968,498</b>
Undergraduate Day Division/waivers	(630,575)	(831,781)
Undergraduate Eve/Summer Programs/Waivers	(181,302)	(191,164)
Total Fees Waivers	(811,877)	(1,022,945)
<b>Net Fees</b>	<b>34,860,514</b>	<b>32,945,553</b>
Application Fees	188,664	188,664
Special fees	371,733	371,733
Commencement Fees	3,030	2,940
Transcript Fees	55,800	54,000
Orientation Fees	134,340	125,000
Testing Fees	18,000	11,500
Libr. fines/ copier inc.	2,500	1,500
Commissions	325,000	281,000
Non-Credit Courses incl Restricted	450,000	408,809
Center for Effective Instruction	275,000	250,000
Intensive English Institute	688,933	638,000
Center for Business & Industry	75,000	75,000
Facilities rentals	250,000	227,000
Miscellaneous	183,000	173,000
<b>Other income</b>	<b>3,021,000</b>	<b>2,808,146</b>
<b>Total General Trust Fund Source</b>	<b>45,131,514</b>	<b>43,144,774</b>
<b>General Operating Budget Income</b>	<b>\$ 80,333,993</b>	<b>\$ 76,948,927</b>





**Worcester State University**  
General Operating Budget (111 & 400)  
FY 2017 Budget

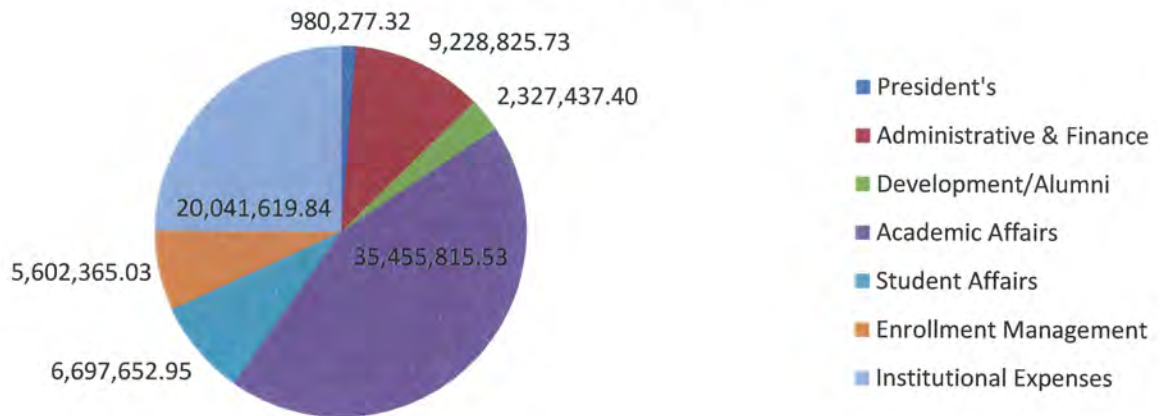
	FY2017 Requested Budget	FY2016 Final Budget
<b><u>Sources of Funds:</u></b>		
Revenues	\$ 71,500,412	\$ 69,513,672
State Funded Fringe Benefits	\$ 8,833,581	\$ 7,435,255
Transfer In - from Reserves	\$ -	\$ 900,000
Transfer In -	\$ -	\$ -
Total Sources	<u>\$ 80,333,993</u>	<u>\$ 77,848,927</u>
<b><u>Uses of Funds:</u></b>		
AA Regular Employees	\$ 38,795,454	\$ 37,954,898
BB Employee Related Expenses	821,466	801,315
CC Temporary Part-Time Employees	7,913,654	7,879,195
DD Staff Benefit Expenses	13,456,915	11,320,556
EE Administrative Expenses	2,880,056	2,458,860
FF Facility Operation Supplies	1,615,714	1,667,593
GG Energy/Space Rental	2,368,498	2,173,350
HH Professional Services	1,328,383	1,214,896
JJ Operational Services	772,564	731,488
KK Equipment Purchase	197,001	202,219
LL Equipment Lease, Maintenance, Repair	1,262,104	1,341,337
NN Infrastructure & Building Improvements	4,348,744	4,729,244
RR Educational Assistance	2,271,719	2,325,543
SS Debt Service	307,013	577,013
UU Technology Expenses	1,994,708	2,422,064
Transfer Out -	-	49,356
Total Uses	<u>\$ 80,333,993</u>	<u>\$ 77,848,927</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>



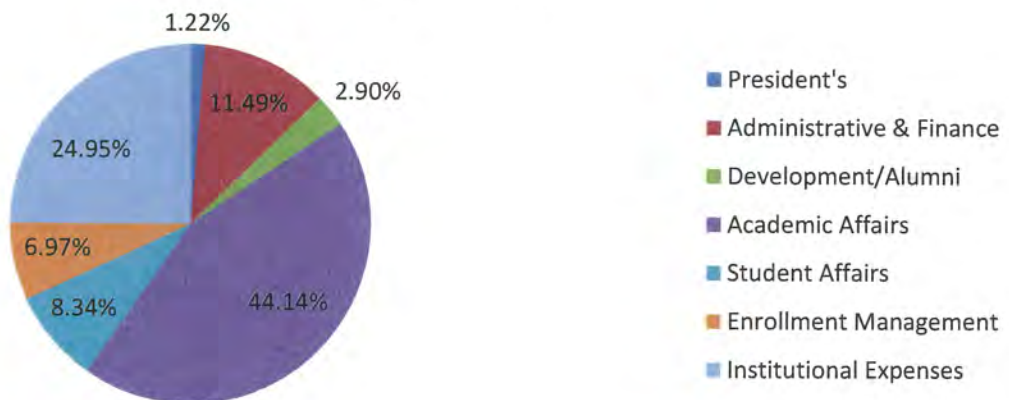
**Worcester State University**  
**400/111 Expenditures by Division**  
**FY 2017 Budget**

Class	Division	Budget FY 17 Subtotals	Budget FY 17 Exp %
2	President's	980,277.32	1.22%
3	Administrative & Finance	9,228,825.73	11.49%
4	Development/Alumni	2,327,437.40	2.90%
6	Academic Affairs	35,455,815.53	44.14%
7	Student Affairs	6,697,652.95	8.34%
8	Enrollment Management	5,602,365.03	6.97%
3	Institutional Expenses	20,041,619.84	24.95%
		<u>\$ 80,333,993.80</u>	<u>100.00%</u>

**Budget FY17**  
**Subtotals by Division**



**Budget FY17**  
**Expense % by Division**



**Worcester State University**  
State Maintenance Appropriation (111)  
FY2017 Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
	State Appropriation	\$ 26,368,898	\$ 26,368,898
	State Funded Fringe Benefits	8,833,581	7,435,255
	Transfer In-	-	-
	Total Sources	<u>\$ 35,202,479</u>	<u>\$ 33,804,153</u>
<b><u>Uses of Funds:</u></b>			
AA	Regular Employees	\$ 26,368,898	\$ 26,368,898
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	8,833,581	7,435,255
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	-
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
KK	Equipment Purchase	-	-
NN	Infrastructure & Building Improvements	-	-
	Transfer Out -	-	-
	Total Uses	<u>\$ 35,202,479</u>	<u>\$ 33,804,153</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**

General Trust Fund (400)

FY2017 Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
Revenues		\$ 45,131,514	\$ 43,144,774
Transfer In - Reserves		-	900,000
Transfer In - Worcester State Foundation		\$ -	\$ -
Total Sources		<u>\$ 45,131,514</u>	<u>\$ 44,044,774</u>
<b><u>Uses of Funds:</u></b>			
AA	Regular Employees	\$ 12,426,556	\$ 11,586,000
BB	Employee Related Expenses	821,466	801,315
CC	Temporary Part-Time Employees	7,913,654	7,879,195
DD	Staff Benefit Expenses	4,623,334	3,885,301
EE	Administrative Expenses	2,880,056	2,458,860
FF	Facility Operation Supplies	1,615,714	1,667,593
GG	Energy/Space Rental	2,368,498	2,173,350
HH	Professional Services	1,328,383	1,214,896
JJ	Operational Services	772,564	731,488
KK	Equipment Purchase	197,001	202,219
LL	Equipment Lease, Maintenance, Repair	1,262,104	1,341,337
NN	Infrastructure & Building Improvements	4,348,744	4,729,244
RR	Educational Assistance	2,271,719	2,325,543
SS	Debt Service	307,013	577,013
UU	Technology Expenses	1,994,708	2,422,064
	Transfer Out -	-	49,356
	Total Uses	<u>\$ 45,131,514</u>	<u>\$ 44,044,774</u>
Net Sources / (Uses)		<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**  
Capital Improvement Trust Fund (405)  
FY2017 Budget

	FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>		
Capital Improvement Fee	\$ 2,787,854	\$ 2,868,444
Transfer In - General Fund	-	-
Parking Revenue	-	-
Total Sources	<u>\$ 2,787,854</u>	<u>\$ 2,868,444</u>
<b><u>Uses of Funds:</u></b>		
SS - Debt Service	\$ 787,800	\$ 787,800
Transfer Out - Parking Garage Oper. Fund	800,000	850,000
Transfer Out - To Reserves	1,200,054	1,230,644
Total Uses	<u>\$ 2,787,854</u>	<u>\$ 2,868,444</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**  
Parking Garage Operating Fund (408)  
FY2017 Requested Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
	Transfer In - Capital Improvement T. F.	\$ 800,000	\$ 850,000
		-	-
	Total Sources	<u>\$ 800,000</u>	<u>\$ 850,000</u>
<b><u>Uses of Funds:</u></b>			
FF	Facility operating supplies	\$ -	\$ -
GG	Energy and space rental	670,000	718,885
HH	Professional services	12,000	12,000
JJ	Operational services	-	-
LL	Equipment lease, maint and repair	-	-
NN	Construction/Maintenance/Improvements	\$ 118,000	\$ 20,000
	Transfer to improvement escrow	\$ -	\$ 99,115
	Total Uses	<u>\$ 800,000</u>	<u>\$ 850,000</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>



**Worcester State University**  
Federal Grants/Program Overhead (433)  
FY2017 Budget

	FY 2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>		
Revenue	\$ -	\$ -
Transfer In - From Federal Aid Grants	9,010	9,010
Transfer In - From Reserves	37,691	37,691
Total Sources	<u>\$ 46,701</u>	<u>\$ 46,701</u>
<b><u>Uses of Funds:</u></b>		
AA Regular Employees	36,152	36,152
CC Temporary Part-Time Employees	-	-
DD Staff Benefit Expenses	10,549	10,549
EE Administrative Expenses	-	-
HH Professional Services	-	-
JJ Operational Services	-	-
KK Equipment Purchase	-	-
Transfer Out -		
Total Uses	<u>\$ 46,701</u>	<u>\$ 46,701</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**  
Parking Fines Scholarship Fund (439)  
FY2017 Budget

	FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>		
Fines and Other Income	\$ 78,000	\$ 73,000
Transfer In - Reserves	13,000	7,000
Total Sources	<u>\$ 91,000</u>	<u>\$ 80,000</u>
<b><u>Uses of Funds:</u></b>		
EE Administrative Supplies	31,000	20,000
RR Educational Assistance	60,000	60,000
Transfer Out -	-	-
Total Uses	<u>\$ 91,000</u>	<u>\$ 80,000</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**  
Health Services Trust Fund (442)  
FY2017 Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
	Fees and Other Income	\$ 445,000	\$ 449,800
	Transfer In - reserves	\$ 100,218	\$ 102,549
	Total Sources	<u>\$ 545,218</u>	<u>\$ 552,349</u>
<b><u>Uses of Funds:</u></b>			
AA	Regular Employees	\$ 105,500	\$ 113,057
BB	Employee Related Expenses	4,400	4,400
CC	Temporary Part-Time Employees	10,000	11,100
DD	Staff Benefit Expenses	35,343	33,917
EE	Administrative Expenses	3,750	3,750
FF	Facility Operation Supplies	19,250	19,250
HH	Professional Services	362,300	362,300
LL	Equipment Lease, Maintenance, Repair	525	525
RR	Client Medical Services	700	600
UU	Technology Expenses	3,450	3,450
	Transfer Out - Reserves	-	-
	Total Uses	<u>\$ 545,218</u>	<u>\$ 552,349</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**  
Resident Hall Trust Fund (445)  
FY2017 Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
	Fees and Other Income	\$ 12,451,780	\$ 12,212,904
	Transfer In - Res Hall Tech and Equip	\$ -	\$ 262,552
	Total Sources	<u>\$ 12,451,780</u>	<u>\$ 12,475,456</u>
<b><u>Uses of Funds:</u></b>			
AA	Regular Employees	\$ 1,303,775	\$ 1,198,517
BB	Employee Related Expenses	40,000	35,000
CC	Temporary Part-Time Employees	125,000	125,000
DD	Staff Benefit Expenses	354,165	345,995
EE	Administrative Expenses	120,000	160,000
FF	Facility Operation Supplies	227,500	215,000
GG	Energy/Space Rental	8,493,275	8,587,405
HH	Professional Services	11,000	15,000
JJ	Operational Services	170,000	192,000
KK	Equipment Purchase	50,000	39,712
LL	Equipment Lease, Maintenance, Repair	162,000	162,000
NN	Infrastructure & Building Improvements	780,000	780,000
RR	Educational Assistance	581,065	569,827
UU	Technology Related Expenses	34,000	50,000
	Transfer Out - to reserves	-	-
	Total Uses	<u>\$ 12,451,780</u>	<u>\$ 12,475,456</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

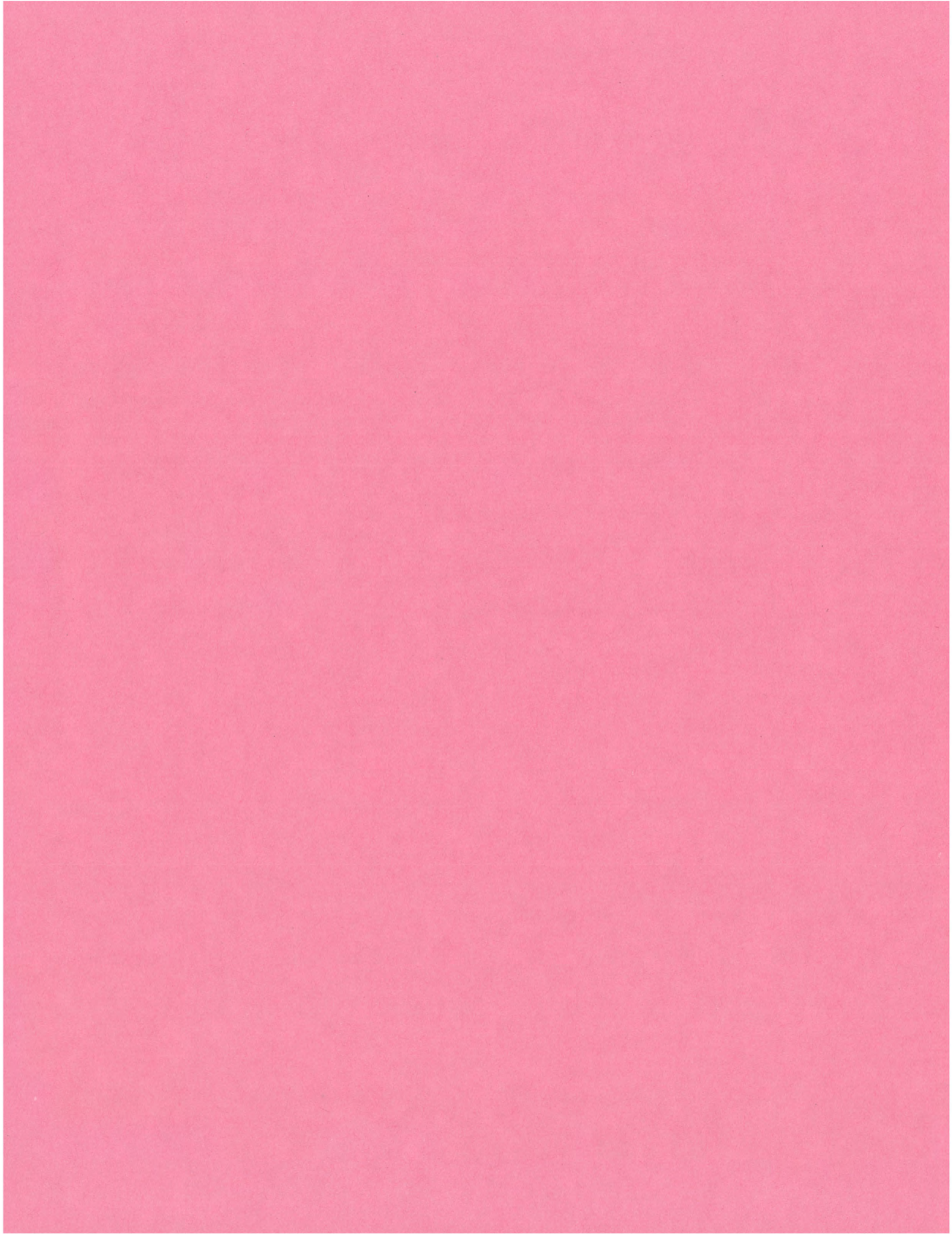
**Worcester State University**  
Student Activities Trust Fund (446)  
FY2017 Budget

		FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>			
	Fees	\$ 285,000	\$ 319,968
	Transfer In - Reserves	\$ 104,100	\$ 46,032
	Total Sources	<u>\$ 389,100</u>	<u>\$ 366,000</u>
<b><u>Uses of Funds:</u></b>			
BB	Employee Related Expenses	\$ 500	\$ 1,000
CC	Temporary Part-Time Employees	6,500	5,000
DD	Staff Benefit Expenses	100	-
EE	Administrative Expenses	60,000	60,000
FF	Facility Operation Supplies	185,000	170,000
GG	Energy/Space Rental	-	-
HH	Professional Services	87,000	87,000
JJ	Operational Services	5,000	5,000
KK	Equipment Purchase	15,000	18,000
LL	Equipment Lease, Maintenance, Repair	30,000	20,000
RR	Educational Assistance	-	-
	Transfer Out -	-	-
	Total Uses	<u>\$ 389,100</u>	<u>\$ 366,000</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

**Worcester State University**Residence Hall Technology and Equipment Trust Fund (448)  
FY2017 Budget

	FY2017 Requested Budget	Final FY2016 Budget
<b><u>Sources of Funds:</u></b>		
Fees and Other Income	\$ 320,000	\$ 347,600
Transfer In - Reserves	39,365	-
Total Sources	<u>\$ 359,365</u>	<u>\$ 347,600</u>
<b><u>Uses of Funds:</u></b>		
AA Regular Employees	\$ -	\$ -
DD Staff Benefits Expense	-	-
EE Administrative Expenses	-	-
GG Energy/Space Rental	299,365	-
LL Equipment Lease, Maintenance, Repair	-	20,000
UU Technology Expenses	60,000	60,000
Transfer Out - Sheehan Hall	-	262,552
Transfer Out - To Reserves	-	5,048
Total Uses	<u>\$ 359,365</u>	<u>\$ 347,600</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>





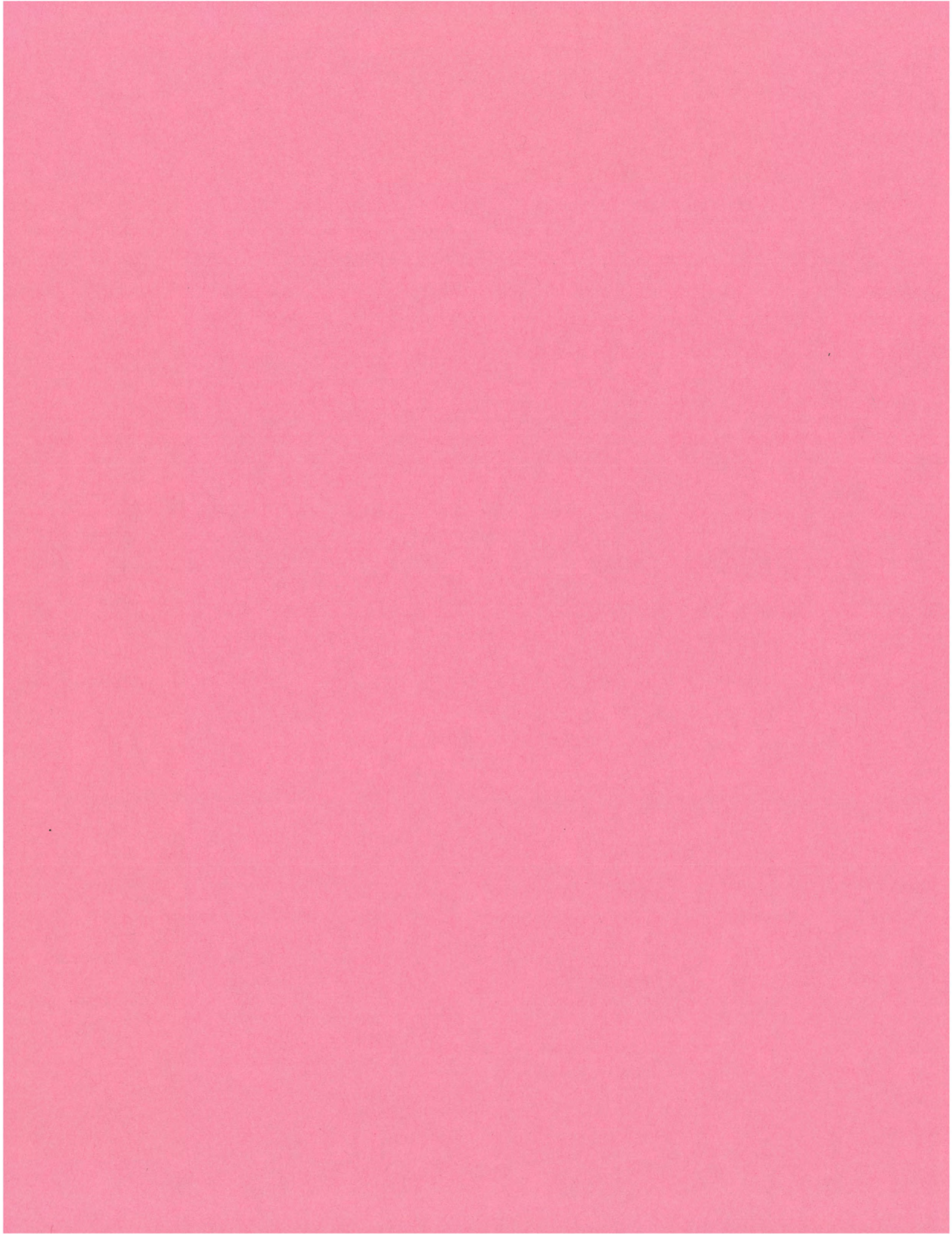


Worcester State University  
Capital Adaptation and Renewal  
FY 2017

Appendix A

Planning studies for future projects	\$ 465,500
Operational assessment	24,000
Athletic Center Swing Space	103,000
Space adaptation to address changing needs	1,175,500
Student Center Air conditioner/Heating unit replacement*	700,000
Student Center Roof	735,000
Student Center Roadway	97,000
	<hr/>
	<u>\$ 3,300,000</u>

\*The University will be receiving \$700 in deferred maintenance funds from DCAM which when combined with the University funds the project will be fully funded.



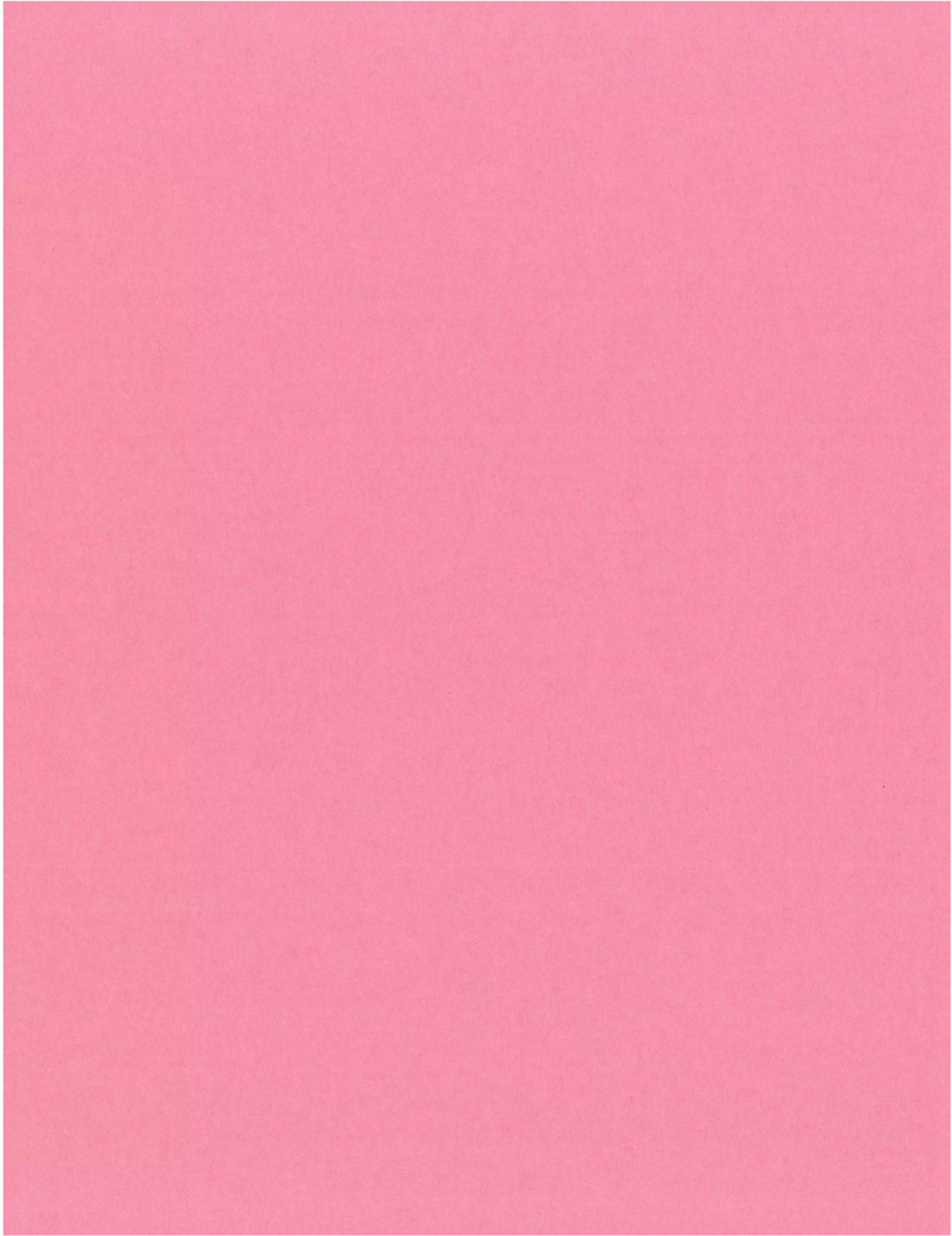


**Worcester State University**  
**Tuition and Fees - Fall 2016/2017**

	Annual	Per Semester	Per Cr Hour
<b>Undergraduate Day Division *</b>			
<b>Cost for Full-Time In-State Student</b>	<b>9,202.00</b>	<b>4,601.00</b>	<b>383.42</b>
<b>Tuition:</b>			
MA Resident	970.00	485.00	40.42
Non-Resident	7,050.00	3,525.00	293.75
NE Regional	1,455.00	727.50	60.63
<b>Fees:</b>			
General Fee	7,534.00	3,767.00	313.92
Student Activity Fee	72.00	36.00	3.00
Student Health Svc Fee	110.00	55.00	4.58
Capital Improvement Fee	516.00	258.00	21.50
<b>Total Fees</b>	<b>8,232.00</b>	<b>4,116.00</b>	<b>343.00</b>
<b>Residence Halls</b>			
Residence Hall Fee			
Chandler Village I	7,785.00	3,892.50	
Dowden Hall	7,485.00	3,742.50	
Single (Additional charge)	400.00	200.00	
Wasylean Hall - single	8,585.00	4,292.50	
Wasylean Hall - double	8,185.00	4,092.50	
Sheehan Hall	8,005.00	4,002.50	
Residence Activity Fee	50.00	25.00	
Technology and equipment fee	220.00	110.00	
Resident Parking Fee - satellite lot	100.00	50.00	
Board	3,640.00	1,820.00	
Damage Deposit (1st Semester)		100.00	
<b>Other</b>			
Health Insurance	2,511.00	na	
Orientation Fee (New Students)	75.00	na	
Commuter Meal Plan	300.00	150.00	
<b>Division of Graduate and Continuing Education</b>			
<b>Tuition:</b>			
UnderGraduate **			130.00
Graduate			150.00
<b>Fees:</b>			
Administrative Fee			
UnderGraduate			125.00
Graduate			126.50
Capital Improvement Fee			21.50
<b>Other University fees:</b>			
Student Teaching	75.00	per course	
Lab Instruction	90.00	per course	
Art Model Fee	25.00	per course	
Applied Music Fee	260.00	per course	
Application Fee	50.00	per item	
Transcript Fee	5.00	per item	
Field Work Supervision			15.00
Internship			15.00

\* Undergraduate Day division courses are offered M-F, 8 am - 4 pm

\*\* Undergraduate courses in the Division of Continuing Education begin at 4 pm M - F, Sat/Sun, and on-line





### Mandatory Fees at Massachusetts Public Colleges and Universities (Based on Fall Resident Undergraduate State-Supported Rates)

Institution	FY-2007	FY-2008	FY-2009	FY-2010	FY-2011	FY-2012	FY-2013	FY-2014	FY-2015	FY-2016	1 Yr % Chg	FY-2017 @	FY17 \$ chg
University of Massachusetts Amherst	\$7,886	\$8,210	\$8,520	\$8,920	\$10,020	\$10,900	\$11,518	\$11,546	\$11,546	\$12,460	8%		
University of Massachusetts Boston	\$6,834	\$7,126	\$7,400	\$7,800	\$8,900	\$9,696	\$10,254	\$10,254	\$10,254	\$10,970	7%		
University of Massachusetts Dartmouth	\$6,894	\$7,178	\$7,444	\$7,844	\$8,944	\$9,720	\$10,268	\$10,268	\$10,268	\$11,174	9%		
University of Massachusetts Lowell	\$6,990	\$7,278	\$7,552	\$7,952	\$9,052	\$9,744	\$10,394	\$10,644	\$10,994	\$11,974	9%		
Bridgewater State University	\$4,956	\$5,124	\$5,328	\$5,694	\$6,144	\$6,644	\$7,144	\$7,144	\$7,444	\$8,018	8%	\$8,718	\$ 700
Fitchburg State University	\$4,572	\$5,022	\$5,430	\$5,930	\$6,830	\$7,330	\$7,740	\$8,016	\$8,290	\$8,964	8%	\$9,164	\$ 200
Framingham State University	\$4,480	\$4,828	\$5,172	\$5,570	\$6,096	\$6,610	\$7,114	\$7,114	\$7,354	\$7,734	5%		
Massachusetts College of Art and Design	\$6,170	\$6,420	\$6,870	\$7,370	\$7,970	\$8,670	\$9,370	\$9,370	\$10,194	\$10,694	5%	\$11,163	\$ 469
Massachusetts College of Liberal Arts	\$4,896	\$5,138	\$5,396	\$5,846	\$6,546	\$7,046	\$7,496	\$7,496	\$7,946	\$8,446	6%		
Massachusetts Maritime Academy	\$4,580	\$4,548	\$4,644	\$4,880	\$5,268	\$5,444	\$5,740	\$5,724	\$5,778	\$6,076	5%	\$6,449	\$ 373
Salem State University	\$5,120	\$5,360	\$5,610	\$5,940	\$6,320	\$6,820	\$7,200	\$7,220	\$7,736	\$8,336	8%	\$8,826	\$ 490
Westfield State University	\$4,980	\$5,240	\$5,482	\$6,048	\$6,462	\$6,918	\$7,328	\$7,328	\$7,712	\$7,846	2%		
Worcester State University	\$4,570	\$4,896	\$5,200	\$5,636	\$6,186	\$6,684	\$7,188	\$7,188	\$7,588	\$7,888	4%	\$8,233	\$ 345
University of Massachusetts*	\$7,382	\$7,687	\$7,966	\$8,357	\$9,447	\$10,265	\$10,867	\$10,926	\$10,999	\$11,882	8%		
State Universities*	\$4,900	\$5,166	\$5,441	\$5,857	\$6,373	\$6,866	\$7,313	\$7,336	\$7,710	\$8,153	6%		
State Universities excludes MCAD and MMA**	\$4,843	\$5,117	\$5,391	\$5,812	\$6,328	\$6,820	\$7,266	\$7,296	\$7,660	\$8,118	6%		

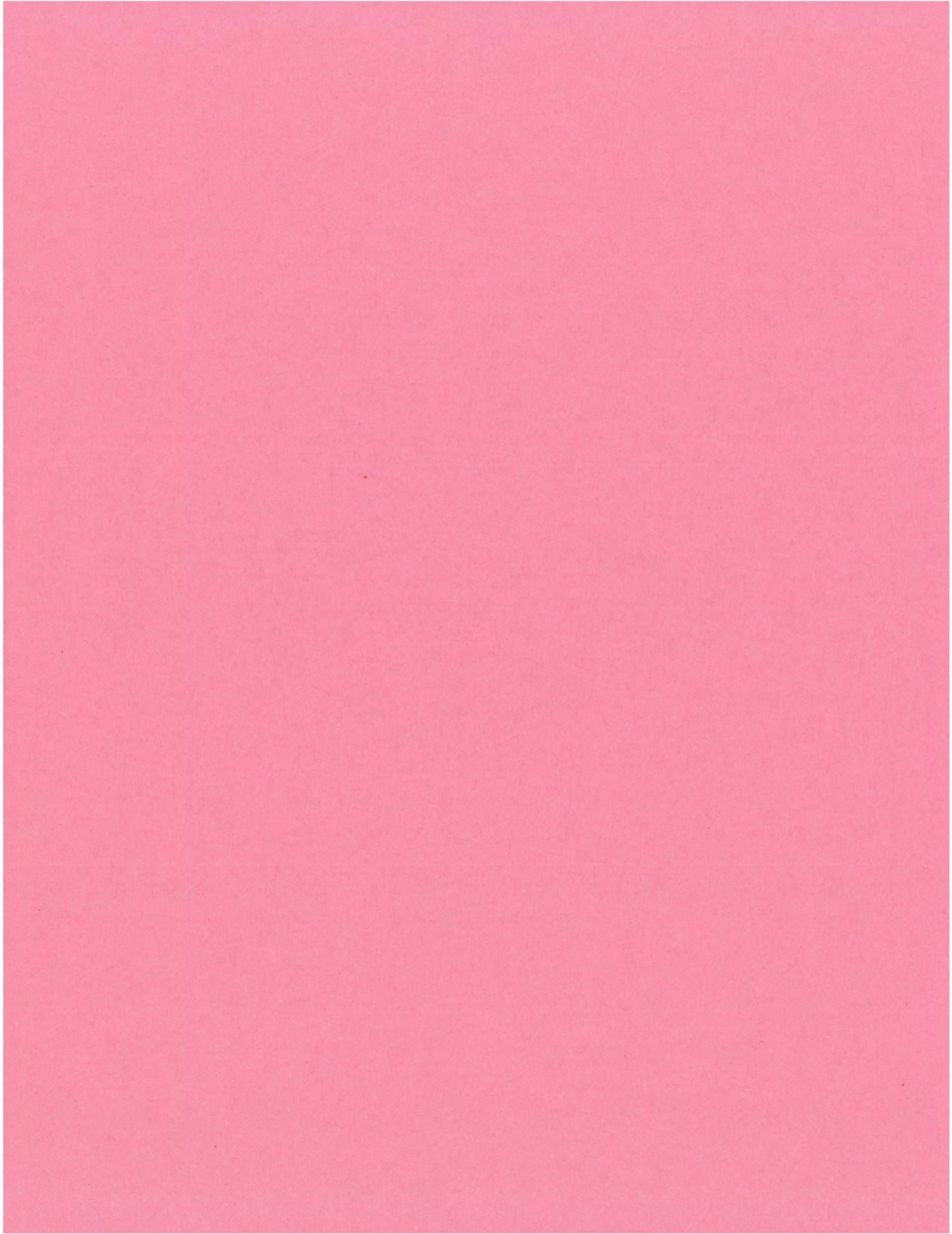
Source: Massachusetts Department of Higher Education

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

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

@ : FY 17 fee data was collected by the State University CFO's. Some institutions have not decided on fee increases as of the date this information was gathered. UMASS data is not available.





**Worcester State University  
Funded Initiatives  
FY 2017 Budget**

<b>Investment Type</b>	<b>Dept #</b>	<b>Department name</b>	<b>Description</b>	<b>Amount</b>
FL SP #1	641/642/651	BIO/CHEM/EEP	Equipment requests, replacement, repair, support	99,853.00
FL SP #1 & #4	726	Career Services	Staff Assistant plus fringe	67,585.00
- SP #3 & #4	360	Human Resources	Expand Interview Exchange to include all part-time hires	12,000.00
- SP #4		Ethnic Studies	New Strategic Initiative + Initial Budget	42,500.00
- SP #2 & #5	819	Enrollment Management	Eduventures and CRM Data	65,000.00
- SP #4	200	Office of President	Student Convocation	20,000.00
FL SP #3	360	Dean Search	Cost of professional recruitment	15,500.00
- SP #2 & #5	200	Trustee Development	Cost of board development program (similar to AGB program)	10,000.00
- SP #1 & #5	200	Academic Space Study/May Street	Campus-wide study	80,000.00
FL SP #5	400	Advancement	Staffing Support for Financial Records and Accounting Processes.	47,309.50
- SP #1 & #5	680/684	DGCE	Funds for part-time clerical support	20,000.00
FL SP #1 & #5	662	Communication	Studies for Mac lab, renovated TV studio and digital sound board	45,000.00
- SP #2, #3 & #5	702	Binienda Center for Civic Eng	Recreation Worc Student Stipends/AL/ANA Students	5,000.00
- SP #1 & #2	819	Enrollment Management	Course Scheduling Software (13,000 on going )	25,953.50
			subtotal	555,701.00
- SP #5	729	Wellness Center	Funds for expansion of program and operations of new facility	1,266,426.00
FL -	521	Division of Grad and CE	Contract raises for adjunct faculty	191,899.00
FL -	500	VPAA	Increase in contracted department chair stipend amount	28,330.00
FL -	310	General Administrative Services	Increase in Commonwealth Fringe Benefit chargeback rate	218,689.00
			Total	2,261,045.00

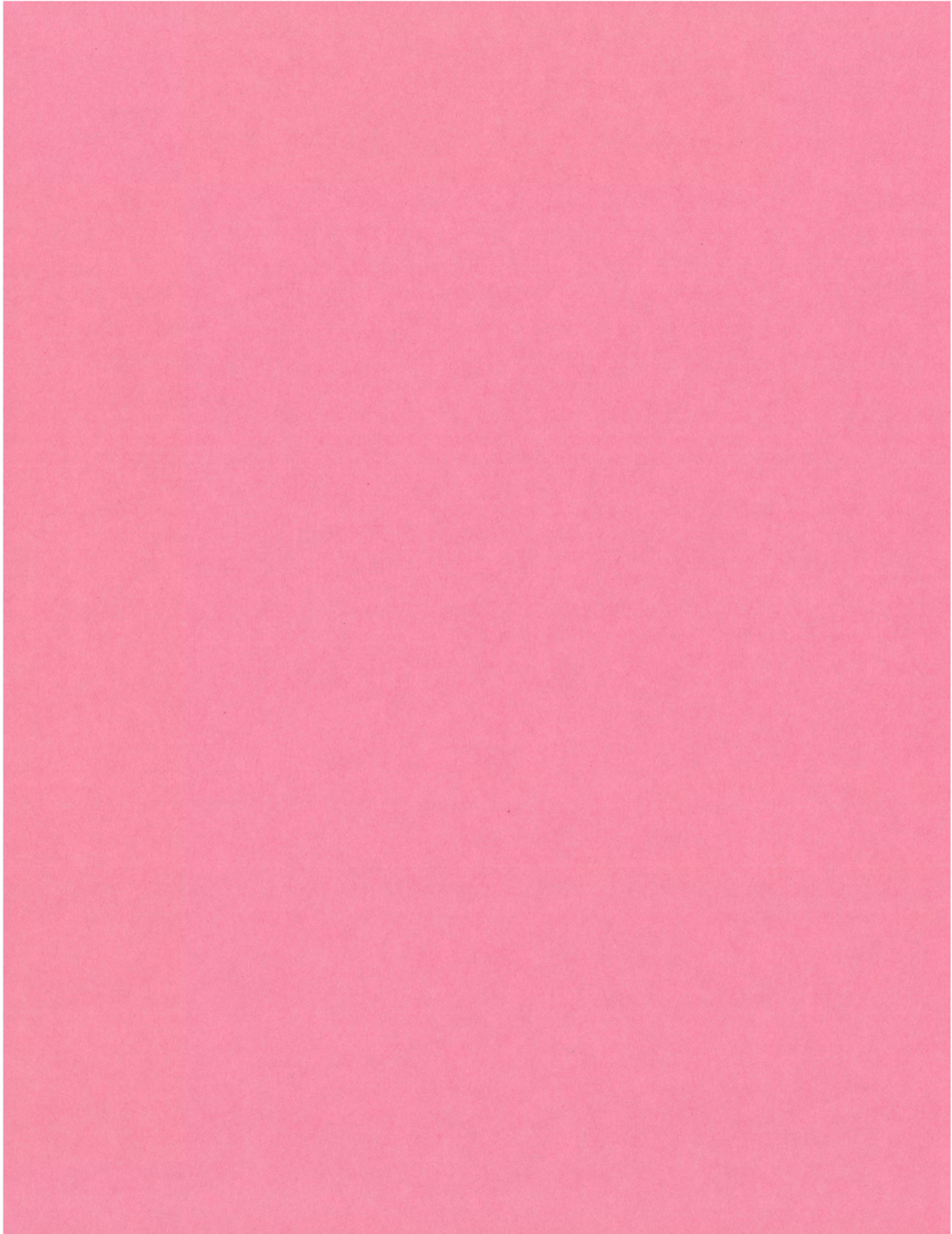
**Investment type reference table**

**FL - Foundation Level Investment:** A request for new funds that is required to maintain and/or build up a level of support or service that is critical to the foundation of university operations, and if not addressed may contribute to unacceptable levels of risk of operational inefficiency, failure of basic university services, or non-compliance.

**SP - Strategic Plan:**

- Goal #1:** Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.
- Goal #2:** Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world.
- Goal #3:** Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success.
- Goal #4:** Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued.
- Goal #5:** Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU'S reputation for excellence and value.







**WELLNESS CENTER**

**FISCAL YEAR 2017  
OPERATING BUDGET**

***DRAFT FOR DISCUSSION***

## **Table of Contents**

Draft Budget worksheet

New cost categories

    Annual Facilities costs

    Annual Athletic cost

        Recreation Sports Equipment

        Athletic Equipment

    Part-time Employees

    Full-time Employees

    Utilities

Proposed Increase to General Fee

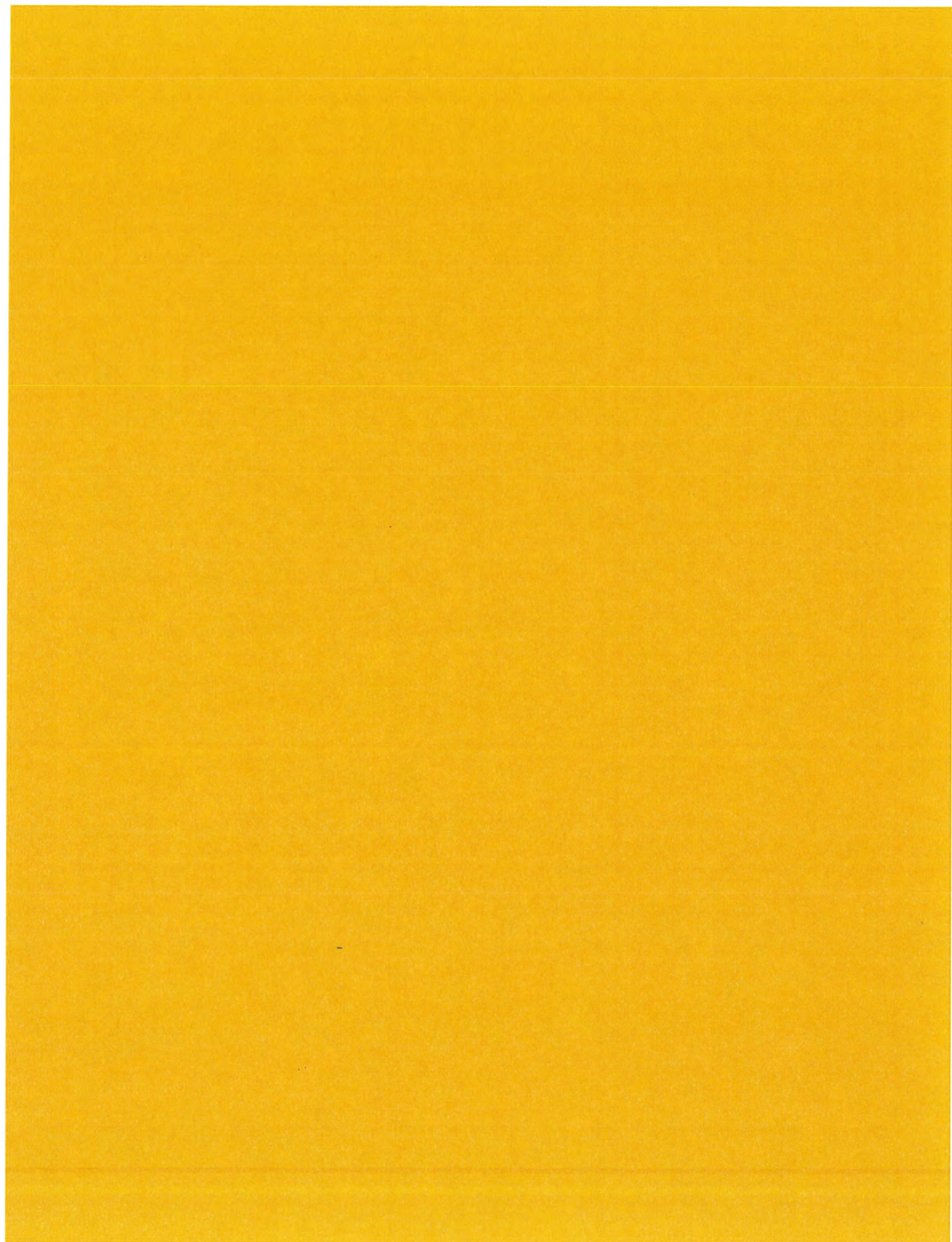
Analysis of Potential Resources and Uses - FY 2017

Reserve Stabilization Worksheet

**Wellness Center  
Draft Budget**

		Athletics FY 2017 Operating baseline	Ongoing overrides to fund	Annual Facilities cost	Annual Athletic cost	Part-time employees	Full-time employees	Increased Utilities	New Funds Subtotal	Wellness Center Budget
730 AAA00	Athletic Dpt	Regular Employees (excludes existing staff)					315,330		315,330	315,330
730 BBB00	Athletic Dpt	Employee Related Expenses								27,000
730 CCC00	Athletic Dpt	Temp Part-time Employees			40,000	191,234			231,234	471,234
730 DDD00	Athletic Dpt	Pension/Insurance Expenses					92,013		92,013	92,013
730 EEE00	Athletic Dpt	Administrative Expenses		7,600	6,300				13,900	113,900
730 FFF00	Athletic Dpt	Facility Operation Supplies		39,115	34,000				103,115	273,187
730 GGG00	Athletic Dpt	Energy/Space Rental	30,000					295,000	295,000	295,000
730 HHH00	Athletic Dpt	Professional Services		2,025					2,025	12,525
730 IJJ00	Athletic Dpt	Operational Services								66,000
730 KKK00	Athletic Dpt	Equipment Purchase			45,309				45,309	53,309
730 LLL00	Athletic Dpt	Equipment Lease, Maint, Repair		1,900	90,600				92,500	287,500
730 NNN00	Athletic Dpt	Infrastructure and Bldg Improvements		66,000					66,000	71,000
730 UUU00	Athletic Dpt	Information Technology Expense			10,000				10,000	20,000
<b>730 Total</b>	<b>Athletic Dpt</b>	<b>Total</b>	<b>30,000</b>	<b>116,640</b>	<b>226,209</b>	<b>191,234</b>	<b>407,343</b>	<b>295,000</b>	<b>1,266,426</b>	<b>2,097,998</b>







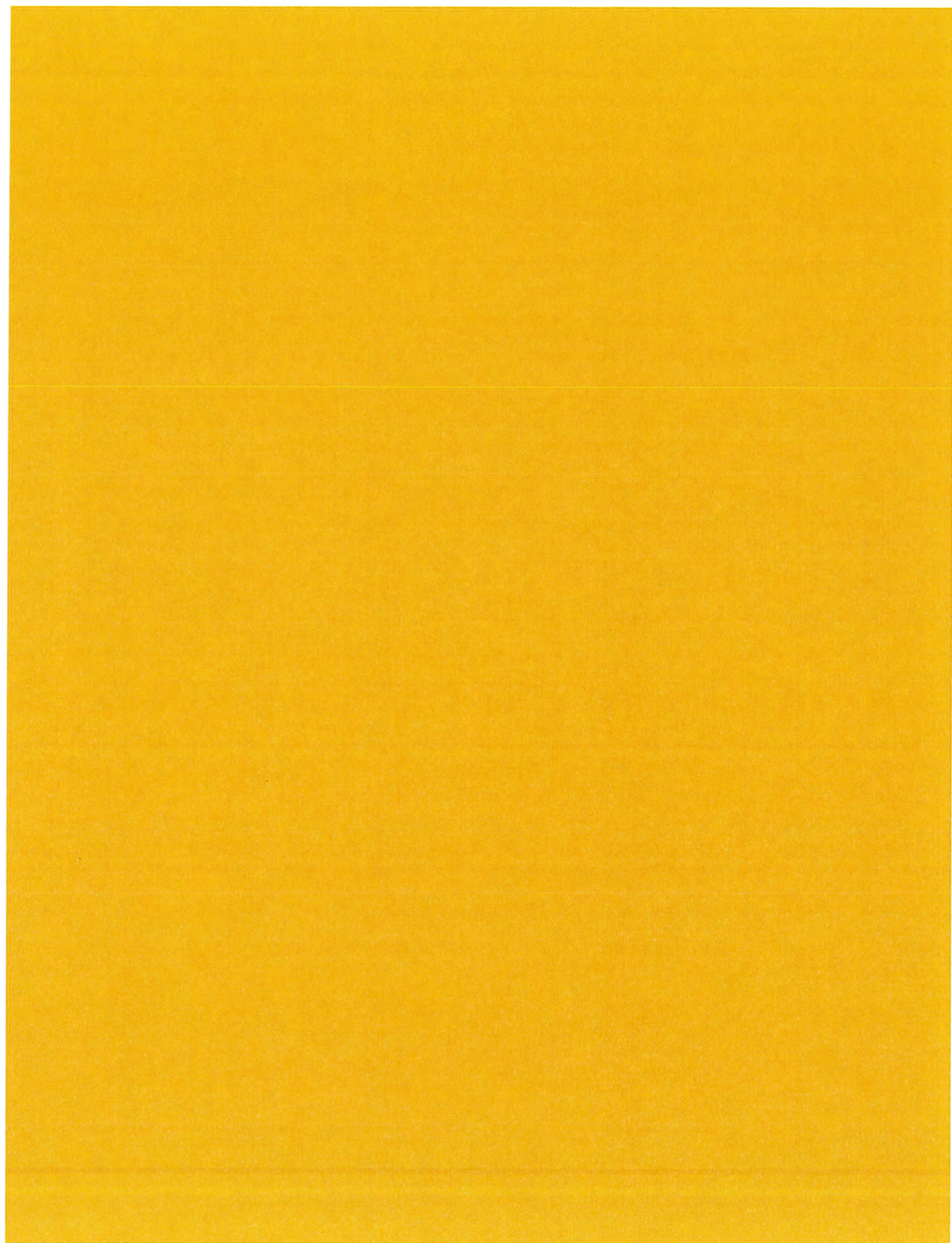
**Wellness Center Budget**  
**Annual Facilities Maintenance Costs**  
**DRAFT**

<u>Vendor</u>	<u>Description</u>	<u>Amount</u>	<u>Exp. Code</u>	<u>Explanation</u>
Sunshine Sign	Exterior labor to perform Banner changeout 3/year	3,600	EEE14	New system
		3,600		
City of Worcester	Backflow Preventor Testing	4,000	EEE19	New system
		4,000		
Industrial Cleaning Products	additional products and new types for supply room	39,115	FFF11	Larger building, some new systems
		39,115		
American Anchor	Roof anchor system annual certification	525	HHHH2	New system
Bolton DiMartini	Walking track structural review	1,500	HHHH2	New system
		2,025		
Workplace essentials	Women's sanitary product and disposal	700	LLL23	Similar but wit additional toilets
		700		
GCS Service	Kitchen Equip PM's and repairs	1,000	LLL63	New system
O'Connell Fire Protection	Fire Extinguisher PM's	200	LLL63	Similar
		1,200		
Wind River Environmental	Grease Trap cleaning/evacuation	600	NNN22	New system
		600		
AALANCO Service Corp	Hot water tank PM's	2,000	NNN50	Add 3 hot water tanks
Athletic Floor Systems	Resurface Competition Gym	7,500	NNN50	Similar:add 2,500 every third year for painting
Caola	Door hardware	1,000	NNN50	Similar
Crestron	Lighting control system PM	500	NNN50	New system
Duct & Vent Cleaning of America	Exhaust duct cleaning	1,250	NNN50	New system
Elevator Maintenance	Elevator PM's	2,400	NNN50	New system
Energy Construction Services	Boiler Maintenance	1,700	NNN50	Add 2 boilers
Gustavo Preston/WSU	Various pump PM's	500	NNN50	New system
Kraft Power	Emergency Generator PM's	800	NNN50	Similar but with annual load bank test added
Nalco	HVAC chemical treatment	250	NNN50	Similar
Northeast Coil	RTU coil cleaning	9,000	NNN50	New system
Offshore	Roof PM's	6,500	NNN50	New system and larger roof spans
Renaud HVAC	RTU PM's	7,500	NNN50	New system
				New system includes sprinklers, duct smokes, modern fire alarm and their associated testing
Simplex Grinnell	Fire alarm/life safety system tests	6,200	NNN50	
Worcester Overhead Door	Overhead Door Maintenance	1,500	NNN50	New system
		48,600		
				New System: 100% lamp Comp & MP, 50% ballast, 50% exit signs & 10% LED
Eagle Lighting	Lamp replacements	5,000	NNN52	
ICPI	Walk-off mats	1,500	NNN52	Similar
MSC Industrial Supply	Filters	2,000	NNN52	New system
WSU	Exhaust PM's	700	NNN52	New system
		9,200		
Cliff Hangers	Window Cleaning 2 per year	5,000	NNN70	Fitness center glass will need cleaning 2X per year
		5,000		
Ransford Pest Control	Pest Control PM's	600	NNN71	Similar
Wayne Wilkowski	Pigeon control & pest control	500	NNN71	Similar
		1,100		
Bells Lawn &	Lawn/Irrigation PM	1,500	NNN74	New system
		1,500		
Total		116,640		

**Wellness Center Budget  
Annual Athletic Program Costs  
Draft**

<u>Additional annual costs</u>	<u>Annual</u>
Leased Cardio	80,000
maintenance contract Cardio/Strength	10,000
computer software/hardware	10,000
music subscription	300
Recreation Equipment Replacement (detail attached)	10,379
Athletic equipment replacement cycle (detail attached)	34,930
Mascot	6,000
Miscellaneous program supplies, and promotional materials	10,000
new program subtotal	161,609
Funds for coach raises (HR to evaluate)	40,000
Increase food per diem	24,000
Washer Dryer Calls (150/call)	600
Total	226,209







**Wellness Center Budget  
Recreational Sports Equipment  
Draft**

	<u>EQUIPMENT</u>	<u>QTY</u>	<u>Price</u>	<u>TOTAL COST</u>	<u>MANUFACTURE/ MODEL #</u>
96003XXX	Border Floor Hockey	26	204.63	\$5,320.38	BSN
1273472	Futsal goals 6X9 (pairs)	2	1,159.28	\$2,318.56	BSN
1377098	Select Futsal Master 6 pack	1	254.10	\$254.10	BSN
1040814	12" Game/Boundary Cone - orange	24	4.99	\$119.76	BSN
1271560	Fixed Rung Agility Ladder	6	31.14	\$186.84	BSN
1063943	Pugg 4' Training Goal (pair)	8	69.87	\$558.96	BSN
1251838	Indoor/Outdoor spring loaded corner flags (set of 4)	4	56.84	\$227.36	BSN
1382858	Kwigoal Practice Field Hockey Goals (pair)	2	\$2,136.98	\$4,273.96	BSN
MTMRAQ	Tennis Rackets	6	\$19.99	\$119.94	BSN
USOPEN	Tennis Balls (cases)	2	\$95.96	\$191.92	BSN
1393486	Pickel ball	4	\$12.54	\$50.16	BSN
1304213	Shield Indoor Floor Hockey Stick set	6	\$187.78	\$1,126.68	BSN
1058XXX	Shield Orange Non Bounce Hotball (set of 3)	10	\$7.84	\$78.40	BSN
1197655	Multi purpose Equipment Cart	3	\$159.74	\$479.22	BSN
1064889	Socks for Floor Hockey sticks Foam Covers	48	\$8.41	\$403.68	BSN
1065336	Mylec Folding Goal	6	\$36.41	\$218.46	BSN
1363633	PickleBall Net	6	\$149.37	\$896.22	BSN
1025XXX	PickleBall Diller set	6	\$224.71	\$1,348.26	BSN
1235593	volleyballs	8	\$29.84	\$238.72	BSN
1155389	volleyball carts	1	\$129.34	\$129.34	BSN
40870	Mesh bags	10	129.34	\$1,293.40	BSN
1276572	Men's Basketballs	8	\$34.99	\$279.92	BSN
1276589	Women's Basketball	4	\$34.99	\$139.96	BSN
VSBMFEL5	Indoor Soccer Balls	4	\$19.89	\$79.56	BSN
1235593	Volleyballs	4	\$24.59	\$98.36	BSN
1371492	Men's Football	2	\$39.59	\$79.18	BSN
NKFT0233	Women's Football	2	\$19.99	\$39.98	BSN
1249804	Versa Cuff Light	2	\$8.99	\$17.98	BSN
1249811	Versa Cuff Medium	2	\$9.99	\$19.98	BSN
1249828	Versa Cuff Heavy	2	\$10.99	\$21.98	BSN
1342574	Versa Cuff Extra Heavy	2	\$11.99	\$23.98	BSN
1249804	Versa Cuff Long Light	2	\$8.99	\$17.98	BSN
1249811	Versa Cuff Long Medium	2	\$9.99	\$19.98	BSN
1249828	Versa Cuff Long Heavy	2	\$10.99	\$21.98	BSN
1342574	Versa Cuff Long Extra Heavy	2	\$11.99	\$23.98	BSN
1281842	Boxing Gloves (pair)	5	\$48.99	\$244.95	BSN
1051216	Target Mitts (pair)	5	\$49.99	\$249.95	BSN
1384302	Body Shield	1	\$79.99	\$79.99	BSN
200234411	Kick Shield	1	\$79.99	\$79.99	BSN
1126631	Class Round Timer	1	\$247.36	\$247.36	BSN
1236149	1236149 Voit 8.25" Special Tuff Ball (Set of 6)	1	\$101.41	\$101.41	BSN
1522	VPG 10HXX Voit Playground Ball 10" Red	12	\$5.99	\$71.88	BSN
1184761	X44RP ASA Yellow Poly Sft (Dozen)	4	\$49.99	\$199.96	BSN
TACSV5WS	Tachikara SV5WS Volleyball	4	\$33.89	\$135.56	BSN
NKFT0231	NKFT0231 Nike Spiral Tech Football (NFHS)	8	\$19.99	\$159.92	BSN
NKFT0232	NKFT0232 Nike Spiral Tech YTH Football	4	\$19.99	\$79.96	BSN
1276572	MAC X10 Elite NFHS Comp Ball - Official	8	\$34.99	\$279.92	BSN
1276572	MAC X10 Elite NFHS Comp Ball-Int	4	\$34.99	\$139.96	BSN
1376985	Nike Premier Team SZ5	8	\$29.99	\$239.92	BSN
1384309	Brine SBVIS95 Indoor Soccerball	4	\$24.59	\$98.36	BSN
MTMRAO	BIOTEC 500 Tennis Racquet	8	\$19.99	\$159.92	BSN
MTDUNCAN24	Dunlop Championship Tennis Balls (case)	2	89.99	\$179.98	BSN
1155006	Wiffle Baseball	12	1.09	\$13.08	BSN
3193XXX	Wiffle Brand Bat 32"	4	3.99	\$15.96	BSN
1235623	Throw Down Bases - 5 piece orange (set)	1	14.99	\$14.99	BSN
BBSBXXXY	Rubber Bases (set)	2	32.99	\$65.98	BSN
BBSBHPXXY	Rubber Home Plate	2	13.99	\$27.98	BSN
1385134	Worth Toxic Reload - Slowpitch Bat 34/27.5	4	79.99	\$319.96	BSN
1388394	Wilson A360 14" Slow Pitch Glove	8	39.99	\$319.92	BSN
1388394	14" Fielders Glove - LHT WTA-0362	4	39.99	\$159.96	BSN
BBUMPIND	Indicator Balls Strike Out-Inn	6	4.47	\$26.82	BSN
CUMPRO	Pro Umpire Placket Navy XLG	8	33.14	\$265.12	BSN



**Wellness Center Budget  
Recreational Sports Equipment  
Draft**

	<u>EQUIPMENT</u>	<u>QTY</u>	<u>Price</u>	<u>TOTAL COST</u>	<u>MANUFACTURE/ MODEL #</u>
1157673	V-Neck Referee Shirt AM	4	26.99	\$107.96	BSN
1157673	V-Neck Referee Shirt AL	4	26.99	\$107.96	BSN
1157673	V-Neck Referee Shirt AXL	6	26.99	\$161.94	BSN
1157673	100% Poly Officials jersey MD	4	26.99	\$107.96	BSN
1157673	100% Poly Officials jersey LG	4	26.99	\$107.96	BSN
1157673	100% Poly Officials jersey XL	6	26.99	\$161.94	BSN
FBREFFLG	FBREFLG Umpire/Referee Flag	12	5.99	\$71.88	BSN
1040814	12" Game/Boundary Cone - orange	8	5.99	\$47.92	BSN
1240245	1240245 Flag Football Ball Spotter Orange	4	6.99	\$27.96	BSN
1240252	1240252 Flag Football Ball Spotter Yellow	4	6.99	\$27.96	BSN
MSWPYLO	MSWPYLO Weighted End Zone Pylon (set)	4	29.54	\$118.16	BSN
1245134	Poly Flag Football Sideline Markers (set)	4	289.14	\$1,156.56	BSN
1149562	1149562 Triple threat Belt w/ Blue- LG	12	2.99	\$35.88	BSN
1149562	1149562 Triple threat Belt w/ Blue XL	12	2.99	\$35.88	BSN
1149524	1149524 Triple Threat Belt w/ Yellow Flag - LG	12	2.99	\$35.88	BSN
1149524	1149524 Triple Threat Belt w/ Yellow Flag - XL	12	2.99	\$35.88	BSN
86703XXX	NIRSA Flag & Touch Football Rules Book	4	19.99	\$79.96	BSN
C47N	Numbered Scrimmage Vest Royal	12	5.75	\$69.00	BSN
C47N	Numbered Scrimmage Vest Gold	12	5.75	\$69.00	BSN
C47N	Numbered Scrimmage Vest Black	12	5.75	\$69.00	BSN
C47N	Numbered Scrimmage Vest Kelly	12	5.75	\$69.00	BSN
C47N	Numbered Scrimmage Vest Scarlet	12	5.75	\$69.00	BSN
C47N	Numbered Scrimmage Vest Orange	12	5.75	\$69.00	BSN
SK999	Indoor/Outdoor Tabletop Scoreboard	2	429.89	\$859.78	BSN
99064	Portable Manual Scorekeeper	2	29.99	\$59.98	BSN
1364614	Fox 40 Whistle (dozen)	3	59.41	\$178.23	BSN
1383898	Whistle Lanyard Black (Dozen)	3	9.99	\$29.97	BSN
MSREFWAL	Referee Wallet w/ Cards	8	4.99	\$39.92	BSN
FBREFFLG	Linesman Flags (pair)	4	5.99	\$23.96	BSN
1162639	Budget Possession Indicator	2	99.84	\$199.68	BSN
1388016	Referee Bean Bags	8	4.99	\$39.92	BSN
1370767	Down Indicators	8	139.41	\$1,115.28	BSN
12440191	Jumbo Display Watch	4	23.99	\$95.96	BSN
SCGOAL5B	Indoor Soccer Goal	2	299.99	\$599.98	BSN
MCB91XXX	MAC Home Plate Brush	4	5.99	\$23.96	BSN
40870	Mesh Ball Net - Gold	8	6.99	\$55.92	BSN
1385400	MAC Wheeled Deluxe EQ Bag - BK	2	56.87	\$113.74	BSN
4095	Mesh Duffle Bag - Scarlet	2	22.89	\$45.78	BSN
1268942	Ultimate Frisbee 175G	8	13.99	\$111.92	BSN
Request to fund through Building initial Furniture, Fixture and Equipment budget line				<u>\$31,135.50</u>	
One third of the estimated cost will be placed in operating funds to cycle out old items on an annual basis including existing inventory				<u>\$10,378.50</u>	

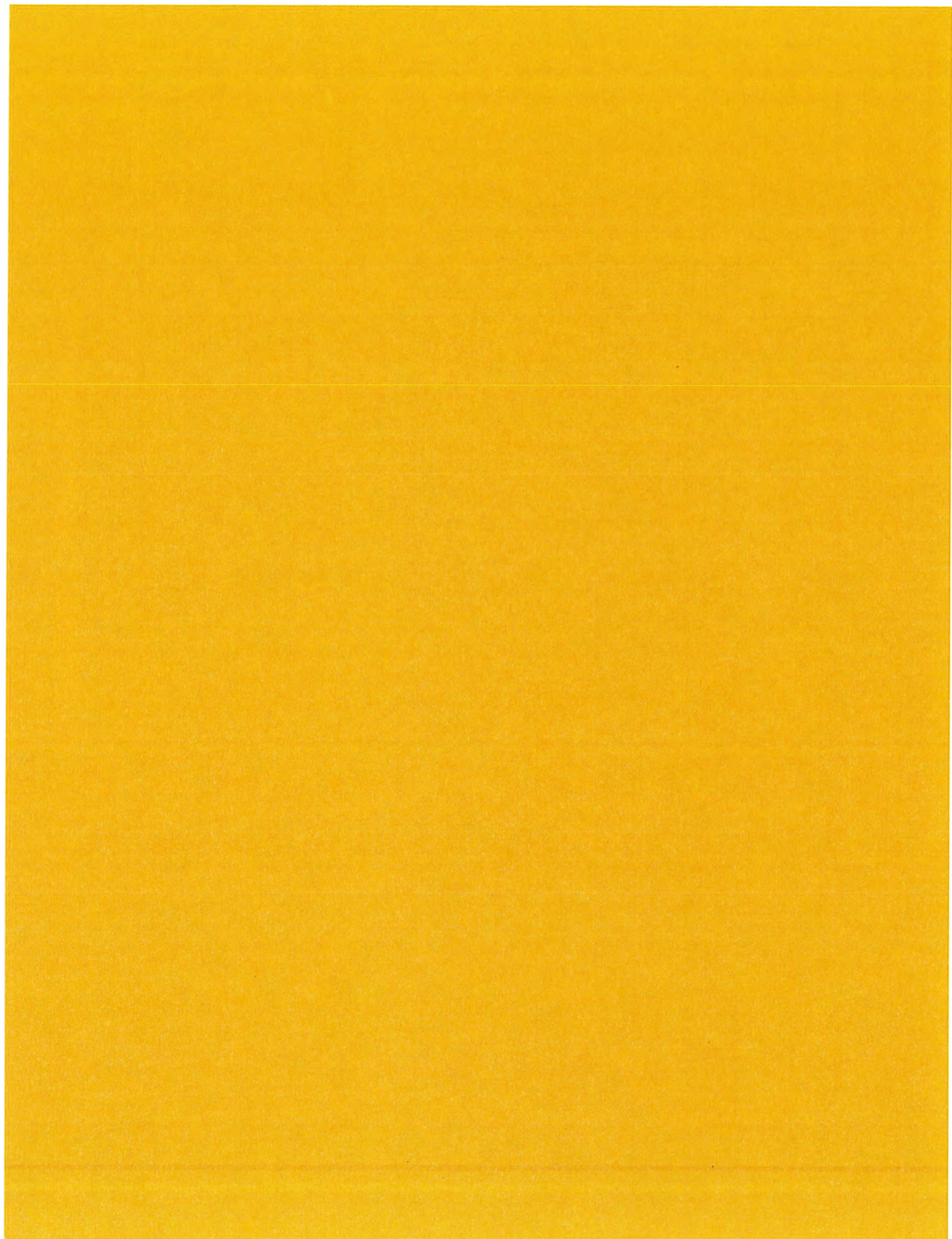
**Wellness Center Budget  
Athletic Equipment  
DRAFT**

	<u>EQUIPMENT</u>	<u>QTY</u>	<u>Price</u>	<u>TOTAL COST</u>	<u>MANUFACTURE/MODEL #</u>
CRTRTCONVEBLK2	table cart	1	401.40	\$401.40	mitylite quote QUO-15812-R9G0Z5
LRT2472FUK11	6 foot folding tables	6	337.93	\$2,027.58	mitylite quote QUO-15812-R9G0Z5
1276664	Simpo SignII Stand	6	59.49	\$356.94	BSN
CP200D	Radios	12	450.00	\$5,400.00	Worad Quote Q88429
CP-150-200	6 unit rapid charger	2	435.00	\$870.00	Worad Quote Q88429
NK384407	Staff T-shirts colors Green	100	13.99	\$1,399.00	BSN
NK384407	Staff T-shirts colors Red	100	13.99	\$1,399.00	BSN
NK384407	Staff T-shirts colors Gold	100	13.99	\$1,399.00	BSN
NK384407	Staff T-shirts colors Blue	100	13.99	\$1,399.00	BSN
NK384407	Staff T-shirts colors Pink	100	13.99	\$1,399.00	BSN
NK384407	Staff T-shirts colors Orange	100	13.99	\$1,399.00	BSN
1202113	50 Person First Aid Kit	3	36.28	\$108.84	BSN
SNBBN288Y	Nylon Basketball Nets	12	3.99	\$47.88	BSN
1525	Master Locks	590	9.13	\$5,386.70	Caola Quote 400965
1525-key	Master Locks Override key	5	3.99	\$19.95	Caola Quote 400965
1240672	HD Inflator	2	138.41	\$276.82	BSN
3075RHXX	Golf Club Sets	4	159.84	\$639.36	BSN
NKBG0343	Nike Golf Club Bags	4	79.42	\$317.68	BSN
NKGL0680	Nike Golf Balls (dozen)	10	29.47	\$294.70	BSN
1162622	Monster Ball Locker	2	389.68	\$779.36	BSN
	The Gun 8000 (inc \$215 Shipping)	1	5,950.00	\$5,950.00	Quote
20YL46	Stanchions	50	236.25	\$11,812.50	Grainger.com
	Stanchions Storage Cart	3	1,251.00	\$3,753.00	Grainger.com
WHCHSS00060001T	Game Chairs (black) add \$5 for blue	50	51.00	\$2,550.00	mitylite quote QUO-15812-R9G0Z5
CRTHSSFBLK2	Chair Rack	1	434.25	\$434.25	mitylite quote QUO-15812-R9G0Z5
1591	Royal Blue First Place Collegiate Hurdle (Royal Blue)	20	164.95	\$3,299.00	MF Quote
4065	Carlton Rocket Starting Block	6	139.95	\$839.70	MF Quote
4051	First Place Universal starting block cart	1	399.00	\$399.00	MF Quote
4794	First Place Int'l PV Pit	1	399.00	\$399.00	MF Quote
1596	First Place Premier College PV Standard	1	1,595.00	\$1,595.00	MF Quote
4825	First Place Prep PV Base Pads	1	1,150.00	\$1,150.00	MF Quote
4867	First Place Collegiate Pit HJ	1	6,295.00	\$6,295.00	MF Quote
1598	First Place Premier High Jump Standard	1	550.00	\$550.00	MF Quote
8625	UCS PV Box Collar	1	499.00	\$499.00	MF Quote
4514	5X10 All Aluminum Cart	2	1,975.00	\$3,950.00	MF Quote
3101	First Place Pole Vault Championship Xbar	3	59.00	\$177.00	MF Quote
3102	1st Place Championship HJ Cross Bar	3	57.00	\$171.00	MF Quote
3110		4	16.00	\$64.00	MF Quote
54	First Place hurdle Dolly with handle	2	250.00	\$500.00	MF Quote
4	First Place implement Cart	1	499.00	\$499.00	MF Quote
9613	Banana Steps 12"	6	8.95	\$53.70	MF Quote
9614	Banana Steps 18"	6	12.95	\$77.70	MF Quote
3124	Smarthurdle #5 adjusts	5	64.00	\$320.00	MF Quote
3190s	ABC Agility ladder hard rung	2	60.00	\$120.00	MF Quote
6575	First Place 100 Memory Stopwatch MF-100	14	19.95	\$279.30	MF Quote
4272	165' FIBERGLASS MEAS. TAPE	1	16.00	\$16.00	MF Quote
4273	200' FIBERGLASS MEAS. TAPE -	1	21.00	\$21.00	MF Quote
3170	400 GRAM NOCKENBALL Blue	1	16.00	\$16.00	MF Quote
3171	600 GRAM NOCKENBALL Red	1	19.00	\$19.00	MF Quote
3172	800 GRAM NOCKENBALL yellow	1	21.00	\$21.00	MF Quote
4850-8	800 gram Turbo Spier	1	55.00	\$55.00	MF Quote
2950-6	Turbo Jav Long Tom 6 - 600 gram	1	40.00	\$40.00	MF Quote
4918	Technique Ramp	1	299.00	\$299.00	MF Quote
7648	BULLET BELT DELUXE Pop & Rip 65.00	4	65.00	\$260.00	MF Quote
4178	SLED DAWG II FOR OLYMPIC WEIGHT PLATE 125.00	2	125.00	\$250.00	MF Quote
7623	INDOOR SHOT/WEIGHT CIRCLE	1	799.00	\$799.00	MF Quote
7623b	WOOD TOEBOARD FOR INDOOR CIRCLE	1	399.00	\$399.00	MF Quote
5619	6" PLYOMETRIC BOX	1	99.00	\$99.00	MF Quote
740140061	6' TRAINING STEEPLECHASE BARRIER 1499.00	1	1,499.00	\$1,499.00	MF Quote
2670	Drive Sled II	1	199.95	\$199.95	MF Quote
10mmSuperX	High Jump and Runways 8 6'X40'&8 4'X60'	1	29,500.00	\$29,500.00	Athletic Surfaces Quote
BS47750	BSN Sports Protector Series Softball Screen	2	\$219.54	\$439.08	BSN
BS47710	BSN Sports Protector Series 7'x7' Baseman Screen	2	\$219.54	\$439.08	BSN
BS47700	BSN Sports Protector Series 7'x7' Sock-Net Screen	2	\$249.87	\$499.74	BSN
1266016	3' X 9' CLAY SOFTBALL PITCHERS MOUND WITH POWER LANE PRO Product	2	\$179.69	\$359.38	BSN
1159172	Jugs Super Softball Pitching Machine	1	\$1,569.87	\$1,569.87	BSN
BBDSBALL	Jugs Sting-Free Dimpled Softballs (Dozen)	3	\$34.89	\$104.67	BSN
1155020	Lite Flite Jugs	1	\$27.89	\$27.89	BSN
1235890	BTM612C Trigon Pro Turf Baseball 6x12 Clay Mat Batters Box	2	\$399.87	\$799.74	BSN
BS47743	BSN Sports Protector Series L-Screen	2	\$219.54	\$439.08	BSN

**Wellness Center Budget  
Athletic Equipment  
DRAFT**

	<u>EQUIPMENT</u>	<u>QTY</u>	<u>Price</u>	<u>TOTAL COST</u>	<u>MANUFACTURE/MODEL #</u>
1237146	ProMounds Collegiate Portable Pitcher's Mound (Item: MP2001)	2	\$857.32	\$1,714.64	BSN
1159196	Jugs Lite-Flite machine Package (Baseball)	1	\$389.41	\$389.41	BSN
FEEDER	18 Ball Baseball Lite-Flite Feeder	1	\$199.00	\$199.00	BSN
K10844	Helmets - Air 8 Batter's Helmet (Item: K10844)	5	\$39.99	\$199.95	BSN
1344073	Portable Lacrosse Goal	2	239.54	\$479.08	BSN
1388426	Portable Lacrosse Crease	2	319.87	\$639.74	BSN
1388427	Portable Lacrosse Goal Crease (Women's)	2	119.87	\$239.74	BSN
1344097	Portable Barrier Net	2	419.87	\$839.74	BSN
40k195	Runners for floor in front of 4 bleachers (60 foot carpet)	6	625.00	\$3,750.00	Grainger.com
1159639	Game Ball racks	2	109.99	\$219.98	BSN
1881750	Laundry Carts	13	280.00	\$3,640.00	Grainger.com
208L2	Replacement backboards	1	1,250.00	\$1,250.00	porterathletic.com
	Scoretable	2	5,000.00	\$10,000.00	waiting for Lord exact quote
	Scoretable possession arrow	3	500.00	\$1,500.00	waiting for Lord exact quote
Request to fund through Building initial Furniture, Fixture and Equipment budget line				<u>\$134,291.12</u>	
	less:	highjumps		-\$29,500.00	
New items to be addressed through a funded revolving replacement cycle				<u>\$104,791.12</u>	
One third of this estimated cost will be placed in operating funds to cycle out old items including existing inventory				<u>\$34,930.37</u>	







# Wellness Center Budget Part-time staffing and Building Hours

Draft

Building/Fitness Hours						
Weekday (M-Th)	# Friday	# Saturday	# Sunday	#	TOTAL	
WORCESTER STATE AY	16 6am-10pm	8 9am-5pm	8 10am-10pm	12	100	
WORCESTER STATE SUMMER	11 7am-6pm	10 CLOSED	0 CLOSED	0	54	
WORCESTER STATE BREAKS	5 7am-12pm	5 CLOSED	0 CLOSED	0	25	

Fitness Center Students	\$60,000	(100 hours per week X \$10/hour X2 staff X30 AY weeks)
	\$17,280	(54 hours per week X \$10/hour X 2 staff X16 Summer weeks)
	\$2,500	(25 hours per week X \$10/hour X 2 staff X5 Break weeks)
	\$79,780	

Reservationist/Athletic Office	\$9,900	(18.75 hours per week X \$12/hour X44 weeks)
pt non union restricted to 18.75		

SECURITY HOURS						
Weekday (M-Th)	# Friday	# Saturday	# Sunday	#	TOTAL	
WORCESTER STATE AY	8 6am-9am/5pm-10pm	8 9am-5pm	8 10am-10pm	12	60	
WORCESTER STATE SUMMER	2 7am-9am	0 CLOSED	0 CLOSED	0	8	
WORCESTER STATE BREAKS	2 7am-9am	0 CLOSED	0 CLOSED	0	8	

AM/PM Manager - Non Student	\$21,600	(60 hours per week X \$12/hour X30 AY weeks)
	\$1,536	(8 hours per week X \$12/hour X16 Summer weeks)
	\$1,536	(8 hours per week X \$12/hour X5 Break weeks)
	\$24,672	

AM/PM Kiosk Manager - Student	\$20,700	(60 hours per week X \$11.50/hour X30 AY weeks)
	\$1,472	(8 hours per week X \$11.50/hour X16 Summer weeks)
	\$460	(8 hours per week X \$11.50/hour X5 Break weeks)
	\$22,632	

Class Instructors (\$25/hour)	\$16,500	(22 hours per week X \$25/hour X30AY weeks) STAFF AND STUDENT	4 classes a day/2 Sat	# of classes	660	# people per cse	20	13,200	50	6,600	fee dc	5	33,000
	\$4,000	(10 hours per week X \$25/hour X16 Summer weeks* STAFF CLASSES	2 classes a day M-F	# of classes	160		20	3,200	50	1,600		5	8,000
	\$20,500												\$ 41,000

Class Instructors (\$30/Hour) *	\$19,800	(22 hours per week X \$30/hour X30AY weeks) STAFF AND STUDENT	4 classes a day/2 Sat	# of classes	330	# people per cse	20	6,600	50	3,300	fee dc	5	16,500
	\$0	(0 hours per week X \$30/hour X16 Summer weeks* STAFF CLASSES											
	\$9,900	start in spring 17											

LAUNDERER HOURS						
Weekday (M-Th)	# Friday	# Saturday	# Sunday	#	TOTAL	
WORCESTER STATE AY	3 3rd Shift	3 As needed	3 As Needed	3	21	
WORCESTER STATE SUMMER	0	0	0	0	0	
WORCESTER STATE BREAKS	3 3rd Shift	3 As needed	3 As Needed	3	21	

Lauderer - student	\$6,300	(21 hours per week X \$10/hour X30AY weeks)
	\$1,050	(21 hours per week X \$10/hour X5 Break weeks)
	\$7,350	

INTRAMURAL HOURS						
Weekday (M-Th)	# Friday	# Saturday	# Sunday	#	TOTAL	
WORCESTER STATE AY	4	0	0	4	20	
WORCESTER STATE SUMMER	0	0	0	0	0	
WORCESTER STATE BREAKS	0	0	0	0	0	

Student Intramural Staff	\$26,400	(20 hours per week X \$10/hour X30AY weeks) X 4 Staff per shift
	\$26,400	
TOTALS	\$191,234	

**Wellness Center Budget  
Full Time Staff Needs  
DRAFT**

<u>Position</u>	<u>Salary</u>	<u>Annual Salary + Fringe (29.18%)</u>
<b><u>Fitness/Rec. positions</u></b>		
Fitness Center Manager	65,000	83,967
Intramural Coordinator/N&W Manager	45,000	58,131
Assistant Fitness Center Manager/Baseball*	-	-
	<b>110,000</b>	<b>142,098</b>

\*Existing staff

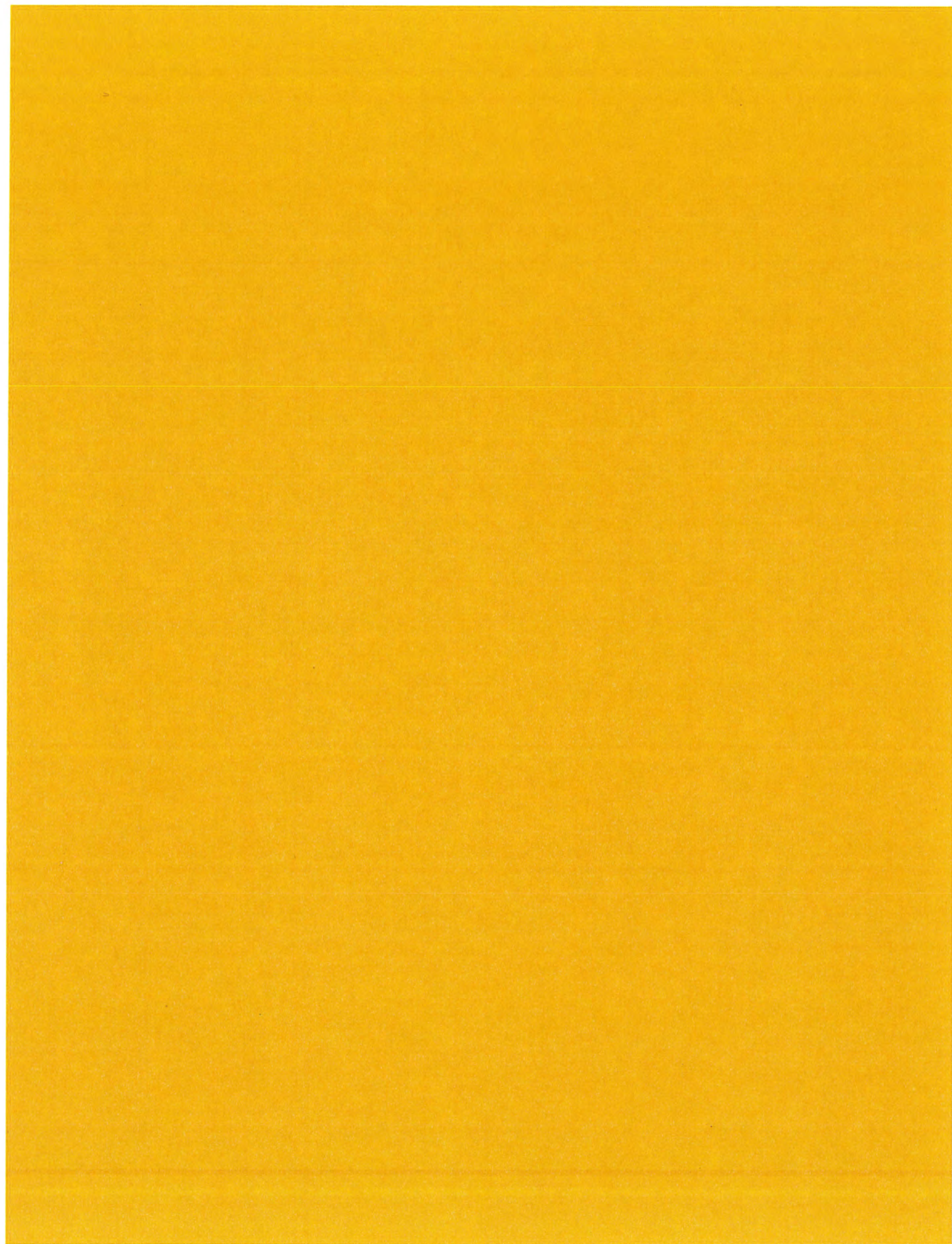
<b><u>Facilities Positions</u></b>		
Maintainer 1 - 1st shift	31,687	40,933
Maintainer 1 - 1st shift	31,687	40,933
Maintainer 1 - 2nd shift	31,687	40,933
Maintainer 1 - 3rd shift	31,687	40,933
Maintainer 11 - 3rd shift	42,082	54,362
HVAC Tech I	36,500	47,151
	<b>205,330</b>	<b>265,245</b>

New AAA lines	315,330
Fringe DDD	92,013
<b>Total</b>	<b>407,343</b>

**Wellness Center Budget**  
**Utilities**  
**DRAFT**

<u>vendor</u>	<u>Description</u>	<u>Amount</u>	<u>Exp. Type</u>	<u>Explanation</u>
National Grid/South Jersey	Electric Utility	218,000	GGG03	Increase due to HVAC systems and lighting and curtain wall
City of Worcester	Water/Sewer Utility	10,000	GGG08	More water based on additional Mechanical and Plumbing systems
Eversource/Direct Energy	Natural Gas Utility	67,000	GGG11	Additional HVAC equipment
		<u>295,000</u>		





**Wellness Center Budget**  
**Proposed Increase to General Fee**  
**DRAFT**

**Expanded Program costs**

Fitness Staff (salary plus fringe)	83,967
Intermural Staff (salary plus fringe)	58,131
Annual new program costs	161,609
parttime staffing for fitness and recreation	191,234

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494,941

Annual fee per FT undergrad (billed hrs)

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115.10

cr hr

4.80



**FY 2017 Budget Worksheet**  
**Analysis of Potential Resources and Uses**  
**DRAFT for DISCUSSION ONLY**

<b><u>Resources</u></b>		
Base budget funds released	528,500	
Amendment 1 funds released	461,580	
fringe savings from amendment 1	238,237	
Amendment 2 funds released	84,000	
	<u>1,312,317</u>	
Early retirement savings	1,011,378	
Temporary Athletic Program relocation funds	103,000	
General fee for expanded prog	506,451	
115.10		
per credit admin fee incr.	121,639	
4.80		
per credit admin fee incr.	45,326	
4.80		
	<u>3,100,112</u>	

<b><u>Uses</u></b>		
FY 17 Collective bargaining	757,962	170.56
Fringe related to CB	221,173	49.77
		<u>220.33</u>
	115.10	<u>335.43</u>
		4.3%

New Wellness Center 1,266,426

Capital Improvement Trust Fund contribution 750,000 ?

2,016,426

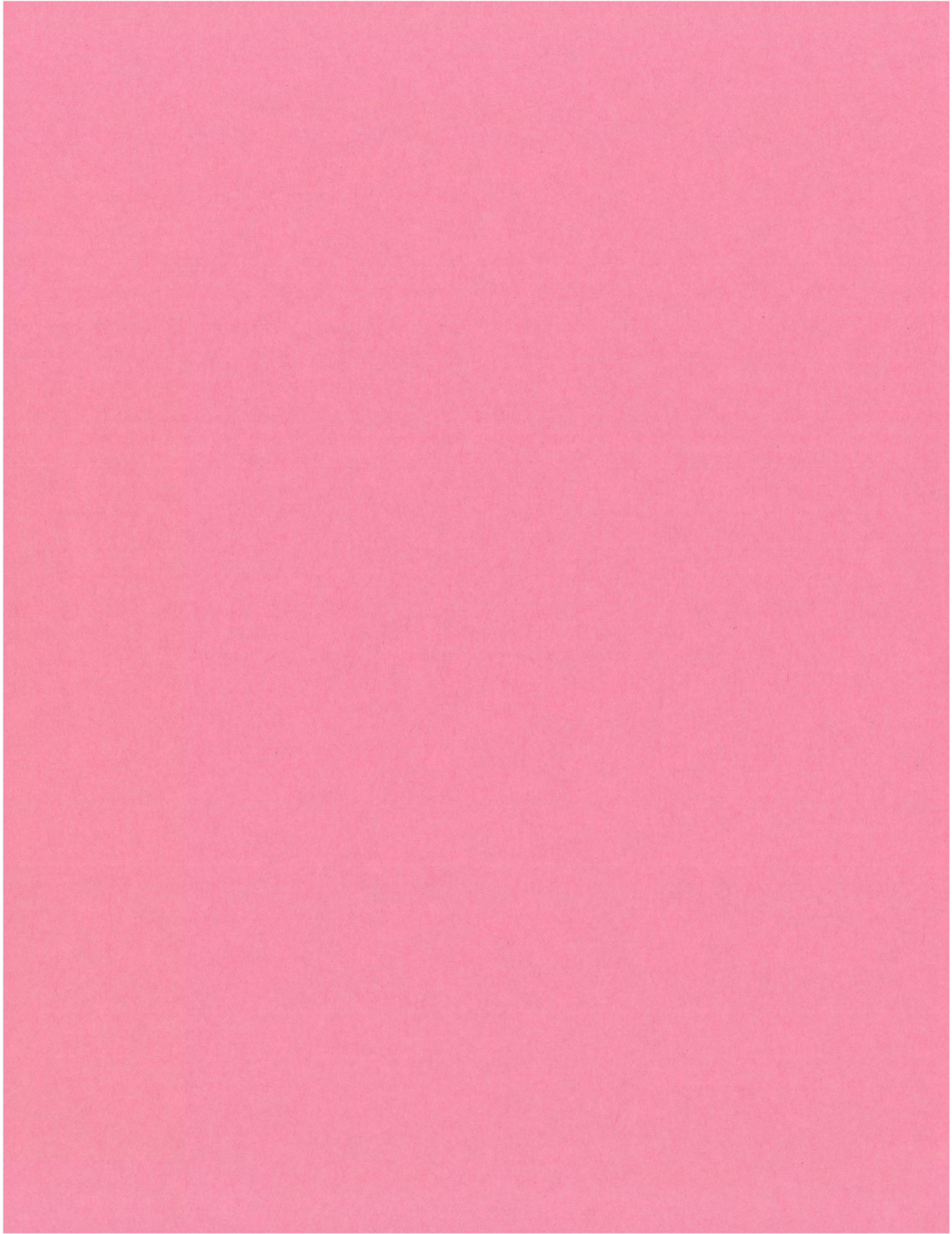
1,083,686 balance of available resources



Reserve Stabilization Worksheet  
DRAFT for DISCUSSION ONLYProjected Unrestricted Reserves June 30, 2020

FY15 credit hours	129,414
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## Wellness Center Operating Budget Narrative FY 2017

The Athletic department operating budget has been funded at a level scenario over many years with a slight increase in FY 2014 to provide resources related to the relocation of athletic program when the old gym building was demolished. The starting point for the operating budget for the Wellness Center during its first year of operations in FY17 is the reconciled Athletic Department budget. The operating baseline represents the funding of the Athletic program as it has historically existed. The categories described below represent additional costs related to the operation, maintenance and upkeep of a facility that is 40,000 square feet larger than the old facility with many more amenities and the cost associate with expanded programming.

### Annual Facilities costs

The old gym was built in the 1960's and did not contain the amenities or level of sophistication of its operating systems that will exist in the new 100,000 square foot building. Annual review and certification is required of the roof anchor system, suspended walking track, backflow preventers, grease traps and elevators that never existed in the old building. In addition expanded services are needed for service and preventative maintenance of the boilers, hot water tanks, lighting systems, exhaust ducts, life safety systems, HVAC, roofs and curtain wall window cleaning.

### Annual Athletic Cost

The opening of the new Wellness Center brings expanded programming for the student body and the larger WSU community. The two story fitness center will be outfitted with state of the art cardio and strength equipment. The cardio equipment will be leased allowing for a three year replacement cycle. Systems will be established to allow for card access to the fitness center and an online reservation process for signing up for recreational classes. Music is provided throughout the building and additional resources are being provided for programming supplies and promotional supplies in addition to the unveiling of a new WSU mascot. The opening of the new facility is also a time to evaluate past practice and assess what additional resources would ensure WSU's athletic and recreational programs reflect quality and value. The annual operating budget provides for replacement of equipment used for recreational, intramural and varsity sports as the useful lives of the items deteriorate. In addition, coach salaries will be evaluated and aligned with the MASCAC athletic conference averages and team food allowances will be increased to match standard per diem rates offered to university employees.

### Part-time Employees

The new Wellness Center offers expanded programming in the areas of fitness and recreation. The facility will have expanded hours in comparison to the old gym building. The two story layout of the fitness center requires the presence of two fitness center monitors when it is open, in addition there needs to be staff to manage the facility during operating hours and staff to



## Wellness Center Operating Budget Narrative FY 2017

support the information desk, support laundry services and support the new intramural programs. Fitness instructors will also be hired to offer recreation programs.

### Full-time Employees

In support of new recreational programming including fitness classes, training on the use of fitness equipment and intramural offerings a Fitness Center Manager will be hired as soon as possible and an Intramurals Coordinator/Night & Weekend manager will be hired for the start of the fall semester. The size and complexity of the building, which includes 3 sets of locker rooms, a competition gym, 2 recreational gyms, juice bar, concession stand and two story fitness center in addition to exercise and function rooms, necessitates the hiring of maintenance staff to cover 3 shifts daily in addition to an HVAC Technician specifically trained to support the systems of the new building.

### Utilities

The new Wellness Center is 100,000 square feet, approximately 40,000 square feet larger than the old gym building. There will be increased cost to heat and cool this additional space. Multiple sets of locker rooms to serve students, staff and the public will place additional demand on water and heating of that water. The curtain wall that surrounds the fitness center was designed to provide efficiencies with regard to heating and cooling however there will still be an increased cost to heat and cool this space in comparison to the old facility.

### Proposed Increase in the General Fee

The Wellness Center FY 2017 operating budget requires an investment of \$1,236,426 to expand programming and support the operations of a larger facility. The majority of the resources to fund this expansion will come from the re-allocation of existing resources. We are seeking an increase to the general fee for undergraduate students and the administrative fee for courses offered through DGCE to fund the costs associated with the fitness and recreational programming that will now be provided to the entire student body. The increased cost of \$4.80 a credit hour or \$115 a year will underwrite this expanded programming going forward.

**Wellness Center  
Draft Budget  
FY 2017**

		Athletics FY 2017 Operating baseline	Annual Facilities cost	Annual Athletic cost	Part-time employees	Full-time employees	Increased Utilities	New Funds Subtotal	Wellness Center Budget
730 AAA00	Athletic Dpt	Regular Employees (excludes existing staff)				315,330		315,330	315,330
730 BBB00	Athletic Dpt	Employee Related Expenses							27,000
730 CCC00	Athletic Dpt	Temp Part-time Employees		40,000	191,234			231,234	471,234
730 DDD00	Athletic Dpt	Pension/Insurance Expenses				92,013		92,013	92,013
730 EEE00	Athletic Dpt	Administrative Expenses	7,600	6,300				13,900	113,900
730 FFF00	Athletic Dpt	Facility Operation Supplies	39,115	34,000				73,115	273,187
730 GGG00	Athletic Dpt	Energy/Space Rental					295,000	295,000	295,000
730 HHH00	Athletic Dpt	Professional Services	2,025					2,025	12,525
730 IJJ00	Athletic Dpt	Operational Services							66,000
730 KKK00	Athletic Dpt	Equipment Purchase		45,309				45,309	53,309
730 LLL00	Athletic Dpt	Equipment Lease, Maint, Repair	1,900	90,600				92,500	287,500
730 NNN00	Athletic Dpt	Infrastructure and Bldg Improvements	66,000					66,000	71,000
730 UUU00	Athletic Dpt	Information Technology Expense		10,000				10,000	20,000
<b>730 Total</b>	<b>Athletic Dpt</b>	<b>Total</b>	<b>116,640</b>	<b>226,209</b>	<b>191,234</b>	<b>407,343</b>	<b>295,000</b>	<b>1,236,426</b>	<b>2,097,998</b>

## **Reserve Stabilization Analysis**

At the close of FY 2015 the unrestricted operating reserves were significantly depleted by the implementation of GASB 68 requiring the University to record the net pension liability for Commonwealth employees that work at Worcester State University. In September 2015 the University transferred \$9M of unrestricted reserves to the Division of Capital Asset Management in accordance with the Memorandum of Agreement identifying the sources of funds for construction of the Wellness Center.

As a result unrestricted reserves are expected to drop to \$15.9M by June 30, 2016, a decrease of \$18.1M since June 30, 2014. The reduction in unrestricted reserves impairs the University's ability to leverage funds for future campus improvements. The University's ratios have experienced unfavorable declines as a result of the decrease in unrestricted reserves.

The administration is considering several options to rebuild the unrestricted reserve balance over the short term.

### **Option A**

- Proposes an annual operating transfer to the Capital Improvement Trust Fund of \$750,000 beginning in FY 2017
- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by June 30, 2019
- The ability to leverage reserves occurs in FY 2020 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee remains flat throughout this scenario with no increases
- Unrestricted fund balance is projected to be \$26,186,738 by June 30, 2020 with a viability ratio of 1.18
- At June 30, 2020, unrestricted reserved are expected to exceed outstanding debt by \$4,052,187.

### **Option B**

- Proposes an annual operating transfer to the Capital Improvement Trust Fund of \$1,000,000 beginning in FY 2017
- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by December 31, 2018
- The ability to leverage reserves occurs in FY 2019 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee is increased by \$5 a credit hour or \$120 a year in FY 2018 and then remains flat at an annual rate of \$636 through June 30, 2020
- Unrestricted fund balance is projected to be \$29,128,068 by June 30, 2020 with a viability ratio of 1.32
- At June 30, 2020, unrestricted reserved are expected to exceed outstanding debt by \$6,993,517.

### **Option C**

- Proposes an annual operating transfer to the Capital Improvement Trust Fund of \$1,000,000 beginning in FY 2017



- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by December 31, 2018
- The ability to leverage reserves occurs in FY 2019 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee is increased by \$5 a credit hour or \$120 a year in FY 2018, and then again in FY 2019 by an additional \$5 a credit hour of \$120 a year. The annual rate then remains flat at \$756 a year through June 30, 2020
- Unrestricted fund balance is projected to be \$30,422,088 by June 30, 2020 with a viability ratio of 1.37
- At June 30, 2020, unrestricted reserved are expected to exceed outstanding debt by \$8,287,537.

### Deferred Maintenance and Capital Projects

The University provides funds for deferred maintenance and capital adaptation and renewal in its annual operating budget. That budget is approximately \$3.3M on an annual basis. The University does not receive funds on a regular basis from Commonwealth resources to maintain the campus. Annual resources provided in the operating budget no longer provide us the ability to maintain the facilities at the same rate that systems require replacement and we have started to fall behind. Furthermore, operating resources do not exist to fund replacement cycles for furnishings and renovation of academic spaces to remain competitive when vying for students. It is unlikely WSU will receive any funds from the Commonwealth to address space planning and academic programming needs or to renovate facilities such as the May Street Building to meet these needs. Below is just a sample of projects that will require funding outside of the operating budget in the coming years.

• Science and Technology Building air handlers/ventilation/cooling systems	\$4,000,000
• Student Center Envelope Refurbishment	\$1,500,000
• Upgrades to Electrical Loop feeds	\$1,550,000
• Athletic Field Refurbishment and upgrades	\$2,750,000
• Sullivan Auditorium ADA compliance	\$1,000,000
• Sullivan Building air handlers/ventilation/cooling systems	\$2,000,000
• Sullivan Building flooring replacement/painting	\$2,700,000
• LRC new boiler plant, duct distribution and sprinklers	\$3,500,000
• Furnishing replacements for areas not renovated in the past 8-10 years	\$2,500,000
• May Street Building fire protection and safety	\$1,800,000
• May Street Building accessibility, structural upgrades	\$3,200,000
• May Street Building life cycle replacements (roof/mechanical/electrical)	\$4,500,000
• May Street Building adaptation to address programming needs	TBD
• Adaptation of space for Academic programming	\$1,750,000

Stabilizing and building unrestricted reserves will provide the university with leverage to borrow funds through MSCBA or MassDevelopment (with legislative approval) to accomplish some of these projects.

# Reserve Stabilization Worksheet DRAFT for DISCUSSION ONLY

Option A

## Reserve Stabilization Worksheet - \$750,000 year operating transfer

June 30, 2015 BUDGET	Total Unrestricted Reserves	Capital Improvement Fee				Expenditures/ Transfers	Annual Net	General Fund Unrestricted	Capital Impr. Fund Unrestricted	Q/S Debt	# of times debt covered
		Parking Fee	Capital Improvement Fee	Dedicated revenue Combined							
June 30, 2015	24,104,278	-	-	-	-	-	-	11,471,195	12,633,083	25,432,886	0.95
FY 2016 results of operations	(8,145,408)	60,000	2,555,000	2,615,000	(768,663)	(768,663)	(8,945,408)	12,271,195	3,687,675	(615,667)	0.64
Debt service					(891,745)	(891,745)					
Transfer to Pkg Gar TF					(900,000)	(900,000)					
Transfer to operating for adaptation and renewal					(9,000,000)	(9,000,000)					
Transfer to DCAM for Wellness Center											
June 30, 2016	15,958,870	60,000	2,555,000	2,615,000	(11,560,408)	(11,560,408)	(8,945,408)	12,271,195	3,687,675	(615,667)	0.64
FY 2017 results of operations	2,523,142	60,000	2,555,000	2,615,000	(750,113)	(750,113)					
Debt service					(891,745)	(891,745)					
Transfer to Pkg Gar TF					750,000	750,000					
Transfer for future projects											
June 30, 2017	18,482,012	60,000	2,555,000	2,615,000	(891,838)	(891,838)	1,723,142	13,071,195	5,410,817	(635,667)	0.76
FY 2018 results of operations	2,543,842	60,000	2,555,000	2,615,000	(729,413)	(729,413)					
Debt service					(891,745)	(891,745)					
Transfer to Pkg Gar TF					750,000	750,000					
Transfer for future projects											
June 30, 2018	21,025,854	60,000	2,555,000	2,615,000	(871,158)	(871,158)	1,743,842	13,871,195	7,154,659	(660,667)	0.89
FY 2019 results of operations	2,566,717	60,000	2,555,000	2,615,000	(706,538)	(706,538)					
Debt service					(891,745)	(891,745)					
Transfer to Pkg Gar TF					750,000	750,000					
Transfer for future projects											
June 30, 2019	23,592,571	60,000	2,555,000	2,615,000	(848,283)	(848,283)	1,766,717	14,671,195	8,921,376	(680,667)	1.03
FY 2020 results of operations	2,594,167	60,000	2,555,000	2,615,000	(679,088)	(679,088)					
Debt service					(891,745)	(891,745)					
Transfer to Pkg Gar TF					750,000	750,000					
Transfer for future projects											
June 30, 2020	26,186,738	60,000	2,555,000	2,615,000	(820,833)	(820,833)	1,794,167	15,471,195	10,715,543	(705,667)	1.18

Projected Interest on Reserve June 30, 2020

Capital improvement Fee  
currently 21.5 per hr  
semester 258  
year 516

FY15 credit 129,414

Reserve Stabilization Worksheet - \$1,000,000 operating transfer and a \$5 credit hour fee increase

Option B

	Total Unrestricted Reserves
June 30, 2015 <i>BUDGET</i>	24,104,278
FY 2016 results of operations	
Debt service	(8,145,408)
Transfer to Pkg Gar TF	
Transfer to operating for adaptation and renewal	
Transfer to DCAM for Wellness Center	
June 30, 2016	15,958,870
FY 2017 results of operations	
Debt service	2,773,142
Transfer to Pkg Gar TF	
Transfer for future projects	
June 30, 2017	18,732,012
FY 2018 results of operations	
Debt service	3,440,912
Transfer to Pkg Gar TF	
Transfer for future projects	
\$5 or hr fee increase	
June 30, 2018	22,172,924
FY 2019 results of operations	
Debt service	3,463,907
Transfer to Pkg Gar TF	
Transfer for future projects	
\$5 or hr fee increase	
June 30, 2019	25,636,831
FY 2020 results of operations	
Debt service	3,491,237
Transfer to Pkg Gar TF	
Transfer for future projects	
\$5 or hr fee increase	
June 30, 2020	29,128,068

	Parking Fee	Capital Improvement Fee	Dedicated revenue Combined	Expenditures/ Transfers	Annual Net	General Fund Unrestricted
	-	-	-	-	-	11,471,195
	60,000	2,555,000	2,615,000	(768,663) (891,745) (900,000) (9,000,000)	(8,945,408) year 1	12,271,195
	60,000	2,555,000	2,615,000	(750,113) (891,745) 1,000,000	1,973,142 year 2	13,071,195
	60,000	2,555,000	2,615,000	(641,838)	2,640,912 year 3	13,871,195
	60,000	2,555,000	2,615,000	(729,413) (891,745) 1,000,000	2,663,907 year 4	14,671,195
	60,000	2,555,000	2,615,000	647,070	2,691,237 year 4	15,471,195

	Capital Impr. Fund Unrestricted	O/S Debt	# of times debt covered
	12,613,083	25,432,886	0.95
princ pvt	3,687,675	(615,667)	0.64
princ pvt	5,660,817	(635,667)	0.77
princ pvt	8,301,729	(660,667)	0.94
princ pvt	10,965,616	(680,667)	1.12
princ pvt	13,656,873	(705,667)	1.32

Projected Unrestricted Reserves June 30, 2020: 29,128,068

Capital improvement Fee:  
currently 21.5 or hr  
semester 258  
year 516

FY15 credit hours 129,414  
FY16 credit hours as of 2/29 118,838

Capital improvement Fee:  
currently 26.5  
semester 318  
year 636  
annual increase 120



**Reserve Stabilization Worksheet**  
**DRAFT for DISCUSSION ONLY**  
**Reserve Stabilization Worksheet - \$1,000,000 operating transfer and two consecutive \$5 per credit hour fee increases**

Option C

	Total Unrestricted Reserves	Parking Fee	Capital Improvement Fee	Dedicated revenue Combined	Expenditures/ Transfers	Annual Net	General Fund Unrestricted	Capital Impr. Fund Unrestricted	QOS Debt	# of times debt covered
<b>BUDGET</b>	24,104,278	-	-	-	-	-	11,471,195	12,633,083	25,432,886	0.95
FY 2016 results of operations	(8,145,408)	60,000	2,555,000	2,615,000	(768,663) (891,745) (900,000) (9,000,000)	(8,945,408) year 1	12,271,195	3,687,675	(615,667) 24,817,219	0.64
Debt service										
Transfer to Pig Car TF										
Transfer to operating for adaptation and renewal										
Transfer to DCAM for Wellness Center										
FY 2017 results of operations	2,773,142	60,000	2,555,000	2,615,000	(750,113) (891,745) 1,000,000	1,973,142 year 2	13,071,195	5,660,817	(635,667) 24,181,532	0.77
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
FY 2018 results of operations	3,440,912	60,000	2,555,000	2,615,000	(729,413) (891,745) 1,000,000	2,640,912 year 3	13,871,195	8,301,729	(660,667) 23,520,885	0.94
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
\$5 or hr fee increase										
FY 2019 results of operations	4,110,857	60,000	2,555,000	2,615,000	(706,538) (891,745) 1,000,000	3,310,857 year 4	14,671,195	11,612,586	(680,667) 22,840,218	1.15
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
\$5 or hr fee increase										
2nd consecutive -										
FY 2020 results of operations	26,283,781	60,000	2,555,000	3,909,140	(598,283) (679,088) (891,745) 1,000,000	3,338,307 year 4	15,471,195	14,950,893	(705,667) 22,134,551	1.37
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
FY17/18 fee increase										
FY 2020 results of operations	4,138,307	60,000	2,555,000	2,615,000	(679,088) (891,745) 1,000,000					
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
FY17/18 fee increase										
FY 2020 results of operations	30,422,088	60,000	2,555,000	3,909,140	(570,833)					
Debt service										
Transfer to Pig Car TF										
Transfer to future projects										
Transfer for future projects										
FY17/18 fee increase										

Projected Unrestricted Reserves June 30, 2020: 50,422,088

Capital improvement Fee  
 currently 21.5 or hr  
 semester 258  
 year 516

FY15 credit hours 129,414  
 FY16 credit hours as of 2/29 118,838

Capital improvement Fee  
 currently 26.5  
 semester 318  
 year 636

2/26/2016 increase over prior year 120

120

647,070

647,070

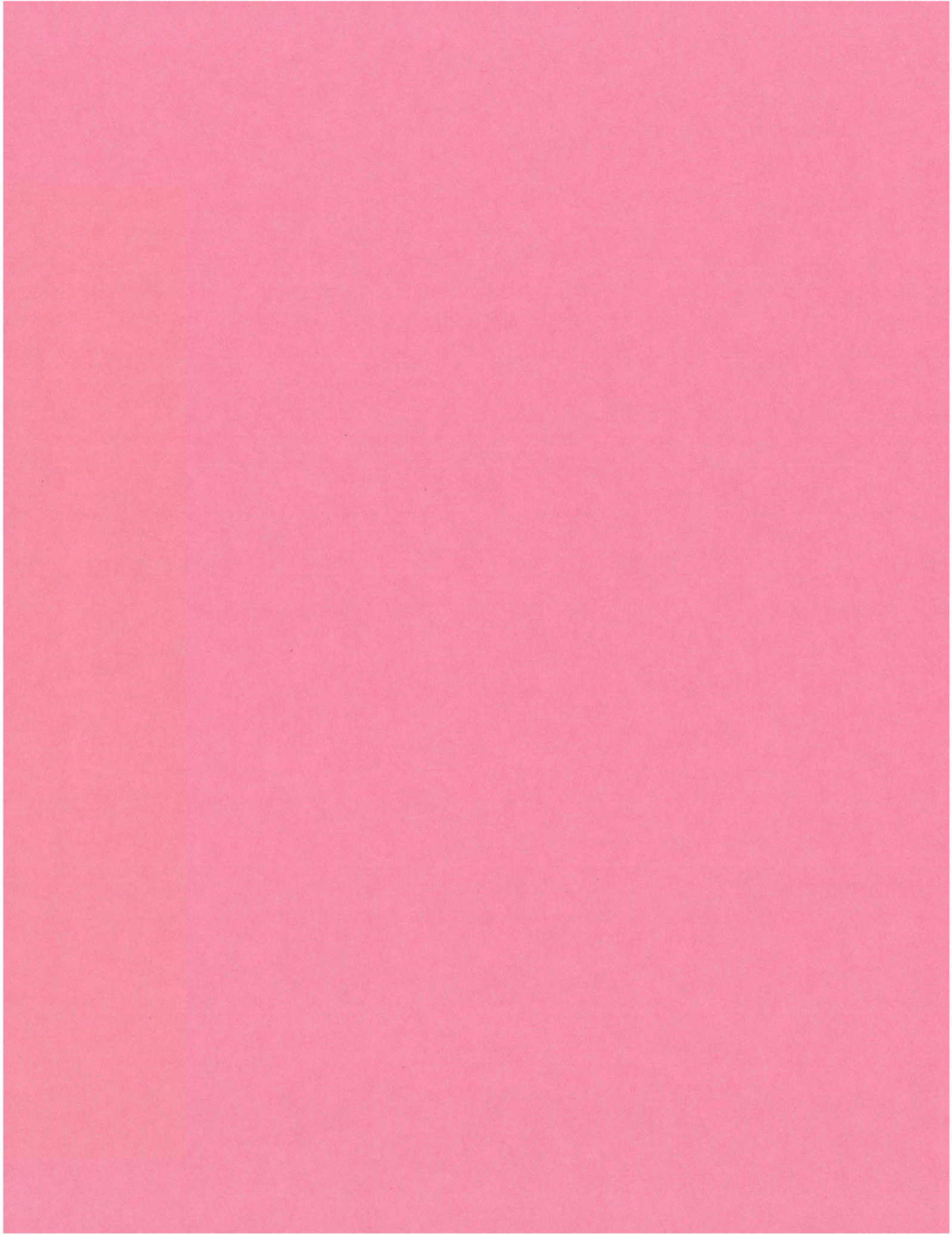
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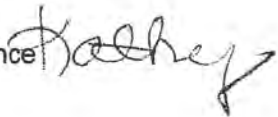
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516





## Memorandum

**DATE:** March 28, 2016  
**TO:** Barry M. Maloney, President  
**FROM:** Kathleen Eichelroth, Vice President for Administration and Finance   
**RE: FISCAL YEAR 2017 UNDERGRADUATE FEES**

The FY 2017 budget process began in October with a focus on the opening of the new Wellness Center. The reconciliation of the previous Athletic Department budget and building of the new Wellness Center budget continued through the fall and winter. An initial presentation was made to the Finance and Facilities sub-committee and the Board in January, with an additional update in early March. During these meetings there was also discussion concerning FY 2017 collective bargaining costs. Those discussions identified the cost associated with the contractual increases and, as in the past, the general fee increase that would be necessary should the University not receive resources from the Commonwealth to fund the increases. A presentation was also made regarding the stabilization of the University's unrestricted reserves and several scenarios were proposed to build the reserves in the Capital Improvement Trust Fund as a means of leveraging funds for future campus improvements.

Since the March 8<sup>th</sup> board meeting the budget process has progressed. Budget managers have prepared their funding request for FY 2017 and have forwarded them through their division. A prioritized list of requests has been prepared by each division. The requests will be discussed in the President's Direct report meeting and further ranked and prioritized at the campus level. The requests are being evaluated with regard to need as a foundational level request to support core University operations or as a request specifically linked to the overarching goals and strategies of the strategic plan. A Cabinet level discussion of the results of the campus level prioritization will also take place in early April.

During the month of April a reconciliation of operating expenses and revenues will be finalized. The reconciliation is relied upon to identify resources available to fund new initiatives in the coming year once all non-discretionary costs have been identified. Available net resources will then be offset from the list of campus wide prioritized requests and a determination will be made of the level of resources that may be committed to the stabilization of unrestricted reserves. The results of this process will be presented to the Finance and Facilities sub-committee prior to the June board meeting.



As in the past, it is important to receive Board approval for the undergraduate fee increases for the coming year as soon as possible. Though the budget process is not complete, consideration and approval of changes in the fee structure for undergraduate students in early April provides incoming students with official tuition and fee information for the coming year and allows the Financial Aid Office to prepare financial aid awards based on actual costs of attendance for the coming year.

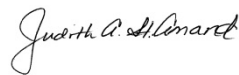
- At this time we seek Board approval of a \$345.25 per year general fee increase for FY 2017.
- The portion of the increase that relates to new programming in the Wellness Center is \$115.25 per year.
- As in the past we seek approval of a general fee increase to fund collective bargaining costs should the Commonwealth not fund this obligation. The fee increase associated with collective bargaining costs is \$230 a year. The fee will not be assessed to students should the Commonwealth provide funds to cover this obligation at the conclusion of the FY 2017 budget process, but prior to the University's distribution of fall semester invoices during the second week of July.
- The General Fee is currently set at \$7,189 per year, with cumulative mandatory fees set at \$7,887 and in-state tuition of \$970 per year.
- An approved increase in the General Fee will set that rate at \$7,534.25 per year, with a total annual cost of tuition and fees of \$9,202.25 for the 2016/2017 academic year.

June 7<sup>th</sup> Board of Trustees Meeting

## NOTICE

THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL MEET AT 6:30 P.M. ON TUESDAY, JUNE 7, 2016 IN THE PRESIDENT'S CONFERENCE ROOM, 2<sup>ND</sup> FLOOR OF THE HELEN G. SHAUGNESSY ADMINISTRATION BUILDING.

1. NOTICE & AGENDA\*
2. VOTES\*
3. APPROVAL OF MINUTES – April 12, 2016\*
4. PRESENTATION – Counseling Center  
*TEAM UP FOR HEALTHY MINDS\**
5. CHAIR OF THE BOARD UPDATE
  - Thank You to Outgoing Student Trustee
  - Welcome New Trustee
  - Presidential Evaluation Material – Charge to HR Committee\*
6. NOMINATING COMMITTEE REPORT
7. APPROVAL OF SUB-COMMITTEE MEETINGS AND MARCH 14, 2017 BOT MEETING\*
8. PRESIDENT'S REPORT
  - A) Trustees and Foundation Authorities – Information Only\*
  - B) Strategic Plan Update\*
9. ACADEMIC AFFAIRS/STUDENT DEVELOPMENT COMMITTEE REPORT
10. FINANCE & FACILITIES COMMITTEE REPORT
11. OTHER BUSINESS
12. ADJOURNMENT



Judith A. St. Amand  
May 31, 2016

\*Attachment





**WSU BOARD OF TRUSTEES  
JUNE 7, 2016**

**VOTES**

Upon a motion made and seconded, it was

**VOTED:**       **to approve the minutes of April 12, 2016 as submitted.**

---

Upon a motion made and seconded, it was

**VOTED:**       **accept the report of the Nominating Committee as presented and  
approve the slate of officers for 2016-2017 as presented.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to approve the Sub-Committee meeting dates and the March 14, 2017 full  
Board meeting date as presented.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to accept the recommendation of the Academic Affairs/Student Development  
Committee and approve a Master's in Public Management Program and a  
Master's in Public Administration and Policy.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to accept the recommendation of the Finance/Facilities Committee and  
approve the FY 2017 Comprehensive University Budget as submitted.**

---

Upon a motion made and seconded, it was

**VOTED:**       **to adjourn the meeting at**

**WORCESTER STATE UNIVERSITY  
BOARD OF TRUSTEES**

**April 12, 2016**

**PRESENT:** Trustee Ronald Valerio, Chair  
Trustee George Albro, Vice Chair  
Trustee Craig Blais, Vice Chair  
Trustee Kurt Correia  
Trustee Maryanne Hammond  
Trustee Karen LaFond  
Trustee Stephen Madaus  
Trustee Dina Nichols  
Trustee Shirley Steele  
Trustee Marina Taylor  
President Barry Maloney, President  
Ms. Judith St. Amand, Assistant Secretary  
Ms. Nikki Kapurch, Special Assistant to the President

**ABSENT:** Trustee Aleta Fazzone

The provisions of General Laws, Chapter 30A having been complied with, and a quorum present, a meeting of the Worcester State University Board of Trustees was held on Tuesday, April 12, 2016, in the Multi-Purpose Room in Sheehan Hall. Trustee Valerio called the meeting to order at 6:30 p.m.

**APPROVAL OF MINUTES – March 8, 2016**

Upon a motion By Trustee Albro and seconded by Trustee Blais, it was unanimously

**VOTED:** to approve the minutes of March 8, 2016 as submitted.

**WELCOME – Commissioner Santiago**

- Chairman Valerio introduced Commissioner Santiago and thanked him for spending the day in Worcester and a good part of his time at WSU.
- Commissioner greeted everyone and acknowledged Mike Mizzoni, Director of Trustee Relations for the BHE, and thanked everyone for their gracious hospitality.
- Commissioner noted that he felt privileged to work with President Maloney, especially in his role as Chair of the Council of Presidents. He is a very strong representative of WSU and the system as a whole.
- Region is blessed with great leadership at the various educational institutions.
- Three different segments in the system and no two are alike. All have different strengths and focus.



- Budget is always an issue and trustees inquired if there might be additional funds available to those institutions who rated high on the Vision Project again this year.
- Unfortunately, Commissioner does not feel the pool of funds will be anything like last year.
- Collective bargaining funding is still a major issue for the university.
- Trustees are not involved in negotiating contracts, but are expected to pick up expense for funding the contracts when the state does not provide adequate funding.
- Will be looking at a fee increase this evening. Affordability is a major issue for students and trustees do not take a fee increase lightly.
- Students are changing and more resources are needed to insure success of all students.
- Commissioner was very impressed with the work being done through the Latino Institute and encouraged the expansion to Springfield if possible.
- Commissioner thanked members of the campus community for their foresight in developing the \$30K program with Quinsigamond Community College. This model will be used statewide to hopefully develop additional programs.
- Chairman Valerio thanked the Commissioner once again for spending the day visiting our city and our campus. Most meaningful to our students.

#### **CHAIR OF THE BOARD UPDATE**

- Chairman Valerio appointed Trustee Stephen Madaus to serve on the Academic Affairs/Student Development Committee.
- Trustee Valerio reminded the Board of the following important upcoming events:
  - April 28                      Academic Achievement Awards
  - May 5                         Distinguished Alumni Awards
  - May 12                      Nurses Pinning Ceremony
  - May 13                      Graduate Commencement
  - May 14                      Undergraduate Commencement

#### **2016 – 2017 MEETING DATES**

Chairman Valerio explained to the Board that normally meeting dates for the next year are set at the annual meeting in June. However, with the official opening of the Wellness Center and our Tri-Board Dinner, it was important to get dates set to begin planning for the two events. Also, a list of sub-committee dates will be brought forward to the full Board in June to provide timely notice to trustees for their planning puposes.

Upon a motion by Trustee Blais and seconded by Trustee Albro, it was unanimously

**VOTED:            to approve the meeting dates for 2016 – 2017 as submitted.**

### **PRESIDENT'S REPORT**

President Maloney provided a written update and also highlighted the following:

- Thank you to members of the Enrollment Management Team and the campus community on the very successful “Congratulations Day” held on Saturday, April 9<sup>th</sup>.
- About 500 accepted students and families attended and our staff and faculty worked with these students to encourage their joining WSU in the fall.
- National deposit deadline is May 1<sup>st</sup>.
- President Maloney shared with the Board the **Five Points of Action**, a plan geared toward realizing the campus’ core value of becoming an inclusive community.
- Recently, Issac Tesfay was promoted to the position of Director of Inclusion, Affirmative Action and Equal Opportunity. He previously served as a Staff Associate for the Upward Bound Program in the Office of Multicultural Affairs.

### **APPROVAL OF AN HONORARY DOCTORATE – Ret. Lt. Colonel James Sheehan**

- President Maloney recommended an honorary doctorate degree be awarded to Ret. Lt. Colonel James Sheehan during our Academic Achievement Awards ceremony on April 28, 2016.
- He was approved by the *Speaker and Awards Committee* in February of 2015 for inclusion in the pool of nominees for future speakers/recipients of degrees and awards.
- President Maloney informed the Board that he just learned that the Lt. Colonel will be having surgery that will prevent him flying to Worcester for the April 28<sup>th</sup> event. However, following discussion with VP McNamara the degree will be awarded during the ceremony which will be recorded and will be personally presented by President Maloney and VP McNamara to Ret. Lt. Colonel Sheehan during one of their visits to Florida.

Upon a motion by Trustee Correia and seconded by Trustee Steele, it was unanimously

**VOTED:**        **to approve the awarding of an honorary degree at the Academic Achievement Awards Ceremony scheduled for April 28 , 2016 as follows:**

**Honorary Doctor of Humane Letters, *Honoris Causa***  
**Lt. Colonel James F. Sheehan '55, USMC Retired**

### **ACADEMIC AFFAIRS/STUDENT DEVELOPMENT COMMITTEE REPORT**

Trustee Shirley Steele, Chair of the Committee, provided the following summary of the actions of the Committee:

- Meeting was held today at 4:30 p.m. to act upon awarding of tenure, promotion, and tenure and promotion.
- Also on the agenda were two degree programs for a Master’s in Public Administration and Policy (MPAP) and a Master’s In Public Management (MPM).

- Dr. Lois Wims, Provost and Vice President for Academic Affairs, provided a very informative and detailed PowerPoint presentation regarding the process for the awarding of tenure and promotion
- Also included for the members of the Committee was a brief summary of each candidate's educational background and scholarly activities.

Upon completion of Trustee Steele's report, a motion was made by Trustee Blais, seconded by Trustee Albro, and it was unanimously

**VOTED:** to recommend approval of the following promotions:

<b><u>Promotion to Associate Professor</u></b>	<b><u>Effective September 1, 2016</u></b>
Patricia Donovan	Occupational Therapy
<b><u>Promotion to Professor</u></b>	<b><u>Effective September 1, 2016</u></b>
Daron Barnard	Biology
Keith Darrow	Communication Sciences & Disorders
Peter Holloran	History & Political Sciences
Matthew Johnsen	Sociology

Upon a motion by Trustee Albro and seconded by Trustee Hammond, it was unanimously

**VOTED:** to approve the following promotions with tenure:

<b><u>Promotion to Associate Professor with Tenure</u></b>	<b><u>Effective September 1, 2016</u></b>
Tanya Mears	History & Political Sciences
Sam O'Connell	Visual & Performing Arts
Christina Bebas	Education
Hye-Sun Kim	Criminal Justice

Upon a motion by Trustee Albro and seconded by Trustee Nichols, it was unanimously

**VOTED:** to approval the awarding of tenure for the following faculty members:

<b><u>Tenure</u></b>	<b><u>Effective September 1, 2016</u></b>
Sara Young	Education
Denise Foley	Education
Charles Fox	Psychology
Jennifer Hood-de-Grenier	Biology
William Shakalis	Library



### **MASTER'S IN PUBLIC MANAGEMENT (MPM) AND MASTER'S IN PUBLIC ADMINISTRATION AND POLICY (MPAP)**

Trustee Steele reported that following discussion with Provost Wims, who had additional conversations with the members of the department, it was agreed that more information is needed. Therefore, upon a motion by Trustee Albro and seconded by Trustee Hammond, it was unanimously

**VOTED:**        **to table action on the two programs, Master's In Public Management (MPM) and Master's In Public Administration and Policy (MPAP) and ask that they be resubmitted to Committee for review and recommendation to the full Board in June.**

### **FINANCE AND FACILITIES COMMITTEE REPORT**

Trustee Craig Blais, Chair of the Committee, reported a meeting was held on April 4, 2016 to discuss an undergraduate fee increase.

- Budget process is in full swing and focuses on the opening of the new Wellness Center.
- Requests are being evaluated with regard to need as a foundational request to support core University operations or as a request linked to the overarching goals and strategies of the strategic plan.
- A reconciliation of operating expenses and revenues will be finalized during the month of April.
- Available net resources will be offset from the list of campus wide prioritized requests and a determination will be made of the level of resources that may be committed to the stabilization of unrestricted reserves and will be presented to the Finance and Facilities Committee prior to the June Board meeting.
- Since the budget process is not complete, consideration and approval of changes in the fee structure for undergraduate students in early April provides incoming students with official tuition and fee information for the coming year and allows the Financial Aid Office to prepare financial aid awards based on actual costs of attendance for the coming year.
- Seeking Board approval of a \$345.25 per year general fee increase for FY 2017.
- The portion of the increase that relates to new programming in the Wellness Center is \$115.25.
- As in the past, seeking approval of a general fee increase to fund collective bargaining costs should the Commonwealth not fund this obligation.
- The fee increase associated with collective bargaining costs is \$230.00 a year.
- The fee will not be assessed to students should the Commonwealth provide funds to cover this obligation at the conclusion of the FY 2017 budget process, but prior to the University's distribution of fall semester invoices during the second week of July.
- An approved increase in the General Fee will set that rate at \$7,534.25 per year, with a total annual cost of tuition and fees of \$9,202.24 for the 2016/2017 academic year.

Upon a motion by Trustee Blais and seconded by Trustee Albro, it was unanimously

**VOTED:**        **to approve a \$345.25 per year general fee increase for FY 2017 based on the following two components:**

- 1) A \$115.25 fee increase for all students to cover programming in Wellness Center, and**
- 2) A \$230.00 undergraduate fee to cover collective bargaining obligation.**

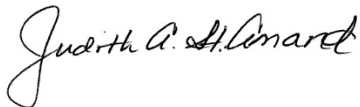
**OTHER BUSINESS**

- Trustee Correia, elected student representative, thanked Chairman Blais on behalf of all students for his sensitivity and openness in dealing with delicate matters such as fee increases. Very much appreciated by the student body.
- Chairman Valerio publicly thanked Kurt Correia, Student Trustee, for his advice and guidance during this past year. Kurt will graduate next month, but is invited to return in June to introduce the soon to be elected new student trustee.
- Next meeting is June 7, 2016.
- Send E-News Alumni to Ipads

Upon a motion by Trustee Albro and seconded by Trustee Taylor, it was unanimously

**VOTED:**        **to adjourn the meeting at 8:00 p.m.**

Respectfully submitted,



Judith A. St. Amand  
Assistant Secretary

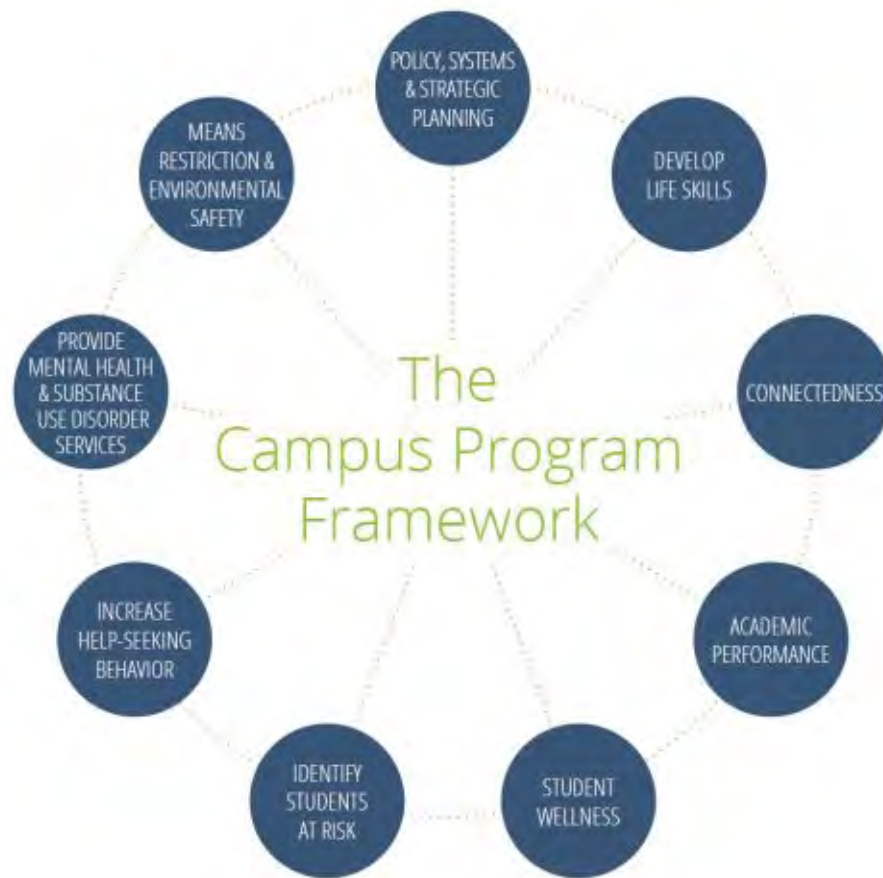
# TEAM UP FOR HEALTHY MINDS

MENTAL HEALTH AWARENESS AND  
SUICIDE PREVENTION



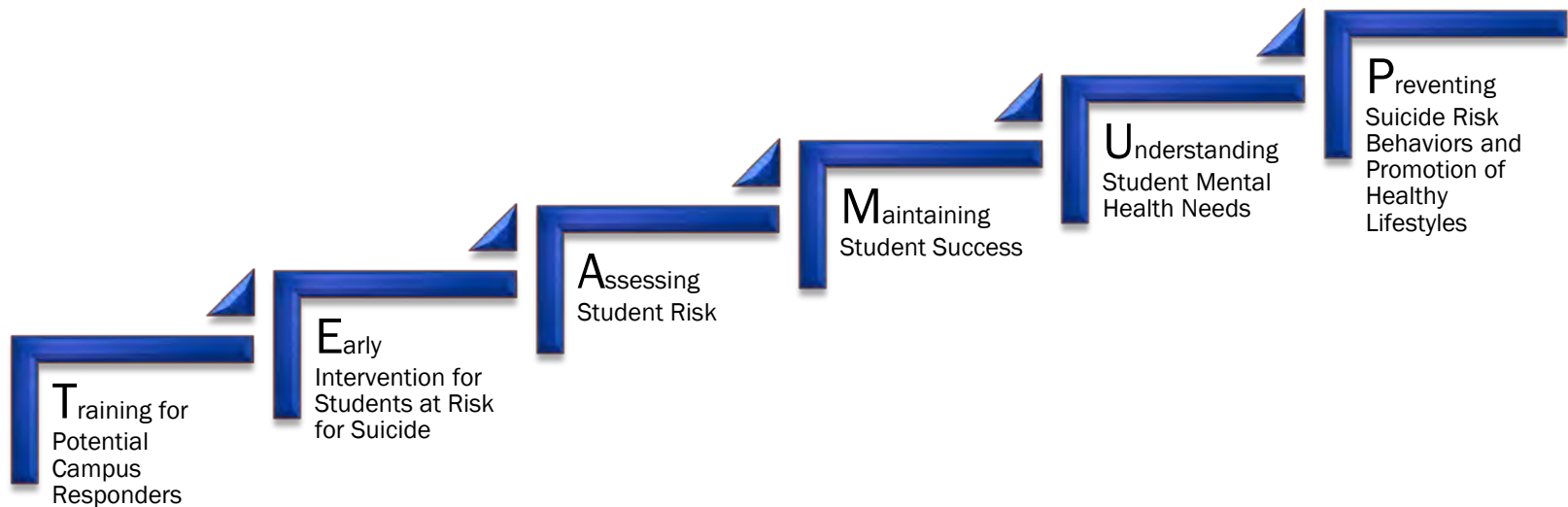
# TEAM UP FOR HEALTHY MINDS

- WSU Counseling Center Initiatives
  - Lay groundwork for JED Campus certification





# TEAM UP FOR HEALTHY MINDS



# TEAM UP FOR HEALTHY MINDS

- Trainning for potential Campus Responders
  - RA's and RD's
    - Mental health response
    - Sexual Violence Response and Title IX Education
    - Substance use/abuse response
  - University Police Department
  - Student Leaders
  - Faculty/Staff
  - Title IX Delegates

# TEAM UP FOR HEALTHY MINDS

- Early Intervention for Students

- Awareness

- Orientation
- Parent Orientation
  - 'Helping From Home'
  - 'Parent Resource Guide'

- SAS Collaboration

- Screenings

- Alcohol and Drugs
- Depression
- Eating Disorders

- AlcoholEdu

- online for 1<sup>st</sup> year students

- Haven

- Online Sexual Violence for 1<sup>st</sup> year students

- Counseling Center Intakes

- Community Consultations

- Student Conduct

- sanctions

- Medical Evaluations

- On-campus Health Services
- Off-campus provider

# TEAM UP FOR HEALTHY MINDS

- Assessing Student Risk

- Counseling Center Staff

- Initial Intake
    - Crisis Intervention
    - Community Consultations

- University Police Department

- Mental Health responders 24/7
    - Crisis Intervention
    - Transport Protocols
      - Mental Health
        - Re-entry
      - Substance Use/Abuse
      - NARCAN Opiate Overdose

- Emergency Mental health

- UMASS MOU

- Emergency Psychological evaluations
      - Hospitalization if necessary
      - Consultation/discharge plan

- Counseling Center Staff



# TEAM UP FOR HEALTHY MINDS

- **M**aintaining Student Success
  - Collaboration with Academic Affairs
  - Student Support Meetings
    - Counseling Center Staff
    - SAS – Student Accessibility Services
    - ASC – Academic Success Center
  - Medical Leave of Absence Protocols
  - Reentry Process
    - Psychological evaluation
    - Hospitalizations

# TEAM UP FOR HEALTHY MINDS

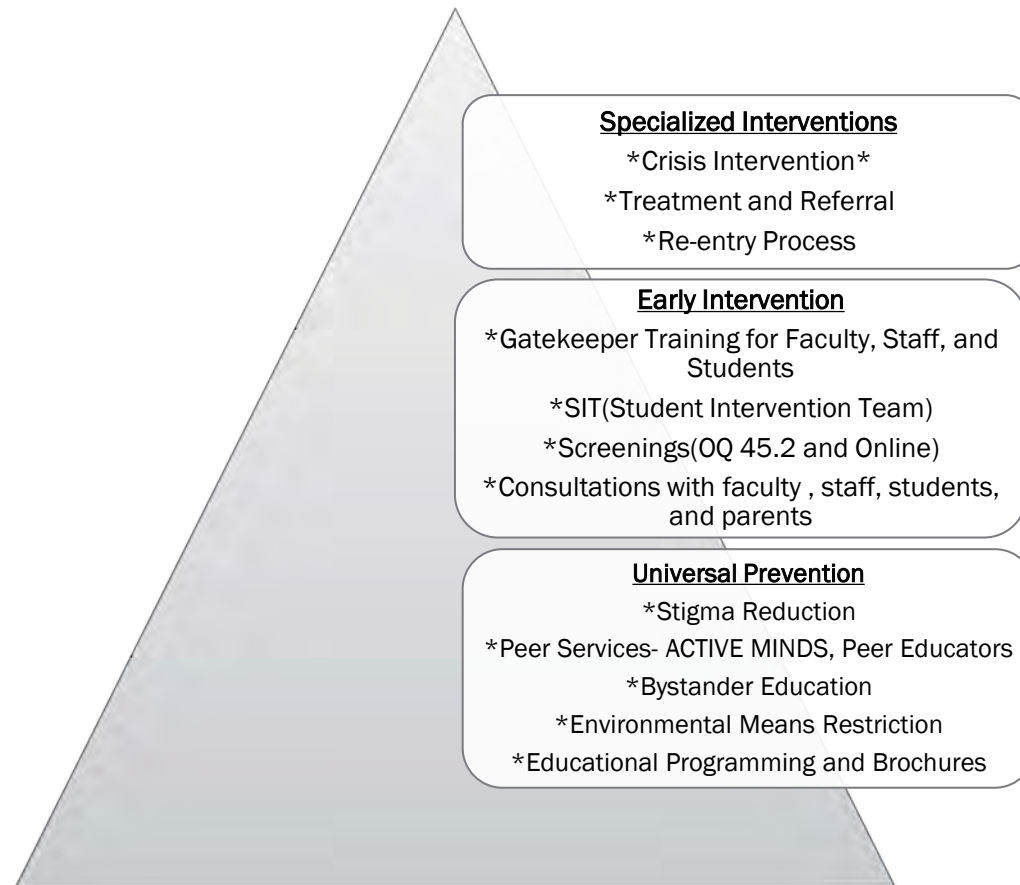
- Understanding Student Mental Health Needs
  - Faculty Training
  - Stigma reduction Campaigns and Programming
  - WSU Peer Services
    - Active Minds (National Student Organization)
    - Peer Educators (Health and Wellness)
    - Student Support Network
  - Bystander Education
    - Alcohol/Drugs
    - Suicide/Depression
    - Sexual Violence
  - Educational Programming
    - SHINE Grant Funding

# TEAM UP FOR HEALTHY MINDS

- Promotion of Healthy Lifestyles
  - Collaboration/Programming with Health and Wellness Office
    - Life Skills for Student Athletes
    - BASICS
  - Collaboration with Health Services
  - University wide commitment to wellness
    - Wellness Center and Future Programming
    - CHIP Grant
    - The Center for Interdisciplinary Health Studies and Practice

# TEAM UP FOR HEALTHY MINDS

- Spectrum of Intervention Response: Suicide Prevention





# TEAM UP FOR HEALTHY MINDS

- Works in progress for 2016-2017
  - Suicide Prevention
    - Kevin Hines (speaker)
  - Increase drug prevention and opiate Identification Training
    - For Resident Advisors
  - Increase Bystander Education – “We Speak Up”
    - Sexual Violence/Title IX
    - Alcohol and Drug
  - Opiate Addiction
    - Chris Herrin (speaker)
    - Educational programming partnership with Spectrum Health Systems



# 2016 PRESIDENTIAL EVALUATION MATERIALS

Chairman will charge the Human Resources Committee with conducting the evaluation of President Maloney and to provide a summary of the evaluation at the September Board meeting.

I write to present my goals for approval for the period beginning November 18, 2014 and ending June 30, 2016. The goals are in alignment with both the recently approved Worcester State University Strategic Plan and the Department of Higher Education's Vision Report. Moreover, the central areas of focus have been developed as part of feedback gathered at an administrative retreat held June 2014.

In addition to providing metrics to support each of the five new strategic goals, there are overarching objectives that must also be addressed and kept in sync with the newly created plan. These objectives include increasing revenues, improving customer service, continuing to improve retention and graduation rates towards established goals, enhancing and expanding current programs and pilot new ones to advance the model of transformative change in students and continuing to improve campus lines of communication and overall climate.

### Academic Program and Excellence

#### 1. Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation

##### METRICS:

- Key Staffing needs
  - Successfully hire a new Provost for the institution and continue to define/resolve structure of academic affairs division
  - Successfully hire new staff into Human Resources and Equal Opportunity/Affirmative Action
- Student Learning
  - Increase 6---year graduation rate, moving toward Vision benchmark of 56% by 2016
  - Increase pass rates on licensure exams (Nursing, OT, Speech, MTEL& CPA)
  - Improve acceptance rate to graduate programs
  - Create a structure to encourage/facilitate team---taught courses, cross---listed courses, and interdisciplinary work.
  - Change class scheduling to better accommodate working and commuting students; Embrace expanded---hour/more---flexible teaching schedule
  - Revisit review the 2011 changes to the LASC
  - Improve two-year developmental math success rate
  - Establish criteria to evaluate new academic program proposals
- Workforce alignment
  - Degrees conferred overall
  - Degrees conferred STEM
  - Degrees conferred health care
  - Establish better articulation agreements with community colleges
- Civic engagement
  - Increase participation in community service and/or civic engagement activities and integrate such activates into the campus academic culture
  - Expand student research
  - Launch two online graduate programs by September 2015
  - Improve internal communication; convene cross---divisional committee to address communications issues



## Community and Campus Life

4. **Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued**

### **METRICS:**

- College participation
  - Establish living---learning communities in the residence halls
  - Work with students to inject energy into student life (organically student---led); offer more activities for students to do on the weekends/after hours
- Achievement gap
  - College participation and population rates
  - 6-year graduation rates of African-American and Latino vs White students, Male vs Female, Pell-eligible vs non-Pell eligible
- Communication
  - Promote our success stories (e.g., website, PR pitches to media, etc.) in order to reach and inspire external audiences
  - Develop mechanisms to coordinate community outreach and create an integrated, University---wide community outreach plan (for expanded visibility, connections, student opportunities, etc.)
  - Enhance communication between DGCE and academic departments
- Cultural awareness and respect
  - Implement a solution---oriented customer service mindset and commitment; include a statement in every job description.
  - Change the culture so that people enjoy working here more and feel more valued
  - Implement new state-wide Title 9 policy and help facilitate mandatory reporter trainings

## Resources, Revenues, and Organizational Sustainability

5. **Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value**

### **METRICS:**

- Revenue enhancement
  - Prepare and support a capital campaign designed to raise revenue for Wellness Center and Temple Emanuel projects
  - Continue to develop a more open and inclusive budget process
  - Develop a plan for space utilization and engage and implement, with DCAMM, a new ten year academic Master Plan
  - Expand interaction with community constituents, including: City of Worcester, Chamber of Commerce, Worcester Consortium, alumni and prospective new students and faculty
  - Rectify tuition discrepancy (day vs. continuing education)
  - Increase out---of---state enrollment and put support systems in place to enable this growth
  - Grow DGCE revenue by 3% annually
  - Review existing administrative policies to align them with the goal of increasing revenue
  - Assess adequacy of the technology infrastructure
  - Assess enterprise risk exposures across the institution

Barry M. Maloney

## Self-Evaluation

Evaluation period July 2015 – July 2016

I write for the purpose of submitting my 2015 – 2016 Self-Evaluation. The information below is presented in the agreed upon format, is directly tied to my 2015-2016 Presidential list of goals, and represents a summary of my performance since my last review August of 2015. Additionally, to help the Board in its review, I have attached the University's year-end report, Strategic Planning grids and Strategic Plan Review Committee (SPRC) report pertaining to every division and the Department of Higher Education's data dashboard for Worcester State. This is included to provide greater detail to many of my accomplishments of the past academic year.

### 1. Graduation Rate and Retention Improvement (Numeric rating 5)

Since my arrival it has been clear that improving the graduation rate, and in support of that goal, retention of students from one year to the next, is the most important issue for Worcester State University. The University's six-year graduation number of 53%, while above the average of peer of institutions, is below the prescribed segmental goal of 56% set by the Department of Higher Education (DHE), which we are expected to meet with the cohort that graduated this May, and for which we will have results this fall. This year's average demonstrates a slight increase from last year, and WSU's three-year average shows a six percentage point increase in the rate, which represents a 13% improvement. (As a point of comparison, a recent NEASC report on Salem State's progress, after implementing a cross-campus, multi-initiative program to improve graduation rates, resulted in a six-year graduation rate improvement of five percentage points, from 45 percent (2006 cohort) to 50 percent (2009 cohort, graduating 2015). Source: [NEASC Report for Salem State University.](#))

Additionally, WSU's retention rate stands at 80% which is above our peer group rate which stands at 78%.

#### ***Highlights in Recruiting, Admitting, Retaining and Graduating Students:***

- Hit Fall 2014 admission goal of 1100 new students (750 freshman & 450 transfers)
- 2% increase in deposits
- One of only 8 of 29 public institutions in the state to see retention growth - Commissioner Santiago
- Continued the University's "Succeed in Four" campaign designed to improve retention outcomes through increased advising, course scheduling and other co-curricular support to assist students towards graduation
- For the twelfth year in a row, we have been recognized by The Princeton Review as a "Best in the Northeast" college, based on student surveys – an accolade that was noted in the Telegram & Gazette's "[College Town.](#)" We are the only one of the nine state universities to make the list



**Challenges:**

- While the overall plan is very sound, the work has just begun. Increasing graduation rates is a slow and laborious process. The campus must be dedicated to our end goal, a 56% six year graduation rate by 2016. The biggest challenge remains getting the entire campus engaged and focused on this mission.

**2. Academic Management and Leadership (Numeric rating 3)**

- A successful search for Provost and Vice President of Academic Affairs resulted in the hiring last year of Dr. Lois Wims.
- A new face at WSU, Lois was hired in July to replace David Caruso. During the past year, I spent considerable time working with the Provost and her leadership team, to continue progress with the undergraduate two-school Dean structure, implemented in 2013; increase academic advising to students; and assess the resource needs for each academic department.
- This past year the Provost hired two Deans: Dr. Jane Friederichs (Interim Dean of Humanities and Social Sciences) and Dr. Roberta Kyle (Dean of Graduate and Continuing Education), which has led to significant gains in each respective school.

**In the School of Health, Education and Natural Sciences (HENS),** we were able to establish a Memorandum of Understanding (MOU) with the City of Worcester on a public health initiative, and continued international relations with the Letterkenny Institute of Technology (LYIT) located in Letterkenny, Ireland, through our mutual nursing programs. We also established MOUs with Universidad San Francisco de Quito in Ecuador, University of Ulster, and with the Kitchwa People of Sarayaku in Ecuador. Finally, we hosted dignitaries from Yamaguchi University in Japan. Growing our international agreements helps realize one of my inaugural goals: increase “study away” opportunities for our students, who primarily come from Central Massachusetts. Toward that end, the number of students participating in international experiences has grown 160% between 2010 and 2014 (see [story](#)).

The HENS School also has demonstrated its effectiveness in the professions, with students’ licensure pass rates among the best in the state. In Nursing, 100% passed the NCLEX this year; the Occupational Therapy December 2015 and the 2014 pass rates equaled 100%; the MTEL (Teacher Test) pass rate, where we have a large number of test-takers, runs better than 95%.

**In the School of Humanities and Social Sciences,** gains were made in getting each Department Chair engaged in improving the overall management of the academic departments by the Dean, a longstanding problem that we made significant progress on this year. (Note: the new supervisory role was a provision bargained in the most recent collective bargaining negotiations with the faculty union). This foundational issue needed to be addressed so that we can both attract a new permanent dean and ensure his or her success.

**Revenue-generating initiatives** in Academic Affairs include:

- The Division of Graduate and Continuing Education increased fees last year, after market research indicated we were under-charging, resulting in significant new revenue for the University; and a new position established in 2015, Director of the Center for Business and Industry, is charged with increasing our professional development contracts with industry as well as grant-funded training.

**Experiential Learning and Community Engagement:** The University also continues to make great strides in experiential learning. On the community service and internship/practicum front, we once again increased the number of hours of service to the community and the number of students who are engaged in those and other related field experiences. These included programs such as ENACTUS, Jumpstart, and the VITA Tax Program. Our students contributed to community partners, ranging from Children of the Border (NGO), Dominican Republic to the Latin American Health Alliance, to many of our neighboring schools.

This number is considerably higher than last year. Much of the increase is due to Jumpstart and wider participation among newer faculty such as Dr. Sebastian Velez's trip to the Dominican Republic.

The follow breakdown of Community Engagement categories for 2015-2016 illustrates our progress:

*Service Learning:* 25 projects involving 688 Students contributing 19,302 hours

*Internships:* 218 Projects involving 217 Students contributing 29,213 hours

*Volunteerism:* 33 Projects involving 508 students and 14,713 hours

*Clinical:* 57 Projects involving 338 students contributing 59,348 hours

*Practicums:* 206 Projects involving 699 students contributing 38,521 hours

*Community Based Research:* 3 Projects involving 20 students contributing 82 Hours.

In all, 545 Projects involving 389 partners and 2229 students contributing 161,594.75 hours

**Summary of Academic Affairs Highlights:**

- Hiring and transitioning of a new Provost, Dr. Lois Wims.
- Hiring of a Dean of Graduate and Continuing Education (DGCE)
- Implementation of new fee schedule for DGCE
- Dialogue has improved with academic departments, as we discuss how best to meet needs – both current and future



- Implementation of \$30K Bachelor's degree program with QCC, MWCC, FSU, STCC and Greenfield Community College – a program used as a model by the Baker Administration in establishing the statewide “Commonwealth Commitment” program
- Participation in the newly created Commonwealth Commitment 2+2 program
- Implementation a 3 +1 program in Nursing with Quinsigamond Community College
- Implemented a partnership with the IdeaLab business incubator to help WSU students with small business development plans
- Increased the amount of community service from 149,000 to 161,000 hours of services
- Established MOU agreement with Jumpstart organization to create volunteer network with area preschool students

### ***Challenges:***

- Completion of work on two key business plans: online learning (expected launch in fall of 2016) and an international student recruitment plan via our new relationship with American International Recruitment Council (AIRC)
- Managing the 15% cap on adjuncts in academic departments
- Searches for a permanent Dean of Humanities and Social Sciences, Assistant/Associate Vice President for Academic Affairs and Assistant Vice President for Assessment and Planning
- Completion of work by two key task force groups: Policy Development for Online Learning and Internships
- Accreditation costs and processes for departments such as Business Administration and Economics
- Increased enrollment and overall scope of the Latino Education Institute (LEI) and its programs
- Creation of ten new advisory groups for all academic majors. Total of 20 by June 2016
- Funding the International Education program and motivating students to participate

### **3. Assessment (Numeric rating 4)**

The largest, and most significant, accreditation work that was continued this year was the work done to keep the new strategic plan for the university front and center in the minds of faculty and staff. Moreover, it was critical to assess the work done by my colleagues and build that process of assessment into the culture of the university.

I created an assessment committee called the Strategic Planning Assessment and Review Committee (SPARC) to help me review divisional goals. The group, made up of faculty, staff and students, met with divisional and department heads throughout the year to assess progress towards divisional action steps and university goals. Their final report is included in this packet. Unfortunately, we still have work to do in some areas as we were unsuccessful in the assessment of Campus Police and overall risk management status. Additionally, we were cited by the Massachusetts State Auditors for deficiencies in inventory controls. Steps have been taken – we hired an outside firm - to resolve that concern.

### ***Highlights in Assessment:***

- Our strategic planning process has been recognized as a model for the 29 public higher education campuses by the DHE
- I participated in a panel session where our “best practice” was shared, at a statewide Trustees’ retreat the Department sponsored
- Developed a process for assessment of newly formed strategic plan and tied the assessment to overall University and Vision Project goals
- Successful completion of Visual and Performing Arts accreditation review

### ***Challenges:***

- Departmental Assessment costs and implementations
- Full implementation of the new Strategic Plan and creating a culture of action steps and accountable goals
- Continued assessment of customer service across all departments
- Full assessment of campus Police Department Conduct a risk management assessment and campus planning exercise

## **4. Infrastructure (Numeric rating 5)**

Since the day I arrived, I have been focused on continuing to make capital improvements to the campus. With three significant projects: improvements to LRC, design and construction of a new wellness center and the siting and construction of a new residence hall and dining commons, I have overseen, in a very hands-on way, construction over my first five years. Presidential advocacy with two state agencies – DECAM & MSCBA – was necessary to make sure that we kept all three projects on schedule and on budget. I am happy to report the projects are moving forward and that costs are still within our means.

With regards to the Wellness Center project, during the past year, the work neared completion. Starting with the demolition of the old gym building, the campus has been abuzz with construction-related activities. Anticipated completion now stands at spring 2016 – up from an earlier estimate of late summer.

The recently opened Sheehan Hall, providing 400+ new beds, was at capacity by Fall 2015, increasing revenue substantially for the University and aiding in our retention and graduation efforts, while the new dining hall has proven to be an excellent recruiting tool. Property acquisition continues to be a priority as we purchased the Temple Emanuel property for a price a former President, who had attempted to purchase the building in the 1990s, characterized as a “steal.” The synagogue, located on May Street and contiguous to the rest of the campus, provides a strategic real estate opportunity for Worcester State University. We made great progress on this project this year. First, the Foundation secured a funding source – a loan through Commerce Bank. Finally, we developed a use agreement with the WSU Foundation so that both

parties have a clear understanding of how the property, and all related costs, will be paid for. We are now moving toward developing a usage plan, with a funding strategy to follow.

***Highlights for Infrastructure:***

- Managed the completion of the Wellness Center construction, totaling \$52 million dollars
- The project will be completed on time and under budget
- Sheehan Hall at capacity
- LRC improvements – electrical upgrades on the third floor
- Student Center renovated
- Managed disruption during the construction period
- Hired a landscaper to improve grounds

***Challenges:***

- Need for specialized science space for Nursing, Speech, Chemistry, Biology and Occupational Therapy programs
- Fall of 2016, work with Rickes Associates to develop a Campus Master Plan which will include the development of a usage plan for the May Street building (formerly Temple Emanuel)
- Planning for deferred maintenance and advocacy for a deferred maintenance bond bill to help pay for work
- Create a comprehensive Sustainability Plan

**5. Fiscal Management and Budgeting (Numeric rating 5)**

The University continues to be a financially healthy organization. With strong reserves, solid enrollment and a good place in the market, Worcester State continues to be a viable institution. We continue to revamp our budget processes to provide greater transparency for the campus community. As academic needs continue to grow, the relationship with the Worcester Center for the Crafts continues to develop and the implementation of a new business plan for DGCE are both priorities in the year to come.

***Highlights of Fiscal Management:***

- Maintained the University's "A2" bond rating with Moody's
- Another external audit validating our fiscal health
- Developed a cost benefit grid to assess the true cost of all academic programs
- Conducted an internal assessment of both payroll and HR functions
- Successfully implemented an early retirement incentive plan (ERIP) for the campus
- The result incentives over 40 employees into retirement and created over \$1 million dollars in savings



**Challenges:**

- Working with campus leaders, and BOT to develop a spending plan for unmet campus needs
- Need to develop a revenue generation plan that incorporates: international enrollment, creation of new delivery methods such as online learning, DGCE and fundraising
- Implementation and realization of new revenue ideas
- Dealing with new federal and state regulations – example GASB 68.
- Develop a new business plan for the Worcester Center for the Crafts
- Develop a financing plan for the renovations of the May Street building

**6. Communication (Numeric rating 3)**

It was clear, starting in my first year and continuing well into year five, that open communications from the president would continue to be a huge expectation from the campus community. The climate on campus continues to demand such transparency. While improvements have been made – new budget process is an example – the campus feels that there are still too many top down directives causing morale to improve only slightly. Therefore, I have continued to focus on student's success as the most important goal in everything we do as an institution. Immediately, I began to open up lines of communication, establishing new governance committees, meeting with as many academic departments as possible, meeting with students in all three residence halls, gathering information from alumni, donors and foundation members, creating a neighborhood association for our immediate neighbors, holding two all-campus "town hall" style meetings and sending out several written communications to all key constituent groups. I am pleased by the positive feedback I have received from these efforts, but acknowledge there is still much work to be done. Finally, our recently hired Assistant Vice President for Human Resources (Stacey Luster) into a new position that will improve internal communications, will make a significant impact on changing the climate at WSU.

**Highlights in Communications:**

- New format for opening meeting and a mid-year town hall meeting
- Continuation of open budget process
- Expanded the Administrative Council group to include all faculty Chairs
- Implementation of a new and improved university news site, [news.worcester.edu](http://news.worcester.edu)
- End of semester retreat for administrators and faculty
- Use of the President's home for several University business and gatherings (nine events hosting faculty, staff, students and alumni)
- Meetings with divisions, departments, chairs, Administrative Council, students in res halls
- Year three of a neighborhood committee to discuss neighborhood issues and civic engagement opportunities
- Increased meetings with alumni, donors and other VIPs including new trip to North Carolina



- Meetings with federal, state and local officials
- Media relations efforts have resulted in an improved ratio of positive to negative stories about the University and an increased presence for our faculty and staff experts

***Challenges:***

- Working with community officials and neighbors to improve parking in and around the campus and reduce the impact on the neighbors
- Greater buy-in on transparent approaches to our communication of decision-making
- Greater uses of campus governance
- Building trust among all key constituent groups

**7. Administrative Management and Leadership (Numeric rating 4)**

The past year was one marked by significant changes in personnel. Fueled by our early retirement incentive and the filling of other key vacancies, the University went through a series of changes this past year. My hands-on oversight was necessary to make sure that these processes brought in, in each case, a high quality member to our campus and that they had a smooth transition into Worcester State. With only the exception of the Dean of Humanities and Social Sciences, we were successful in these searches.

***Highlights in Administrative Management and Leadership:***

- Charged all areas and offices with a “students first” customer service approach. Two divisional trainings occurred during the year (Payroll and Human Resources & Enrollment Management)
- Year Four of new comprehensive marketing campaign for the University – now managed by Executive Director of Marketing, hired in 2013. Revamped recruitment materials and communication plan, increased use of videos, and further development of the Web site as a marketing tool progressed
- Our new Provost and Vice President for Academic Affairs Dr. Lois Wims joined us in July, replacing Interim Provost David Caruso
- Dr. Jane O’Brien Friederichs joined us in late August as interim Dean of Humanities and Social Sciences, as Dr. Lisa Boehm left in July for a position at Manhattanville College. The search for a permanent dean will begin again soon
- In the Administration and Finance (A&F) Division, Stacey Luster joined us in July as our new Assistant Vice President for Human Resources, Payroll, and Affirmative Action and Equal Opportunity, while Interim Human Resources Director Jack Giarusso finished up that same month

- The hiring of Ms. Luster oversaw the hiring of Susan Moore as the new Director of Human resources and Isaac Tesfay as the new Director of Affirmative Action, Equal Opportunity and Diversity
- Finally, in A&F, Anisa Hoxha was named Director of Budgeting, Planning, and Policy Development, after serving in that role on an interim basis for the past several months, while Heather LaMarche was appointed as financial analyst after having served in a temporary capacity in that position
- Assisted with the management of over 20 faculty searches and an additional 20 administrative and staff searches

***Challenges:***

- Hiring of the Assistant Vice President for Academic Affairs, Assistant Vice President for Assessment and Planning and creating an expanded staffing plan for Career Services and Disability Services
- The advent, presence and continued growth of non-traditional competition
- Continue to develop a team that is supportive of each other and the mission of the institution

**8. Decision Making and Problem Solving (Numeric rating 4)**

CEO's make hundreds of decisions per week. The key for any President is that we must instill a sense of trust, collegiality, accountability and resolve to get others to make decisions that always have the University and our student's best interests in mind. Decision making gets magnified during times of crisis. It is in this area that I think that I handled myself very well. The challenge moving forward is considering ways to continue to empower my colleagues so that good decisions can be made at the appropriate levels.

***Highlights of Decision Making and Problem Solving:***

- Solidifying teamwork among the Division Heads, as evidenced by an A&F-led search for the Provost position, and more productive and collegial President's direct report meetings
- Dealing with numerous campus emergencies and appropriate implementation and training of the new Title IX sexual assault reporting requirement
- New personnel and organizational structure in Academic Affairs, Human Resources and Diversity areas
- Action Steps to move the campus toward a culture of inclusion

***Challenges:***

- Trying to build collaborative team across all divisions
- Challenge getting talented VPs to work together
- Fostering and maintaining a productive, welcoming work environment

## **9. Fundraising (Numeric rating 4)**

Once again, another area of strength for the University is fundraising. As one of only two Massachusetts State Universities listed, according to the Princeton Review, as one of the 75 Best Public Value institutions it is easy to see one of the reasons is our impressive alumni giving rate of 9% - the highest among our Massachusetts state university peer institutions. Our alumni continue to believe in Worcester State University.

### ***Highlights in Fundraising:***

- Launched the \$15 million dollar capital campaign, "Change Lives"
- Met with hundreds of alumni and attended events on campus, in the greater Worcester area, throughout the Commonwealth and around the country
- Received a \$500,000 gift on behalf of the late Barbara (Hickey) O'Brien, WSU class of 1957, establishing an endowed fund for the Department of Education's students and faculty
- Exceeded the required \$250,000 challenge established by the DeFeudis family towards Change Lives Campaign
- Largest turnout at Florida alumni events in Florida with almost 200 individual contacts made
- A "Day of Giving" that exceeded goals for number of participants and dollars raised
- A CASE-award-winning "Thank a Donor" day ([Thank a Donor Day Wins Case Award](#))

### ***Challenges:***

- Raising money, a projected \$2.5 million, to help cover costs associated with the new Wellness Center
- Continue to increase the alumni participation rate
- Develop new pockets of alumni support – both out of state and with young alumni
- Tap into markets such as banking and corporate gift giving
- Raise money for new initiatives such as faculty research, acquisition of Temple Emanuel, international education and scholarship.

## **10. Internal Relationships/Campus Climate (Numeric rating 4)**

Similar to the past four years, I have approached the internal relationships portion of my job by, simply, talking with as many of my colleagues as possible. In order to move the institution forward, I needed to establish the following: show that the President's Office is actively engaged in the health and wellbeing of each department of campus, build levels of trust between the administration and faculty and students and come up with an operational plan towards building a more civil campus. While I have made some strides, there is still a lot of work left to do and levels of frustration are still relatively high in some areas. Moreover, this is an area that will benefit from the new strategic plan.



***Highlights of Internal Relationships/Campus Climate:***

- In sync with the University's Strategic Plan, I implemented a five point commitment for creating a more inclusive and welcoming environment ([President's Action Steps for Inclusion](#)). The points included:
- **Cultural competency training** first groups to be trained: Direct Reports, Cabinet, and Campus Police
- **Diversity a goal in all hiring processes**
- **Student engagement on all race, gender and ethnic topics**
- **Cross-racial interaction:** Campus programming designed to share the experiences of racial minorities
- **Classroom context**, which includes perspectives of people from diverse ethnic backgrounds incorporated into class content **Ethnic Studies Concentration:** Approved a new ethnic studies concentration - a greatly anticipated student supported initiative
- Held divisional and departmental meetings with all key groups – faculty, staff and students
- Continued support of employee recognition efforts
- Facilitated a campus conversation of the new mission statement and development of Strategic Plan
- Re-designed the Employee Recognition event
- Committed to provide training to better orientate BOT members and provided trustee orientation for new members: Kurt Correia, Karen LaFond, Dina Nichols and Marina Taylor

***Challenges:***

- Get campus dedicated to the notion of "Students First" decision making
- Develop an internal communications plans with the newly hired AVP for HR
- Continue to make strides in the area of cross divisional collaboration – best example was Enrollment Management Committee
- Foster a climate of civility among all members of campus community
- High number of grievances continue to be filed by our unionized colleagues

**11. External Relationships/Leadership in the Community (Numeric rating 4)**

During my fifth year on the job, I continue to prioritize developing external relationships. Over nights and weekends, during breakfasts, lunches or dinners, I attended countless community events, meeting leaders, listening to stakeholders and trumpeting Worcester State's stories. I am supported in this effort by my family. Laura has agreed to serve on my behalf when asked by groups and my children happily engage with alumni, students, visitors and other stakeholders to assist in our efforts at fostering good relationships. Similar to last year, the largest consumer of my external time was my role as Chair of the MA State University Council of Presidents. The role has me directly working, on behalf of the nine state universities with the Secretary, Commissioner and the Board of Higher Education, as well as legislative leaders, such as the House Speaker and Senate President.



***Highlights of Leadership in Community:***

- Chair, MA State University Council of Presidents (COP)
- Held regular meetings with civic and community leaders
- Continued the presence of the WSU Latino Education Institute (LEI) in Springfield - the partnership includes the Springfield Public Schools and Springfield technical Community College (STCC) - have raised, privately, over \$80,000 towards this effort
- Selected to the NCAA's Division III President's Advisory Board
- Selected as the Massachusetts State Collegiate Athletic Conference (MASCAC) representative to the NCAA
- Board Member serving on the following boards: Greater Worcester Foundation (new), Worcester Regional Research Bureau, WBDC, Worcester Chamber of Commerce, Wilbraham and Monson Academy, Spectrum Health Systems and member Consortium of Colleges in Worcester
- Selected by my peers, to a two year term starting July 1, 2016, as Chair of Higher Education Consortium of Central Massachusetts (HECCMA)

***Challenges:***

- Get WSU leadership team more involved in local community boards to help increase visibility
- Raise visibility of WSU outside of the Central MA market
- Develop and maintain Latino Education Institute presence in other markets in MA (Springfield, Lawrence or Boston) to help improve our recruitment of the best students from those groups, as well as assist those communities in the success of their Latino population
- Balance community needs against limited resources of WSU
- Establish new partnerships and programs that would benefit our students
- Use new relationships to raise revenue and bring greater resources to the University

PRESIDENTIAL  
EVALUATION  
MATERIALS (Part II)



## Massachusetts Department of Higher Education

One Ashburton Place, Room 1401  
Boston, MA 02108-1696

TEL (617) 994-6950  
FAX (617) 727-0955  
WEB [www.mass.edu](http://www.mass.edu)

Carlos E. Santiago, *Commissioner*  
Chris Gabrieli, *Chairman*  
*Massachusetts Board of Higher Education*

### MEMORANDUM

**TO:** Community College Board Chairs  
State University Board Chairs

**CC:** Community College Presidents  
State University Presidents

**FROM:** Carlos E. Santiago, Commissioner

**DATE:** May 13, 2016

**SUBJECT:** 2016 Vision Project Dashboards

PRESIDENT'S OFFICE

MAY 18 2016

WORCESTER STATE UNIVERSITY

A handwritten signature in blue ink, appearing to be "CES", written over the "WORCESTER STATE UNIVERSITY" stamp.

---

In follow-up to my email memos on Friday, May 6, attached please find 11 hard copies of the 2016 Vision Project Dashboard for your campus. A more detailed cover letter is included on page 2 of the attached booklets, and the Contents page includes a link to download a spreadsheet containing all underlying data.

Please distribute these copies to your Board as you see fit. An email that I sent you on May 6 also included a link to a PDF of this document, which I encourage you to share with your fellow trustees as well. We have sent copies to your presidents separately.

I welcome you to contact Mike Mizzoni, Director of Trustee Relations (617-994-6934 or [mmizzoni@bhe.mass.edu](mailto:mmizzoni@bhe.mass.edu)) or me if you have any questions.

Attachments

---

## FW: 2016 Vision Project Dashboard

Valerio, Ron <RVALERIO@ufpt.com>

To: "George Albrog (albrog@charter.net)" <albrog@charter.net>

Cc: "Judy.StAmand@worchester.edu" <Judy.StAmand@worchester.edu>

Fri, May 6, 2016 at 5:26 PM

George,

This just came in from the Commissioner.

It is our WSU Vision Dashboard he referred to in his earlier email today.

You may want to reference this document in the Presidents Evaluation.

The link to the WSU Dashboard is listed below.

Thanks,

Ron Valerio

*President's  
Eval*

**Ronald R. Valerio**

Senior Manager Medical

**UFP Technologies, Inc.**

100 Hale Street

Newburyport, Ma. 01950

(c) 508.612.0900

(o) 978.234.0942

rvalerio@ufpt.com | www.ufpt.com

---

**From:** Commissioner Santiago [mailto:Commissioner@bhe.mass.edu]

**Sent:** Friday, May 06, 2016 5:03 PM

**To:** Valerio, Ron; Maloney, Barry

**Subject:** 2016 Vision Project Dashboard

Dear Chair Valerio and President Maloney:

As promised in my memo earlier today, here is a link to your 2016 Vision Project Dashboard: <https://www.dropbox.com/s/awn9zowcujyej8z/2016-05%20Vision%20Project%20Dashboard%20-%20SU%20Worcester.pdf?dl=0>

Hard copies for trustees and presidents will be shipped to each president's office next week.

Best,  
Commissioner Santiago





## Massachusetts Department of Higher Education

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Boston, MA 02108-1696

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FAX (617) 727-0955  
WEB [www.mass.edu](http://www.mass.edu)

Carlos E. Santiago, *Commissioner*  
Chris Gabrieli, *Chairman*  
*Massachusetts Board of Higher Education*

### MEMORANDUM

**TO:** Community College Presidents  
State University Presidents

**FROM:** Carlos E. Santiago, Commissioner *CES*

**DATE:** May 13, 2016

**SUBJECT:** 2016 Vision Project Dashboards

PRESIDENT'S OFFICE

MAY 17 2016

WORCESTER STATE UNIVERSITY

---

Enclosed please find (1) six copies of the final 2016 Vision Project Dashboards for you and your staff, and (2) 11 copies for your trustees, along with a cover memo addressed to your board chair.

Please note that there is a more detailed cover memo on page 2 of the dashboard document, and the Contents page includes a link to download a spreadsheet containing all underlying data. The email that I sent you on May 6 also included a link to a PDF of your dashboard, which I encourage you to share with your staff as you see fit.

Once again, I want to thank all presidents for their valuable feedback throughout this process. I look forward to continued collaboration with you around the measuring and tracking of our system-level goals.

Enclosures



# the VisionProject Dashboard

**Worcester State University**

May 2016



MASSACHUSETTS  
Department of  
Higher Education

# Dear Presidents and Trustees:

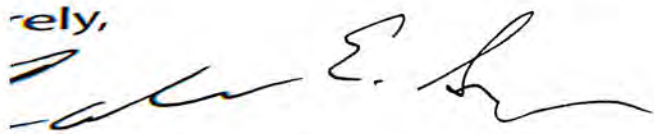
I am pleased to share the 2016 Vision Project Dashboard for your campus. I hope that you find this a helpful tool for use in assessing annual institutional progress in the context of the annual presidential evaluation process and the setting of priorities for the academic year ahead.

While we have made no major changes to the dashboard metrics and format overall, we have taken a more uniform and streamlined approach to the drafting of executive summaries, and we have added suggested questions to stimulate dialogue about campus performance and goals for improvement, where warranted. I am more than willing to engage the campus leadership in a dialogue regarding alternative, and presumably better, measures over the coming year. We would, however, need to reach a broad consensus on any proposed changes.

This year we have moved the release of the system-level Vision Project report from fall to spring to align with the release of these individual campus dashboards. This is a significant change, further underscoring the link between our work on individual campuses and our work as a system. As you know, the Vision Project was approved by the Board of Higher Education in 2010 as a series of performance metrics aimed at tracking our progress toward our goal of becoming a national leader among state systems of higher education.andidly, there are times when the realities we face might prompt some of us to question whether reaching such a goal is possible, or even desirable. What does it matter and what purpose does it serve, one might ask, whether our public institutions ever join the ranks of institutions in leading states? Isn't it enough that we provide access and opportunity to local students, put them on a path to lifelong learning, and strive our best to meet the needs of regional employers?

While visiting with and learning from so many of you during this, my first year as Commissioner, I have come to believe that the past five years of working toward greater improvement has served us well—as individual institutions, and also as a system. The truth is that our collective striving for national leadership has resulted in a degree of collaboration between institutions that could not have been imagined before we began this journey together. Whatever the rationale for improving performance—whether on behalf of local communities, or to be ranked among the nation's finest institutions—I reject the view that we are either-or propositions. We are better off today—and our students are better off—than we were in 2010 because of the stretch goals we have set for ourselves. So I am proud of the progress we have made together and must continue to try to achieve. In various ways, thank you for your good work.

Sincerely,



E. Santiago  
Commissioner  
Massachusetts Department of Higher Education



# Contents

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including Closing Achievement Gaps



**College Completion** 8  
including Closing Achievement Gaps



**Workforce Alignment** 10  
including Closing Achievement Gaps

**Appendix: Use of Resources** 14

**Vision Project  
Dashboard Notes** Back cover

## See Also

You may download a detailed spreadsheet containing the data used to create this dashboard report at:

[www.mass.edu/vpd/worc002.xlsx](http://www.mass.edu/vpd/worc002.xlsx)



# Executive Summary

## Introduction

Trustees and presidents should view this Vision Project Dashboard as an essential resource for campus-level discussions about performance. What follows here is a narrative summary of campus progress toward achieving the goals of the Vision Project, the strategic agenda for public higher education approved by the Massachusetts Board of Higher Education in 2010. When reviewing the metrics contained in this Dashboard, please keep the following in mind:

### 1. Segment-wide metrics

This Vision Project Dashboard presents Worcester's performance on a wide array of segmental measures, with the intent of supporting institutional self-assessment. Throughout this summary, trustees and presidents will find suggested questions to encourage discussion leading towards a deeper level of understanding of system priorities, institutional performance, signature achievements, and areas for further growth and improvement.

*Can any of the metric outcomes, positive or negative, be explained in the context of Worcester's individual mission or unique characteristics? How would the institutional narrative change if Worcester were compared to "similarly situated" peer institutions, rather than to other state universities?*

*Which of Worcester's existing policies or practices can be identified as positively influencing the metric outcomes for which your campus has significantly improved or consistently performed well?*

*What potential new policies or practices might be implemented to significantly improve the outcomes for Worcester in the future?*

### 2. Recency of Data

Due to the lag in availability of higher education data, few metrics reflect FY16 results. When using the dashboard as part of the presidential evaluation process, trustees should ask if their institution can provide any more recent information that might enhance the relevancy of the metric outcomes.

### 3. Trend and Change Assessments

Most metrics also include an assessment of five-year trend and an indicator of one-year change. Five-year trend is an important component of performance assessment. One-year change is not intended to have the same weight in assessment, as random fluctuations can occur from year to year, but are included to prompt discussion about emerging factors and recent policy changes that may be affecting performance positively or negatively.

## 4. Developmental Math

In 2013 the BHE launched a Developmental Math initiative ([www.mass.edu/devmath](http://www.mass.edu/devmath)) intended to increase the number of students completing college-level math requirements by improving developmental (remedial) math placement and instruction practices. The FY15 numbers shown in the dashboard coincide with the first year of implementation of this pilot. Implementation of the pilot differed significantly from campus to campus with regard to the assessment of college-readiness, mode of course delivery, and identification of college-level curriculum. Because some of these distinct campus practices may not be captured in the DHE's HEIRS data system, the developmental math metric in this dashboard may not provide a complete picture of the developmental math outcomes at your institution. Trustees are encouraged to ask questions about their institution's participation in this pilot and to explore additional institutional data for greater context.

## College Participation

### including Closing Achievement Gaps

Worcester enrolled 6,914 undergraduate students in FY15, 13.9% of all undergraduates enrolled in the Commonwealth's state universities. Between FY11 and FY15, Worcester's undergraduate enrollment increased 6.3%. Undergraduate enrollment across the state universities during this time increased a slight 1.4%.

In FY14, 30.5% of all state university undergraduates were participants in the federal Pell Grant program; at Worcester, 27.8% of enrolled undergraduates were Pell Grant recipients. Like the majority of the state universities, Worcester has been increasing the share of Pell Grant recipients enrolled on campus year over year, confirming the important role public institutions play for students from low-income backgrounds. Over the last five years, however, mandatory fees at state universities across the Commonwealth have increased at an average rate of 4.4% per year (see Appendix). At Worcester, fees have increased at an average rate of 4.3% per year to \$7,888.

*How does the institution plan to continue to serve low-income students in the face of growing student financial need, historical increases in educational costs, and continued uncertainty in state funding?*



Not only is it the mission of Massachusetts public higher education to provide “accessible, affordable, relevant, and rigorous programs” for all students, but increasing access to underserved students is crucial to meeting state workforce needs and institutional enrollment targets at a time of flat or declining enrollment for many of the Commonwealth’s public institutions. The racial and ethnic diversity of Worcester’s student body in AY2015 (9.1% Latino/a and 8.2% African American) nearly mirrored the demographic profile of the communities of Worcester’s student body (10.2% Latino/a and 4.8% African American).

Single-year changes in enrollment between 2009 through 2015 suggest that Worcester has made progress increasing the diversity of its student body while closing enrollment gaps across traditionally underserved groups in higher education. The 4.4 percentage point enrollment gap for Latino/a students in 2009 fell to 1.1 percentage points in 2015. Latino/a students make up 9.1% of all enrolled students.

*What current and emerging efforts underway at Worcester have proven successful in enrolling and serving traditionally underrepresented students?*

*What “best practices” could Worcester share with other institutions?*

## College Completion

### including Closing Achievement Gaps

The percentage of students graduating within six years at Worcester was 53.1% in 2014. Across the state universities, the average six-year graduation rate was 56.5%. Students who transfer in to Worcester also graduate at below-average rates compared to the state universities overall, at 59.6%.

Closing Achievement Gap measures for college completion rates are based on rolling three-year averages for college graduation rates due to the limited number of students in these categories. Though the number of African American students at Worcester is very low for estimating rates, these students appear to graduate at rates similar to their White peers; on average across the state universities, African American students graduate at a rate 11.4 percentage points

lower than their white peers. Latino/a students at Worcester had an average graduation rate 10.7 percentage points lower than their White peers, equal to the gap across the state universities as a whole. The gap between Pell-eligible and non-Pell student graduation rates at Worcester is 10 percentage points, compared to an 8.9 percentage point gap across the state universities.

*What are the biggest barriers to completion for Worcester students?*

*What specific steps can the state universities and DHE take to narrow or close gaps in student achievement?*

## Workforce Alignment

### including Closing Achievement Gaps

In FY15, Worcester conferred 1,319 degrees, a 12.0% increase since 2011. 11.4% of these degrees were in STEM fields, higher than the 10.7% share of STEM degrees across the state universities. Nationally, 13.1% of degrees awarded by public master’s institutions are STEM degrees.

In STEM and health care fields across the state, there is wide variation in the gap of STEM and health care degrees conferred across student subgroups. Overall, these gaps have not changed appreciably over the last five years; however, at Worcester, the gaps for African American students and Latino/a students earning STEM degrees have reversed. In other words, Worcester students who identify as either African American or Latino/a graduate at higher rates in STEM fields than their White peers.

*What specific steps can Worcester take to continue to raise the percentage of students who graduate with STEM and health care degrees?*

*What “best practices” could Worcester share with other institutions?*

*Should Worcester be placing a higher emphasis on recruiting and retaining students in these fields?*

*Has Worcester identified other high-need fields in its region or in the state that require comparable attention?*

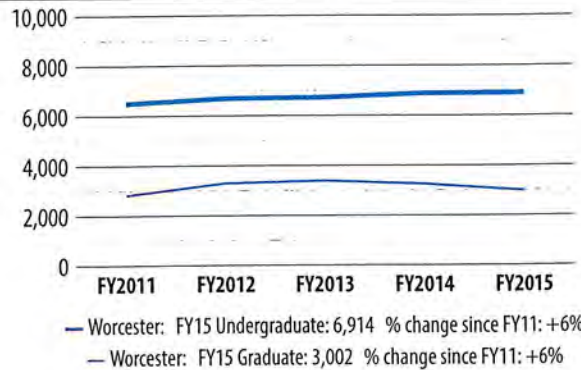
**Trend Data** ✓ = Improving Performance  
 ○ = Flat Performance  
 ✗ = Worsening Performance



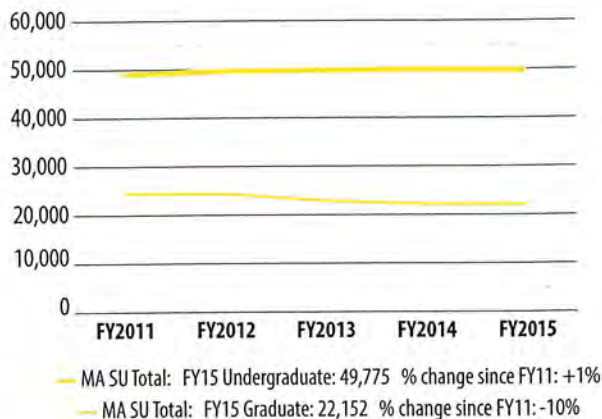
# College Participation

## ■ Enrollment Rates

**Annual Headcount Enrollment**  
FY11-FY15

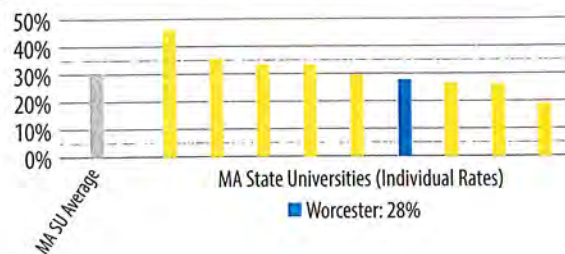


	Five-Year Trend	One-Year Change
<b>Worcester</b>		
Undergraduate	✓	○
Graduate	✓	✗



	Five-Year Trend	One-Year Change
<b>MA SU Total</b>		
Undergraduate	○	○
Graduate	✗	✗

**% of Undergraduates Receiving Pell Grants** FY14



	Five-Year Trend	One-Year Change
<b>Worcester</b>	✓	○
<b>MA SU Average</b>	✓	✓



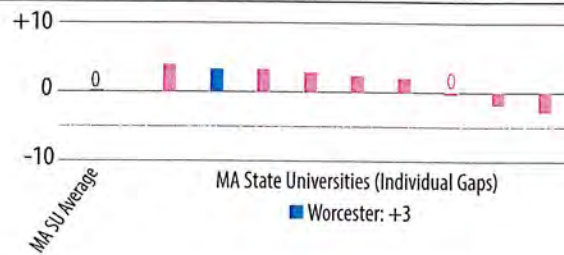


## College Participation Gaps

On Closing Achievement Gap charts, situations where the target group is trailing the majority group are shown as red bars / negative numbers. Situations where the target group is out-performing the majority group are shown as green bars / positive numbers.

### ■ Gaps Between Enrollment and Population Rates

Gap Between  
% African-American  
of Enrolled Students &  
% African-American  
in Areas Served 2015



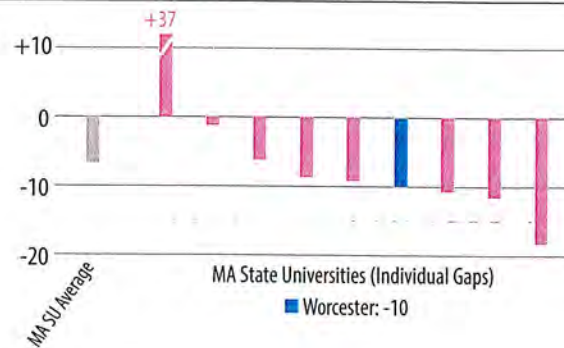
	Five-Year Trend	One-Year Change
Worcester	⊖	⊖
MA SU Average	⊖	⊖

Gap Between  
% Latino/a  
of Enrolled Students &  
% Latino/a  
in Areas Served 2015



	Five-Year Trend	One-Year Change
Worcester	⊖	⊖
MA SU Average	⊖	⊖

Gap Between  
% Male  
of Enrolled Students &  
% Male  
in Areas Served 2015



	Five-Year Trend	One-Year Change
Worcester	⊖	⊖
MA SU Average	⊖	⊖



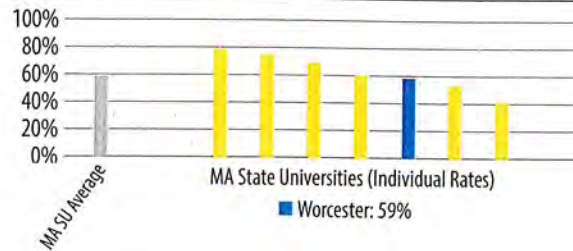
**Trend Data** ✓ = Improving Performance  
 ☹ = Flat Performance  
 ✗ = Worsening Performance

# College Completion

## Progress Rates

### Two-Year Developmental Math Progress Rate for First-Time Freshmen 2015

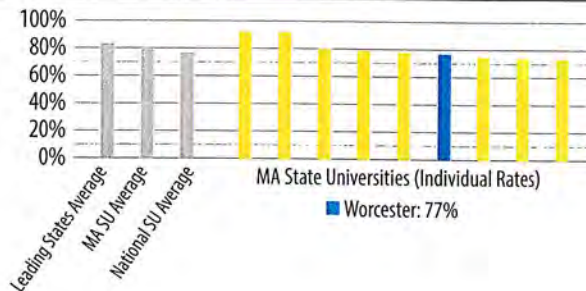
Enrolled 2013, completed dev'l and credit-bearing course by 2015



	Five-Year Trend	One-Year Change
Worcester	☹	✓
MA SU Average	✓	✓

### Fall-to-Fall Retention Rate of First-Time, Full-Time Freshmen 2015

Entered fall 2014, still enrolled fall 2015

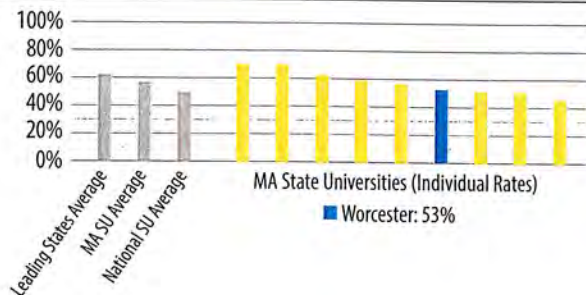


	Five-Year Trend	One-Year Change
Worcester	☹	✗
MA SU Average	☹	✗

## Graduation Rates

### Six-Year Graduation Rate of First-Time Freshmen 2014

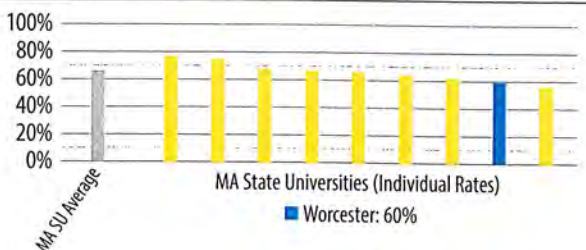
Entered fall 2008, success by 2014



	Five-Year Trend	One-Year Change
Worcester	✓	✓
MA SU Average	☹	✓

### Six-Year Graduation Rate of Students Who Transfer In 2014

Entered fall 2008, success by 2014



	Five-Year Trend	One-Year Change
Worcester	☹	☹
MA SU Average	✓	✓



## College Completion Gaps

On Closing Achievement Gap charts, situations where the target group is trailing the majority group are shown as negative numbers. Situations where the target group is out-performing the majority group are shown as positive numbers.

### ■ Gaps in Graduation Rate

Five-Year  
Trend

One-Year  
Change

#### Gap Between African American & White Students on Six-Year Graduation Rate 2012-14

Due to small African American cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts. Two campuses are excluded as the combined cohorts are still too small to compare.



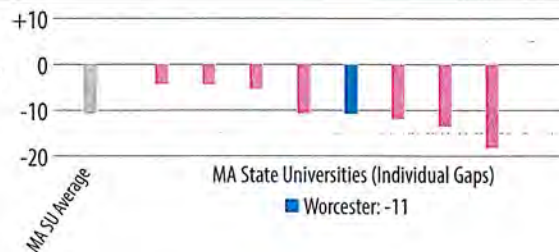
Worcester

MA SU Average



#### Gap Between Latino/a & White Students on Six-Year Graduation Rate 2012-14

Due to small Latino/a cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts. One campus is excluded as the combined cohorts are still too small to compare.



Worcester

MA SU Average



#### Gap Between Male & Female Students on Six-Year Graduation Rate 2012-14



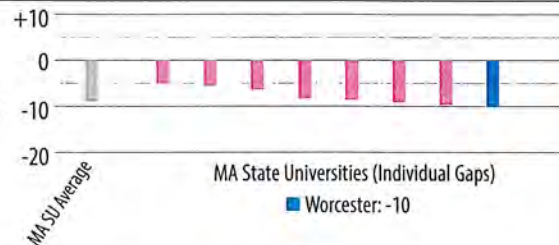
Worcester

MA SU Average



#### Gap Between Pell-Eligible & Non-Pell-Eligible Students on Six-Year Graduation Rate 2012-14

Due to small Pell-eligible cohorts at some MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts. One campus is excluded as the combined cohorts are still too small to compare.



Worcester

MA SU Average



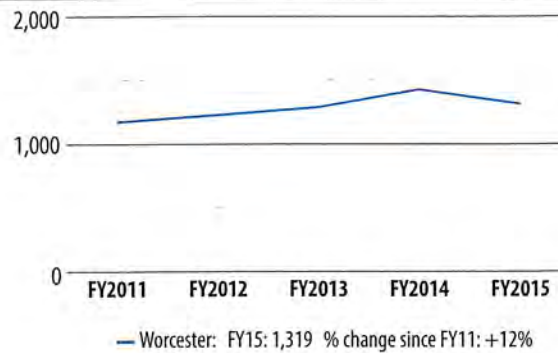
**Trend Data** ✓ = Improving Performance  
 ○ = Flat Performance  
 ✗ = Worsening Performance



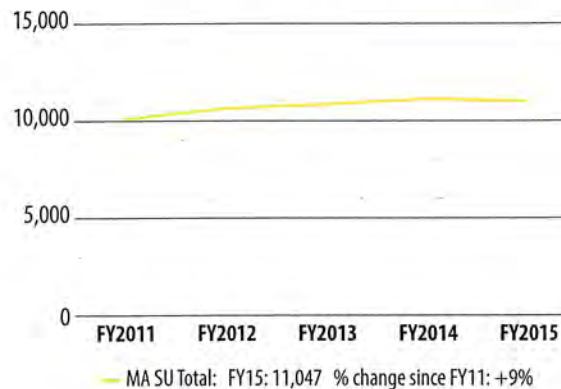
# Workforce Alignment

## ■ Degrees Conferred Overall

**Degrees Conferred  
in All Fields**  
FY11-FY15



Worcester



MA SU Total

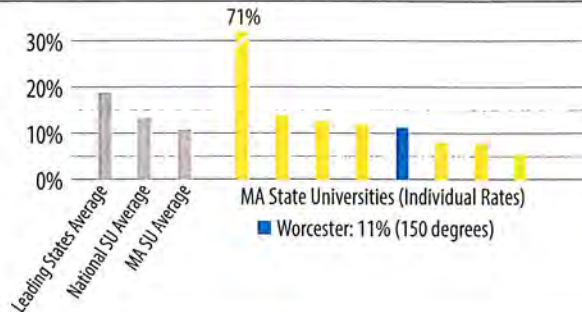




## ■ Degrees Conferred in High-Need Fields

### STEM Degrees Conferred as % of All Degrees Conferred FY15

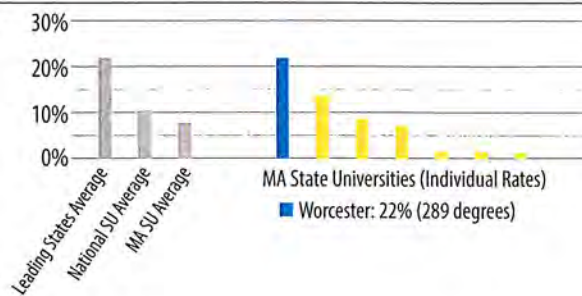
Due to a standard lag in availability of national IPEDS data, the Leading States Average and National SU Average are based on FY14 data.



	Five-Year Trend	One-Year Change
Worcester	⊖	✓
MA SU Average	⊖	⊖

### Health Care Degrees Conferred as % of All Degrees Conferred FY15

Due to a standard lag in availability of national IPEDS data, the Leading States Average and National SU Average are based on FY14 data.



	Five-Year Trend	One-Year Change
Worcester	⊖	✓
MA SU Average	⊖	⊖



# Worcester State University

## Vision Project Dashboard

**Trend Data** ✓ = Improving Performance  
 ○ = Flat Performance  
 ✗ = Worsening Performance

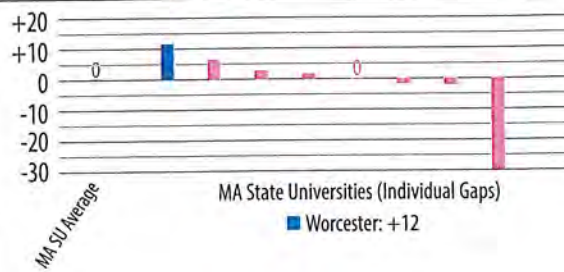
### Workforce Alignment Gaps

On Closing Achievement Gap charts, situations where the target group is trailing the majority group are shown as negative numbers. Situations where the target group is outperforming the majority group are shown as positive numbers.

#### ■ Gaps in Degrees Conferred in High-Need Fields

##### Gap Between African American & White Rate of STEM Degrees Conferred as % of All Degrees Conferred to Group 2013–15

Due to small African American cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts.



Worcester

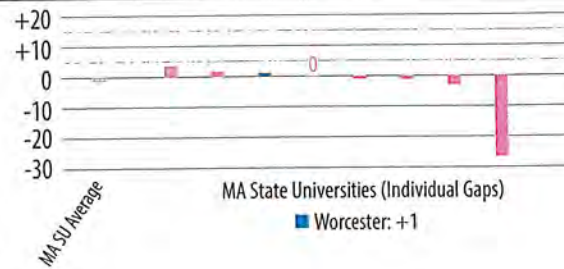


MA SU Average



##### Gap Between Latino/a & White Rate of STEM Degrees Conferred as % of All Degrees Conferred to Group 2013–15

Due to small Latino/a cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts.



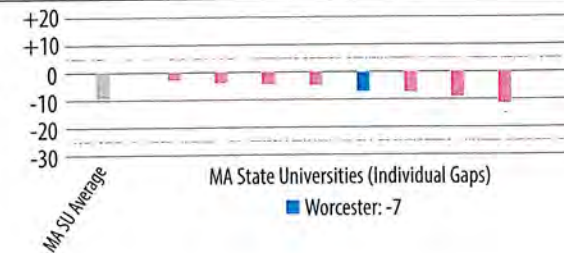
Worcester



MA SU Average



##### Gap Between Female & Male Rate of STEM Degrees Conferred as % of All Degrees Conferred to Group 2013–15



Worcester



MA SU Average



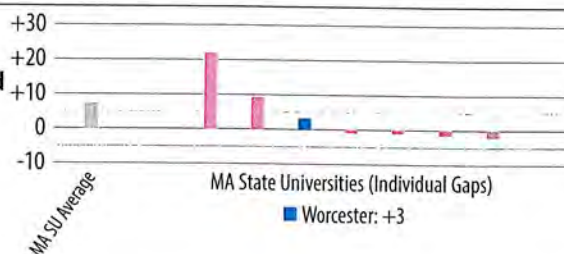
## ■ Gaps in Degrees Conferred in High-Need Fields (cont.)

Five-Year  
Trend

One-Year  
Change

### Gap Between African American & White Rate of Health Care Degrees Conferred as % of All Degrees Conferred to Group 2013–15

Due to small African American cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts.



Worcester

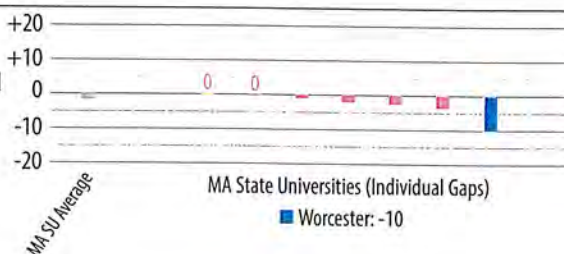
MA SU Average

⊖

⊖

### Gap Between Latino/a & White Rate of Health Care Degrees Conferred as % of All Degrees Conferred to Group 2013–15

Due to small Latino/a cohorts at several MA state universities, and the unreliability of comparisons among such small cohorts, this metric compares the combined outcomes for the three most recent cohorts.



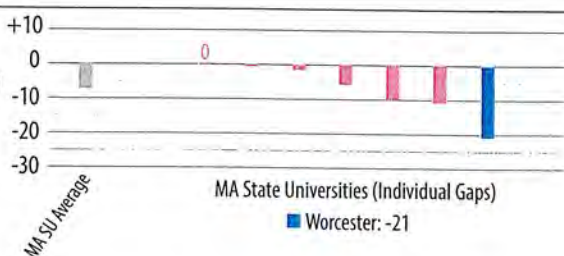
Worcester

MA SU Average

⊗

⊖

### Gap Between Male & Female Rate of Health Care Degrees Conferred as % of All Degrees Conferred to Group 2013–15



Worcester

MA SU Average

⊖

⊖

# Use of Resources

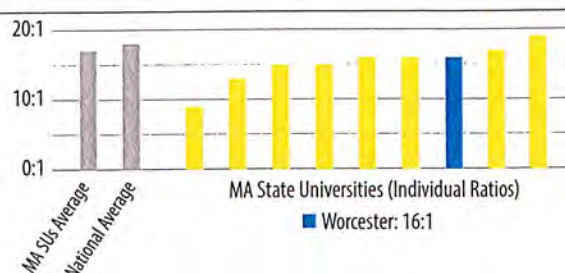
Trend Data ✓ = Improving Performance

○ = Flat Performance

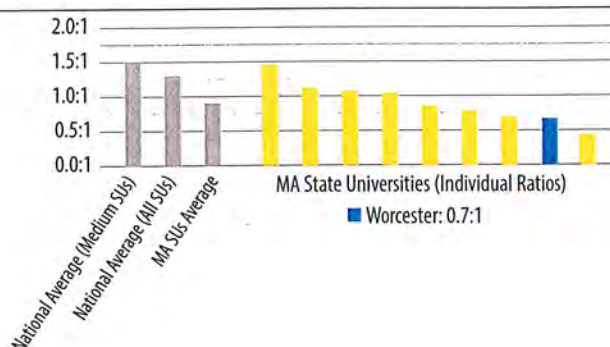
✗ = Worsening Performance

## Faculty Ratios

# FTE Students  
Per FTE Faculty Member/  
Instructional Staff 2014



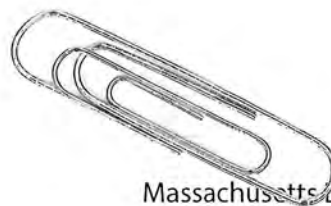
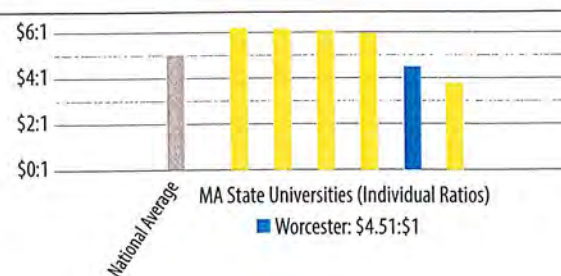
# Full-Time Faculty Members  
Per Part-Time  
Faculty Member 2014



## Spending Ratios

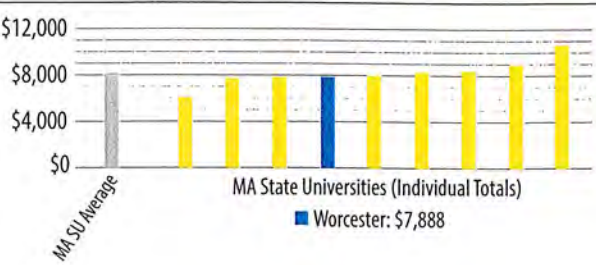
Dollars Spent on Instruction  
Per Dollar Spent on  
Institutional Support 2014

Note: Comparisons are made to  
public institutions of the same  
Carnegie Classification.



■ **Affordability**

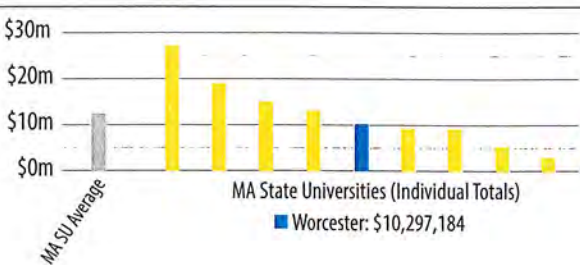
**Mandatory Fees for Full-Time, Resident, Undergraduate Students** FY16



	Five-Year Trend	One-Year Change
Worcester	⊗	⊗
MA SU Average	⊗	⊗

■ **Fundraising**

**Total Private Funds Received (Institution & Foundation)** 2011-15





## Vision Project Dashboard Notes

**Throughout**—All Trend Assessments follow these rules unless otherwise noted:

- **Five-Year Trend:** An average rate of change is calculated using the most recent three-year averages. An average rate of change equal to or greater than a one percentage point (on rates) or 1 percent (on counts) increase or decrease is Improving or Worsening; otherwise trend is Flat.
- **One-Year Change:** Using the two most recent years of data a percentage point (on rates) and a percent change (on counts) is calculated. A minimum 1 percentage point (on rates) or 1 percent (on counts) increase or decrease is Improving or Worsening; otherwise trend is Flat.
- Trend assessments are provided to generally summarize the direction on the metric. "Improving Performance," "Flat Performance," and "Worsening Performance" simply report whether a metric was higher, lower, or equal to its prior level based on one-year change or whether the long-term trend is improving or worsening. To fully understand the significance of these patterns, one must take into account specific institutional circumstances not evident in the numbers themselves.
- Trend assessment of performance gaps is focused on the narrowing or closing of the gap. An improving trend means the performance gap is closing, a worsening trend means the gap is widening. The same applies to one-year change.

### Page 6—% of Undergraduates Receiving Pell Grants

- Source: United States Department of Education (USDOE), Integrated Postsecondary Education Data System (IPEDS).
- Trend: Five-year trend is based on five most recent years of data (FY10–FY14).

### Page 7—% of Enrolled Students vs. % in Areas Served

- Latino/a and African-American percent of enrollment is based the annual unduplicated undergraduate headcount of students with a known race/ethnicity (not equal to total enrollment because of students with unreported race/ethnicity).

- Source: DHE, HEIRS Annual Enrollment File.
- "Areas Served" Definition: Population age 18–29 with at least a high school credential of the Public Use Micro Data Areas weighted for university enrollment. Source: 2013 American Community Survey, Census Public Use Microdata.

### Page 8—Two-Year Developmental Math Progress Rate

- Percent of first-time, degree-seeking students enrolling in developmental math who complete a college-level math course within two years.
- Source: DHE, HEIRS Annual and Fall Enrollment Files.
- Note: Not all students are expected to enroll in and complete a college-level math course. The share of students required to complete a college math course varies across campuses because of program mix and institutional practices for assessing college math proficiency.

### Page 8—Fall-to-Fall Retention Rate of First-Time, Full-Time Freshmen

- Percent of initial cohort retained at initial institution. Source: DHE, Fall Enrollment File. National comparison data is for the fall 2013 entering cohort.
- Source: USDOE, IPEDS.

### Page 8—Six Year Graduation Rate of New Transfer Degree-Seeking Students

- Trend: Based on five most recent cohorts with complete data.
- Source: DHE, HEIRS Fall Enrollment and Degree Files.

### Page 9—Gap Between Pell-Eligible & Non-Pell-Eligible Students on Six-Year Graduation Rate

- Trend: Based on five most recent cohorts with complete data.
- Source: DHE, HEIRS Fall Enrollment, Financial Aid and Degree Files.

### Page 11—STEM Degrees Conferred

- Definition: Life Sciences, Physical Sciences, Technology, Computer Science, Mathematics and Engineering.
- Source: DHE, HEIRS Degree File
- National comparison data is for FY14 degrees and certificates. Source: USDOE, IPEDS.

### Page 11—Health Care Degrees Conferred

- Definition: Includes all health professions and related programs.
- Source: DHE, HEIRS Degree File
- National comparison data is for FY14 degrees and certificates. Source: DHE, HEIRS Degree File

### Page 14—# FTE Students Per FTE Faculty Member/Instructional Staff

- Definition: Ratio is equal to the total FTE students (not in graduate or professional programs) divided by total FTE instructional staff (not teaching in graduate or professional programs).
- Source: USDOE, IPEDS.

### Page 14—# Full-Time Faculty Members Per Part-Time Faculty Member

- Definition: Ratio is equal to the total number of full-time faculty (non-medical instructional staff only) divided by the total number of part-time faculty (non-medical instructional staff only).
- Source: USDOE, IPEDS.

### Page 14—Dollars Spent on Instruction Per Dollar Spent on Institutional Support

- Definition: "Instruction" includes instruction, academic services and student support. "Institutional Support" includes executive oversight; administrative, planning, fiscal and legal operations; public relations; and development.
- Source: USDOE – IPEDS, Framingham State from HEIRS Fiscal File

### Page 15—Mandatory Student Fees

- Definition: Mandatory fees charged to full-time, full-year MA residents.
- Trend: Based on five most recent years.
- Source: DHE, HEIRS Tuition and Fee Survey

### Page 15—Total Private Funds Received

- Definition: Total private funds received by institution and foundation.
- Source: DHE, HEIRS Fiscal File

# President's Update

June 2016

## From the President's Office

### President's Message



Record numbers of students donned caps and gowns for both our graduate and undergraduate commencements on May 13 and 14, which celebrated the accomplishments our high-achievers, master's candidates, and graduating seniors during a flurry of year-end ceremonies.

(Read more at [WSU News.](#))

In this final issue of the Update for the academic year, we look back beyond the most recent time period at some of our accomplishments over the past nine months. Similarly, at the June 7 year-end Board of Trustees meeting, we will examine progress toward meeting the objectives of our 2015-2020 Strategic Plan, "Vision 2020: Scholarship, Partnership, and Leadership for a Changing World." The Strategic Plan Review Committee recently issued a report on the first 18 months of the strategic plan's implementation, finding that the university has met both of its objectives for Year One, which were **Campus Climate** and **Academic Excellence**, with a special emphasis on retention.

In addition, WSU's five divisions used annual goal-setting processes to tie their work to the strategic plan, while 13 cross-campus initiatives, funded in the winter of 2015, bore fruit in jump-starting progress toward becoming (in the words of the strategic plan) a university that "champions academic excellence in a diverse, student-centered environment that fosters scholarship, creativity, and global awareness."

### Newsworthy

Media outlet stories about us included

(<http://news.worcester.edu/external-posts/>):

- Lt. Gov. Karyn E. Polito's commencement address, covered by the Telegram and Gazette and published with the full list of our graduates;
- A piece in the Worcester Magazine on the prospects for job placement of our graduates and an article in Worcester Business Journal on 4+1 master's degree programs, including a WSU photo;
- Statewide media coverage of the Commonwealth's version of our \$30K Commitment Transfer Pathways Agreement with area community colleges, called the Commonwealth Commitment.



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### PRESIDENT'S OFFICE

Worcester State University  
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Worcester, MA 01602  
508-929-8000  
[www.worcester.edu](http://www.worcester.edu)

Recent Our News stories include:

- The [Enactus student group placed in the top 20 out of 535](#) competitors nationwide.
- The [Worcester Center for Crafts announced a pledge](#) from Education Prof. Carol Donnelly and her husband, Jim, and named its library for the Donnellys.

### Community, Government, and International Relations

- Governor Baker's policy pronouncement regarding a new Commonwealth Commitment (which followed WSU's own \$30K Commitment initiative with three central Massachusetts public institutions) included President Maloney as a signor on behalf of the Commonwealth's State Universities.
- As chair of the state university's Council of Presidents, President Maloney attended meetings of the Board of Higher Education and participated in ongoing discussions with state legislative leaders over funding for Massachusetts public higher education.
- President Maloney joined local, state, and federal officials for the groundbreaking of a new ice rink facility soon to be constructed in the Canal District area of Worcester. WSU is a prospective tenant as the future home to Lancer ice hockey. Also present were U.S. Representative Jim McGovern, Lt. Governor Karyn Polito, State Senators Harriette Chandler and Michael Moore, Worcester Mayor Joseph Petty, and WSU Trustee Craig Blais.
- The President and the university hosted visits to campus by overseas partners, including visiting teachers from Chulalongkorn University in Bangkok, and two separate visits from faculty members with the University of Worcester in England. Both overseas universities are long-standing partners of WSU. Separately, the President's Office made representations to current and prospective international partners in the Czech Republic (Czech University of Life Sciences of Prague – an established exchange partner), Italy (Università Cattolica del Sacro Cuore, Milan – soon to be an affiliated partner), and Montenegro (University of Montenegro, Podgorica – a prospective partner) earlier this spring.



### Promoting Diversity and Inclusion

- The Strategic Plan Review Committee determined that the University has met its goal to promote a more diverse and inclusive campus in Year One of the strategic plan.
- Dr. Brittney Cooper, professor of Gender and Africana Studies at Rutgers University and co-founder of the Crunk Feminist Collective, delivered the **Sarah Sharbach talk**: "#SayHerName: Toward A Gender Inclusive Movement for Black Lives."

### Organizational Updates

- The University realized significant savings from an early retirement incentive program implemented this past year. At our annual May employee recognition and retirement event, we noted that 18 faculty and 14 staff were retiring, who represented more than 800 years of service to Worcester State.





## Academic Excellence

- WSU faculty presented and/or published over 100 scholarly works this year.
- For the 2016-2017 academic year, 13 new faculty were hired in Humanities and Social Sciences, with 5 contributing to the diversity of the faculty; 7 new faculty were hired in Education, Health and Natural Sciences.
- **National Examinations**
  - WSU **Nursing students'** NCLEX Performance Summary for 2015 is 97.5%. In Massachusetts, the 2015 baccalaureate program pass rate was 85.08% and it was 87.48% nationally.
  - The **Speech-Language Pathology graduate program** had a 100% pass rate for all students taking the Praxis exam for the 2015-2016 academic year.
  - The **Occupational Therapy Department** reports a 100% pass rate for its twelve student May 2015 cohort.
- Proposals for the **Masters of Public Administration and Policy** and **Master's in Project Management** graduate programs are pending WSU's Board of Trustees and the Department of Higher Education approvals.
- The **Liberal Studies** major graduated its first student in December of 2015 and four additional students at the May 2016 commencement ceremony. The first award for academic excellence in Liberal Studies was given out at the April 28th Academic Achievement Awards ceremony at Mechanics Hall.
- Worcester State entered into a new articulation agreement in **Environmental Science** with **Quinsigamond Community College**.
- Faculty and students in the Departments of Urban Studies and Visual and Performing Arts created an original production called **CitySpeak** that brought together people who live in the city of Worcester.
- Worcester State hosted a panel session titled **Global Terrorism – Local Terror** to encourage discussion about the historical, economic, legal, religious, sociological, and urban contexts of terrorist events.

- The **Scholarship Committee** received 9,471 applications from 759 students for 169 named, multiple scholarships. Students will be notified in early July, and awards will be placed in their accounts before the fall semester tuition bills. Students and donors will be invited to attend the annual Scholarship Donor brunch next fall on Sunday, September 18, 2016.
- For the current academic year, the **Santander Universities Study Abroad Scholarship Fund** enabled 61 students to receive financial assistance for their global experience. Ten students participated in semester-long experiences; 51 students participated in short-term (less than eight weeks) experiences. Destinations included Dominican Republic, Ecuadorian Amazon, Cuba, Nicaragua, El Salvador, South Korea, England, Ireland, Costa Rica, Italy, Austria, Spain and Mexico.



## Partnering with our Community

- The **Massachusetts Workforce Development Grant** allows CNAs (Certified Nursing Assistants) and other hospital workers to gain university credit through portfolio development. Advisors will meet with participants to help them develop higher education plans. **UMass Memorial** and the union that covers these employees will partner in recruiting participants. The first cohort of 18 students has completed the program's first course and has started its second.
- Department of Nursing RN-to-BSN and MS students partnered with **Bay State Savings Bank** to celebrate "**National Public Health Week.**" Students offered free health screenings and education for the community at in several Bay State Savings Bank branch locations. Activities included Automated External Defibrillator (AED) training; using new training equipment underwritten by Bay State Savings Bank; vital sign and blood pressure checks; stroke awareness education; and prescription drug safety instruction.
- The **Sustainability Fair**, in its ninth year when it was offered last fall, featured presentations, panel discussions, product demonstrations, film screenings, food vendors, and other related activities.
- The **Worcester State University Speech-Language-Hearing Center** provided free hearing screenings and speech-language services to several schools in the area including the **Nativity School**. In total, the Center provides thousands of hours of services per academic year to Worcester State University and the greater Worcester community.
- The **Center for Business and Industry** provided grant-writing assistance to National Quality Review for a workforce training fund; delivered DiSC (a personal assessment tool) Workplace and DiSC Management training to over 180 employees at Country Bank; participated in networking events including Corridor Nine Chamber of Commerce Business Expo, Worcester Women's Leadership Conference, Corridor Nine Speed Networking Breakfast, and Worcester Regional Chamber of Commerce Business After Hours.
- The **WSU-CHIP (Community Health Improvement Plan) in Action project** is funded by the **Greater Worcester Fairlawn Foundation**. This project links WSU with the City of Worcester's Department of Public Health (WDPH). WDPH developed its Community Health Improvement Plan (CHIP) to improve the health of Central Massachusetts' residents and to provide data to support the improvement.

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## President's Update

- The **Education Department** and the **Binienda Center for Civic Engagement** welcomed **Jumpstart** (a program of the National Corporation for Community Service) to campus in the fall. Jumpstart's mission is to work towards the day when every child enters kindergarten prepared to succeed. This year, over 30 WSU students participated and there are plans to expand the program in AY 2016-2017.
- The **Worcester State Civic Corps** placed five students in the **Recreation Worcester Program** as a pilot funded by a Strategic Plan Implementation Fund (SPIF) grant. WSU students supported programs at Chandler Elementary, Goddard School, and Claremont Academy. Recreation Worcester is a program run by The City Manager and is based on a **Three As Philosophy: Arts, Academics, and Athletics**.
- The annual **Student Government Association (SGA) Auction** to support **Abby's House, the Mustard Seed and Sherry's House** surpassed the goal of \$24,000.00, raising over \$28,000.





## Preparing for Our Future

- Working to expand its draw of entering students beyond Worcester County, out-of-state student and international student enrollment increased by 20%. Of new students enrolled for the Fall 2015 semester, 90 were out-of-state students (an increase of 28.5% over the Fall 2014 goal) and 12 were international students (an increase of 20% over the Fall 2014 goal).
- Worcester State will continue to leverage the success of the Fall 2015 student enrollment goals by developing specific recruiting strategies to ensure stable university enrollment in a declining demographic market. Recruitment, yield, and enrollment efforts were adjusted to capitalize on new prospective student markets, such as Albany, NY, to assure student yield.
- Worcester State has revised all of its undergraduate recruitment collateral and developed a new counselor brochure, a search piece, and a brochure for high school juniors. Additionally, the development of new Graduate School recruiting materials is near completion.
- Worcester State is implementing new software that will enable assessment of current market attitudes toward Continuing Education and Graduate School registration. These applications also provide more transparent financial accountability on the level of individual programs. This project is part of a broader initiative to achieve greater operational efficiencies that support the university's ability to realize its mission.
- The **Counseling Center** developed a new wellness campaign entitled **TeamUp for Healthy Minds**. New approaches to the Behavioral Intervention Team, campus-wide suicide prevention programs, student mental health in the classroom webinars, and alcohol and other drugs reduction strategies were added this year.
- **Athletics and the Health and Wellness Office** will use the new Wellness Center to re-launch recreation and personal wellness programming. Members of the community are defining a new holistic approach to address all of the dimensions of wellness as part of a comprehensive campus-wide initiative.
- A celebration of the re-naming of the Worcester State University Department of Education for **Barbara (Hickey) O'Brien**, a 1957 graduate and benefactor of the university, was held in May. The O'Brien family has contributed over half a million dollars to Worcester State University, supporting WSU students with six endowed scholarships and sponsoring the annual Robert K. O'Brien Next Big Idea contest to encourage student entrepreneurship. The O'Briens' generosity will enable Worcester State University's Education Department to provide no-cost programs to support teacher candidates as they prepare for the challenging MTEL examinations.

- The **Alumni Connections Series** launched this spring, with inaugural Business Alumni Connections and Criminal Justice Alumni Connections events. Featuring an **Ask the Alumni** panel and networking with alumni and students, these events engaged an estimated 100 new alumni and students.
- The Alumni Office held successful student giving campaigns this spring. On April 6, in conjunction with the **Annual Day of Giving**, Lifetime Lancers (our student alumni association) launched the **Lancers for Lancers Book Fund** campaign. With 202 students involved in the initiative, the young alumni and student giving challenge set by Gregg '86 and Pam Rosen '85 was met, allowing WSU to receive a \$10,000 challenge gift from the Rosens. An additional 43 students donated to efforts outside of the Lifetime Lancer Book fund on the Day of Giving.
- Additionally, the **Class of 2016** will contribute the remaining dollars in their class fund to the Worcester State Foundation to create the **Class of 2016 Scholarship**. This student-led campaign featured video solicitations delivered via email, Facebook, and Text-to-Give, as well as a first-ever **Clear the One Card Day**, which encouraged seniors to donate their remaining common funds to the effort. With these new methods of outreach, the number of senior donors increased by nearly 75% from the previous year.
- The 2016 **Day of Giving** realized 649 donors and 698 gifts from 22 states and 11 countries. A total of \$77,133 was raised. Sixty percent of the donors were alumni and 28 percent were faculty and staff. The remaining contributors were parents, students, and friends.
- Worcester State has 100 percent giving from all three of the WSU boards (Trustees, Foundation, and Alumni Association), with total board giving at \$161,000; 93 percent of WSU Cabinet members gave in FY2016, for a total of \$10,494.
- To date, Worcester State has raised \$2.8 million for FY2016 in individual and corporate donations, as well as grants. With the 23<sup>rd</sup> annual Worcester State Foundation Golf Tournament still ahead and end of year annual giving efforts underway, we are on track to reach our \$3 million goal.
- The **Change Lives Campaign** continues to progress. To date, we have raised \$4.6 million for scholarship; \$4.6 million for academic/student development, including athletics; \$1.7 million for plant, property and equipment; and \$1.7 million for mission support in unrestricted dollars.

- As of April 30, 2016 (the last calculated date available prior to submission for this report) the Worcester State Foundation has provided more than \$600,000 to the University:
  - \$364,323 – Student Scholarships, Awards, Internship Stipends
  - \$103,120 – Programs and Community Involvement
  - \$87,955 - Real Estate (including the May Street Building, Chandler Street properties, and Craft Center)
  - \$19,768 – Faculty Research/Support
  - \$27,885 – Plant, Property & Equipment

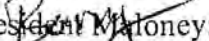


James B. Cox  
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May 31, 2016

Barry Maloney, President  
Worcester State University  
486 Chandler Street  
Worcester, MA 01086

Re: Board of Trustees and Foundation Authorities

Dear President  Maloney:

You asked me to describe the duties of the Board of Trustees both generally and in relation to the Foundation. You also inquired about the University Board's oversight of Foundation undertakings, including the Foundation's investment policies and decisions.

The boards of trustees of the state universities were created by the state legislature. They have the powers granted to them in G.L. c. 15A, 22. These many powers include authority to create all policies necessary for the administrative management of personnel, staff services and the general business of the university. Enumerated in the statute are the duty to prepare and submit budgets; the authority to establish all fees subject to BHE guidelines; the authority to appoint, transfer, dismiss, promote and award tenure to personnel of the institution; to manage and keep university property in repair; the power "*to seek, accept, and administer for faculty research, programmatic and institutional purposes grants, gifts and trusts from private foundations, corporations, federal agencies, alumnae and other sources*" (my emphasis due to relevance of this passage to this memorandum); authority and duty to implement affirmative action policies and programs; power to establish and evaluate student services policies; duty to recommend to the BHE admission standards and academic programs; transfer funds; establish and operate programs; confer degrees; duties to submit a five year plan, to submit financial data and spending plans as required to the BHE; develop a mission statement; engage in and report self-assessment; and the ability to undertake an entrepreneurial model encompassed in a five year plan approved by the BHE.

The legislature also authorized a state university Board of Trustees to certify a foundation that is organized and operated exclusively for the benefit of the university. G.L. c. 15A, 37 (a). The state legislature requires that such a foundation's governing board cannot consist of members fifty percent of whom are members of the institutional board or institution employees. In other words, a foundation cannot be governed or controlled by the university it supports. The entities are intended to be distinct.



The essential obligations of the board members of either the university or its foundation are the Duty of Care and the Duty of Loyalty;<sup>1</sup> these duties together are commonly known as fiduciary duties. In brief, the Duty of Care requires a board member to act in a reasonable and informed manner when participating in board decisions concerning the management of the organization. It describes the level of competence that is expected of a board member. The Duty of Loyalty requires board members to exercise their power in good faith and in the best interests of the organization, and prohibits board members from using their positions with the organization (the university or the foundation) for individual or personal advantage. Board members must act with the strictest good faith in governing the organization and must be mindful that they are stewards of the organization. The well being of the organization must prevail over that of the board member, or his or her employer, personal business, family, and others. Board members owe these duties to the organization on whose board they sit; the duty is to the organization itself. Thus, the university board members owe such duties to the university, and the foundation's board member owe such duties to the foundation.<sup>2</sup>

Worcester State University has certified the Worcester State Foundation, Inc. in accordance with c. 15A, 37. The Foundation cannot exist without this empowerment from the University.<sup>3</sup> However, the Foundation has a separate board, and acts independently of University oversight. The University board can influence the Foundation board primarily by collaborating with it, making its wishes known, and by the careful actions of the three university-connected Foundation board members who sit on the Foundation board and must act in the best interests of both the University and the Foundation.

By a Memorandum of Understanding executed by the parties in February of 2015, the University and the Foundation have acknowledged the terms of their relationship and delineated the respective roles of each. The two boards stated the Foundation will have the authority to manage investments and funds entrusted to it. The Foundation reports its activities to the Board of Trustees regularly, and its audit is consolidated with the audit of the University. The Foundation is not required to obtain the University's approval of investment strategies or choices, and the University cannot dictate a specific path to the Foundation.

The University board members who do not sit on the Foundation board have no formal obligations to the Foundation. However, these members should be mindful that the Foundation is shepharding funds the University may have received as well as funds the Foundation received in the name of the University. The Foundation bears the name of the University and acts

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<sup>1</sup> There are other duties for board members, such as duty of oversight, but those are not discussed here.

<sup>2</sup> There may be situations where the University board members and University employee sitting on the Foundation board are conflicted because they owe duties to both organizations. Addressing those situations is beyond the scope of this memorandum, and deserve separate consideration.

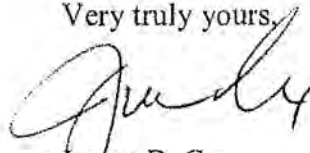
<sup>3</sup> The University Board of Trustees presumably could withdraw certification.

Barry Maloney, President  
May 31, 2016  
Page 3

exclusively for the benefit of the University. At all times the University board therefore should make reasoned decisions in good faith with regard to the Foundation.

Please contact me if you would like to discuss the application of these general guidelines to a specific situation.

Very truly yours,



James B. Cox

JBC/dmb

# STRATEGIC PLAN

## **Executive Summary and Overview Progress on Strategic Plan**

Worcester State University has made significant progress in the first 18 months of implementation of the 2015-2020 strategic plan, "Vision 2020: Scholarship, Partnership, and Leadership for a Changing World." (Strategic Plan web site: [here](#).)

Developed over the course of a year by a cross-campus Strategic Planning Committee (SPC) with input from all campus constituencies, that plan was approved by the Trustees in October 2014. Two strands for implementation were established:

- 1) WSU's five divisions used annual goal-setting processes to tie each goal to the strategic plan. (Division's goal grids were presented to Trustees in November 2014; those grids are attached with progress to date noted on each.)
- 2) A Strategic Plan Implementation Fund (SPIF) was established to encourage cross-campus collaborative initiatives that would "jump start" aspects of the Plan. After an open grant process, the University awarded \$371,000 for 13 projects in early in 2015. Projects leaders were given 18 months to fulfill their objectives (by August 2016). Oversight of each has been provided by a relevant division head.

In early 2016, the SPC was dissolved and the Strategic Plan Review Committee (SPRC) was formed to assess progress. Attached is that group's first report. To summarize:

**The SPRC concluded that the University has met both of its objectives for Year One of the plan, in which the areas of focus were "Campus Climate" and "Academic Excellence."** Progress has been made toward ensuring the campus is:

- 1) **More inclusive and diverse;** and
- 2) **Promoting academic excellence.**

(For specifics on how each Division ensured that we met these objectives, refer to the attached grids, which tracked the Divisions' progress and were the basis of the SPRC's work.)

A key recommendation of the SPRC is to "establish a campus-wide event where the **progress on the strategic plan is shared** with the campus community. Transparency of progress would keep the strategic plan vital within the campus community."

A key observation of the committee is that the divisions demonstrated growth and understanding of the process of planning and evaluation.





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## **2015-2016 Strategic Plan Update Report**

### **Assessment of Institutional Effectiveness**

Prepared by

Strategic Plan Review Committee

Kirshner Donis, Kevin Fenlon, Andrea Grice, Joan Mahoney, Robin Quill,  
Tammy Tebo, Sierra Trudel, Sarah K. Van Voorhis, Carol Lerch, chair



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## Introduction

During the 2014-2015 academic year a steering committee of faculty, staff, administrators, students, alumni, and trustees were brought together to develop a new strategic plan. The mission and core values were reviewed, a new vision emerged from the campus dialogues, and the plan was unveiled to the community at the fall opening day ceremony - *The Strategic Plan 2015-2020: Scholarship, Partnership, and Leadership for a Changing World*. It was approved by the Board of Trustees at their October 2015 meeting.

In fall 2015, \$423,455 were set aside to “kick-start” initiatives that supported the new plan (Strategic Plan Implementation Funds - SPIF). Proposals were due in November, 2015, (43 proposals were submitted) and were reviewed by a committee made up of volunteers from the strategic plan steering committee and representatives of each division. SPIF review committee recommendations were submitted to the president’s direct reports group for final selection. Proposals were evaluated based on their support of the strategic plan goals and cross-divisional collaboration. Thirteen proposals were funded, for a total of \$371, 586.50. Interim reports were due April, 2015, October, 2015, and April, 2016. The final reports are due in September, 2016. Information from these interim reports are included in the divisional updates where appropriate. See Appendix A for details and Google site for proposals, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>.

## Institutional Effectiveness

Institutional effectiveness is “... the degree to which institutions can harness their resources to achieve their objectives [and] depends upon the ... institution’s willingness to set priorities and solve its problems” (American Council on Education, 2016). Campus climate and academic excellence are always in the forefront of campus operations, but this year were identified specifically for attention across the university. Even though the priorities were named late in the year, February, the divisions were able to support both in their updates to the Strategic Plan Review Committee (SPRC). The divisional reviews provide documentation for the university’s progress on the strategic plan and our effectiveness as an institution.

Two areas of focus were identified as of special interest in the divisional reviews: Campus Climate, a presidential initiative, and Academic Excellence. These two areas are part of the university mission:

*Worcester State University champions academic excellence in a diverse, student-centered environment that fosters scholarship, creativity, and global awareness. A Worcester State education equips students with knowledge and skills necessary for lives of professional accomplishment, engaged citizenship, and intellectual growth.*

They are part of the institutional core values:



- **Academic Excellence:** We are committed to providing opportunities to excel in a close-knit learning environment characterized by distinguished faculty, excellent teaching, and creative linkages between classroom learning and real-world experiences.
- **Engaged Citizenship:** We are committed to promoting community service, social justice, the democratic process, environmental sustainability, and global awareness to prepare students to be active and informed citizens.
- **Open Exchange of Ideas:** We are committed to inviting and considering the most expansive range of perspectives in teaching and learning, in scholarly and creative work, and in the governance of a complex, diverse institution.
- **Diversity and Inclusiveness:** We are committed to being an inclusive community in which our diversity enhances learning for all and in which people from all cultures and backgrounds have the opportunity to participate fully and succeed.
- **Civility and Integrity:** We are committed to respecting the dignity of all members of our community and to demonstrating this commitment in our interactions, decisions, and structures.

They are also represented by goals 1 and 4 of the strategic plan:

1. **Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation**
2. Leverage WSU's distinctive strengths , both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world
3. Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success
4. **Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued**
5. Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value

The following report has five main sections: 1) recommendations, 2) support of focus areas and institutional goals, 3) divisional action plans and evaluation, 4) location of all divisional reports, and 5) updates on NEASC projections for the period up through spring 2016.

In section one the committee makes overall recommendations based on findings from the divisional updates. Section two contains the evaluation of progress on the areas of focus and strategic plan goals. Discussion draws on the information presented in the divisional executive summaries, update sessions, and divisional action plans that support a particular area or goal. Section three contains the divisional evaluations along with their executive summaries. Section four has been moved to a Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>, where all of the documents relating to the strategic plan and review are stored. Divisional action plans will be found at this site. Section five contains an update on the NEASC self-study projections that had a completion date up to spring 2016. The table is also on the Google site. Use the link above to access the site.

## Recommendations

SPRC has a comprehensive overview of the work done each year on the strategic plan. Based on our “30,000 foot view”, we would like to recommend the following:

### 1. Pre-planning –

#### a. We suggest two possible scenarios for the timing of the selection of areas of focus:

- i. Identification by the end of the fall academic semester for the current academic year. The upcoming budget process would be aligned with the priorities identified. The budget process begins in March with an April/May determination of financial priorities. If university areas of focus are identified before the budget process begins, then divisional and fiscal priorities can be aligned. Current practice has these out of sequence.

Pro: Discussions during the current year for the areas of focus, budget alignment.

Con: Not enough time to strategize specifically for the areas of focus identified.

- ii. Identification in September for the next academic year. This timeline would allow time for planning within the divisions and the university as a whole on how to address the areas of focus.

Pro: Allows ample time to strategize initiatives that support the areas of focus identified.

Con: Might be too far ahead so focus is lost.

### 2. Cross-divisional, cross-university collaboration and communication –

- a. SPRC is the only group on campus with an overview of divisional activities. The updates could be shared at direct reports meetings. A special session of the President’s Direct Reports should be devoted to sharing best practices on working with the university strategic plan. Two divisions, Enrollment Management and Student Affairs, have comprehensive, inclusive action plans that could serve as a model for the other divisions. Devise a way to embed “sharing best practices” across divisions as well as across campus. Each area has strengths that could be shared with others.
- b. Establish a campus-wide event where the progress on the strategic plan is shared with the campus community. Transparency of progress would keep the strategic plan vital within the campus community.
- c. Establish a reward structure that recognizes cross-collaboration and reinforces a “culture of positivity”. (The reward does not have to be monetary or released time.) Recognition should be done in a meaningful way, identifying who is making a difference, being sure to “spread the wealth” and not focus on the same groups over and over.
- d. Implement a monthly Campus Coffee Break on the model used by Dean Larrivee. The Worcester State Coffee Break is an opportunity for the staff and faculty to come together in a social setting for a short period of time each month. The conversations could be targeted or open, providing an opportunity for people to gather with different groups on campus. If the idea is accepted, the ground rules should be clearly defined that this is not a “gripe session”. Please see Addendum B for a possible outline.

3. Develop metrics that provide meaningful data –
- a. Metrics can be qualitative as well as quantitative. Surveys have the ability to generate both types of data. Establish baseline data in order to benchmark progress. Survey different constituents, have focus groups to drill down on specific issues. We have experts in all types of data analysis across campus. Classes could be used to develop surveys, graduate assistants could coordinate focus groups, etc.
  - b. Respectfully, “ongoing” is not an acceptable outcome.
  - c. This is a persistent issue, highlighted in the 2014 report.
    - i. *One trend that needs to be supported throughout the year is how to analyze data. Analysis and evaluation requires more time for divisional and cross-divisional development and discussion. Multiple measures are also needed, including qualitative and quantitative data and analysis. Bringing this discussion into the normal work flow will take vigilance by the campus leadership teams.*
    - ii. *Cabinet would provide a forum to discuss and evaluate data and should be utilized in this way throughout the year. Due to the history of working mainly within one’s own division, there may be concern about sharing a problem or asking for assistance. Trust can be developed in an open and respectful environment where all are working for the good of the university.*



## Institutional Assessment and Evaluation

Commentary and discussion of progress on the area of focus is presented In Section Two. Since the strategic plan is a comprehensive document, and is representative of the entire university, results have been combined here from all divisions based on their executive summaries and session discussions with SPRC.

SPRC evaluation is based on the executive summaries, update session discussions, and action plans. The focus is on the current year, and the committee also looked at previous reports for progress on any recommendations made in previous years.

### Definition of Evaluation Results

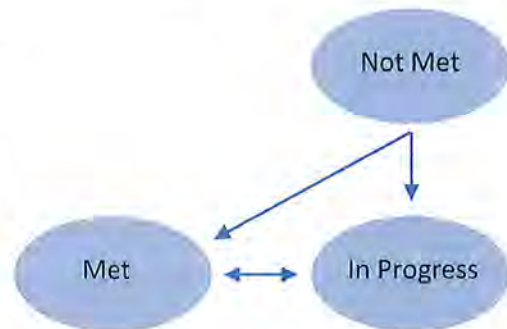
The committee uses the phrases “Met”, “In Progress”, and “Not Met” for the results of each evaluation area. SPRC evaluations are limited to the past year only, and we encourage all divisions to take advantage of this assessment time frame to take on larger and farther reaching goals as they learn from their initiatives from previous years.

No division should consider themselves finished in terms of integrating the university goals and strategic plan even if all evaluation results are “Met”. Because growth is cyclical, movement from “Met” to “In Progress” should be expected as divisions move from basic initiatives to more complicated and long-term initiatives that bring the division closer in line with the Strategic Plan.

“Met” means that the division has presented meaningful data showing the outcome of initiatives for this criteria. We challenge divisions who have “Met” in most or all areas to use their solid foundation to create further reaching goals and initiatives for the next assessment period, and to collaborate with other divisions to share best practices.

“In Progress” means that the division presented clearly defined goals and a solid action plan with initiatives that are still ongoing. We encourage divisions with “In Progress” results to continue their efforts and create a timeline for completion to keep themselves accountable. These divisions should also focus on meaningful longitudinal data collection so that they can evaluate the success of ongoing initiatives and create a solid assessment foundation for future goal setting.

“Not Met” means that the division has taken no action in this area this year. We encourage divisions with these results to set well defined goals and implement them over the next year. These divisions should network with other divisions to learn best practices so they can build a solid foundation for future initiatives. We see this as an excellent opportunity to integrate cross-divisional collaboration into a division’s foundation for planning and assessment.





The divisions had already developed their initiatives and action steps for the year, but most have been able to highlight specific areas where they support campus climate and academic excellence.

### **Area of Focus - Campus Climate**

In this year of the Black Lives Matter movement, the campus has identified a special focus on diversity and campus climate. The president brought together a group of faculty and staff to open dialog on campus on diversity issues. As a result *campus climate* was identified for specific focus of the strategic plan review. Campus climate involves, but is not limited to, diversity issues, communication, respectful interactions, customer service, etc. As a core institutional value, campus climate is implicit in the divisional action plans.

### **Status**

**The focus on Campus Climate is met for this year.**

Evaluation of this area of focus is limited due since this was identified late in the academic year. Each division has implicit in their initiatives and action step items that support an inclusive, welcoming environment and have discussed in the [executive narratives](#).

### **Discussion**

Administration and Finance focused on “service and support of the WSU [community](#).” They are establishing baseline data through surveys of various campus groups. Enrollment Management “encourages all members of the campus to be included in campus activities, decision-making processes, and [outcomes](#)” to support the campus. Student Affairs has made a “commitment to training on topics of diversity as it relates to social justice, inclusive workspace, and engagement of our [student body](#).” University Advancement supports “a vibrant campus life and collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and [valued](#).”

See the individual [executive summaries](#) for more complete discussion of campus climate.

### **Recommendation**

Areas of focus should be identified prior to budget planning for the following year. Identifying the specific focus of the strategic plan for the coming year allows divisions to prioritize their action plans as well as develop their budgets accordingly. Divisions have their annual retreats in the late spring and summer months so making them aware of the coming focus should be timelier. See overall [recommendations](#) for two possible scenarios.

## **Area of Focus – Academic Excellence & Goal 1**

**Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.**

### **Status**

**The goal of promoting academic excellence is met for this year.**

### **Discussion**

Academic excellence is at the heart of the university as demonstrated in the mission statement, "... to champion academic excellence in a diverse, student-centered environment". All 13 SPIF grants focused on academic excellence and each division contributes to support our effectiveness.

Administration and Finance has streamlined the process for tuition payment "in an effort to serve students better and increase retention and graduation [rates](#)." Enrollment management's "work is designed to enhance students' interaction with academics through promotion, recruitment, registration, and [more](#)." Student Affairs supports academic excellence through non-classroom activities such as service learning and community [service](#). Students see the interface of their academic work with real world experiences. University Advancement supports students with various [scholarships](#) that enable them to continue their studies.

See the individual [divisional summaries](#) for more complete discussion of academic excellence.

### **Overall Impressions**

This first assessment of the new strategic plan is much improved over the previous sessions, showing growth and understanding of the process of planning and evaluation. The discussions have become lively interactions between SPRC and the divisional vice presidents, sparking new ideas and alternative ways to see an issue and create a solution. The process was tweaked slightly this year, requesting an executive summary of the progress of the entire division on the focus areas and any goals that the area Dean and VPs wanted to highlight. In previous years, each division reported by department, showcasing individual successes.

### **Recommendation**

The campus would benefit greatly from a campus-wide discussion of the progress on the strategic plan. The development process was transparent, reaching all campus groups multiple times. Their input was valued and is represented in the strategic plan. The evaluation and update process is insular. Only the SPRC members and the president's direct report group have access to the final document. The president will provide a summary of progress to the Board of Trustees in June. As of today, there are no plans to celebrate the progress on the strategic plan with the wider campus communities.

The SPRC has an excellent overview of the campus and can see the collective progress on the strategic plan. The committee is also aware of areas where improvement is needed. If the report is read and shared with a wider audience, more of the campus will understand the great work that is accomplished

all across the university. Keeping the essence of the report insular leads to loss of interest in strategic planning as a whole, and may hinder the development of the next plan. We promised transparency – we need to fulfill that promise.



## Administrative Assessment Review by Division

In this section are the individual divisional evaluations. These have been prepared by members of the strategic plan oversight committee based on the information provided in the divisional executive summaries, discussions, and action plans, and are based on the review template categories.

### Academic Affairs

Evaluation	Results
Focus area: Campus Climate	Not Discussed
Focus area: Academic Excellence	In Progress
<u>Divisional Objectives</u> Included Cross-Divisional Collaboration	In Progress
<u>Analysis of Effectiveness</u> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	In Progress
<u>Supporting Documentation</u> Sufficient Information/Evidence to Understand Analysis	In Progress

### Summary of Process

Academic Affairs provided the committee with an initial assessment plan that covers the next year. We look forward to seeing the results of this plan at the update session in 2017. An executive summary was requested of all divisions, but has not been submitted by academic affairs as of this report. If the executive summary is provided at a later date, it should be added in the next session.

### Strengths

The SPIF grant *"The ALANA initiative: Expanding and enriching curricula and community for ALANA and all students at WSU"*, succeeded in implementing an Interdisciplinary Concentration in Ethnic Studies which was approved by Governance in February 2016. A cross-departmental and cross-divisional working group of faculty and staff from the Office of Multicultural Affairs and Enrollment Management worked to cultivate increased racial and ethnic diversity among students, faculty, alumni, and the campus community.

### Recommendations

Moving forward, Academic Affairs should create overarching divisional goals to unify the focus of the departments within Academic Affairs and further integrate the strategic plan into the function and communication of the division. We recommend that the action plan provided be implemented



immediately to begin the process of collecting and assessing longitudinal data to aid in information based decisions.

## Administration and Finance

Evaluation	Results
Focus area: Campus Climate	Met
Focus area: Academic Excellence	Met
<u>Divisional Objectives</u> Included Cross-Divisional Collaboration	Met
<u>Analysis of Effectiveness</u> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<u>Supporting Documentation</u> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Administration and Finance planned projects to move the University towards a more customer-focused experience. The division gathered data from a series of surveys of faculty and staff about specific departments. SPRC looks forward to analysis based on the data from these surveys. It will be important to maintain baseline data and to think strategically in order for Administration and Finance to determine the impact of any upgrades and changes. The division will be implementing Elevate™ as a system to facilitate the collection and use of data and plans, and will share their results with other offices and divisions on campus. Elevate™ is a data collection and analysis tool that part of Colleague.

### Strengths

The Bursar and Enrollment Management have been successful in bringing the number of nonpayment holds down over the last few academic years. The success of resolving student nonpayment holds impacts student retention at the university and increases on time (within 4-6 years) graduation rates.

Administration and Finance collected data through pre- and post-surveys for departments in the division and supplied aggregated data to the committee.

### Recommendations

Administration and Finance could survey the student body specifically about the students' experiences related to the billing process. Useful data could include the evaluation and assessment of all departments in the division, allowing the division to make information-based decisions on how to enact change. Administration and Finance could then share their best practices with the university.

A procedurally literate student body would enhance the impact of any projects Administration and Finance initiates in the areas of customer service. An educational component could improve student

comprehension of billing processes and timelines, and increase student understanding of the educational and financial impact of academic choices, such as dropping courses, repeating courses, and taking a combination of evening and day courses.

Charting data will help clarify the division's progress as it relates to the university strategic goals. We encourage follow through with the analysis of the pre and post-surveys, and suggest that appropriate adjustments be made to future surveys to increase the accuracy and functionality of the survey data. This assessment process should be applied to other projects as well, such as the pilot project using ImageNow™ to track paperwork as it moves through the approval process.

## Enrollment Management

<b>Evaluation</b>	<b>Results</b>
<b>Focus area: Campus Climate</b>	Met
<b>Focus area: Academic Excellence</b>	Met
<b><u>Divisional Objectives</u></b> Included Cross-Divisional Collaboration	Met
<b><u>Analysis of Effectiveness</u></b> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<b><u>Supporting Documentation</u></b> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Enrollment Management provided a clear organizational plan and transparency of the processes used in evaluating their action plan. The divisional plan is inclusive of all departments within Enrollment Management. Each department has individual goals which tie directly to the divisional action plan, thus to the University strategic plan. The committee views the Enrollment Management method as a model process on strategic plan methods.

### Strengths

Enrollment Management maintained strong communication with the committee throughout the review process and answered the committee's follow-up questions thoroughly and in a timely manner. Their goals are well organized and easy to understand.

The division took SPOC's 2014 recommendations into consideration. The divisional objectives and key strategies/initiatives are clearly linked to the University Strategic Plan and the institutional goals. In the 2014 report, SPOC recommended that the Enrollment Management divisional action plan be more comprehensive in representing the entire division. The 2016 plan includes goals and actions that span the multiple departments within the division.

Enrollment Management has done a commendable job supporting the university's core value of academic excellence. Enrollment Management purchased a new piece of catalog and governance software and worked to improve the university recruitment materials and website. They have successfully continued the implementation and use of the Admitted Student Questionnaire and the analysis of the resulting data.



SPRC also recognizes Enrollment Management's devotion to campus climate. The division worked internally and cross-divisionally to improve the climate of Worcester State University by providing customer service training for all Enrollment Management employees, participating in diversity and inclusion workshops and offering cross-divisional bi-monthly Information Sharing Sessions. Enrollment Management's future plans include offering civility training to all EM employees, creating an annual award for superior customer service and reconfiguring of Financial Aid office space.

## **Recommendations**

SPRC recognizes the initial efforts made by the Division of Enrollment Management to align academic programs with workforce information. The Committee recommends further action based on collaborations with Career Services and University Advancement. The current data and information populating these webpages is a valiant first step in the process of establishing this type of recruitment tool and informational resource. To take this endeavor to the next level, it would be beneficial to note more specific and real-time data related to employment trends, projections, education requirements (e.g. Master's, Ph.D.) and base salaries. Working in tandem with Career Services and University Advancement would assist in the creation of these benchmarks and service many purposes across campus.

After the Financial Aid office is reconfigured and the team has completed customer service training, the division could create follow-up surveys with students and staff to see if the changes have helped improve the campus climate.

Enrollment Management has an excellent opportunity for cross-divisional collaboration. We recommend surveying other divisions to assess data needs that can be collected on admission or graduation. We also strongly encourage Enrollment Management to offer support to other divisions as they undergo their strategic plan assessment and planning.

## Student Affairs

Evaluation	Results
Focus area: Campus Climate	Met
Focus area: Academic Excellence	Met
<u>Divisional Objectives</u> Included Cross-Divisional Collaboration	Met
<u>Analysis of Effectiveness</u> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<u>Supporting Documentation</u> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Student Affairs provided well-articulated assessment goals that were interconnected across their departments as well as other divisions. Each initiative is intricately linked and thus supports all of the strategic plan goals. The department succeeded in meeting the goals of campus climate and academic excellence, and their plan shows a student-focused approach to meeting these goals.

### Strengths

The division paid close attention to the overarching goals of campus climate and academic success, especially in their collaborations with other offices and departments on campus. The actions for the strategies and initiatives are linked in such a way that the plans for any given goal will support the success of the other four goals.

Goals related to academic excellence were inclusive of accessibility needs and attended to the needs of at-risk students with barriers to persistence. The initiatives demonstrated a comprehensive focus on student success by meeting the needs of students from their undergraduate experience through their goals of post-graduation employment or graduate school.

Student Affairs has demonstrated excellent collaboration throughout the campus. Student involvement is critical to the success of the initiatives, involving them in the overarching goal of improving services to students and fostering a strong connection between students and the campus community. These initiatives are supported by plans to improve event planning across campus and using technology to improve communication throughout the university.

Student Affairs maintained strong communication with the committee throughout the review process, and its goals are well organized and easy to understand.

## **Recommendations**

We suggest that Student Affairs utilize specific action steps that will help keep them accountable and allow them to measure success. We encourage Student Affairs to continue their support of other divisions as they work on their action plans by sharing their best practices in initiative mapping across the goals of the strategic plan.

## University Advancement

Evaluation	Results
Focus area: Campus Climate	Met
Focus area: Academic Excellence	Met
<u>Divisional Objectives</u> Included Cross-Divisional Collaboration	Met
<u>Analysis of Effectiveness</u> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<u>Supporting Documentation</u> Sufficient Information/Evidence to Understand Analysis	Met

### Summary Process

The office of University Advancement provided initial data on donor funded scholarships which have impacted student retention and graduation rates. These outcomes are important to track in order to increase funding and would foster cross divisional collaboration to meet strategic plan goals.

### Strengths

The division actively focused on campus climate, which is shown through their efforts to unite the campus community. These initiatives include WSU's Annual Day of Giving, Lifetime Lancer Student-Alumni Council, Adopt-a-Scholar program, and a new mascot.

University Advancement maintained strong communication with the committee throughout the review process. The division paid close attention to Academic Excellence and demonstrated the success of their initiatives with data. They provided the number of scholarships awarded in the fall 2015 semester and analyzed the effect of scholarship awards on WSU student retention and six-year graduation rates. University Advancement's partnership with Enrollment Management for the awarding of academic scholarships is an excellent example of cross-divisional collaboration.

University Advancement has benefitted from the Disney Model of Management, the details of which can be found in [Appendix C](#).

### Recommendations

We see an opportunity for University Advancement to collaborate with sister universities and become a state wide leader the standardization of terms, benchmarks, best practices, and goals. By establishing



baseline quantitative measures, future planning could be adjusted to serve both students and the University more effectively.

University Advancement has a strong relationship with Enrollment Management in the sharing of data around scholarships and retention. We recommend a longitudinal and long term data collection and analysis with an integration of qualitative data to support scholarship assessment.

The impact of the events calendar could be enhanced by instituting a shared event planning calendar for use in collaborative meetings with VP's, direct reports, etc. This calendar would be different from the university calendar posted on the website since it would include events in the pre-planning stage. This could streamline planning processes and improve cross divisional collaboration on events by networking them together during the event planning stage.

University Advancement has implemented best practices in Customer service and should consider offering workshops or trainings to other divisions.

## **Divisional Executive Summaries**

Each division was asked to provide both an executive summary of their work this year and updated action plan matrices. The summaries are included in this section; the action plan matrices and additional materials may be found on the Google Site established for the Strategic Plan Review Committee. Please use the link provided to access the Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/> .

### **Academic Affairs**

The executive summary of divisional progress has not been received as of the finalizing of this report.

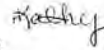
## STRATEGIC PLAN (Part II)

## Administration and Finance

### Memorandum

**TO:** Strategic Plan Review Committee

**FROM:** Kathleen Eichelroth, Vice President of Administration and Finance



**RE: ADMINISTRATION AND FINANCE 2016 UPDATE**

**DATE:** April 28, 2016

#### AREAS OF FOCUS:

Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed included, respected, empowered and valued

Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value

During the past year the focus in A&F has been on service and support of the WSU community. The overarching goals have been to collect data to form a baseline from which we would seek to improve and refine the ways in which we support campus constituents. A round of survey's were issued for each functional area and a second year of feedback is being collected. We will be evaluating the baseline survey data and comparing it to the second year results. We will devise a plan to actively respond to what the survey tells us with regard to the actual and perceived issues that rise to the top.

While we began the survey process, we also worked with IT in support of resources for the FY 2016 budget to fund technology replacement cycles, Colleague functional audits, and training services and expanded upgrades/new software to support the efficiency and effectiveness of university operations. Colleague conducted on site audits of the processes and use of software in various business units across campus. Procurement, Accounts Payable, Budget, Accounting, Bursar, Grants and Financial reporting were visited by a Colleague consultant who evaluated our business processes and provided staff with tools, tricks and pointers with regard to the most effective ways to process business activities. Progress was made on using Image now to automate the flow of documents across campus with a goal of eventually converting all university forms to an electronic routing process.

Also during this year we have been working with IT and DGCE to find a product that supports transparent reporting and current market attitudes towards continuing education and graduate program registration. The University has entered in to a contract to implement Elevate, which is a Colleague product that integrates with current registration and financial reporting modules. This



product is consumer friendly and provides a structure that supports financial accountability on a program level. Elevate is versatile and can be expanded for registration of fitness and recreational classes in the new fitness center, registration for training and development opportunities offered by Human Resources , in addition to any offering, fee based or free, for which we would encourage pre-registration.

In response to the first round of survey's, budget, procurement and accounts payable training sessions were upgraded and improved in an attempt for the information to be easier to understand and the purpose for policy and procedures to be communicated in a clearer fashion. In addition, the administrative policy sub-committee of Cabinet has re-convened with the intent of codifying current documented administrative practices into approved administrative policy. The group will also consider methods to effectively catalog and communicate administrative policy to the WSU community and make their recommendations to Cabinet.

Other areas of focus during the year included follow-up on the process for non-payment deletions in conjunction with the enrollment management team in an effort to serve students better and increase retention and graduation rates. We are rounding the corner to the completion of the Wellness Center building. The building provides new resources to the WSU community with expanded offerings in intramural and recreational programs. We anticipate a potential for new revenue generation when the facility offers programming to the general public. During 2016 an early retirement incentive was offered to employees as a cost saving measure. The success of this university initiative has provided for the re-distribution of resources from salaries to fund the increased costs to operate the new 100,000 square foot Wellness Center in FY 2017.

In the coming year we will continue with the initiatives that we have reported on, in addition to adding a new specific action under Goal #4 Community and Campus Life. The specific action is to "Implement Talent Management Plan" as detailed in the attached grids. The implementation of a talent management plan will touch on the following strategies under this goal: promote greater collaboration across divisions in support of shared, university-wide goals and mutual accountability for progress; nurture a campus culture that promotes cultural awareness and sensitivity as well as commitment to social responsibility and environmental stewardship; significantly improve internal communication and ensure faculty and staff feel they have a voice in setting strategic direction and priorities for the University; Celebrate contributions to campus and community by faculty, staff, students, and alumni who embody WSU's core values; and, ensure opportunities to succeed at WSU are equally available to all members of the faculty and staff.

## Enrollment Management



**WORCESTER**  
STATE  
**UNIVERSITY**

### STRATEGIC PLAN **VISION** 2020

2015-2020 Strategic Plan Evaluation

Enrollment Management Divisional Report

March 9, 2016

#### Introduction

This report shall serve as evidence of the Enrollment Management Divisions update on the 2015-2020 Strategic Plan. This report is presented to the Strategic Plan Review Committee (SPRC) on March 9, 2016, in concert with verbal discussion of institutional goals, divisional priorities, and metric outcomes during the 2015-2016 academic year. Also included in this report are preliminary results of the Strategic Plan Incentive Fund (SPIF) Grants and NEASC Projections that were associated with the Enrollment Management Division.

In February 2016, it was announced that the areas of focus for this SPRC Review included Campus Climate and Academic Excellence. As Academic Excellence is engrained in the 2015-2020 Strategic Plan, documentation of the achievement of related goals is easily done. As Campus Climate is only eluded to in the 2015-2016 Strategic Plan, by such goals as Diversity and Inclusiveness and Civility and Integrity, the demonstrated achievement of this focus must be adapted from related priorities that the division had during this review period.

The Division of Enrollment Management is glad to provide this report and proud of the efforts made during this review period to support and meet the goals of the Worcester State University 2015-2020 Strategic Plan. Questions can be directed to Vice President Ryan Forsythe at 508-929-8498 or [rforsythe@worchester.edu](mailto:rforsythe@worchester.edu).



## **Campus Climate**

The mission of the Division of Enrollment Management (EM) and its primary functional body, the Enrollment Management Committee, is related to the bringing together of members of the WSU community to address issues of enrollment, retention, and graduation of all students. It is our core belief that positive recruitment, retention, and graduation outcomes are only possible on a campus with vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued.

From appreciating and celebrating the differences between all students, faculty, staff, and librarians to encouraging all members of the campus community to be included in campus activities, decision making processes, and outcomes, the Enrollment Management Division establishes strategic goals and other plans to encourage a campus climate which we all are proud of and benefit from. Examples of EM efforts to encourage progress towards a healthy campus climate can be seen in multiple strategic goals and outcomes. Specifically in the 2015-2016 academic year, the Enrollment Management Division is proud to have:

- Completed Customer Service training for all employees
- Participated in diversity and inclusion discussions and workshops for all divisional leaders
- Worked cross-divisionally to inform campus constituencies on divisional goings-on via bi-monthly Information Sharing Sessions
- Continued the collaborative and cross-divisional work of important committees, such as the Enrollment Management Committee, Transfer Advisory Board, etc.
- Enhanced communication of student, faculty, and staff success stories through the improved E-News website and other channels
- And more...

In future years, the Enrollment Management Division looks forward to:

- Furthering customer service and civility training for all employees
- Reconstructing the physical Financial Aid Office space to encourage improved interactions with staff
- Adding an annual award for superior customer service
- And more...

## **Academic Excellence**

Excellence in academics is the cornerstone of a post-secondary institution of higher learning. Enhancement of the undergraduate and graduate academic programs, through academic excellence and innovation, is essential to meeting the enrollment needs of an institution, among many other institutional priorities. It is because of this crucial need that the Enrollment Management Division is wholly embracing and supportive of the institutional goal of Academic Program and Excellence.

As the EM division does not deliver academic programs, our work is designed to enhance students' interaction with academics through promotion, recruitment, registration, and more. Goals and outcomes related to academics in EM often center on issues of program awareness, using registration data for program delivery and enhancements, enrolling appropriate numbers of students, etc.

Specifically in the 2015-2016 academic year, the Enrollment Management Division is proud to have:

- Improved recruitment materials, website, and video representation of academic programs
- Met data-informed Enrollment Management Plan Goals through cross-divisional work in the Enrollment Management Committee
- Administered the campus' first professional Admitted Student Questionnaire (ASQ)
- Capitalize on the promotion of HECCMA cross-registration opportunities
- Continue improvements to the Starfish Early Alert system for notifying students of progress in classes
- And more...

In future years, the Enrollment Management Division looks forward to:

- Creating a real-time data library for weekly enrollment comparisons by various measures
- Continue to meet data-informed Enrollment Management Plan Goals
- And more...

## **Goals, Strategies, Initiatives, Projections, and Analysis of Accomplishments**

### **Enrollment Management Metrics – Spring Update**

Please see the attached *Enrollment Management Metrics – Spring Update* for specific key strategies, initiatives, and actions established for the Enrollment Management Division. This document includes clearly articulated goals, evidence of cross-divisional collaboration, and clear actions that will be taken in future terms/years.

### **NEASC Projections from 2012 Self Study – Spring 2016 Update**

Attached is the *NEASC Projections from 2012 Self Study – Spring 2016 Update* document, which includes updates from the Enrollment Management Division for the current review period.

### **Enrollment Management Directors Goal Documents**

The 2016 goal documents for the Enrollment Management Directors of Admissions, Financial Aid, and Registrar are available for SPRC review. These documents reflect the expectations of the individuals in the Director positions, as well as the expectations of the offices which they oversee. Director and office goals are established based on the immediate needs of the division and the strategic plan goals and metrics.



## Strategic Plan Incentive Fund (SPIF) Updates

The three Strategic Plan Incentive Fund (SPIF) projects that are affiliated with the Enrollment Management Division are on track to meet their goals and have satisfactorily submitted their mid-year reports in late 2015. These projects include:

- The ALANA Initiative: Expanding and enriching curricula and community for ALANA and all students at WSU
- Study the Cultural Impact of Worcester State University...
- Urban Networks



# WORCESTER STATE UNIVERSITY

## Annual Report on Strategic Planning

2015-2016

Division of Student Affairs

### Overview

Comprised of 17 departments, the mission of Student Affairs is to promote and enrich students' education through a seamless learning environment that enhances the classroom learning experiences. This is fostered by interacting with students in their everyday lives through teaching, mentoring, advising, and counseling.

Student Affairs is an integral part of the learning process in higher education, providing opportunities for "student to learn through action, contemplation, reflection and emotional engagement as well as information acquisition (Learning Reconsidered)."

This past year, the work in Student Affairs focused on direct service to students, engagement, marketing of services, and a new Council for the Advancement of Standards (CAS) calendar for assessment. The numbers of students seeking services from departments like Counseling and Student Accessibility Services has jumped dramatically in recent years. The division faces significant challenges to meet all of the demands and needs of students without an increase to staff and working to prevent current staff burnout.

### Update on Assessment and Planning

On October 16, 2015 the Student Affairs Division held a meeting of all the directors and associate/assistant directors to discuss the next steps for strategic planning. The goals of this retreat were to allow for an open and creative discussion between members of the division as it related to the University Strategic Plan and cross collaboration. Participants were asked to funnel concepts from departmental strategic plans towards the newly established divisional working groups. The three

working groups each headed by an Assistant Dean(s) are Student Engagement, Retention, and Marketing of Programs/Services.

The groups were tasked with the following:

- All initiatives must relate back to the five overarching goals and strategies
- Review all departments within the division for initiatives that relates back to the group topic. Groups can also develop new initiatives.
- Prepare action plan draft by December 18, 2015 and final plan by February 19, 2016. This plan should focus the work for the next year to 18 months.

Each group met and created action plans. For the first time, staff members were able to link action plans to divisional objectives, cross-divisional objectives and ultimately the institutional goals.

The below summary is a sample from the work of the three groups to address campus climate, cross-divisional work, and student engagement.

### **Student Engagement Working Group**

**Highlights:** Provide 3- 5 significant highlights from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **campus climate and/or cross-divisional work**?

- SPIF Funding- Civic Core: 14 ALANA Sophomore Students involving trips to Nicaragua, Dominican Republic and work with the City of Worcester Recreation program
- AY 15-16 Diversity Lecture Series, 4 in total
- Work with Reyes House. ENACTUS, Binienda Center
- CHIPS Program- Community health and improvement plan with Dean of Education, Health, and Natural Sciences
- Conduct Board representation by Faculty and staff in other divisions
- Coming Out Day and Transgender Day sponsored by Pride Alliance

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Limited Resources (budget limitations, transportation for students doing community work, staffing)
- Better Coordination of planning events (no double booking)
- Need a culture of collaboration
- Fiscal Policy Restraints (must wait until July 1 to book for next AY—timely planning)

- Lack of diversity among involved students

**Ongoing/future assessments:** In this section please describe **your groups' plans** moving forward. Did you come up with any new initiatives specific to your working group?

- Utilizing Noel Levitz Data to outreach to engage students
- Utilizing Alcohol EDU Data to outreach to engage students
- Comprehensive proposal for co-curricular transcript
- Work with institutional research on NESSE data

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- JumpStart
- Renovation of 3<sup>rd</sup> Floor of the Student Center
- 4-5 new student organizations this academic year

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Limited Resources
- Better Coordination of planning events (no double booking)
- Need a culture of collaboration
- Fiscal Policy Restraints (must wait until July 1 to book for next AY—timely planning)
- Lack of diversity among involved students
- Outreach to under engaged students

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Co-Curricular Transcript
- Use of Noel Levitz Data
- Use of Alcohol Edu Data
- Opening of the Wellness Center
- Expand program offering for commuter students

### **Marketing of Programs/Services Working Group**

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **campus climate and/or cross-divisional work**?

- Met with the Marketing department to discuss the university vision for a consistent branding.
- Student Affairs participated in Admissions Open Houses and will be participating in Congratulations day.



- Offices worked to properly brand materials used for recruitment and retention purposes.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Ensure all marketing materials should properly support the university's campus climate.
- There should be a consistent look to all materials, table appearance, staff and faculty dress to achieve a cohesive look and feel to the university during open house type events.

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- We plan to interview the student affairs departments to learn what each department is currently doing for marketing. We can use this information to learn effective strategies from each other and determine what each is doing and materials they are using for their marketing efforts.

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- Expansion of new Medias for marketing initiatives.
- Cohesive branding identity.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Funding for new marketing initiatives (technology, etc.)
- Consistent enforcement of branding guidelines to direct departments when purchasing marketing materials (shirts, table covers, giveaways, etc.).

**Ongoing/future assessments:** In this section please describe **your groups plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Gather information on how departments interact/reach out to the student population.
- Determine a best practices guide for all student affairs departments.

### **Retention Working Group**

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **campus climate and cross-divisional work**?

- Student Intervention Team (SIT) has evolved into a cross-divisional team following nationally established best practices for identifying and intervening with students presenting with mental health issues/behavior challenges. Over

the past few months work has been focusing on marketing, training, and website development

- Title IX cross-divisional training delegates, faculty and staff. Working on marketing campaign. Collaboration with Diversity, Inclusion and Equal Opportunity
- Faculty Staff Guide published by Disability Services Office and distributed to all faculty (full-time, part-time, adjuncts) and all staff. Available in "hard copy" or online
- Career Services providing outreach to all faculty during SP16 semester. Multi-prong approach, including but not limited to: presenting in classes, mock interviews, dining etiquette, several career fairs.
- Counseling Center Webinar: Offering webinar three times for faculty addressing classroom behaviors and mental health concerns.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Given student development theory model, student needs far outweigh current resources (time, money and staff).
- Unconditional acceptance in each division's role and acknowledgement of various areas of expertise within the University structure.
  - Proposed Strategies:
  - Student Affairs Dean and Academic Deans meet monthly.
  - Student Affairs Professional Staff attend Chairs Meetings once/semester.

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Counseling Center conducts a faculty survey annually with a follow-up letter and brochure to all faculty, including adjuncts.
- More educational/training opportunities on the following topics:
  - Title IX
  - Faculty Mental Health Training
  - Faculty Staff Guide from DSO
  - Faculty Outreach from Health & Wellness
  - Efforts to increase racial diversity within staff

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- Career Services Programming (many events)

- Counseling and DSO Offices: Individualized case management approach when assessing students' mental health and other disability related issues as well as academic needs. This will serve to better facilitate the students connections with both on campus and off campus support systems.
- DSO and Athletics Joint Orientation for exempt first year students
- DSO, Academic Success and Athletics Workshop at Accepted Students Day
- Emergency Funds through Student Affairs

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Engagement of commuter students
- International students compliance with Dept. of Public Health regulations; this populations would benefit from a case management approach.
- Engagement of non-traditional students; currently meet with students on a case-by-case basis.

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Career Services uses an evaluation form at every event and utilizes responses to improve services.
- All Student Affairs departments conduct annual evaluations of programming and direct services.
- All Student Affairs departments keep up to date with current trends and best practices in their respective fields.

## Academic Excellence

In collaboration with the Center for Teaching and Learning (CTL), The Binienda Center for Civic Engagement (BCCE), in efforts to forward the strategic plan goal of Engaged Citizenship, will provide \$1000 to faculty -- 1 from Humanities and Social Sciences and 1 from the School of Education, Health, and Natural Sciences -- to develop modules within established classes that involve community based / service projects.

The Binienda Center has awarded Dr. Kevin Anzzollin (World Languages) a \$1000 stipend to develop Spanish Conversation 1: La Diaspora Caribena as a civic engagement course.

## Cross Divisional Collaborations-two examples

### Binienda Center for Civic Engagement and Education Department

This year, The Education Department and the Binienda Center for Civic Engagement are welcoming Jumpstart to campus. Jumpstart, which is a program of the National Corporation for Community Service, has as its mission is to work towards the day that every child enters kindergarten prepared to succeed. WSU students participating (as we call them, Corps members) receive training in the fall and then spend time in low income Worcester preschools regularly throughout the academic year. Each Corps member is put on a team of peers to go into the same preschool classroom each week and are assigned 2-3 children to focus on for the year. Jumpstart asks for a commitment of around 12 hours per week which adds up to over 300 hours over the course of the year. At the end of the year students will qualify for an AmeriCorps education award (\$1200) as well as certification by the Massachusetts Department of Early Education and Care. This year, WSU recruited 30 students to the program.

### **Campus Approach to Wellness**

In an ongoing effort to increase communication between divisions and support for students in crisis, the Counseling Center has developed a new wellness campaign entitled TeamUp for Healthy Minds. The fall semester started with trainings on new approaches to behavioral intervention teams and campus-wide suicide prevention programs. The spring so far has a series of programs for faculty on the topic of managing student mental health issues in the classroom.

Athletics and the Health and Wellness Office will use the new Wellness Center to re-launch recreation and personal programming. Members of the community are actively defining a new holistic approach addressing all of the dimensions of wellness. This model identifies traditional activities (intramurals, fitness center, etc.) as part of programming, but strategically, the mission is more comprehensive and campus-wide.

### **Strategic Planning Incentive Fund Grants (SPIF)**

#### **Career Services**

##### ***Filling The Gap In Undergraduate Career And Life –Planning Services and Support***

programming has provided the platform for dialogues between regional employers and faculty to: discuss employer expectations for new employees; allow faculty to highlight advantages to employers of the range of critical thinking, quantitative literacy, and rounded education informed from a liberal arts and sciences curriculum; and provide more coherent direct pathways to emerge for WSU students to particular high value employment as appropriate.

These dialogues involving regional employers have better informed faculty, students, and alumni regarding employer expectations of new interns and employees. Although attendance at the Employer Faculty Dialogs has been less than desired, clear collaborations have been formed amongst participants.

It was concluded there is a need to invite more faculty to the table to discuss how a partnership with Career Services may directly support their work, and their respective students. Therefore



to address this we submitted an addendum to our original proposal identifying the need for additional personnel to create sector specific collaborations between Career Services and faculty. Our request funded a position for a Liaison who is now responsible for strengthening existing relations as well as creating new relations with both internal and external community players.

The Liaison is making strides creating informative events, advising Deans, Department Chairs, and faculty about manners by which we can support their individual classrooms with credit bearing syllabi activities. Ultimately the series of events will increase the career development of WSU undergraduate and graduate students, and alumni. As seen below, efforts from this grant have already produced bridges into several academic departments, directly resulting in increased students receiving career development guidance and support services. Below is a listing of events sponsored by the SPIF grant:

- Healthcare Employer/Student Panel
- Non-Profit Employers/WSU Faculty Breakfast
- Non-Profit Employer Student Panel
- Business Employers/WSU Faculty Breakfast
- Business Employer/Student Panel
- Bio-Biotech Employer/Faculty Breakfast
- Bio-Bio Tech Employer/Student Panel
- Non-traditional Education Employer/ Faculty Luncheon
- Non-traditional Education Employer/Student Panel
- Embarking On A Shared Vision Of Student Success Guide
- Sail Through Your Next Interview-Mock Interview Day

#### **The Binienda Center for Civic Engagement**

This year (15-16), with SPIF funds, The Binienda Center, the Sociology Department, and International Programs, with some help from Multicultural Affairs Office, recruited 12 sophomore-level students from underrepresented groups with demonstrated financial need into a "Civic Corps." Each student was paid (or will be paid) \$1000 in an effort to increase student access to service learning, faculty-led travel, and also to develop the skills and knowledge of students, and improve the level and quality of civic engagement on campus overall. This program has been a success. We have students working in Recreation Worcester, four travelling to the Dominican Republic with Professor Velez, and four travelling to NICA with Professor Guevara. This proposal seeks to renew funding for this project in fiscal year 2017 giving additional sophomore ALANA students the opportunity to work with faculty and staff in a variety of para-professional, community engagement projects such as: playing an organizational role in Recreation Worcester, The WSU Jimmy Fund Council, Jumpstart, and Working for Worcester, or faculty-led travel.

#### **Athletics and Communications Department**

The Communication and Sports Broadcasting Internship program has made great strides over the past few months. After a delayed start due to the slow arrival of broadcasting equipment, combined with the logistics of the interns learning how to operate the equipment, the students have done a very good job in providing broadcasts of select Worcester State home games ("Lancer Selects"). These broadcasts have allowed for parents, alumni, and other WSU supporters to receive a higher quality live video feed of the game(s) on their computers, and also to receive play-by-play and color analysis of these select games.

These students have proactively created "Lancer Nation Station" - a YouTube channel showing highlights and providing pre and post-game coverage of our 19 division III Worcester State varsity athletic teams. As sports information interns, they produce and coordinate interviews of Worcester State athletes and coaches to use for Lancer Nation Station.

### **Campus Climate**

Moving forward, the Division of Student Affairs has made a commitment to training on topics of diversity as it relates to social justice, inclusive workplace, and engagement of our student body. The following trainings have been scheduled for the remainder of 2016:

- Student Affairs division-wide retreat with Robb Jones from Holy Cross 5/24-5/25
- Director and Associate Director of Athletics to attend NCAA Inclusion Forum
- Front Line staff training-August
- Additional Division Trainings throughout the semester

## University Advancement

### Goal 1: ACADEMIC EXCELLENCE

The overarching goal of all activities of the Office of University Advancement is to promote the academic excellence of Worcester State University. Like a number of support divisions, our activities frequently happen behind the scenes, outside the classroom, and with different constituencies other than students or faculty. Our primary focus of supporting this strategic goal is financial, with direct support for students, programs, and the campus physical plant. Secondly, a number of our activities either directly or indirectly promote the academic excellence of Worcester State through our communication and marketing efforts of Advancement activities and our events themselves.

The greatest highlight of the Advancement Office's impact on academic excellence is the evidence of the impact of donor-funded scholarships on student retention and graduation completion rates. The attached charts demonstrate the significant impact on yield and retention of students who receive donor-funded scholarships over those who do not participate in the program. As a reminder to the committee, the scholarship program is open, available, and advertised in multiple formats to all students in collaboration with Academic Affairs, Student Affairs, Marketing and Enrollment Management from January to April each year.

Significantly, six-year graduation rates of students who receive scholarships are nearly 25% higher for the fall 2007 cohort and 15.5% higher for the 2008 cohort than those students who do not receive scholarships. We are confident in saying that continuing our scholarship program and fundraising for scholarships will remain a top priority for the Advancement division in our support of Academic Excellence.

You will see in our Goal 1 report a number of other ways we are working to support Academic Excellence this year with donor funding for the Center for Teaching and Learning, the Honors Program, and grants for student research, scholarship and creative activity. The CTL and grant areas have not yet been assessed for the year. For impact on students, we've determined the best measurement to use to be impact on retention, and we won't have updated numbers till close of semester.

The detail of the impact of donor funds on the Honors Program is attached in an impressive report from the Director. With funds used for study abroad scholarships, research and travel grants, course development and programming, and achievement awards, the Director notes that funding provided a "substantial positive impact on the learning opportunities of a significant number of Honors students."

In FY16, we had also intended on working more with faculty for informal talks and presentations to donors and alumni. We have regularly collaborated with the chorale director and the gallery director for a number of years, and intended on growing those programs a bit. However a near-five-month-long vacancy in staffing in the alumni office due to a resignation negated those plans. Additionally, it offered us a chance to revision the position, which has been recreated with a stronger focus on student programming. Goals for FY17 will likely be different.

#### **Goal 4: CAMPUS COMMUNITY (CAMPUS CLIMATE)**

Perhaps second to Academic Excellence is the Advancement Office's pursuit of supporting a "vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and valued."

You will note from our grid for Goal 4 that we have added significant activities and action steps to our plan for this fiscal year, many in close collaboration with other divisions. We aim to engage all our constituents (students, faculty, staff, alumni, donors, and community members) with a common goal of civility and respect. Creating a culture of philanthropy starts long before someone makes their first gift. It starts with creating a feeling of being connected, understanding the significant impact paying forward the good, the help, and the support that you have received to others. It sometimes means breaking down barriers to long-standing processes that are no longer relevant, and sometimes breaking down barriers between groups. It starts with creating an awareness among the students that there are people in the world who care about WSU and them even if they don't know them personally. It starts with listening to people's questions and desires, and adapting programs or publications to fill those needs. It starts with creating a value for the activities and programs of WSU starting when a student first enters the campus and transcending beyond graduation year.

Significantly, one of the first major changes completed this year was a complete re-design of the alumni magazine, including a name change to Worcester State Magazine. Focus groups of students, young alumni, board members and members of the WSU faculty community were consulted throughout the planning process. A new designer with fresh ideas and an eye toward engaging visual layouts was brought on and the magazine was launched in the fall.

We launched the Thank A Donor day utilizing students on campus to sign notes of gratitude to donors on the same day we hold our Distinguished Donor reception at Mechanics Hall. This event annually features a student speaker as well as the President. Adding the Thank A Donor activities to the campus life of the day links students to the notion of philanthropic support and helps them realize that there are alumni and friends out in the world who believe so much in the mission of WSU and them that they give back generously.

Listening to the feedback of students and alumni, we've retooled our Business After Hours and our Department Reunions to become "Alumni Connections" events, bringing together alumni, faculty, and students to not just socialize, but to network and establish career connections. We have also, through our Change Lives campaign, launched our online alumni career mentoring network, utilizing a model that UMass has piloted to great success. This was supposed to launch in January, but Procurement constraints delayed it until just this month, April, 2016.

A specific response to creating a wholesome, safe and nurturing environment for students is our sponsorship of a talk by Dr. Kristen Lee Costa '96, who is a noted expert on stress management. This talk is specifically designed for students needing to manage academic stress.

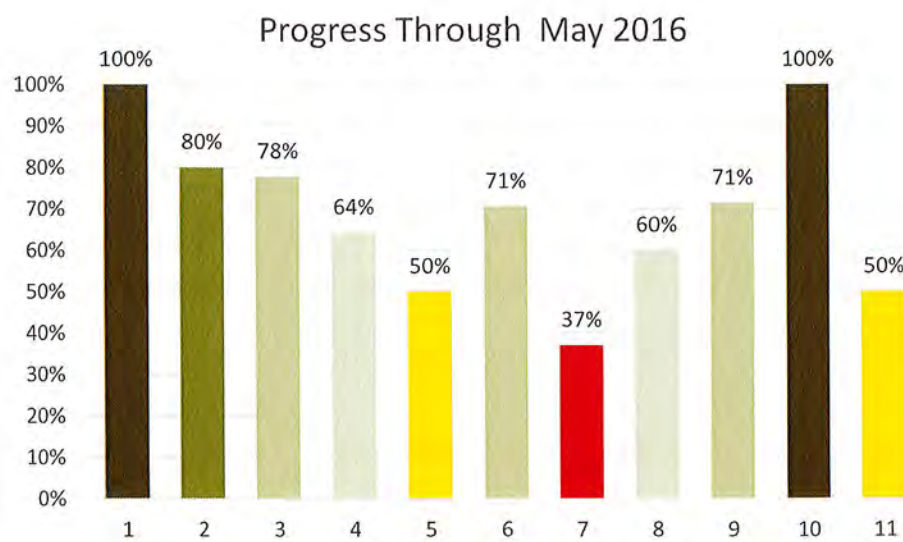


Our annual Day of Giving has become a great example of nurturing a vibrant campus life. All student organizations, athletic teams, SGA, and CLEWS are invited to participate in the day by helping with activities on campus that show gratitude to the donors of the day. More than 90 students participated. Additionally, alumni are utilized as social media ambassadors out in the world to promote the Day of Giving among WSU friends and others and preliminary numbers for the Day of Giving are more than 500 gifts and more than \$63,000 raised.

## NEASC Projections

121 projections were identified in the 2012 NEASC Self Study document, prepared for the ten-year accreditation update. Progress has been made over the past four years, with 63% of the projections completed (76 of 121). Those identified for Standards 1 and 10 have been completed. There has not been much progress on the projections for Standard 7, Library and Other Information Sources, with only 37% complete. This is primarily due to the turnover in library positions.

Standard	# Projections	Completed	%	
1	2	2	100%	
2	10	8	80%	
3	9	7	78%	
4	28	18	64%	
5	6	3	50%	
6	17	12	71%	
7	27	10	37%	
8	5	3	60%	
9	7	5	71%	
10	6	6	100%	
11	4	2	50%	
	121	76	63%	



The complete table of responses is stored on the Google Site,  
<https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/> .

## Appendix A - SPIF Updates

\$423,455 was set aside for strategic plan implementation grants to support work directly related to the strategic plan. Grant proposals were submitted to the Strategic Plan Implementation Fund (SPIF) review committee in the fall 2014 semester. Recommendations were submitted to the president's direct report group for final approval. 13 proposals were funded for a total of \$371,568.50. Monies were made available to the proposers during the spring 2015 semester. Updates have been submitted in October, 2015 and April 2016. The final reports are due September 30, 2016.

Project	Award	Divisions	Authors	Strategic Plan Goals	April 2015	Oct 2105	April 2016	Final Report
The ALANA Initiative: Expanding and enriching curricula and community for ALANA and all students at WSU	\$ 30,262.00	Academic Affairs, University Advancement, Student Affairs, Enrollment Management	Michelle Corbin, Aldo García Guevara, Tanya Mears, Marcela Uribe-Jennings, Kristin Waters	1, 2, 3, 4, 5	N/A	√	√	
CitySpeak: A New, Interdisciplinary Model to Address Urban Issues Through the Arts	\$ 9,970.00	Academic Affairs	Tom Conroy and Sam O'Connell	1	N/A	□		
Communications and Sports Broadcasting Internship	\$ 6,220.00	Academic Affairs, Student Affairs	Michael Mudd, Nikki Narducci and Don Bullens	1, 2	N/A	√	√	√
Creating Assessment-driven, Evidence-based Training for First Year Seminar Faculty	\$ 38,625.00	Academic Affairs	Charlotte Haller	1, 2, 3	N/A	√	□	
Development of a Watershed Science and Education Co-Laboratory to Advance Student Learning, Foster Undergraduate Research, and Engage the Community	\$ 75,957.00	Academic Affairs	Timothy Cook, William Hansen, Elena Braynova, and Karl Wurst	1, 2, 3	N/A	√	√	√
Faculty Ambassador Program for International Students	\$ 4,000.00	Academic Affairs	Katey Palumbo, Sam O'Connell, Jackie Brennan	1, 3, 4	N/A			



Filling the gap in Undergraduate Career and Life Planning Services and Support	\$ 26,852.50	Academic Affairs, Student Affairs	Matthew Johnsen, Jillian Anderson, Kristie Haskell (Pivot Point Strategy and Solutions), Karen Pelletier (Worcester Regional Chamber of Commerce)	1, 2	N/A	√	√	
Increasing student access to Global and Local Service and community engagement overall, through a Civic Corps, in order to promote student retention and success	\$ 18,360.00	Academic Affairs, Student Affairs	Mark Wagner, Aldo Guevara, Marcela Uribe-Jennings, Katey Palumbo	1, 3	N/A	√	√	
Study Away Scholarship Program	\$ 30,000.00	Academic Affairs	Katey Palumbo, Sam O'Connell, Jackie Brennan, Aldo Guevara	1, 3	N/A		√	
Study the cultural impact of Worcester State University and create a long-range plan for culture and the arts at WSU and in the community and region.	\$ 35,500.00	Academic Affairs, University Advancement, Student Affairs, Enrollment Management	Adam Zahler & Kristin Waters	1, 2, 3, 4, 5	N/A	√	√	√
Upgrade Colleague Reporting and Operating Analytics/SAP Business Objects Software to version 4.0	\$ 10,240.00	Academic Affairs	Colleen (Kelly) Laviolette	1	N/A	√	√	√
Urban Networks	\$ 25,000.00	Academic Affairs, Enrollment Management	Thomas Conroy and Mary Jo Marion	1, 2, 3	N/A	√	√	
WSU Archives Project: More Effectively Using and Promoting the Special Collections	\$ 60,600.00	Academic Affairs	Aldo Guevara, William Shakalis, Erika Briesacher, Tom Conroy, Josna Rege, Mark Wagner, Roberta Kyle, and Linda Hixon	1,2,4	N/A	√	√	

Grant information is located on the Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>.

## Appendix B –coffee & Conversation

The Strategic Plan Review Committee recommends that the president's office implement a monthly Campus Coffee Break. The Worcester State Coffee Break is an opportunity for the staff and faculty to come together in a social setting for a short period of time each month. We recommend the event be held on the first Wednesday of every month from 2:00PM to 3:00PM, hosted on a rotational basis by the five university divisions and the office of the president. Each division will be responsible for paying for the catering and hosting the university community either within their division space or a meeting room scheduled through Conference Services. The committee recommends that the coffee break be an hour long. This will give people a chance to stop by for a few minutes between meetings and rotate office coverage. It is important that all faculty and staff be encouraged to attend.

### Benefits

We feel a university coffee break will help foster community, aiding in the cross-divisional operation of the university. It will help improve the campus climate by giving the university staff and faculty a chance to get together socially. The committee has found that each division has excellent opportunities for cross-division collaboration. Communication of these initiatives could be improved. We propose that the coffee break host division assemble a 6 month calendar that lists projects and events (both confirmed and tentative) that each division has upcoming. It would be the responsibility of each division to email their events to the coffee break host 1 week prior to the upcoming coffee break for compilation. The finished cross-division calendar would then be projected at the coffee break so everyone can see what is coming up. We believe this will increase communication and cross-divisional collaboration.

### Costs

*Time* This event would cost the university staff time. To foster a community of inclusion, it is imperative that all employees be encouraged to attend. This means that division heads and managers should work with their employees to manage office coverage. It is for this reason that we recommend the event be 1-hour long. The purpose being that staff can attend the coffee break in shifts. We feel it is important that the all-inclusive push for this come from the president's office. We, as a university, need to foster a culture of inclusion that puts value on interpersonal relationships and scheduled social times such as the Worcester State Coffee Break.

*Money* The Strategic Plan Review Committee recommends that the financial burden of this event be spread evenly between the divisions and president's office with each area taking a turn hosting, planning and paying for the catering. We have a campus community of 550 people. Assuming 250 people attend the coffee breaks, we recommend a budget of \$875 per month. The rotation of hosting duties will mean that each division will be responsible for hosting twice per year.

### Sample Schedule:

September 7, 2016	President's Office
October 5, 2016	Academic Affairs
November 2, 2016	Administration and Finance
December 7, 2016	Enrollment Management
January 4, 2017	Student Affairs
February 1, 2017	University Advancement
March 1, 2017	President's Office

April 5, 2017	Academic Affairs
May 3, 2017	Administration and Finance
June 7, 2017	Enrollment Management
July 5, 2017	Student Affairs
August 2, 2017	University Advancement

**Sample Calendar:** This is a sample of a cross-divisional calendar that could be displayed at the coffee break. The events in the calendar are imaginary.

Date	September	October	November
1	Pre-College Conference	EM Understanding Financial Aid	Pre-College Conference
2	UA Event	SA Trip to WAM	UA Event
3			
4	SA Welcome Back Students Table meeting		SA Welcome Back Students Table meeting
5	Labor Day: NO CLASSES	SA Student Assistance Meeting	Labor Day: NO CLASSES
6	Classes begin	AF Procurement Training	Classes begin
7	UA - Biology Alumni Reception		UA - Biology Alumni Reception
8	AA STEM Success		AA STEM Success
9	AA Music Success/ EM Understanding Financial Aid	AA Honor's Department Reception	AA Music Success/ EM Understanding Financial Aid
10	AA Event English Lit. Success	AA Choral Auditions/ EM Open House	AA Event English Lit. Success
11		AA Lecture on Irish Immigration in America	
12	Last day to add day courses	AF Photoshop Training	Last day to add day courses
13	EM Understanding Financial Aid		EM Understanding Financial Aid
14	SA Icecream Social	SA Football Game	SA Icecream Social
15		UA Homecoming	
16	Last day to add day courses	UA Reunion	
17	EM Understanding Financial Aid	AF P Card Training (TENTATIVE)	EM Understanding Financial Aid
18	SA Icecream Social		SA Icecream Social
19	Last day to add day courses	EM Understanding Financial Aid	
20		SA Taco Tuesday	
21			
22	President's Office - Convocation	SA Duck Hunt	President's Office -Coffee (TENTATIVE)
23		AF Excel Training	
24			
25	President's Office - Open office hours	UA - Music Alumni Reception (TENTATIVE)	
26			
27			
28	EM Celebrate Diversity in Enrollment		EM Celebrate Diversity in Enrollment
29	AF Procurement Training		AF Procurement Training
30			
31		UA - Pictures with Chandler E. Lancer	



## Appendix C - The Disney Way

The Disney Model of Management focuses on putting the customer first. Disney promotes four keys for excellent customer service: Safety, Courtesy, Show and Efficiency. Safety is always the top priority followed closely by courtesy. Disney employees are trained to be “assertively friendly” to all customers. All employees, front-line or back-end, are dedicated to the customer experience and will help a customer even if it is not their primary job function. In the book The Disney Way: Harnessing the Management Secrets of Disney in Your Company<sup>[i]</sup> authors Bill Capodagli and Lynn Jackson examine the Disney four core concepts of Dream, Believe, Dare and Do. The four concepts are further broken down into the Disney Company’s 10 management principles:

1. Give every member of your organization a chance to dream, and tap into the creativity those dreams embody.
2. Stand firm on your beliefs and principles.
3. Treat your customers like guests.
4. Support, enable, and reward employees.
5. Build long-term relationships with key suppliers and partners.
6. Dare to take calculated risks in order to bring innovative ideas to fruition.
7. Train extensively and constantly reinforce your organization’s culture.
8. Align long-term vision with short-term execution.
9. Use the storyboarding technique to solve problems, plan projects, and improve communication.
10. Pay close attention to detail.

In University Advancement this means we have fostered a culture of placing our constituents’ (alumni, donors, and WSU and neighborhood community members) needs first. We smile at our guests, offer them coffee or refreshment and answer their questions promptly. Our mantra is “we build and maintain relationships” and place close attention to the “details”. No phone goes to voicemail while the office is open. Anyone in the office is encouraged to pick up a ringing phone and help the caller.

UA has bi-weekly full staff meetings where we review what each area is working on and upcoming/tentative events and initiatives. This level of communication gives everyone in the office an overview of the division and allows us to answer customer questions. UA employees are encouraged to read The Disney Way: Harnessing the Management Secrets of Disney in Your Company by Bill Capodagli and Lynn Jackson. Copies of the book and other Disney management books can be found in the department.



# STRATEGIC PLAN

## DIVISIONAL METRICS

# ACADEMIC AFFAIRS

**GOAL #1: Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.**

Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/ person	Implementation milestones	Resource Requirements	2015-16 Outcomes/Results
(a) Develop and offer innovative, integrative academic programming that advances transformational change in students	<ol style="list-style-type: none"> <li>1. New undergrad programs</li> <li>2. New graduate programs</li> <li>3. New certificate programs-DGCE</li> <li>4. IELI is in the 4th year of implementing its new curriculum and is proposing that during year 5 a review and revise project be conducted to ensure that the curriculum is still current.</li> <li>5. Develop STEM supplemental instruction (SI) program</li> <li>6. Enhance infrastructure to support field and laboratory investigations of watershed science topics.</li> <li>7. Communication and Sports Broadcasting Internship</li> <li>8. Location of Art classes at WCC</li> <li>9. Urban Networks: Community Action Research projects</li> </ol>	<ol style="list-style-type: none"> <li>1. 4 new undergrad programs</li> <li>2. 5 new graduate programs</li> <li>3. 6 new certificate programs</li> <li>3A. 50% of new programs will be interdisciplinary</li> <li>4. May 2017 Curriculum revised</li> </ol>	<ol style="list-style-type: none"> <li>1. Provost, deans, department chairs, faculty, DGCE dean</li> <li>4. Susan Seibel</li> <li>5. Linda Larrivee and Daron Barnard</li> <li>6. Timothy Cook, William Hansen, Elena Braynova, Karl Wurst</li> <li>7. Nikki Narducci (SID) and Michael Mudd (Director of Athletics)</li> <li>8. Worcester Center for Crafts/VPA</li> <li>9. Thomas Conroy, MaryJo Mario</li> </ol>	<ol style="list-style-type: none"> <li>1. Two by 2018; 4 by 2020</li> <li>2. Three by 2018; 5 by 2020</li> <li>3. All six launched by 2018</li> <li>4. Number of STEM students receiving SI tutoring</li> <li>5. Increase in pass rates</li> <li>6. Purchase of 8 canoes, canoe trailer.</li> <li>Purchase of state of the art, automated nutrient analyzer</li> </ol>	<p>\$5,000 to hire outside consulting faculty for each program and \$1,500 summer stipend for WSU faculty</p> <p>TOTAL = \$75,000</p>	<ol style="list-style-type: none"> <li>1. Ethnic Studies concentration</li> <li>2. (2) graduate programs- MP AP, MPM</li> <li>3. Substance Abuse Counseling Certificate</li> <li>4. Curriculum revised</li> </ol>
(b) Encourage more interdisciplinary collaboration in teaching & research	<ol style="list-style-type: none"> <li>1. Develop and gain approval: Ethnic Studies Interdisciplinary Concentration</li> <li>2. New CTL workshop on interdisciplinary teaching</li> <li>3. Add funds for new mini-grant focus on interdisciplinary research</li> <li>4. Develop Substance Abuse Counseling Certificate</li> <li>5. Arts &amp; Culture @WSU- Expanding academic offerings in VPA, Languages and Literature, Communication</li> </ol>	<ol style="list-style-type: none"> <li>1. Approved by governance</li> <li>2. New workshop designed and offered each spring semester</li> <li>3. \$35,000 added to mini-grant program specifically to fund interdisciplinary research</li> </ol>	<ol style="list-style-type: none"> <li>1. Working Group</li> <li>2. Provost, Associate VPA, CTL director, VPIA</li> <li>3. Linda Larrivee, Roberta Kyle, Cherie Comeau</li> <li>4. EHNS</li> <li>5. Kristen Waters</li> </ol>		<p>1. None</p> <p>3. \$60,000</p> <p>TOTAL = \$60,000</p>	<ol style="list-style-type: none"> <li>1. Completed</li> <li>2. Workshop first offered in spring 2015</li> <li>3. Funds added to mini-grants by 2016-2017 based on fund raising and campus budget</li> <li>4. Accepted by state and DHE</li> </ol>
(c) More clearly articulate the purpose and promote greater cohesiveness for the Liberal Arts and Sciences Curriculum (General Education)	<ol style="list-style-type: none"> <li>1. Improve catalog and website presentation of LASC</li> <li>2. Create new recruitment brochure and freshman advising materials for LASC</li> <li>3. Implement linked LASC courses</li> <li>4. Engage in Mass pathway development</li> </ol>	<ol style="list-style-type: none"> <li>1. Catalog and website updated by fall 2015</li> <li>2. New brochure and advising materials by Spring semester 2016</li> </ol>	<ol style="list-style-type: none"> <li>1 &amp; 2: AVPAA, LASC Director, Web and marketing staff, Academic Success Center</li> <li>3. AVPAA, LASC</li> </ol>		<p>1 &amp; 2: \$2,500 for LASC new brochure</p> <p>3. Summer stipends to support faculty work on linked courses</p>	<ol style="list-style-type: none"> <li>1 &amp; 2 all complete by summer 2016</li> <li>2. LASC Program Review underway</li> <li>3. 5 linked courses by 2015-2016; 10 linked courses by fall 2017; 20 to 30 linked courses by 2020</li> <li>3. May 2016: Accepted by community colleges</li> </ol>

		3. Linked courses begin in 2015-2016	4. Director, chairs 4. Math: Michael Winders; Early childhood education: Carol Donnelly; STEM		TOTAL = \$25,000	and state universities 4. Math pilot re: GPA as placement 5. Math Pathway developed
(d) Strengthen liberal arts of learning and expression	1. Expand scope and scale of Theme Semester and Keynote Lecture(s) 2. Add new Living-Learning Community 3. IELI students have become volunteers as a group or individually through the Center for Civic Engagement	1. New initiatives within Theme Semester and Keynote Lecture 2. One new Living-Learning Community focused on liberal learning	1. Provost, Associate VPAA, Theme Semester director 2. Provost, deans, VPSA 3. Susan Seibel/ Mark Wagner	1. New initiatives by 2016-2017 2. New Living-Learning Community by 2016-2017	1. \$10,000/year to fund new initiatives 2. None TOTAL = \$30,000	1. Theme Perception well received- Jenny Boylan lecture & book
(e) New academic programs emphasize community and environment	See (a) above – one new undergrad program will be in environmental science	See (a) above	See (a) above	See (a) above	See (a) above	
(f) Strengthen connections between classroom learning and experiential learning through co-curricular programming	1. Implement co-curricular transcripts 2. Design and implement two new co-curricular programs that link to academic programs 3. Revise DGCE Student Evaluation process to increase student participation and increase response 4. Improved articulation of the Graduate credit program in crafts	1. Co-curricular transcripts in use by 2016-2017 2. One new program by 2015-2016; a second new program by 2017-2018	1. Provost, VPSA, VPAA, Theme Semester director 2. Provost, VPSA 3. Kyle/ Institutional Research/ IT		1. \$2,000/year for software license 2. \$2,500/year for each program TOTAL = \$25,000	Planning process takes place during 2015-2016 2. Evaluation of first program serves as basis for second 3. Target Completion Spring 2016: Increase in % of student who complete student evaluations of courses
(g) Place greater emphasis on research and strengthen research infrastructure	1. Create an Office of Sponsored Research and add new position of Associate VPAA for Research reporting to Provost 2. Watershed Science web portal	1. Office of Sponsored Research in place and Associate VPAA for Research hired	1. President, Provost 2. Timothy Cook, William Hansen, Elena Braynova, Karl Wurst	1. Office created and Associate VPAA hired by July 1, 2016	1. \$120,000/year TOTAL = \$480,000	Not completed
(h) Build the infrastructure to support growth in graduate offerings and enrollments	1. Add full-time position of assistant dean for graduate studies and online programs 2. Add a full-time clerical position for graduate school 3. Increase funding for graduate assistantships by 50% 4. Revision of Graduate Assistantship Program to increase transparency, expand	Search during 2015-2016 2. Search during spring 2015 3. Add funds for increase in assistantships	1. Provost, DGCE dean 2. Provost, DGCE dean 3. President, provost 4. Graduate School (Kylie/Grady)	1. Assistant dean position filled for July 1, 2016 2. Clerical position filled for July 1, 2015 3. Funding for increase in grad assistantships added in FY17 budget 4. 2015/2016 rollout of new	1. \$85,000/year 2. \$27,500/year 3. \$35,000/year TOTAL = \$505,000	1. Completed 2. Completed 3. Completed 4. Assessment of students and mentors. Numbers of Extensions requested.



	opportunities and influence recruitment and retention			program. Full cycle will be complete August of 2016.			1. Achieved 2. Partial Completion
(i) Expand high-quality online classes and develop new online programs	<ol style="list-style-type: none"> <li>1. Provide incentive funding for quality assessment of online classes in DGCE.</li> <li>2. Fund faculty training in online instruction for online classes</li> <li>3. Contract with outside firm to support marketing and recruitment for online programs</li> </ol>	<ol style="list-style-type: none"> <li>1. Incentive funding begins for 2015-2016</li> <li>2. Stipend for faculty who participate in training</li> <li>3. Contract for both regional online programs and large scale national programs supported by contracted firm</li> </ol>	<ol style="list-style-type: none"> <li>1. DGCE dean</li> <li>2. Provost, deans</li> <li>3. President, provost, deans, chairs</li> </ol>	<ol style="list-style-type: none"> <li>1. \$500 incentive funds for each quality assessment</li> <li>2. Provost, deans</li> <li>3. First firm contracted by summer 2015, first online program enrollments by fall 2017</li> </ol>	<ol style="list-style-type: none"> <li>1. 5,000/year</li> <li>2. \$15,000/year</li> <li>3. No upfront cost to University, revenue split contract at 50/50</li> </ol>	TOTAL = \$100,000	
(j) Strengthen data collection, sharing, and usage related to student learning and experience	<ol style="list-style-type: none"> <li>1. Add new clerical position to support Office of Assessment and Planning</li> <li>2. Include information about student learning outcomes for each major in catalog and on website</li> </ol>	<ol style="list-style-type: none"> <li>1. Hire new clerical staff for Office</li> <li>2. Add information to catalog and website</li> </ol>	<ol style="list-style-type: none"> <li>1. Provost, assistant VPAA for Assessment and Planning</li> <li>2. Associate VPAA</li> </ol>	<ol style="list-style-type: none"> <li>1. New clerical staff person starts July 1, 2015</li> <li>2. Additional information added for 2016-2017 catalog</li> </ol>	<ol style="list-style-type: none"> <li>1. \$27,500/year</li> <li>2. None</li> </ol>	TOTAL = \$110,000	
(k) Increase commitment to information literacy and instructional technologies	<ol style="list-style-type: none"> <li>1. Achieve 25% increase in student attendance at information literacy library sessions</li> <li>2. Add up-to-date technology to support DSO registered students and faculty</li> <li>3. Add new technology to support faculty teaching</li> </ol>						
(l) Ensure that library is a 21st century learning resources center	<ol style="list-style-type: none"> <li>1. Increase print and electronic resources for study and research</li> <li>2. Expand the availability of research and instructional services during weekends and evenings</li> <li>3. Increase the collaborative and quiet study space in the library</li> <li>4. Creation of WSU Archive</li> <li>5. Organization of Dennis Brutus Collection</li> </ol>	<ol style="list-style-type: none"> <li>1. Significant increase in information access budget over three years</li> <li>2. Research librarians available to answer reference questions</li> <li>3. Add significantly to total number of seats in library and renovate space for collaborative study and library instruction</li> </ol>	<ol style="list-style-type: none"> <li>1. Provost, associate VPAA, library director</li> <li>2. Library Director</li> <li>3. Library Director</li> <li>4. Library Director</li> </ol>	<ol style="list-style-type: none"> <li>1. 10% increase in information access budget each year for three years (FY16, FY17, FY18)</li> <li>2. Hire part-time librarians by 2016-2017</li> <li>3. Complete by 2017-2018</li> <li>4. On target</li> <li>5. On target</li> </ol>	<ol style="list-style-type: none"> <li>1. \$40,000/year for three years</li> <li>2. \$30,000/year</li> <li>3. \$100,000</li> </ol>	TOTAL = \$310,000	<ol style="list-style-type: none"> <li>1. Increased funding on target</li> <li>2. 3 Professional librarians hired- start July 2016</li> <li>3. On target</li> <li>4. Completed</li> <li>5. Completed</li> </ol>

**GOAL # 2: Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and Make a difference in the world.**

Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/ person	Implementation milestones	Resource Requirements	2015-16 Outcomes/Results
(a) Capitalize on WSU's urban location as programmatic and educational asset	<ol style="list-style-type: none"> <li>1. Develop new community partnerships</li> <li>2. Increase number of advisory boards</li> <li>3. Market urban location to potential students audience</li> <li>4. Assist in founding of Academic Health Collaborative (3 universities with WDPH) &amp; Launch Center for Interdisciplinary Health Research and Practice</li> <li>5. CitySpeak : arts- and research-based urban planning and community development. Collaboration with community-based organizations serving diverse populations. Creates mini public squares in which voices can be heard and empowered. CitySpeak requires and actively seeks participation from all citizens.</li> <li>6. Launch Translation Center</li> </ol>	<ol style="list-style-type: none"> <li>1. Initiate 5 new community partnership</li> <li>2. Achieve 50% increase in number of academic program advisory boards</li> <li>3. Work with EM on marketing strategies</li> </ol>	<ol style="list-style-type: none"> <li>1. Provost, deans, department chairs</li> <li>2. Provost, deans, department chairs</li> <li>3. Provost, VP/EM</li> <li>4. Kelly Carlson, Linda Larrivee, center advisory board</li> <li>5. Tom Conroy, Sam O'Connell</li> <li>6. Antonio Gujardo-Donados,</li> </ol>	<ol style="list-style-type: none"> <li>1. One new community partnership initiated each year</li> <li>2. One new advisory board launched each year</li> <li>3. Include urban assets in marketing by 2016-2017</li> <li>6. Worcester Community: partners, including African Community Education, Girls Inc. of Worcester; Oak Hill CDC; Parent Professional Advocacy League Ground; Worcester NAACP</li> </ol>	<ol style="list-style-type: none"> <li>1. None</li> <li>2. None</li> <li>3. \$10,000</li> </ol> <p>TOTAL = \$30,000</p>	<ol style="list-style-type: none"> <li>1. Achieved</li> <li>2. Achieved</li> <li>3.</li> <li>4. Assist in founding of Academic Health Collaborative (3 universities with WDPH) &amp; Launch Center for Interdisciplinary Health Research and Practice</li> <li>5. CitySpeak : arts- and research-based urban planning and community development. Collaboration with community-based organizations serving diverse populations. Creates mini public squares in which voices can be heard and empowered. CitySpeak requires and actively seeks participation from all citizens.</li> <li>6. Launch Completed Translation Center</li> </ol>
(b) Expand efforts to integrate arts and sciences	See Goal 1 b					
(c) Better articulate the relationship between academics and workforce alignment	<ol style="list-style-type: none"> <li>1. Add catalog and website language articulating the potential careers related to each major and graduate program</li> <li>2. Grow # of cohorts in Med Leadership &amp; Administration (principal licensure) program</li> <li>3. Grow # of students in UMass RN-BSN off-site nursing program</li> <li>4. Collaborative Devised Theatre project: Urban Studies students conducted research interviews with Worcester residents. VPA students using those interviews as basis for creating a performance about issues of living in Worcester. (April 7-10, 2</li> <li>5. Increasing student access to Global and</li> </ol>	<ol style="list-style-type: none"> <li>1. Catalog and website added by 2016-2017</li> <li>2.</li> </ol>	<ol style="list-style-type: none"> <li>1. Associate VPAA, deans, department chairs</li> <li>2. David Roach/ Sara Grady</li> <li>3. Stephanie Chalupka/Sara Grady</li> <li>4. Adam Zahler Tom Conroy</li> <li>5. Mark Wagner, Aldo Guevara, Kaley Palumbo, Sebastian Velez</li> </ol>	<ol style="list-style-type: none"> <li>1. Catalog and website added by 2016-2017 catalog</li> <li>2. Two add'l cohorts started Fall 2015 for a total of 65 active students and 5 cohorts</li> <li>3. Fourth cohort started Fall 2015 for a total of 47 active students; Cohort V recruitment Spring '16</li> </ol>	<ol style="list-style-type: none"> <li>1. None</li> </ol>	<ol style="list-style-type: none"> <li>2. Successful completion rate of degree program and license</li> <li>3. Number of students entering the program and number of students graduating from the program</li> </ol>

	Local Service and community engagement overall, through a Civic Corps, in order to promote student retention and success among sophomore ALANA students. 016)					
(d) Promote and stress curricular interdisciplinary and programmatic connectedness	See Goal 1.b and 1.c					
(e) Cultivate and enhance local, regional, and global connections to strengthen WSU's contributions to the wider world	1. Increase study abroad participation 2. Increase international student population on campus 3. Develop new student and faculty international exchange opportunities 4. Develop STEM 4+1 program	1. Increase by 10% per year 2. Increase by 20% per year 3. Create 5 new student and/or faculty international exchange relationships	1. Associate VPAA 2. 3. Linda Larrivee, Roberta Kyle, Sara Grady, Carol Donnelly 4. May 2016: Submission to and acceptance by WSU governance process	1. Annual 10% increase 2. Annual 20% increase 3. Two by 2016-2017, Five by 2019-2020	1. See #2 below 2. \$50,000/year for new study abroad staff beginning 2016-2017 3. None TOTAL = \$200,000	AY 2015-16: 158 students studied away with 96 of them participating on WSU faculty-led programs Scholarships for student travel totaling \$68, 875 Hosted visitors from Dongguk University (South Korea), U of Worcester, Letterkenny Institute of Technology (Republic of Ireland), Ulster University (UK) New exchange partners include Universidad de San Francisco (Quito, Ecuador) and University of Ulster (UK, Northern Ireland); New partner institutions include the American College of Greece (Athens) and Università Cattolica del Sacro Cuore (Milan, Italy) and we have also signed an exchange agreement with the Sarayaku Tribe of Ecuador
(f) Nurture student interest in diversity, global awareness, environmental literacy, and engaged citizenship	1. See Goals 1.e and 2.e above					
(g) Expand opportunities that encourage students to develop leadership potential	Develop and implement two new leadership development programs	1. One leadership development program in academic affairs 2. One leadership development program in student affairs	1. Provost, associate provost, deans 2. VPSA	1. Completed by 2016-2017 2. Completed by 2016-2017	1. None 2. None	
(h) Strive to have highest six-year graduation rate among state universities	1. Expand retention office services 2. Increase faculty participation in Starfish 3. Increase Starfish support in UITS	1. Add full-time staff assistant to retention office 2. Increase faculty participation to 50%	1. VPENI, retention director 2. Provost, deans, chairs 3. Provost	1. Achieved by 2016-2017 2. 40% by 2016-2017, 50% by 2018-2019 3. Achieved by 2016-2017	1. \$30,000/year 2. None 3. \$25,000/year TOTAL = \$220,000	



		3. Add a part-time staff to UTS for Starfish support				
(i) Improve career services						
GOAL #3: Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success.						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/ person	Implementation milestones	Resource Requirements	2015-16 Outcomes/Results
(a) Strategic align program offerings with student interests and workforce trends	See Goals 1.a and 2.c					Ongoing
(b) Implement a sustainable approach to online programming	See Goal 1.i					Under review
(c) Implement comprehensive marketing strategy						
(d) Increase diversity of student body						
(e) Engage faculty, students & alumni in recruitment						Alumni career events x2
(f) Increase financial support for students						
(g) Leverage k-12 initiatives to increase applicants						Ongoing
(h) Establish stronger articulation agreements with community colleges	1. Increase high level articulation agreements with community colleges state-wide	1. 50% increase by 2019-2020	Provost, deans, chairs, VP/EM,	1. 25% increase by 2017-2018, 50% increase by 2019-2020	1. None	Transfer Pathways on target for 16 programs New articulation agreements
(i) Ensure availability of courses needed for students to graduate on time	1. Implement a comprehensive academic due diligence initiative including three-year course offering plans for all degree programs	1. Faculty load reports, course enrollment monitoring, independent study and internship oversight, three-year course offering plans	Provost, deans, chairs	1. Academic due diligence processes all implemented by 2016-2017	1. None	Commonwealth Commitment signed



(f) Strengthen academic advising across the university	1. Develop and implement a quality academic advising workshop series	1. Workshops designed by Center for Teaching and Learning (CTL) and Academic Success Center (ASC)	Provost, associate VPAA, directors of CTL and ASC	1. First workshops offered 2017-2018	1. None	
(k) Expand services in the evening for all students	1. Offer evening hours for the Academic Success Center	1. ASC evening hours to parallel those of registrar and bursar	Provost, associate VPAA, ASC director	1. ASC evening hours added by 2016-2017	1. None	Evening Capstone effort
(l) Provide excellent customer service to students in all divisions and offices	1. Implement customer service training in academic affairs division 2. Develop and implement an annual university quality customer service award	1. Training begins 2016-2017 2. Award implemented for 2016-2017	President and direct reports	1. Ongoing annual training 2. Annual	1. None 2. None	

**GOAL #4: Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, empowered, and valued.**

Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/ person	Implementation milestones	Resource Requirements	2015-16 Outcomes/Results
(a) Foster a culture of engagement, pride, and gratitude among all WSU constituencies	1. Dean's Notes 2. Offer campus-wide events on current national an international issues organized by HSS faculty and supported by Dean's Office 3. Four Exhibits the Mary Cosgrove Dolphin Gallery; 2 shows of student work; Three plays in Fuller Theatre; Four Choral concerts and XTreme ARTery; two weeks of performances, recitals and exhibits		1. Jane O'Brien Friederichs 2. Faculty/ Jane O'Brien Friederichs 3. VPA			1. Dean's Notes 2. Offer campus-wide events on current national an international issues organized by HSS faculty and supported by Dean's Office 3. Four Exhibits the Mary Cosgrove Dolphin Gallery; 2 shows of student work; Three plays in Fuller Theatre; Four Choral concerts and XTreme ARTery; two weeks of performances, recitals and exhibits
(b) Promote greater collaboration across divisions						Multiple effort Cross-sponsored events Joint Chairs' Meetings
(c) Increase options for students outside the classroom						
(d) Establish living-learning communities	Create new living-learning communities in residence halls	1. Establish 3 or 4 new living-learning communities	Provost, deans, chairs, VPSA	Establish one by 2016-2017, 3 or 4 total by 2018-2019	1. None	At target

(e) Create more opportunities for informal interaction among students, faculty, and alumni						
(f) Promote cultural awareness and sensitivity						
(g) Improve internal communication and ensure faculty/staff voice						
(h) Celebrate contributions by faculty, staff, and students that embody WSU core values	Establish new core-values based award	Suggestion: call it the "Board of Trustees Award"	President and direct reports, Board chair	Establish by 2017-2018	1. None	1. Community Service Awards 2. Celebration of Scholarship & Creativity- increased presentations by 43%, increased attendance by prospective employers 3. Academic Achievement Awards- added 3 new awards this year
(i) Ensure opportunities to succeed at WSU are equally available to all members of the faculty and staff						
(j) Promote a pluralistic student experience	Increase diversity among faculty and staff in academic affairs	Achieve 20% increase	Provost, deans, chairs, faculty	Achieve 20% increase by 2018-2019	1. None	Increased faculty diversity in HSS by 30%
(k) Increase alumni presence on campus						
<b>GOAL #5: Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/ person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>2015-16 Outcomes/Results</b>
(a) Align programs and allocate academic resources in response to student interest and strategic priorities	See Goals 1.a, 1.b, 1.e, 2.c, and 3.a					
(b) Mitigate uncertainty by identifying and growing new revenue streams	1. New graduate programs and certificates 2. Online programs 3. Increase international student enrollment	1. See Goal 1.a, 1.e 2. See Goal 1.i 3. See Goal 2.e				

(c) Implement campus master plan						
(d) Secure funding for deferred maintenance						
(e) Explore options for expanding campus footprint						
(f) Bolster WSU's technology capacity and infrastructure	1. Improve IT hardware and software 2. Improve IT risk preparedness	1. Add new hardware and software 2. Add IT risk management staff	Provost, CIO	Completed by 2019-2020	1. \$50,000/year 2. \$50,000/year TOTAL = \$400,000	
(g) Strengthen and sustain alumni giving						
(h) Develop long-term plan for increasing financial support and professional development for faculty and staff						

# ADMINISTRATION & FINANCE



**The Strategic Plan 2015-2020:**  
**Scholarship, Partnership, and Leadership for a Changing World**

Administration and Finance - April 2016 Update

GOAL # 3 Enrollment, retention and Student Success:						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
L. Provide excellent customer service to students (Also addresses Goal 4 B)	<ul style="list-style-type: none"> <li>Rework the process and timeline for notifying students of overdue bills and non-payment holds</li> </ul>	<ul style="list-style-type: none"> <li>Decrease in the overdue notices issued after the start of the semester</li> <li>Decrease in the number of deleted registrations due to unresolved accounts balances</li> </ul>	<ul style="list-style-type: none"> <li>Bursar/Student accounts</li> <li>Julie Camel, Director of Student Accounts</li> </ul>	<ul style="list-style-type: none"> <li>The new process was introduced in anticipation of the Fall 2014 semester in cooperation with the Enrollment Management Committee</li> </ul>	<ul style="list-style-type: none"> <li>Additional time on behalf of the Bursar and Financial Aid Office staff in the form of student outreach to help students resolve bill payment issues</li> </ul>	<ul style="list-style-type: none"> <li>29 % decrease in overdue notices mailed for student accounts in arrears after classes started</li> <li>53% decrease in deleted registrations due to unresolved account balances</li> <li>Continue assessment process in to a second year of implementation looking towards even fewer account issues as classes begin and additional reduction of the number of deleted registrations</li> </ul>
				<p><b>April 26, 2016</b></p> <ul style="list-style-type: none"> <li>Fall 2015 – Blackboard holds were placed more aggressively (lower dollar threshold) and the deadline was moved up one week to be closer aligned with add/drop</li> </ul>		<p><b>April 26, 2016</b></p> <ul style="list-style-type: none"> <li>The number of accounts in arrears that were subject to Blackboard holds was down 9% from Fall 2014</li> <li>The more aggressive approach to holds did not have a significant effect on the accounts, with only an additional 2 students being deleted for non-payment over the prior year</li> </ul>

<p>L. Provide excellent customer service to students, divisions and offices</p>	<p>Departments within the division have developed a series of survey questions which will be distributed to the campus community to establish a baseline for each department. The departments participating include Administrative Services, Bursar/Onecard, Purchasing/Accounts Payable, Human Resources, Payroll, Fiscal Affairs, and Budget. Facilities has several years of survey results from surveys conducted by Sightlines.</p>	<ul style="list-style-type: none"> <li>The number of responses to the survey</li> </ul>	<ul style="list-style-type: none"> <li>Division of A&amp;F/Kathy Eichelroth</li> </ul>	<ul style="list-style-type: none"> <li>Survey's were developed by department directors</li> <li>Deb Kurczka worked with Assessment to create the survey tools</li> <li>Survey's will be released at an opportune time over the next several months.</li> </ul> <p><u>April 26, 2016</u></p> <ul style="list-style-type: none"> <li>The first round of surveys were issued for all departments including student accounts, Proc/AP/Budget, Admin Services, Fiscal Affairs and HR/PR/Div/EEO between Nov 2014 and Sept 2015</li> <li>Second round of surveys began Nov 2015 with Student Accounts, Proc/AP/Budget and Admin services issued through March 2016</li> </ul>	<ul style="list-style-type: none"> <li>None at this time</li> </ul>	<ul style="list-style-type: none"> <li>All surveys have been administered with assistance from the Assessment Office.</li> <li>Each area is in the process of creating a dashboard of metrics using the results of the initial surveys.</li> <li>Specific actions will be identified to improve areas that received less than positive feedback from those completing the survey</li> </ul> <p><u>April 26, 2016</u></p> <ul style="list-style-type: none"> <li>Have reviewed the first round of results and in the process of creating a chart of baseline data to which future survey results will be tracked against</li> <li>Finding that there is some confusion with regard to the public perception of the function/operations of each area</li> <li>Future survey's will likely be more specific with regard to the services that we are seeking feedback on. Broad general questions tend to lead people astray.</li> <li>The current results will allow be used to guide an education campaign with regard to what service area is responsible for.</li> <li>The current results have provided some low hanging fruit that can be immediately addressed, or has already been in the works to address certain issues, which will be communicated to the public</li> </ul>
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**The Strategic Plan 2015-2020:**  
*Scholarship, Partnership, and Leadership for a Changing World*

Administration and Finance - April 2016 Update

GOAL # 4 Community and Campus Life:						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
B. Promote greater collaboration across divisions in support of shared, university wide goals and mutual accountability for progress (also supports Goal 3 L)	<ul style="list-style-type: none"> <li>Re-purposed resources in the existing A&amp;F budget to create a full time benefits coordinator position</li> </ul>	<ul style="list-style-type: none"> <li>Number of employee contacts</li> <li>Improvement in communication to employees regarding available benefits</li> <li>Increased benefit offerings</li> <li>Increased enrollment in programs</li> </ul>	<ul style="list-style-type: none"> <li>Human Resources/Director of Human Resources</li> </ul>	<ul style="list-style-type: none"> <li>Approach the one year anniversary of the position in January 2015</li> </ul> <p><b>April 26, 2016</b></p> <ul style="list-style-type: none"> <li>Currently in year 3 of this position. We now have data to begin assessment against baseline data</li> </ul>	<ul style="list-style-type: none"> <li>none</li> </ul>	<ul style="list-style-type: none"> <li>HR to gather data from the first year of implementation to measure the metrics and milestones</li> <li>This data will be used as baseline</li> <li>Baseline data will be evaluated and specific actions will be identified to improve customer service and expand offerings to employees</li> </ul> <p><b>April 26, 2016</b></p> <ul style="list-style-type: none"> <li>10-12 employee contacts/week</li> <li>1:1 meetings with all new hires</li> <li>1:1 benefit overview with all faculty finalists</li> <li>New hires receive new benefit information packet</li> <li>Utilize FacStaff to remind employees of benefits and deadlines</li> <li>Increased employee discount programs by 21%</li> <li>20% increase in flexible spending programs</li> </ul>
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GOAL # 4 Community and Campus Life:						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
B. Promote greater collaboration across divisions in support of shared, university wide goals and mutual accountability for progress (also supports Goal 3 L)	<ul style="list-style-type: none"> <li>work with others across campus to create financial systems that support unique programs/events /activities that do not fit the existing account structure and budget model</li> </ul>	<ul style="list-style-type: none"> <li>documented process/protocol of budget for and report on such activity in a manner that is meaningful to the university</li> </ul>	<ul style="list-style-type: none"> <li>Budget and Fiscal Affairs/CFO and Director of Budget, Planning and Policy development</li> <li>UTS, enrollment management and Administrative services have been added to the work group</li> </ul>	<ul style="list-style-type: none"> <li>Cleanup and restructure the chart of accounts</li> </ul>	<ul style="list-style-type: none"> <li>Commitment to set aside time to clean up the existing account structure</li> <li>Funds have been provided for in the budget to research and procure the reporting tool</li> <li>FY 16 budget contains resources to begin to address improvements to Colleague functionality and employee training</li> <li>Implement a financial reporting tool that sits on top of the Colleague system</li> <li>Evaluate the current and future</li> </ul>	<ul style="list-style-type: none"> <li>The Chart of accounts by department code has been cleaned up for the FY16 budget load. Significant changes have been made with coding for Academic Affairs for ease in pulling data for financial reporting.               <ul style="list-style-type: none"> <li>April 26, 2016                   <ul style="list-style-type: none"> <li>A team from Ellician came in to meet with Finance, Budget, Procurement and AP in November to conduct a functional audit of the way we use the system. During the audit we discussed a change to the chart of accounts. We determined that there is an easier way to handle this than there had been in the past. We are looking to work on a roll out of an improved chart for the FY 2018 budget load</li> </ul> </li> <li>A moderate amount of progress has been made with the Image Now software product that the University uses. Administrative Services and UTS has been working with end user department to develop electronic work flows. The Admissions Office has implemented this process and funds have been provide in the FY16 budget for Financial Aid to automate their workflows.                   <ul style="list-style-type: none"> <li>April 26, 2016                       <ul style="list-style-type: none"> <li>This process began in FY 2016. The project has run in to some scope issues and needs more resources</li> </ul> </li> </ul> </li> <li>The Image Now products can also be used to create electronic workflows with forms.</li> </ul> </li> </ul>



					<p>demand on the enterprise system and work together to identify solutions to expanding the use of the system to record all university activity in a manner that meets all the needs of the university and can be supported and maintained by appropriate staffing levels and financial resources</p>		<p>Progress has been made by UTS and Administrative services to train staff on this process and prepare for implementation of a pilot document flow process with procurement/AP</p> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o A proto-type of the travel authorization form has been developed and has been tested as a document that is routed electronically through the system for approvals. This form will go live for all departments in September 2016 with other electronics forms to follow shortly thereafter</li> <li>• UTS, Enrollment Management team and A&amp;F have been working together to define the functionality of Colleague that is desired to serve various programs and student populations. Our discussions have led us to explore various options including a change in platform to SQL, hiring a consultant to examine our current use of colleague and propose a method for expanded use of the system that addresses some of our needs and evaluation of a new Colleague module for DGCE called Elevate</li> </ul> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o Working with UTS and DGCE there have been several presentations of the Elevate product to various campus constituencies. University has contracted with Ellucian to purchase this product and proceed with implementation in the spring/summer 2016. The initial users of the product will be DGCE and the Wellness Center Fitness programs.</li> <li>o The product allows for the segmentation of various customer bases with various rates and online</li> </ul>
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**The Strategic Plan 2015-2020:**  
***Scholarship, Partnership, and Leadership for a Changing World***

Administration and Finance - April 2016 New Goals

GOAL # 4 Community and Campus Life:						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, respected, empowered, and valued	<b>Implement Talent Management Plan</b> Annual anti-discrimination and cultural competency training for all employees  Supervisors <ul style="list-style-type: none"> <li>• Supervision and evaluation</li> <li>• Stress management and morale building</li> <li>• HR, EO/AA and Payroll Nuts and Bolts-SSTA, employee handbook overview, selection process overview, etc.</li> </ul>					
	New Employees <ul style="list-style-type: none"> <li>• Electronic on-boarding</li> <li>• 1:1 or small group</li> </ul>					

	sessions within 1 week of hire (on going w/ HR; IT t.b.d.)					
	Department Chair Roundtables <ul style="list-style-type: none"><li>• Best Practices</li><li>• Leadership and Mentoring</li></ul>					
	Faculty Roundtables <ul style="list-style-type: none"><li>• New Faculty Mentoring</li><li>• Best Practices</li><li>• Teaching Effectiveness</li><li>• Academic Advising</li><li>• Continuing Scholarship</li></ul>					



GOAL # 4 Community and Campus Life:						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
B. Promote greater collaboration across divisions in support of shared, university wide goals and mutual accountability for progress (also supports Goal 3 L)	<ul style="list-style-type: none"> <li>work with others across campus to create financial systems that support unique programs/events /activities that do not fit the existing account structure and budget model</li> </ul>	<ul style="list-style-type: none"> <li>documented process/protocol of budget for such activity in a manner that is meaningful to the university</li> </ul>	<ul style="list-style-type: none"> <li>Budget and Fiscal Affairs/CFO and Director of Budget, Planning and Policy development</li> <li>UTS, enrollment management and Administrative services have been added to the work group</li> </ul>	<ul style="list-style-type: none"> <li>Cleanup and restructure the chart of accounts</li> </ul>	<ul style="list-style-type: none"> <li>Commitment to set aside time to clean up the existing account structure</li> <li>Funds have been provided for in the budget to research and procure the reporting tool</li> <li>FY 16 budget contains resources to begin to address improvements to Colleague functionality and employee training</li> </ul>	<ul style="list-style-type: none"> <li>The Chart of accounts by department code has been cleaned up for the FY16 budget load. Significant changes have been made with coding for Academic Affairs for ease in pulling data for financial reporting. <ul style="list-style-type: none"> <li>A team from Ellician came in to meet with Finance, Budget, Procurement and AP in November to conduct a functional audit of the way we use the system. During the audit we discussed a change to the chart of accounts. We determined that there is an easier way to handle this than there had been in the past. We are looking to work on a roll out of an improved chart for the FY 2018 budget load</li> <li>A moderate amount of progress has been made with the Image Now software product that the University uses. Administrative Services and UTS has been working with end user department to develop electronic work flows. The Admissions Office has implemented this process and funds have been provide in the FY16 budget for Financial Aid to automate their workflows. <ul style="list-style-type: none"> <li>This process began in FY 2016. The project has run in to some scope issues and needs more resources</li> </ul> </li> </ul> </li> <li>The Image Now products can also be used to create electronic workflows with forms.</li> </ul>

<p>demand on the enterprise system and work together to identify solutions to expanding the use of the system to record all university activity in a manner that that meets all the needs of the university and can be supported and maintained by appropriate staffing levels and financial resources</p>	<p>Progress has been made by UTS and Administrative services to train staff on this process and prepare for implementation of a pilot document flow process with procurement/AP</p> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o A proto-type of the travel authorization form has been developed and has been tested as a document that is routed electronically through the system for approvals. This form will go live for all departments in September 2016 with other electronics forms to follow shortly thereafter</li> </ul> <ul style="list-style-type: none"> <li>• UTS, Enrollment Management team and A&amp;F have been working together to define the functionality of Colleague that is desired to serve various programs and student populations. Our discussions have led us to explore various options including a change in platform to SQL, hiring a consultant to examine our current use of colleague and propose a method for expanded use of the system that addresses some of our needs and evaluation of a new Colleague module for DGCE called Elevate</li> </ul> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o Working with UTS and DGCE there have been several presentations of the Elevate product to various campus constituencies. University has contracted with Ellucian to purchase this product and proceed with implementation in the spring/summer 2016. The initial users of the product will be DGCE and the Wellness Center Fitness programs.</li> <li>o The product allows for the segmentation of various customer bases with various rates and online</li> </ul>	<p>Progress has been made by UTS and Administrative services to train staff on this process and prepare for implementation of a pilot document flow process with procurement/AP</p> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o A proto-type of the travel authorization form has been developed and has been tested as a document that is routed electronically through the system for approvals. This form will go live for all departments in September 2016 with other electronics forms to follow shortly thereafter</li> </ul> <ul style="list-style-type: none"> <li>• UTS, Enrollment Management team and A&amp;F have been working together to define the functionality of Colleague that is desired to serve various programs and student populations. Our discussions have led us to explore various options including a change in platform to SQL, hiring a consultant to examine our current use of colleague and propose a method for expanded use of the system that addresses some of our needs and evaluation of a new Colleague module for DGCE called Elevate</li> </ul> <p>April 26, 2016</p> <ul style="list-style-type: none"> <li>o Working with UTS and DGCE there have been several presentations of the Elevate product to various campus constituencies. University has contracted with Ellucian to purchase this product and proceed with implementation in the spring/summer 2016. The initial users of the product will be DGCE and the Wellness Center Fitness programs.</li> <li>o The product allows for the segmentation of various customer bases with various rates and online</li> </ul>
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<p>registration and payment</p> <ul style="list-style-type: none"> <li>o Also provides for programs revenues to be matched against programs budgets/expenses so program profitability can be assessed.</li> <li>• The group will continue to evaluate these options and discuss with Direct Reports and Cabinet our findings and recommendations</li> </ul>								
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# UNIVERSITY ADVANCEMENT



**The Strategic Plan 2015-2020:  
Scholarship, Partnership, and Leadership for a Changing World**

<b>Office of University Advancement GOAL # 1 Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b>
B	Promote 2x a year the WSF Student Research, Scholarship & Creative Activity Fund	2x yearly analysis of results and reporting to provost and deans	Karen, Louise	2x year call for submissions (Sept. Jan.) Submit info at end of year to ER	None	WSF Board review. Review and analysis by ER team for effect/impact
D	Utilize faculty for informal talks and presentations to alumni and donors	2-3 presentations/collaborations a year. Survey of participants after event to assess interest/satisfaction/engagement	Camilla, Tara, Christina, Nancy	Spring 2015 planning for 2015-2016 event calendar	Stipends / honorarium unless faculty offer to do them for free	FY17 awards results to be submitted to ER for analysis. Data on student's supported sent to ER 5/23/16 Gallery and Chorale directors collaborate annually with Alumni Reunion and Tea events
D	Provide \$50,000 over 5 years to support Honors Program	<ul style="list-style-type: none"> <li>FY disbursement to Honors Program</li> <li>Additional programming enabled (as reported by honors program directors)</li> </ul>	Tom McNamara	Annual Reports from Honors Program Annual Funding from Foundation	Funding from Foundation	See attached report. Updated (May 2016) report attached
G	Provide \$20K a year through CTL for 5 years for student-faculty research	<ul style="list-style-type: none"> <li>FY disbursement to CTL</li> <li># of students/faculty supported</li> </ul>	CTL Sue Foo, Andrea Billics	Call for proposals	Unknown	End of year report due from CTL at close of semester. Requested report 5/23/16
J	Share data on scholarships with appropriate division(s) for assessment of (ER) for assessment of impact on retention	Metrics related to retention to be reported by ER	Louise	Submit scholarship info.	None	End of year report due from ER at close of semester. Requested report 5/23/16

Revised 5/23/16

In 2015-16, we continued to use the Sheehan Seed Grants (which designated \$50,000 to be distributed to the program over five years) for study abroad, student research and travel, and honors course development.

Lt. Col. Sheehan charged us to “nurture the smart ones” and “make a big splash,” and we are pleased to report that we have done so through the following expenditures:

- **Study Abroad Scholarships** (students): \$3000
  - David Carroll (Greece)
  - Danielle Attardo (Costa Rica)
  - Kendall Charpentier (Spain)
- **Research and Travel Grants** (students): \$3,058
  - James Lenoir, fossil radiocarbon dating: \$558
  - Alexis Anderkin and Emily White, Dominican Republic service learning trip: \$600
  - Kristina Ferranto, Nicaragua service learning trip: \$300
  - Elizabeth Eisenbud, study abroad in Australia: \$300
  - Danielle Bavoux, Monica Bhaktri, Micah Klayman, Kelsey Miskis, Spring Break DC Leadership trip: \$1,000

• **Honors Course Development and Programming funds** (faculty): \$3442

- Class field trips
  - FYS (Aldo Guevara): books and bus trip to see author of *Enrique's Journey*: \$563
  - SYS--We the People (Charlotte Haller): CitySpeak theatre outing: \$332
  - Enactus—DC project competition (Joan Mahoney): \$1305
- Course materials: DVDs for Reel American History project (Karen Woods Weierman): \$142.50
- Tickets to Student Immigration Movement Dinner (Aldo Guevara): \$100
- Spring Break Reading Fellowships and Essay Contest (Karen Woods Weierman)—Amy Angell, Micah Klayman, Ryan Lindsey, Kasey Wozniak: \$1,000

• **Commonwealth Honors Project Prizes:** \$500

First Prize (\$250)  
 Amy Angell: *The Goodbye Moon—A Memoir of Loss*  
 Faculty advisor: Dr. Elizabeth Bidingger

Second Prize (\$150)  
 Kayleigh Berger and Kasey Wozniak: *Introducing Elizabeth Bishop, Poetry, and Writing as a Process*  
 Faculty advisor: Dr. Heather Tresseler

(Summer Undergraduate Research Program)

Third Prize (\$100)

Jim Lenoir: *Lake Sediment Based Insight into the Deglaciation and Post-Glacial Climate and Environmental History of the Mealy Mountains, Southeastern Labrador, Canada*

Faculty advisor: Dr. Tim Cook

(Summer Undergraduate Research Program)

Honorable Mention

Brittany Desilets: *Keyes House Access to Health Care*

Faculty advisor: Dr. Joan Mahoney

(City of Worcester Community Health Improvement Plan WSU summer internship)

We believe these expenditures strongly reflect Lt. Col. Sheehan's priorities (research, study abroad, and scholarships) and that they made a substantial positive impact on the learning opportunities available to a significant number of our honors students. If additional funds were to become available, we would welcome the opportunity to offer more study abroad scholarships and to expand our course development funding.

Respectfully submitted,

Karen Woods Weierman, Director  
Jennifer Hood-DeGrenier, Assistant Director

May 19, 2016

**The Strategic Plan 2015-2020:**  
***Scholarship, Partnership, and Leadership for a Changing World***

<b>Office of University Advancement GOAL # 2 Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results December 2015</b>
E	Expand alumni and local, regional, global network of philanthropic, in-kind and mentoring supporters Launch of the Lifetime Lancer Student-Alumni Council	250 face to face visits 75 proposals submitted	Tom, Jane, Karen, Camilla, Tara	Already in process	Costs related to travel, presentations, collateral, cultivation stewardship	349 face to face visits 149 proposals submitted
G		Hold 8 programs Recruit 10 founding members	Christina	Already in process	Costs related to programming	15 Current members, 3 events. Included a 4 month period without a staff member to manage due to a resignation.
G	Provide \$100,000 in support to Center for Service Learning and Civic Engagement to increase scope and programming Increase Funding for Study Abroad/Study Away Opportunities	FY disbursement to Center. Celebration of the renaming of Center in honor of John Binenda	Tom McNamara, Karen Sharpe, Camilla Caffrey and Sharon McDonald	Already in Progress	Funds from bequest to Foundation	Completed. First presentation of Binenda student award in April 2016.
G	Alumni Business After Hours program and Departmental Reunions	FY 15 disbursement of \$30,000 4x year Business After Hours 4x year Departmental Reunions	Tom McNamara, Karen Sharpe & Sharon McDonald Christina Tara	Already in progress	Funding from Corporate Partners Costs related to mailings, promotional items, cultivation, stewardship	End of year report due from International Programs in May 2017. Requested May 23, 2016 Reformatted as on-campus Alumni Connections networking events with faculty, students, alumni. 2 held in Spring 2016

Revised 5/23/16



**The Strategic Plan 2015-2020:  
Scholarship, Partnership, and Leadership for a Changing World**

<b>Office of University Advancement GOAL # 3: Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b> December 2015
E	Collaborate with Admissions team to pair with alumni for recruitment events, offer fee waiver when recommended by alumni, regional recruitment events	None set for alumni participation- staff member resigned. Admissions metrics not yet submitted to OUA	Admissions staff is the lead on this, working with Alumni staff: Camilla, Christina, Tara	See attached plan from Admissions.	Unknown	Goal would be to have an increased number of qualified applicants who were referred by alumni.
F	Implement Transfer Scholarship Program by providing \$30,000 per year for five years to provide 15 \$1,000 scholarships for incoming transfer students that would be available to them for two years. Advancement would provide funding. Admissions/Enrollment would be responsible for selecting the students and awarding the scholarships	First cohort (Fall 2015) \$15,000 for FY16 and \$15,000 for FY17 Second cohort (Fall 2016) \$15,000 for FY17 and \$15,000 for FY18 Third cohort (Fall 2017) \$15,000 for FY18 and \$15,000 for FY19 Fourth cohort (Fall 2018) \$15,000 for FY19 and \$15,000 for FY20	Advancement for Funding. Admissions/Enrollment Management for selection of students and awarding of funding	First cohort to be selected in fall of 2015 and awarded for FY16	Funding from Foundation	Increased # of Transfer students attending and being retained as reported by Admissions.
F	Changing Lives Campaign Goal for Scholarship Support: \$5 million by 2017	Raise \$5,000,000 in financial support of students in the form of scholarships, research grants, study away grants and scholarships. See attached chart	University Advancement Department (all)	Raise \$750,000 by end of FY 15	Campaign Budget Funding	Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.
F	Launch of Adopt a Scholar program	Goal of 10 new Adopt a Scholar funds for FY15	Tom, Jane, Karen, Camilla with ER	Brochure produced, solicitations underway	None	Goal is to increase enrollment in under enrolled programs by offering scholarships that would follow a student for four years. Two fold goal – increase enrollment/increase retention.
L	Remind and promote the Advancement Division's core values and office operations guide	No phone goes to voice mail, thank you letters within 48 hours, courteous helpful/service to all	Office of University Advancement Staff	Already in place	None	Create a more professional collegial atmosphere that is customer focused/student centric
						Outcomes/Results April 2016
						Admissions chose not to implement the referral program this year – Alumni will reconnect with them for FY17 to see if they will implement then
						100% yield, 100% semester-to-semester retention, and a 3.615 average collegiate GPA to demonstrate success.
						As of April 30, 2016 Campaign has raised \$4.6 in total for scholarships
						13 new scholarships for FY15; 6 additional new scholarships in FY16. With Admissions and Financial Aid, a process was developed to accommodate students who drop out or transfer out
						These established OUA best practices have continued and will continue on a daily basis.

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<b>Office of University Advancement GOAL # 4: Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and valued.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b>
A	Personal notes following events, personal phone calls, emails upon gifts; annual stewardship events, development of new stewardship events, launch of Lifetime Lancers Student-Alumni Council, annual DAA Awards, every other year HOF awards,	Personal SMART Goals	Camila, Tara, Christina, Tom, Karen, Jane, Diana, Missy, Dir. Adv. Communications (TBD)	Launch of Lifetime Lancers Student-alumni council; annual stewardship events, new stewardship event for Pillar Society at A.A.;	Departmental budget, Hiring of new Director of Advancement Communications	<b>Outcomes/Results April 2016</b> These established OUA best practices have continued and will continue on a daily basis.
B	Work with Deans upon completion of Academic Programs Reviews to determine funding opportunities Work with various departments, centers to develop funding opps/plans related to campaign	TBD	Tom, Sharon	Launch of capital campaign in May 2015	Highly dependent on availability of campaign budget funding	These established OUA best practices have continued and will continue on a daily basis.
E/K	4-6 Departmental/Affinity (athletics) events for alumni, staff, faculty students per year	# New alumni attendees per event/per semester 4-6 events per year	Camila, Tara, Christina, Karen, Deans, Depart. Chairs, Athletic Director, Coaches	Completion of events per semester	Cooperation of Department Chairs and faculty, coaches and athletic administrators	Ongoing for athletics, see Alumni Connections separate entry below.
H	DAA Awards, HOF Awards, Honorary Degree Nominees, Advancement communications and campaign profiles and features; nominations for local and statewide awards, Scholarship Tea, Scholar-Donor brunch, stewardship events	Annual OUA schedule of recognition/events, See example attached	OUA Staff	OUA schedule of recognition/events	Annual Budget funding and staff time	These established OUA best practices have continued and will continue on a daily basis.
	WSU's Annual Day of Giving	Held first Wednesday of every April	OUA team with Diana Curran as lead staff, students, student groups, and alumni	Follow the Day of Giving 6 month planning schedule, see attached.	OUA budget for Development events	Raised \$77,133.51 from 649 donors one day on April 6, involving more than 90 students and groups involved with campus activities

Launch of new Lancer mascot	Completed & revealed on 4/21 Naming contest completed by 4/15/16	Collaboration between Marketing, OUA, Athletics	Costume design milestones managed by Marketing	Athletics budget	In process	Completed & revealed on 4/21 at public event at WAM Naming contest completed by 4/15/16
Reformat of Business After Hours as Alumni Connections events with students, faculty and alumni for networking on campus	2 per semester, # of alumni participating	Tara	Completion of events	Alumni budget	In process	CJ event held 4/4, Business event to be held /14. Final numbers to be analyzed at year end
Thank A Donor Day. WSU students participate on campus signing personal notes of thanks on post cards to be sent to all DD donors	Held in late October each year on same day as Distinguished Donors event	Diana, Christina	Completion of event	Development budget	Completed	Completed
Dr. Kristen Lee Costa, Class of 1996, featured talk on how to navigate academic stress	Event booked for April 26	Tara	Completion of event	Alumni budget	TDB	Will be completed In April
Alumni Connections online career mentoring network	Launch in January 2016	Tara	Launch in January 2016	Campaign budget	Did not launch in January as expected because of issues coming from Procurement	Launched in March 2016
Redesign and launch of new Worcester Statement magazine and new template for Alumni Enews	New design launch Fall 2015	Kris	Survey groups, individuals, campus, for feedback on design, theme, name in summer 2015, set design theme with designer in August, 2015	Campaign budget	First issue launch in Fall 2015 Received first ever letters to the editors as feedback and more opportunity for dialogue with campus community	Spring issue released first week of May
First Sin Qua Non Faculty & Staff giving society event for donors, an event of gratitude and community for campus donors	Attendance by faculty and staff	Karen	Completion of event	Development budget	Unlike alumni donor community, we learned that December is not a good time for campus community to hold event.	Next annual event will be held in September 2016.
First New Student Fall Convocation Event	New in Fall 2015 all incoming 1st year students and transfer students invited to a ceremony attended by faculty, staff and administrators – with key note speaker to welcome students to campus and create a new campus tradition. New students processed into Sullivan Aud lead by Faculty Marshall, President and faculty in academic regalia A reception with food followed.	Collaboration with Academic Affairs, Conference & Event Services and President's Office. DUA team members served on committee	Fall 2015 was first one – creating a new tradition of welcoming new students to campus.	University Advancement budget provided funding for food for the reception. University Advancement Staff arranged to have a recent alumnae as the keynote speaker	Feedback was universally positive. Significant # of first year students attended as did faculty and staff.	Will become an annual event

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Office of University Advancement GOAL # 5 Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results December 2015
B	Continue development of unrestricted giving, strategic planning of grants and major gifts, launch of the Changing Lives capital campaign in FY15 to support University priorities	OUA Dashboard measurements of annual fundraising goals and progress toward goals. Staff SMART goals	Tom, Camilla, Karen, Jane, Diana, Tara, Sharon	Ghosh renovation phase II grant submissions, Worcester State Fund appeal, Fac/Staff appeal, Day of Giving appeal, WSF annual golf tournament, launch of Changing Lives capital campaign in FY15	OUA budget Campaign budget	Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.
E	Acquisition of Temple Emmanuel Property and Parking, 71,300 square feet of additional programmable space for WSU and 126 parking spaces	Quarterly meetings with Foundation Real Estate Committee and Temple Leadership and Tom McNamara	Tom McNamara/Real Estate Committee of Foundation	Financing Secured by May, 2015 Closing on Sale by 6/30/15	Funding from the Unrestricted assets of the Foundation for down payment and closing costs.	Dependent on the outcome of the campus master plan for use of space
GH	Launch of The Changing Lives Campaign <ul style="list-style-type: none"> <li>\$5 million for scholarship</li> <li>\$5 million for academic development (internships, research endowment, faculty development, departmental funds, academic initiatives)</li> <li>\$3 million for capital projects (Ghosh, Wellness, Temple, Student Center, WCC)</li> <li>\$2 million for area of greatest immediate need (unrestricted)</li> </ul> Creates positioning for philanthropic culture of giving, paying it forward for future years.	\$15 million raised by June 30, 2017 Tracked on OUA Dashboard – See attached report	Office of University Advancement Staff, President Maloney	Public Launch in Spring of 2015 \$3.4 Million raised in FY 15  Campaign total as of March 31, 2016  \$2.1 Million for FY16  \$12.3 Million	Campaign Funding Budget	Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.  Increased student engagement in the philanthropic process while they are undergraduates will lead to more engaged alumni. Re-engaging alumni will broaden the basis of philanthropic support and alumni donor base.
G	Launch new young alumni giving society, cultivation events, engaging faculty to cultivate, strategic asks with attendance	OUA Dashboard measurements of annual fundraising goals and progress toward goals. See attached.	Office of University Advancement staff	Strategic asks with attendance, eblast follow ups, hand written note follow ups, personal letter follow ups, individual visits. Each gift officer's quarterly benchmark met	Staff time, OUA budget, P&P resources	Giving society for young alumni launched in Fall 2015, other activities ongoing
						These established OUA best practices have continued and will continue on a daily basis.
						Completed June 19, 2015
						These established OUA best practices have continued and will continue on a daily basis.

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	Secure \$300,000 Gift to Name the Education Department in Memory of Barbara (Hickey) O'Brien '57 creating an endowed fund to support the education department in perpetuity	Gift from long time donor Bob O'Brien in memory of his wife who passed away in April of 2015	Tom McNameara	Discussions on gift to memorialize Mrs. O'Brien took place over the year since her passing – gift was received in March of 2016	Campaign Budget		This gift will provide \$15,000 per year to the Education Department in perpetuity to provide funding for Faculty Development and MTEL tests for students. Event was held on May 3, 2016.
	DeFeudis Challenge - \$250,000 challenge match to go to support Wellness Center. Longtime friend and supporter of WSU. Gene DeFeudis challenged the Advancement Office to raise \$250,000 in money by December 31, 2015 and if they could do that he would match that \$250,000 with a \$250,000 gift bringing the total raised to \$500,000 to support equipment and programming of the new Wellness Facility	Goal was to raise \$250,000 by 12/31/15. By 12/31/15 we had raised \$319,000 surpassing our goal	Tom McNameara	Exceeded goal by deadline of 12/31/15. Utilized a variety of modes and methods to raise funds.	Campaign Budget	Raised \$319,000 by 12/31/15	Uses of funding being developed in conjunction with Athletics

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# STUDENT AFFAIRS

**The Strategic Plan 2015-2020**  
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**GOAL 1**

SUBMITTED BY	Key Strategy or Initiative	Specific Action	Metrics and Milestones for Success	Responsible Department	Implementation Milestones	Resource Requirements	Outcomes/Results
OSILD	D, F Also Goal 4: A, E, H	Implement the new Student Employee Appreciation program to include monthly recognition events and celebration of the National Student Employee Appreciation Week in April.	a. Set a monthly recognition event schedule for the year. b. Continue to celebrate the National Student Employee Appreciation Week in April by holding events each day that week. c. Work with Career Services to offer a resume/interview skills workshops specific to our student employees.	OSILD Career Services Conference and Events Services	a. Research on student employee programs was completed over the summer and a calendar/schedule was developed. b. Members of the OSILD are in the process of planning events for April for the student staff members. c. A Career Services session was planned for the spring semester.	a. Budget for recognition items, student employee events, and annual semester socials/dinners is required.	a. A monthly recognition calendar was developed in September 2014. c. Career Services will be hosting a workshop in February 2015.
ATHLETICS	A Also Goal 3: J, K Also Goal 4: E	Continue to develop and improve mandatory Life Skills Enhancement Programs for all freshman student athletes	Meet 1x/month on a Sunday evening with all freshman student-athletes covering various topics such as Alcohol Awareness, Time Management Skills, Study Skills, Nutrition, etc.	Coordinator of Student-Athlete Support Services	Have hosted four (4) Freshman Life Skills Seminars in 2015. Also hosted Etiquette Dinner for Senior Student-Athletes	Partnership with Health and Wellness Education Appelizers	Develop well rounded student athletes who will "succeed" and graduate from WSU and become solid citizens and become a supportive alumnus
RES. LIFE	Strive for 4, 3, 2, 1 (4 years to graduate, 3.0 GPA, 2 hours of study for each class, 1 extracurricular activity)	Resident Assistants will assess the resident students in their areas through the Resident Assessment.	Metric: The Resident Assessment will create a baseline to judge future years data against.	Residence Life and Housing	Resident Assistants will complete the Resident Assessment beginning in November 2014.	None	
VETERANS SERVICES	J	Collaborate with Enrollment Mgt./Retention Team Assessment & Planning to gather data	Create a system that allows the Institution to quickly assess and respond to those student who may need assistance academically/financially/socially in order to achieve success	Office of Military Affairs/Veterans Services	2015-2016	Data Collection and Assessment	Improved tracking and outreach to our Military and Veteran population to insure their success. <b>Ongoing</b>
HEALTH SERVICES	D: Strengthen intellectual life on campus, and foster an environment that promotes discourse, discovery, and practice in the liberal arts of learning and expression	a. Distribute Patient Satisfaction Survey to students who have visited Health Services for patient visit.	Metric: Patient Satisfaction Survey Milestone: Survey results	Health Services staff Assessment Office staff	2014 -2015	Budget Line for Giveaway item	a. 52 Patient Satisfaction Surveys were sent electronically to students between 10/1/14 and 11/30/14. 11/52 surveys were returned. <b>108 Patient Satisfaction Surveys were sent electronically to students between 10/1/14 and 3/31/15.</b> <b>22/108 surveys were returned</b>
HEALTH SERVICES	Health Services Initiative: Students will be aware of their lifestyle choices and impact on their health and wellness.	b. Begin Monthly raffle of giveaway (gift card) to student that completes survey, randomly drawn by Assessment Office			a. Patient Satisfaction Survey was sent out to students, seen in Health Services in the previous 2 weeks beginning 10/1/14 through 11/30/14.		90.9% of the respondents rated the education provided during his/her visit to Health Services, regarding healthy behaviors as good, very good or excellent. <b>95.4% of the respondents rated the education provided during his/her visit to Health Services, regarding healthy behaviors as, good, very good or excellent.</b>

							b. Monthly gift card drawing was established. \$10.00 Gift card to Bookstore to be distributed to winner of monthly drawing.		100% of the respondents stated that they were able to identify at least 1 personal, healthy behavior, due to his/her visit to Health Services  The Gift cards to Bookstore were distributed to 1 student in October and 1 student in November.  The return rate for surveys in 2013-2104 was 15%. The return rate for surveys 2014-2015 was 22%. This demonstrates an increase which may be related to the give-away item this year.
HEALTH SERVICES	Health Services Initiative: Students will demonstrate personal responsibility for self-care	Distribute Post Educational Assessment Survey to students who have visited Health Services for a specific health issue.	Metric: Post Educational Assessment Survey regarding Urinary Tract Infections Milestone: Survey results	Health Services staff Assessment Office staff	Post Educational Assessment Survey regarding Urinary Tract Infections was sent out to students who had visited Health Services for this problem between 10/1/14 and 11/30/14.	None		6 Post Educational Assessment Surveys were sent electronically to students between 10/1/14 and 11/30/14. 10 Post Educational Assessment Surveys were sent electronically to students between 10/1/14 and 3/31/15.  1/6 Assessment Surveys were returned. 1/10 Assessment Surveys were returned  100% of the students who completed the survey were able to correctly identify at least 2 ways to prevent urinary tract infections.  100% of the students who completed the survey were able to identify at least 2 complications of an urinary tract infection, to return for evaluation.  Research based, impactful health programming on consistent basis.  Committed students and more opportunities for students. Met with Linda Larrivee, Dean of Health Sciences. I was instructed to meet with Chair who is currently out until mid-summer.	
HEALTH & WELLNESS	F.A.E.L.J	Expand Peer Health Educators and the HC338 class to work collaboratively.	Work with Health Science Dept. chair	Office of Health & Wellness Health Sciences.	Develop Curriculum and Syllabus				
HEALTH & WELLNESS	J	Increase number of students who complete ACHA assessment by 50%	Reach out to dept. chairs to educate about importance this data collection. Share data results with community	Office of Health & Wellness				Better understanding of our students wellness behaviors which can assist in program planning and improvement of student services.  Educate community regarding results with improved data sample.	



HEALTH & WELLNESS	A.F.E		Design impactful programs that specifically target areas of concern.		Use evaluation and ACHA data to measure success	Office of Health & Wellness, Per Health Educators, Residence Life.				Cross-collaboration between departments. Next ACHA survey to be completed in Spring 2016. Fall 2015 workshops will be offered to outline Health Education department and data.
CAREER SERVICES	A.E.F		Work with two departments each year to offer assistance with networking and career opportunities. (upkeep of this will depend on staff)		Continue to collaborate on an event where students will be trained on professional table manners and interviewing techniques at a Dining Etiquette Event.  Continue to work with Alumni Relations to schedule a Fall/Spring event where students become more informed about career/job development skills through networking and mock interviews conducted by selected alumni.	Career Services Business Professor  Career Services/University Advancement- Alumni Relations	Dining Business  Employer Relations Coordinator	Spring 2014 is an annual event to continue in 2015-2020.  Fall 2014 cancelled due to staff shortage. Fall 2015 event being planned. This will be an annual event 2015-2020.  Spring 2015 - This will be an annual event 2015-2020	If numbers increase we would need additional resources. \$400 was for the purchase of suits for two senior students.  In order to continue this and similar events we need: Employer Relations Coordinator	Increased 50 students' knowledge of proper dining manners and interview tactics during a Dining Etiquette event held on 4/6/15.  At a scheduled Spring event students will become more informed about career/job development skills through mock interviews conducted by selected alumni.  Students registered to participate in a mock interview with alumni and Career Services personal to become more informed about career/job development skills. An additional 8 students from public health were interviewed in the CS department  Formal presentations are made in academic classrooms where students learned about career and job development skills  Students will become more informed about career/job development through presentations and handouts developed and presented for groups, clubs and organizations. (117 students)  Students will learn career development fundamentals and Career Services service provision.
CAREER SERVICES	K		Establish a Career Service presence on social media focusing on LinkedIn.		Create a new marketing social media site for students, alumni and employers.	Career Services Marketing		2015-2016	In order to continue this and similar events we need: An additional full time Career Counselor to educate students Clerk to maintain site Monies to create new marketing banners and brochures to educate stakeholders.	Students/Alumni and employers will learn of Career Services offerings and effective online networking tactics. Created LinkedIn Career Services page and are encouraging followers.

CAREER SERVICES	J	Create and use an assessment tool for one on one appointments.	Career Services counseled student/alumni will be given the opportunity to assess provided services which will be used to make service provision adjustments in order to ensure quality.	Career Services Institutional Research	2015	Create a new satisfaction survey for students. In order to accomplish this we need: A full-time clerk to initiate the survey and analyze data	Career Services counseled student/alumni will be given the opportunity to assess provided services which will be used to make service provision adjustments in order to ensure quality. <b>Ongoing</b>
CAREER SERVICES	E	Create partnerships with local employers for internships and full time positions for various majors.	Proactively recruit employers to list internships and career opportunities in WSU CSO.	Career Services	2014 Ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full-time Employer Relations Coordinator to recruit and respond to potential employers in WSU CSO.	<b>Created instructional marketing flyer for employers to join CSO. (Lancet Link)</b> <b>Meet one on one with estimated 200 employers at various job fairs and recruiting events to educate companies on how to locate our employer services via the new website. 133 new employers have registered and begun listing internships and jobs.</b>
			Create opportunities for employers to man recruitment/informational tables and to hold on-campus networking events.	Career Services	2014 Ongoing throughout 2015-2020	An additional full time Employer Relations Coordinator to recruit and respond to, secure and arrange for employer visits.	Employers manned recruitment/informational tables or held networking events where they networked with individuals students about available internship/job opportunities. <b>15 employers provided opportunities for students and alumni regarding internships and careers.</b>
			To be more effective with student career development counseling services hold at least 2 Service Learning Advisory Board meetings annually and invite local employers to present services and needs to Advisory Board.	Career Services	2014 Ongoing throughout 2015-2020		Advisory Board meetings were held on 5/12/14 and 9/23/14 where we learned of community career opportunities and services to better counsel students and alumni. <b>Ongoing</b>
DISABILITY SERVICES	F	Increase student participation in The Washington Center Internship program Establish Gamma Chi.	Increase student participation in The Washington Center Internship program a. Invite students who meet criteria (3.1 gpa with 24 completed credits) Fall 2014; update each semester b. Schedule biweekly meetings of the executive board and monthly membership meetings Fall 2014 c. Host induction ceremony April 2015 a. Collaborate cross campus. Prepare faculty workshops	DSO, Academic Affairs, Communication and Science Disorders Dept.	2014 Ongoing throughout 2015-2020	Willing faculty to allow CS staff in classroom	Increase student awareness regarding Washington Center Internship program. <b>Ongoing</b>
DISABILITY SERVICES	K	WSU's chapter of Delta Alpha Pi, the international honor society for students with disabilities Institutional knowledge and Commitment to Universal Design for Learning	WSU's chapter of Delta Alpha Pi, the international honor society for students with disabilities	DSO, Academic Affairs, Communication and Science Disorders Dept.	a. Research on DAPI was completed last year and a plan was established. b. Members of DSO staff, Academic Affairs, Communication and Science Disorders Department and Conference and Event are planning Induction Ceremony	Students Fundraising and collecting dues from membership to support annual induction ceremony	a. Gamma Chi WSU Chapter of DAPI Honor Society was recognized as active October 2014. b. Induction Ceremony will be held April 25, 2015 11am-1pm Blue Lounge. Kick off to Disability Awareness Week.
BINIENDA CENTER	A, E	Build stronger connections between students' classroom learning and community and campus engagement.	Increase number of Service Learning Courses	DSO, Education Department and Center for Teaching and Learning	a. Research b. Develop a proposal with Education Department and Center for Teaching and Learning for series of Faculty Workshops and resource for Universal Design for Learning. Move from average of 12-14 SL courses each year to 20 each year	Collaboration; may need small budget for workshop supplies and/or food/beverages.	a. Number of Faculty who attend b. Evaluations

		Design and create bridges between Academic Affairs (curricular) and Student Affairs (co-curricular)  Assess high impact practices	Create a (Community Leadership) minor that supports and advances experiential learning and civic engagement both locally and globally.	Director of The Center for Teaching and Learning  Associate Dean, Office of Student Involvement and Leadership Development  Director of The Binienda Center	Create minor in SL/CE so that students are recognized for this work on their transcripts	and Academic Affairs.	number of these courses.
BINIENDA CENTER	D	Develop collaborative innovative programming that crosses divisions and integrate civic engagement with classroom experience.	Implement a faculty fellow program of junior and senior fellows to build bridges between Student Affairs (The Binienda Center) and Academic Affairs (center for Teaching and Learning, etc.) New courses and program designs in civic engagement and service learning.	Director of The Binienda Center Teaching and Learning Associate Dean, Office of Student Involvement and Leadership Development	Secure funding for faculty and students to conduct research on high impact practices and present at conferences on the subject of service, civic and democratic engagement.	Funding for faculty fellows.  Grants writing and research team.	New Courses develop in SL and CE  A Minor is Service Learning.
BINIENDA CENTER	A, E	Design and create bridges between Academic Affairs (curricular) and Student Affairs (co-curricular).	Expand the offerings of professional development workshops and research opportunities for faculty engaged in service learning and civic engagement.	Director of The Binienda Center Teaching and Learning Associate Dean, Office of Student Involvement and Leadership Development	Create minor in SL/CE so that students are recognized for this work on their transcripts	Continue to fund and seek funding for innovative programming in SL and CE	Complete outreach and create programs with Alumni who have worked in these courses and programs
BINIENDA CENTER	B	Assess high impact practices	Assess community perceptions of institutional engagement; track and recording institutional-wide engagement data; assess the impact of community engagement on students, faculty, the community, and the institution.	Director of The Binienda Center Office of Institutional Research	Create minor in SL/CE so that students are recognized for this work on their transcripts	Grants writing and research team	Present and publish on SL and CE at WSU Adequately assess the effectiveness of these courses and programs and share with faculty at bi-annual workshops.
BINIENDA CENTER	A	Recognize student work in the areas of community-based research and civic and democratic engagement.	Develop planning committee across divisions to consider co-curricular transcript.	Director of The Binienda Center Director of The Center for Teaching and Learning  Associate Dean, Office of Student Involvement and Leadership Development	Implement Co-curricular Transcript	Funding and infrastructure to support co-curricular transcript	All incoming students are oriented to co-curricular transcript. Co-curricular transcript lives in an office where student activities can be verified and recognized.



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**GOAL 2**

SUBMITTED BY	Key Strategy or Initiative	Specific Action	Metrics and Milestones for Success	Responsible Department	Implementation Milestones	Resource Requirements
OSILD	G Also Goal 1, F Also Goal 4; C, E	Design a third level of the leadership training program that includes online modules and allows for a more flexible program structure.	a. Research 3-tier leadership programs at other universities. b. Prepare proposal for program launch in fall 2015.	OSILD	a. Currently researching 3-tier leadership programs. b. Proposal is being prepared for submission in November 2014.	Additional start-up funding to purchase program materials, including books, team building initiatives, and other resources.
OSILD	G Also, Goal 1 F, and Goal 4 C, E	Successfully implement the inaugural year of the Commuter Assistant program.	a. Recruit 30 first year students to participate in the program during summer orientation. b. Hold 10 programs throughout the fall semester, including events on and off campus. c. Evaluate the program in December 2014 in order to make improvements for fall 2015. d. Recruit 8 students to be Commuter Assistants for fall 2015.	OSILD		
OSILD	G Also, Goal 1 f, and Goal 4 c, e.	Design a third level of the leadership training program that includes online modules and allows for a more flexible program structure.	a. Research 3-tier leadership programs at other universities. b. Prepare proposal for program launch in fall of 2015.	OSILD		
ATHLETICS	A, B, D, E, F, I Also Goal 1 E Also Goal 3 C, G	Develop and implement an elementary school reading program that will be supported by student-athletes and/or teams	On average, 1x per week during the school year, select student athletes and school mascot will visit a Worcester city elementary school to read a book to the classroom and emphasize the importance of reading and education	Coordinator of Student-Athlete Support Services	2016-17	Corporate Sponsor would be preferred to help pay for collateral materials, plus the program would have "legs" to it to potentially generate revenue.  Developing a "kid-friendly" mascot and suit would also be beneficial for this program
ATHLETICS	G	Team Captain Leadership Breakfasts	Senior Athletic Administrators and FAR's meet collectively 1x/month with all team captains as a group	Associate Athletic Director	<b>Karen Tessmer and I hosted three (3) Captain Leadership Breakfasts in 2015 featuring guest speakers and contributions from our FAR's</b>	Research content to discuss with the collective group
CESO	I	To develop a formal and consistent Student Internship position within CESO	1 – 2 filled Internship opportunities per academic year	CESO, Career Services / On campus Dept.	2015-2016	None
VETERANS SERVICES	H	Increase Degree completion rate of our Military/Veterans population by providing those support services to increase overall success	Have our non-matriculated population to become degree seeking students and increase graduation rate overall	Office of Military Affairs/Veterans Services	2015-2020	Partnership with Enrollment Mgt Retention Team
VETERANS SERVICES	I	Improve career related services and expand professional networking opportunities within the community	Form those relationships and partnerships with local/state/federal resources and programs currently available	Office of Military Affairs/Veterans Services	2015- 2018	Utilize our own career services at WSU and partnerships with outside agencies geared to this specific population
HEALTH & WELLNESS	D,E,F,G	Expand Peer Health Educators and HC338 class to work collaboratively.	Work with Health Science chair.	Office of Health & Wellness	Develop Curriculum and Syllabus	



CAREER SERVICES	Establish a central location to post/advertise internships.	Identify a centralized bulletin board to utilize.	Career Services	2014 2015-2020 Ongoing maintenance will be required	In order to utilize this to the best of our ability we need a full time Clerk to screen for appropriateness of submitted internship/job descriptions and maintain the ongoing upkeep.
CAREER SERVICES	Work with two departments each year to offer assistance with networking and career opportunities. (upkeep of this will depend on staff)	Continue to collaborate on an event where students will be trained on professional table manners and interviewing techniques at a Dining Etiquette Event.  Continue to work with Alumni Relations to schedule a Fall/Spring event where students become more informed about career/job development skills through networking and mock interviews conducted by selected alumni.	Career Services Dining Services Business Professor  Career Services University Advancement - Alumni Relations	Spring 2014 This is an annual event to continue in 2015-2020  Fall 2014 cancelled due to staff shortage. Fall 2015 event being planned. This will be an annual event 2015-2020.	If numbers increase we would need additional resources  In order to continue this and similar events we need: An Employer Relations Coordinator
		Formal presentations will be made in academic classrooms where students will learn about career and job development skills.  Formal lectures and hands on activities will be presented in co-curricular settings where students will become more informed about career and job development skills	Career Services Earth, Environment and Physics, Chemistry CJ Communications Nursing Career Services Psych Club OSILD (STARS Program) Green Career Fair Communications Day MERC  Career Services	These are ongoing throughout 2015-2020  These are ongoing throughout 2015-2020  2015-2020	In order to continue this and similar events we need: An additional full-time Career Counselor Willing academic professors  In order to continue this and similar events we need: An additional full-time Career Counselor Willing groups, clubs or organizations  In order to continue this and similar events we need: An additional full-time Career Counselor
CAREER SERVICES	Establish a Career Service presence on social media focusing on LinkedIn.	Collaborate with the Academic Success Center to develop services/resources for the first year student orientation.  Create a new marketing social media site for students, alumni and employers.	Career Services Marketing UTS	2015-2016	In order to continue this and similar events we need: An additional full-time Career Counselor to educate students Clerk to maintain site Monies to create new marketing banners and brochures to educate stakeholders

CAREER SERVICES	I	Create and use an assessment tool for one on one appointments.	Career Services counseled student/alumni will be given the opportunity to assess provided services which will be used to make service provision adjustments in order to ensure quality.	Career Services Institutional Research	2015	Create a new satisfaction survey for students. In order to accomplish this we need: A full-time Clerk to initiate the survey and to analyze the data
CAREER SERVICES	C.E.I	Create partnerships with local employers for internships and full time positions for various majors.	Proactively recruit employers to list internships and career opportunities in WSU CSO.	Career Services	2014 Ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full-time Employer Relations Coordinator to recruit and respond to potential employers WSU CSO
			Create opportunities for employers to man recruitment/informational tables and to hold on-campus networking events.	Career Services	Ongoing throughout 2015-2020	An additional full time Employer Relations Coordinator to recruit and respond to, secure and arrange for employer visits.
			To be more effective with student career development counseling services hold at least 2 Advisory Board meetings annually and invite local employers to present services and needs to Advisory Board.	Career Services Service Learning	Ongoing throughout 2015-2020	
			Increase presentations in academic classrooms for advertising when the representative for the Washington Center comes to campus.	Career Services	Ongoing throughout 2015-2020	Willing faculty to allow CS staff in classroom
CAREER SERVICES	E.I	Explore list serve options for students that will host jobs and opportunities off campus where students may become more engaged.  Increase student participation in The Washington Center Internship program	Research options for students that will offer a usable resource for internships and job opportunities that reflect trends in University offerings and the global workforce.  Increase presentations in academic classrooms for advertising when the representative for the Washington Center comes to campus.	Career Services UTS  Career Services	2015-2016  2015-2016	Partner with UTS  Willing faculty to allow CS staff in classroom

DISABILITY SERVICES	G	Establish Gamma Chi Wsu's chapter of Delta Alpha Pi, the international honor society for students with disabilities.		Invite students who meet criteria (3.1 gpa with 24 completed credits) Fall 2014  Schedule biweekly meetings of the executive board and monthly membership meetings Fall 2014 and continuing Spring 2015  Host induction ceremony April 2015	DSO, Academic Affairs, Communication and Science Disorders Dept.	Research on DAPI was completed last year and a plan was established.  Members of DSO staff, Academic Affairs, Communication and Science Disorders Department and Conference and Event are planning Induction Ceremony	Students Fundraising and collecting dues from membership to support annual induction ceremony
BINIENDA CENTER	Goal 1: E	Continue to build bridges and programming between Student Affairs, Academic Affairs, and The Office of Residence Life and Housing to support integrative learning and experiential learning through a living learning community.	Develop CLEWS retreats and seminars on student leadership and civic engagement for CLEWS mentors.	Director of Binienda Center Director of Residence Life and Housing Assistant Director, Residence Life and Housing Office of Institutional Research	Engage a group of influential faculty in creating course work for CLEWS/Community Leadership Programming.	Secure partnership development/Program Manager position for the Binienda Center.	
BINIENDA CENTER	F, H	Assess the impact of the CLEWS LLC	Assess the CLEWS Students and Control Group in areas of GPA, Dean's List, Retention, Judicial Findings, and Leadership Roles	Director of Binienda Center  Office of Institutional Research	Present on and publish the CLEWS LLC	Continue to partner with Office of Institutional Research to create annual comprehensive report on CLEWS Cohorts and Control.	
BINIENDA CENTER	A, E	Work with three local elementary schools in creating programs for our students to gain experience and professional acumen. Provide alternative break opportunities such as Habitat Build days and the NYC Social Justice Fieldtrip.	Continue to provide programs such as the Clemente program and the Tatum After School Programs for CLEWS students to take leadership roles in the community.	Director of Binienda Center  Director of Residence Life and Housing	Continue to support students and provide programming for CLEWS cohorts	Increase programming budget for the CLEWS program	
BINIENDA CENTER	A, C	Continue to build bridges and programming between Student Affairs, Academic Affairs, and The Office of Residence Life and Housing to support integrative learning and experiential learning through a living learning community.	Develop CLEWS retreats and seminars on student leadership and civic engagement for CLEWS mentors.  Provide alternative break opportunities such as Habitat Build days and the NYC Social Justice Fieldtrip.	Director of Binienda Center  Director, Residence Life and Housing	Increase number of students participating in activities, such as make a Difference Day and Earth Day.  Expand concept of CLEWS Conversations	Secure partnership development/Program Manager for the Binienda Center	

BINIENDA CENTER	A	<p>Continue to build bridges and programming between Student Affairs, Academic Affairs, and The Office of Residence Life and Housing to support integrative learning and experiential learning through a living learning community.</p> <p>Continue to participate in the Day of Giving Challenge.</p>	<p>Provide alternative break opportunities such as Habitat Build days and the NYC Social Justice Fieldtrip.</p>	<p>Director of Binienda Center Director of Residence Life and Housing Assistant Director, Residence Life and Housing</p>	<p>Invite students into activities such as the Day of Giving Challenge that celebrate Worcester State faculty, staff, students and alumni.</p>	<p>Access to printing and publications. Build an alumni cohort of CLEVS as it develops.</p>
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Outcomes/Results
Promote the importance of reading and education to youths in the community
Provide positive PR and exposure for Worcester State, with also some revenue potential through merchandise sales
Student-athletes will become more effective leaders for their respective teams as well as in their professional lives
Continue to increase graduation rate among this targeted population
Increase career training /networking/placement of our military and veterans population
Research based, impactful health programming on consistent basis. <b>Pending</b>

<p>A WSU Internship/Job bulletin board was created near the Career Services offices. <b>Ongoing submission for internships and jobs are posted.</b></p>	
<p>Increased 35 students' knowledge of proper dining manners and interview tactics during a Dining Etiquette event held on 3/5/14.</p> <p>At a scheduled Spring event students will become more informed about career/job development skills through mock interviews conducted by selected alumni.</p> <p>28 Students registered to participate in a mock interview with alumni and Career Services personnel to become more informed about career/job development skills. An additional 8 students from public health were interviewed in the CS department.</p> <p>Formal presentations are made in academic classrooms where students learned about career and job development skills (180 students)</p> <p>Students will become more informed about career/job development through presentations and handouts developed and presented for groups, clubs and organizations. (117 students)</p> <p>Students will learn career development fundamentals and Career Services service provision. (Summer 2015)</p>	<p>Students/Alumni and employers will learn of Career Services offerings and effective online networking tactics.</p> <p>Created LinkedIn Career Services page and are encouraging followers.</p>

<p>Career Services counseled student/alumni will be given the opportunity to assess provided services which will be used to make service provision adjustments in order to ensure quality. <b>Ongoing</b></p> <p>Increase the known employer opportunities for student and alumni regarding internships and careers.</p> <p><b>Created instructional marketing flyer for employers to join CSO. (Lancer Link) Meet one on one with estimated 200 employers at various job fairs and recruiting events to educate companies on how to locate our employer services via the new website. 133 new employers have registered and begun listing internships and jobs.</b></p>	
<p>Employers manned recruitment/informational tables or held networking events where they networked with individuals students about available internship/job opportunities.</p> <p><b>15 employers provided opportunities for students and alumni regarding internships and careers.</b></p>	
<p>Advisory Board meetings were held on 5/12/14 and 9/23/14 where we learned of community career opportunities and services to better counsel students and alumni. <b>Ongoing</b></p> <p>Increase student awareness regarding Washington Center Internships. <b>Ongoing</b></p> <p><b>Ongoing</b></p>	

Gamma Chi WSU Chapter of DAPI Honor Society was recognized as active October 2014.
Induction Ceremony held April 25, 2015 11am-1pm Blue Lounge. Kick off to Disability Awareness Week. 23 students inducted; 11 graduating seniors.
Current Executive Board raised over \$1200 in bake sales, dues and induction ceremony fee.
4 Executive Board Members elected for AY2015-2016. Will begin working on peer-mentoring program with first year students.
Growth of CLEWS program each term with CLEWS Volunteers, the students who hear about the program and sign on.
Two leadership retreats each year for CLEWS mentors.
Nurture CLEWS original cohort through graduation with a 90% retention rate. High retention rates of the Middle Tier (2.6-3.2 GPA) students in CLEWS Track numbers of CLEWS students in roles such as RA, Peer Mentor, or active in community programs. Assess Partnerships with local schools
Evaluate Alternative Break and CE Programs. Develop new partnerships.
High retention rates of the Middle Tier (2.6-3.2 GPA) students in CLEWS
Two leadership retreats each year for the CLEWS mentors.



CLEWS Alumni Cohort Continue to expand the Celebration of Service	Participate and create more spirit events such as Day of Giving
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**The Strategic Plan 2015-2020**  
Scholarship, Partnership, and Leadership for a Changing World

**GOAL 3**

SUBMITTED BY	Key Strategy or Initiative	Specific Action	Metrics and Milestones for Success	Responsible Department	Implementation Milestones	Resource Requirements	Outcomes/Results
OSILD	A, L	Redesign and revamp the Transfer Orientation program to involve greater faculty participation and a more personalized program.	a. Recruit faculty to participate in the Transfer Orientation Program. b. Create a personalized schedule for transfers based on their number of accepted transfer credits. c. Implement an online registration form for Transfer Orientation.	OSILD Admissions Academic Services Center	a. Faculty did not attend due to schedule restrictions in August 2014. b. A new program was developed for August that included three different sessions for students based on credits transferring in to WSU. c. A form was used for the August 2014 program, but will be updated to a new version for the January 2015 program registration.	Ability to bring in faculty outside of contract dates in order to include them in the program.	
ATHLETICS	E, J, L Also Goal 2H	More detailed guidelines will be implemented in order for coaches to recruit student-athletes that are "WSU caliber" who have the skill set and will be given the opportunity to succeed academically at WSU. Alumni are also a great resource to help identify potential recruits	Coaches will be evaluated annually by their success in the recruitment of student-athletes, specifically those with exempt status, through the performance of these student-athletes in the classroom and the field of play  Athletic Director will check in with coaches to make sure that they are communicating with the Academic Advisor and monitoring their student-athletes behavior and academic progress daily  Academic progress of student-athletes will continued to be monitored regularly by the Athletics Academic Advisor	Athletic Director (currently managed by Assistant AD) and Coordinator of Student-Athlete Support Services	By editing the Recruitment Exemption Guideline Forms so that the AD can review the potential recruits in more detail, incoming recruits will have a much better chance to succeed in 4. We are focusing on quality not quantity. This new policy has significantly decreased the amount of "at risk" recruits entering our University for 2015-16. So far the number of exemptions requested is at 29 as opposed to over 50 last year at this time.	AD will continue to emphasize and monitor the type of student-athlete that is being recruited athletically and academically to Worcester State University  Editing of the exemption form to be more informative in selecting and acceptance exemption student-athletes	Increase in retention and graduation rates for student-athletes
COUNSELING	L	Students will be seen in accordance with urgency/severity of needs	Students will be seen with in the week they call.	Counseling Center Staff	2015-2016	1 new full time Counselor	Reduce possibility of waitlist Increase critical case management time Prevent staff burnout Increase outreach and programming efforts to community Begin campus wide Suicide Prevention Campaign  <b>Strategic Plan 2015</b> <b>Submitted budget request for FY15-16 for additional full time</b>

COUNSELING	J	Collaborate with Academic Success Center when referring students with complex mental health needs and complicated academic needs	Students will be more informed of options in a timely manner	Counseling Center staff ASC staff	2015-2018	Partnership with ASC	Students will be more informed with about academic options given complexity of need. <b>Established streamlined referral process.</b> <b>Clarified academic appeal process and documentation needs for student appeals.</b> <b>Students are receiving advising in a comprehensive and timely manner.</b>
STUDENT CONDUCT	L	Keep officers up to date on information	Hold a yearly training for both new and returning board members to keep them up-to-date with campus policies and best practices	SOC Various staff and faculty members	Hold Training in August prior to the student returning. Have hearing officers and board members attend	Mutual training time Training manual Available Space	Have (4) hearing officers trained (RDs) for 2014-2015 Have (1) GA trained as a hearing officer for 2014-2015 Have (14) staff members trained as board members for 2014-2015 Have (4) faculty members trained as board members for 2014-2015
VETERANS SERVICES	F	Encourage all Military / veterans to fill out FASFA	Students will have additional funds to support and ease their financial burden while attending WSU	Office of Military Affairs/Veterans Services	2015-2018	Partnership with Financial Aid Office	Increased funding to support the Military/Veterans Population
HEALTH SERVICES	K, L	Students will be seen in accordance with urgency/severity of needs.	Metric: Tracking reports a. Students will be evaluated in Health Services within 2 business days from their request for an urgent appointment. b. Students will be evaluated within 5 business days or at student's discretion for routine appointments.	Health Services staff	2014 - 2015	1 new Full time Nurse Practitioner Rehire 25 hour, evening clerical position	a/b. Expand available appointments for urgent care visits and routine care visits
HEALTH SERVICES	K, L	Assist in transitioning students and staff into newly renovated space.	a. Coordinate the move of Health Services Office to new permanent location b. Explore expanding hours (evening) for Health Services	Health Services Staff Facilities Staff	2014-2016	1 new Full time Nurse Practitioner Rehire 25 hour, evening clerical position	Health Services staff packed all office supplies during Summer 2014. Facilities assisted with move to new permanent space on 8/18/14. Facilities staff has addressed physical issues with new space during Fall Semester 2014 Additional Nurse Practitioner staff needed to expand evening hours will be discussed during budget discussion for FY 2016
HEALTH SERVICES		Participate in Diversity and Customer Service workshops/education	Health Services staff will participate in at least 1 Diversity or Customer Service workshop/education during Academic Year	Health Services staff	2014-2015	None	Lori Williams ANP, attended 1 lecture entitled "Quality Customer Care and Services on 11/16/14, sponsored by the WSU Diversity Office.

HEALTH & WELLNESS	A. I	Expand and develop Peer Health Education and HC338 class to work collaboratively.		Health & Wellness				<p>By expanding the Peer Health Ed. Experience we will be offering the students experience in programming and exposing them to real careers. In addition, providing better customer service to our students. <i>Pending</i></p>	<p>Lisa Gaiman, AMP, attended 1 webinar entitled "Transgender Students 2015, Strategies for Serving and Supporting" on 11/13/14, sponsored by the WSU-Student Affairs Office.</p>
CAREER SERVICES	A	Establish a Career Service presence on social media focusing on LinkedIn.	Create a new marketing social media site for students, alumni and employers.	Career Services UTS Marketing	2015-2016	An additional full time Career Counselor	<p>Students/Alumni and employers will learn of Career Services offerings and effective online networking tactics. <i>Created LinkedIn Career Services page and are encouraging followers.</i></p>		
CAREER SERVICES	A	Create partnerships with local employers for internships and full time positions for various majors.	<p>Continue to collaborate on an event where students will be trained on professional table manners and interviewing techniques at a Dining Etiquette Event.</p> <p>Continue to work with Alumni Relations to schedule a Fall/Spring event where students become more informed about career/job development skills through networking and mock interviews conducted by selected alumni.</p>	<p>Career Services Dining Services Business Professor</p> <p>Career Services/University Advancement- Alumni Relations</p>	<p>Spring 2014 This is an annual event to continue 2015-2020</p> <p>Fall 2014 canceled due to staff shortage. Fall 2015 event being planned. This will be an annual event 2015-2020.</p>	<p>If numbers increase we would need additional resources</p> <p>In order to continue this and similar events we need: An Employer Relations Coordinator</p>	<p>Increased 35 students' knowledge of proper dining manners and interview tactics during a Dining Etiquette event held on 3/5/14.</p> <p>At a scheduled Spring event students will become more informed about career/job development skills through mock interviews conducted by selected alumni. <i>28</i></p> <p><i>Students registered to participate in a mock interview with alumni and Career Services personal to become more informed about career/job development skills. An additional 8 students from public health were interviewed in the CS department.</i></p>		
		Formal presentations will be made in academic classrooms where students will learn about career and job development skills.		<p>Career Services CJ Communications Nursing</p>	2014 These are ongoing throughout 2015-2020	<p>In order to continue this and similar events we need: An additional full-time Career Counselor Willing academic professors</p>	<p>Formal presentations are made in academic classrooms where students learned about career and job development skills (<i>180 students</i>)</p>		



CAREER SERVICES	A	<p>Formal lectures and hands on activities will be presented in co-curricular settings where students will become more informed about career and job development skills</p> <p>Collaborate with the Academic Success Center to develop services/resources for the first year student orientation.</p> <p>Students will be offered another list of existing internships and job opportunities that reflect trends in University offerings and global workforce</p> <p>Develop a list serve for students that will host jobs and opportunities off campus where students may become more engaged.</p>	<p>Career Services Psych Club OSILD (STARS program) Green Career Fair Communications Day MERC</p> <p>Career Services Academic Success OSILDI</p> <p>Career Services UTS</p>	<p>2014 These are ongoing throughout 2015-2020</p> <p>2015-2020</p> <p>2015</p>	<p>In order to continue this and similar events we need: An additional full-time Career Counselor Willing groups, clubs or organizations</p> <p>In order to continue this and similar events we need: An additional full-time Career Counselor</p> <p>Partnership with UTS</p>	<p>Students will become more informed about career/job development through presentations and handouts developed and presented for groups, clubs and organizations. (117 students)</p> <p>Students will learn career development fundamentals and Career Services service provision. (Summer 2015)</p> <p>Intense research was completed and meetings with IT personnel determined that present CSO system was sufficient and should be supported going forward.</p> <p>Ongoing</p>
DISABILITY SERVICES	L K	<p>Increasing numbers of students will be seen in accordance with the severity of their needs Extended Office Hours and Walk-In Hours to meet student needs.</p> <p>a. Office open until 6:00 pm on Mon, Tues, Wed.; track number of students served. b. Walk-in hours held 4 days/week for a total of 6 hours/weekly; track number of students served. c. Student survey sent at the end of each semester. d. Database (either internally developed or external product)</p>	<p>DSO, Student Affairs, and Office of Institutional Research &amp; Assessment</p>	<p>a. Expanded hours started in Fall 2013 b. Walk-in hours started in Spring 2014 c. Database completion</p>	<p>One full-time staff member Three OT Graduate Students</p> <p>Funding (initial and annual licensing fee) for external database product. Staff flexibility</p>	<p>a. Prioritize high need, case management services b. Prevent staff burnout c. Assist students with problem solving skills d. More efficient use of case management and data collection systems.</p> <p>Results AY14-15: Total Number Unduplicated Students registered: 512 Total Number Student Visits to DSO: 3,979. Total Number of Exams Administered: 1004 (more than double AY 13-14) Total number of students receiving ongoing one-on-one individual support: 75 Institutional Advance conduct analysis.</p>
DISABILITY SERVICES	J	<p>DSO staff serves as Academic Advisers for Undeclared DSO students.</p>	<p>Academic Success Center Disability Services Office</p>	<p>Each semester, look at retention rated of this group of students.</p>	<p>Staff time and training</p>	
DISABILITY SERVICES	D	<p>Individually based services for students</p>	<p>Disability Services Office</p>	<p>Assign Grad Students a caseload of students Provide training and supervision</p>	<p>Funding staff time for training and supervision</p>	<p>Increased retention rates Results: 75 students received individual support. Several students increased enrollment</p>

							students improve academic achievements...
BINIENDA CENTER	A, G	Maintain and develop pre-professional programs for our students to gain experience and professional acumen.	Work with three local elementary schools in creating programs for our students to gain experience and professional acumen.	Director of The Binienda Center Director of Career Services Office The Binienda Center Advisory Board	Maintain afterschool and support programs at three local schools and Family Support Program at the The Clemente Course.	Maintain current Binienda Center Budget Grow Endowment of the Binienda Center	Begin Binienda Scholarship Programs, Spring '15.
BINIENDA CENTER	A	Track student involvement in civic and democratic engagement.	Continue to maintain reciprocal partnerships with local schools and non-profits, such as Dana Farber and RPK Children's Action Corps.	Director of The Binienda Center Director of Career Services Office The Binienda Center Advisory Board Career and Community Advisory Board Director of IUI	Maintain afterschool and support programs at three local schools and Family Support Program at the The Clemente Course. Implement Co-Curricular Transcript	Work closely with Advancement and Grants office to secure program funding. Funding and infrastructure for tracking co-curricular activities.	Maintain and expand Celebration of Service. Develop and implement co-curricular transcript university wide.
BINIENDA CENTER	H	Develop study group around idea of so-curricular transcript	Begin committee work across divisions on mechanism to recognize and honor civic engagement Conduct outreach with Alumni Affairs for strategic alignment between WSU and economic and civic organizations	Director of The Binienda Center Associate Dean, Office of Student Involvement and Leadership Development The Binienda Center Advisory Board	New mentoring opportunities for alumni and staff New networks for the Career and Community Advisory Board.	Funding for retreats and workshops for CLEWS cohorts and returning alumni who have worked in SL and CE	Develop and implement co-curricular transcript university wide. Expand annual celebration of service to recognize community partners, faculty, students, and staff and alumni engaged with the community. Conduct retreats and workshops with alumni who have worked in SL and CE courses and programs.
BINIENDA CENTER	A	Develop strategic partnerships that align campus life with workforce development and community enrichment Continue WSU Neighborhood Council.	Conduct outreach with Alumni Affairs for strategic alignment between WSU and economic and civic organizations Continue to expand engagement with city and civic organizations.	Director of The Binienda Center Director of Career Services Office The Binienda Center Advisory Board Career and Community Advisory Board	New networks for the Career and Community Advisory Board Three NAC meetings each year that focus on concerns of common interest to the University, neighbors, and the city. New networks for the Career and Community Advisory Board.	Infrastructure and cost sharing necessary to maintain strategic partnerships with city and civic organizations.	Conduct outreach with alumni who have worked in these courses and programs. Support and retain students who see community, civic and democratic engagement as central to their education.
BINIENDA CENTER	A, E	Continue and expand civic and community engaged programming	Continue to maintain reciprocal partnerships with local schools and non-profits, such as Dana Farber and RPK Children's Action Corps.	Director of The Binienda Center Director of Career Services Office The Binienda Center Advisory Board Career and Community Advisory Board	At least one partnership each year that includes training and workforce development practices that relate to community based research, and social welfare	Continue cross divisional cost sharing for programming Secure funding and infrastructure for tracking co-curricular activities	Expand annual celebration of service to recognize community partners, faculty, students, and staff and alumni engaged with the community.

**The Strategic Plan 2015-2020**  
Scholarship, Partnership, and Leadership for a Changing World

**GOAL 4**

SUBMITTED BY	Key Strategy or Initiative	Specific Action	Metrics and Milestones for Success	Responsible Department	Implementation Milestones	Resource Requirements	Outcomes/Results
OSILD	A,B,C,F	Increase and diversify programming opportunities for both resident and commuter students.	a. Create an additional commuter programming series focusing on life skills needed outside of the college campus. b. Continue to provide weekend programming throughout the academic year and collaborate with student organizations and residence life.	OSILD Residence Life	a. No progress has been made on creating an additional commuter programming series. b. There are 10 weekend events planned for the 2014-2015 academic year. Events are programmed by the OSILD, and also in collaboration with both SEC (the Student Events Committee) and Residence Life.	Additional budget allocation to increase programming and student volunteers to assist with program planning and implementation.	b. 3 weekend programs have been completed. 2 more programs will be completed during the fall semester, with 5 additional programs planned for the spring semester.
OSILD	A,C Also, Goal 3: A	To hire an additional staff person to support and develop additional weekend, late night, and other programming.	a. To gain approval for a new position and to conduct a search for the position.	OSILD Residence Life	a. Search completed and staff person would ideally be hired Summer 2015.	Funding for a new staff person is necessary, as well as identifying an office space and sources of funding for additional programming.	
OSILD	A,C,F,H	Successfully implement the STARS program to aid in the strengthening of student organizations.	a. To have 20 student organizations participate in the STARS program. b. Hold 6 STARS workshops for members of student organizations. c. Evaluate the program in April 2015 in order to make improvements for fall 2015.	OSILD	a. In fall 2014, 30 student groups are actively participating in STARS. b. 6 workshops have been planned for the 2014-2015 academic year. 2 have already been held and there are 4 more scheduled: 1 more in the fall semester and 3 in the spring semester. c. Program evaluation will take place in April 2015.	Additional funding was secured from Senate for the year in order to provide budgetary rewards to student organizations. This will eventually need to become a permanent budget line for Senate. b. 2 workshops, one on Recruitment and one on Publicity, have been held this semester. These workshops have helped increase the ability of student leaders in providing effective leadership within their groups.	a. 6 student organizations have completed Level 1. Involvement in the program has increased event co-sponsorship opportunities between organizations. b. 2 workshops, one on Recruitment and one on Publicity, have been held this semester. These workshops have helped increase the ability of student leaders in providing effective leadership within their groups.
OSILD	A,C Also, Goal 2: G	Successfully implement the inaugural year of the Commuter Assistant program	a. Recruit 30 first year students to participate in the program during summer orientation. b. Hold 10 programs throughout the fall semester, including events on and off campus. c. Evaluate the program in December 2014 in order to make improvements for fall 2015. d. Recruit 8 students to be Commuter Assistants for fall 2015.	OSILD	a. Over 50 students were recruited during summer orientation. b. A Commuter Social was held during Welcome Week, and members of the program were in attendance. c. Commuter Assistants have been meeting informally with their assigned students both on and off campus throughout the semester. c. Program evaluation will take place in December. d. Recruitment of Commuter Assistants for fall 2015 will take place in April 2015.	Funding specifically for the Commuter Assistant program would allow for more formal programs for members.	a. 6 students are currently in the program and matched with Commuter Assistants.



OSILD	A,C,D,E Also, Goal 3, A, K	Assist in transitioning students and staff into newly renovated space.	OSILD	<p>a. Student organizations were scheduled to move into the POD storage in September.</p> <p>b. Members of the OSILD are currently working with a committee of students to develop guidelines for use of the new student organization space as well as assigning office space.</p> <p>c. Kickoff event will be planned as a the project completion date approaches.</p> <p>d. With the addition of a new late night food option, expanded hours for the Student Center have been discussed but not finalized.</p>	<p>POD storage units have been rented to store student organization supplies during the renovation of the third floor. To accommodate later Student Center operating hours, additional student staffing and/or expanded student employee hours will be necessary.</p> <p>b. New office assignments have been decided by the student committee, and are awaiting approval from Senate and the OSILD.</p>	<p>a. All student organizations who occupied offices moved their belongings to the POD storage units in September. They currently borrow keys from the Information Desk when they need to retrieve something.</p>
ATHLETICS	K Also, Goal 5 G, H	<p>Protocols will be put in place to improve the capabilities and effectiveness of head coaches being able to reach out and interact with alumni from their respective programs.</p> <p>To engage the WSU community in scheduling software improvements and innovations; finding new ways to utilize the current software system</p>	Athletic Director	<p>The new policy for Alumni Engagement will be introduced at our Coaches Meeting on June 3, 2015.</p>	<p>Front Rush, which is a software specializing in recruiting and alumni engagement.....we already pay annually for a license</p>	<p>Engage or re engage athletic alumni with the long term hope that they will support the Athletic Department in many ways, including financially</p>
CESO	G	<p>Hold open campus meetings to discuss software updates</p> <p>Collect survey results from those meetings as well as from system users</p> <p>Publish calendars to WSU's main website and departmental websites from the reservation software</p>	CESO	2015-2017	<p>Professional development money to attend CollegeNet regional and annual conferences</p> <p>Part time software administrator that would work with CESO, Registrar and UTS</p>	<p>Cultivate a collaborative work environment.</p>
COUNSELING	B	<p>Collaborate with Academic Affairs to implement consistent training for faculty around students in distress and emergency response</p> <p>Suicide Prevention effort</p>	Academic Affairs Director of Counseling	2015-2016	N/A	<p>Consistent training plan</p> <p>All faculty are informed</p> <p>Faculty response and referral is timely</p> <p>To begin FA15</p>
COUNSELING	C	<p>Offer Student Support Network (SSN) utilizing collaborative efforts between divisions and</p> <p>KA document</p>	Counseling Center Staff will coordinate	2015-2018	<p>Monies for materials</p> <p>Interested Faculty</p> <p>Interested SA Staff</p>	<p>Increased # students trained in responding to other students in distress</p> <p>Collaboration across campus represents campus wide efforts in Suicide prevention on Campus.</p>



COUNSELING	F		Establish Campus wide Suicide Prevention efforts and programming	Develop a core planning group	Director of Counseling and Staff	2015-2016	Collaboration across divisions and SA departments	Increased campus wide awareness Reduced stigma and myths around suicide Increased campus wide sensitivity to students with mental health needs Developed Suicide Prevention Model Market FA15
RES. LIFE		Students will be engaged in the residential community.	Programming, Fitness Center	Metric-Programming evaluations, Quality of Life Assessment. Milestone-Continued attendance at programming and fitness center.	Residence Life and Housing	Compile programming evaluations. Create annual Quality of Life Assessment.	None	
RES. LIFE		Students will demonstrate personal responsibility.	Education and Programming.	Metric-Track reports. Milestone-Decrease in policy violations.	Residence Life and Housing	Create tracking mechanism to monitor roommate conflicts.	Number of policy violations from the Office of Student Conduct.	
STUDENT CONDUCT	A		Increase the visibility of the Student Conduct Office (SCO)	Attend campus events such as Student Org programs, Athletic events, departmental programs, etc.	Student Conduct Coordinator (SCC)	-Students will see the SCC outside of the SCO. -attend 3 events per semester by 2015-2016 academic year	Program/Event information	
STUDENT CONDUCT	C		Provide student office support for SCO	Employ Federal Work Study students  Be awarded a Graduate Assistant (GA)	SCC, Dean's Office, Financial Aid Office  DGCE	Have FWS students hired prior to the academic year.  Successfully employ 1-3 FWS who work 6 hrs per week each semester  Be awarded a GA from the DGCE Have a GA work 15 hrs per week each semester	Available FWS Money  Students who have been awarded FWS  GA Application Available GA money from DGCE	3 FWS student currently working 6 hours/week  Awarded a GA for 2014-2015 who works 15 hours/week
STUDENT CONDUCT	E		Create informal interactions	Advise Student Orgs/Groups	SCC/OSILD	Be asked to be an advisor for a student org Attend Advisor Luncheon in Sept Advise at least (1) student org per academic year from 2015-2020.	Available student org to advise.	Advising SGA Auction, Student Senate, and 2016 Class Committee
STUDENT CONDUCT	B		Bridge gaps between the SCO and faculty	Send out FacStaff Announcement requesting faculty and staff sit on various conduct boards.	SCC Various faculty members  Various faculty members	Have faculty respond to request Get at least (2) faculty members to agree to sit on boards Have faculty members attend training Get at least (2) faculty members to agree to sit on boards	Access to facStaff Mutual Training Time Training Manual Available Space	Have (4) faculty trained to sit on conduct boards for the 2014-2015 academic year

HEALTH SERVICES	A: Foster a culture of engagement, pride and gratitude among all WSU constituencies	Participate in Diversity and Customer Service workshops/education	Health Services staff will participate in at least 1 Diversity or Customer Service workshop/education during Academic Year	Health Services staff	2014-2015	None	<p>Lori Williams ANP, attended 1 lecture entitled "Quality Customer Care and Services on 11/16/14, sponsored by the WSU Diversity Office.</p> <p>Lori Williams, ANP, attended "Campus Transgender Communities" lecture sponsored by WSU-Diversity Office on 4/23/15.</p> <p>Lisa Gaimari, ANP, attended 1 webinar entitled "Transgender Students 2015: Strategies for Serving and Supporting" on 11/19/14, sponsored by the WSU-Student Affairs Office.</p> <p>Lisa Gaimari, ANP, participated in continuing education related to Primary Care for Lesbian, Gay, Bisexual and Transgender patients in 5/14.</p> <p>Health Services staff attended Title IX presentation by Rosie Naughton on 2/4/15/</p>
HEALTH SERVICES	A, F	Collaborate with International/IELI Office regarding needs of International student population	Development of collaborative plan	Health Services staff International Office staff IELI Office staff	2014-2016	None	<p>Health Services staff collaborated with the IELI Office regarding the Mexican Student Projects project in November 2014.</p> <p>Health Forms were collected and reviewed (over a 1 week) for 27 students in regards to Massachusetts DPH Immunization Requirements.</p> <p>Health care was provide by Health Services for the students while residing on campus for 6/27 students visited for urgent care visits.</p> <p>Health Care was provided by Health Services for 46 IELI students and 13 Exchange students, during AY 2014-2015.</p>
HEALTH & WELLNESS	B,C,E,F	Work across campus to create an environment	Work with AOD task force to do environmental scan, review ACHA data and establish vision	Campus wide Task Force	AOD		A positive healthy campus environment and message.

		that supports and promotes healthy choices.	plan.					Support for our students in regards to health & wellness which assists in retention. <b>Pending completion of Biannual Review.</b>
HEALTH & WELLNESS	C	Have AOD task force write strategic plan based on environmental scan and data.						By developing a strategic plan and increasing student participation it will guide the wellness process, increase awareness, promote a health environment and offer students opportunity to participate in a unique area outside of the classroom. <b>Pending completion of Biannual Review.</b>
CAREER SERVICES	A,B,C,E,K	Work with two departments each year to offer assistance with networking and career opportunities. (upkeep of this will depend on staff)	Continue to collaborate on an event where students will be trained on professional table manners and interviewing techniques at a Dining Etiquette Event.	Career Services Dining Services Athletics Health and Wellness	Spring 2014 This is an annual event to continue in 2015-2020	If numbers increase we would need additional resources <b>\$400 was for the purchase of suits for two senior students.</b>	Increased 50 students' knowledge of proper dining manners and interview tactics during a Dining Etiquette event held on 4/6/15. <b>Suits were purchased for two students for professional presentation on how to dress for the interview.</b>	At a scheduled Spring event students will become more informed about career/job development skills through mock interviews conducted by selected alumni. <b>28 Students registered to participate in a mock interview with alumni and Career Services personal to become more informed about career/job development skills.</b> <b>An additional 8 students from public health were interviewed in the CS department.</b>
			Continue to work with Alumni Relations to schedule a Fall/Spring event where students become more informed about career/job development skills through networking and mock interviews conducted by selected alumni.	Career Services/University Advancement- Alumni Relations	Fall 2014 cancelled due to staff shortage. Fall 2015 event being planned. This will be an annual event 2015-2020.	In order to continue this and similar events we need: An Employer Relations Coordinator		Formal presentations are made in academic classrooms where students learned about career and job development skills. <b>(180 students)</b>
			Formal presentations will be made in academic classrooms where students will learn about career and job development skills.	Career Services <b>Earth, Environment and Physics</b> <b>Chemistry</b> <b>CJ</b> <b>Communications</b> <b>Nursing</b>	These are ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full-time Career Counselor Willing academic professors		



CAREER SERVICES	C.E	<p>Formal lectures and hands on activities will be presented in co-curricular settings where students will become more informed about career and job development skills</p> <p>Collaborate with the Academic Success Center to develop services/resources for the first year student orientation.</p>	<p>Career Services Psych Club OSILD (ISTARS program) Green Career Fair Communications Day MERC</p>	<p>These are ongoing throughout 2015-2020</p>	<p>In order to continue this and similar events we need: An additional full-time Career Counselor Willing groups, clubs or organizations</p> <p>In order to continue this and similar events we need: An additional full-time Career Counselor</p>	<p>Students will become more informed about career/job development through presentations and handouts developed and presented for groups, clubs and organizations. (117 students)</p> <p>Students will learn career development fundamentals and Career Services service provision. (Summer 2015)</p>
CAREER SERVICES	C.E	<p>Establish a Career Service presence on social media focusing on LinkedIn.</p>	<p>Career Services Marketing</p>	<p>2015-2016</p>	<p>In order to continue this and similar events we need: An additional full time Career Counselor to educate students Clerk to maintain site Monies to create new marketing banners and brochures to educate stakeholders.</p>	<p>Students/Alumni and employers will learn of Career Services offerings and effective online networking tactics. Created LinkedIn Career Services page and are encouraging followers.</p>
CAREER SERVICES	A.B.C.J	<p>Create partnerships with local employers for internships and full time positions for various majors.</p>	<p>Career Services</p>	<p>Ongoing throughout 2015-2020</p>	<p>In order to continue this and similar events we need: An additional full time Employer Relations Counselor to recruit and respond to potential employers in WSU CSO.</p>	<p>Increase the known employer opportunities for student and alumni regarding internships and careers. Created instructional marketing flyer for employers to join CSO. (Lancer Link) Meet one on one with estimated 200 employers at various job fairs and recruiting events to educate companies on how to locate our employer services via the new website. 133 new employers have registered and begun listing internships and jobs.</p>
		<p>Create opportunities for employers to man recruitment/informational tables and to hold on-campus networking events.</p>	<p>Career Services</p>	<p>Ongoing throughout 2015-2020</p>	<p>An additional full time Employer Relations Counselor to recruit and respond to, secure and arrange for employer visits.</p>	<p>Employers manned recruitment/informational tables or held networking events where they networked with individuals students about available internship/job opportunities. 15 employers provided opportunities for students and alumni regarding internships and careers.</p>



CAREER SERVICES	A,B,E,I	Develop a list serve for students that will host jobs and opportunities off campus where students may become more engaged.	Students will be offered another list of existing internships and job opportunities that reflect trends in University offerings and global workforce	Career Services UTS	2014	In order to continue this and similar events we need: Administrative staff to schedule presenters and ensure parking, room and food reservations.	Advisory Board meetings were held on 5/12/14 and 9/23/14 where we learned of community career opportunities and services to better counsel students and alumni. <b>Ongoing</b>  Intense research was completed and meetings with IT personnel determined that present CSO system was sufficient and should be supported going forward. <b>Ongoing</b>
DISABILITY SERVICES	A,C,J	Establish a Peer Mentoring program through DAP	Establish a Peer Mentoring Program through DAP	DSO, CSD Dept., Academic Success Center, Residence Life	2014	a. Research model programs b. Develop policy and procedure manual c. Recruit Peer Mentors from Gamma Chi membership	Increase # of students trained to provide peer support to new & transfer students.  Analyze relationship between students who have a peer mentor and retention/graduation rates <b>In Progress</b>
DISABILITY SERVICES	B	Priority Registration	Continue cross-divisional collaboration with Student Affairs, Enrollment Management, and Academic Affairs. <b>Revise criteria for Priority Registration.</b>	DSO, Registrar's office, Academic Success Center		a. Revised criteria Summer 2014 b. Communicate with students, faculty and staff	Revised criteria will provide reasonable number of students who meet eligibility for Priority Registration  Results: Completed. Students who entered WSU prior to FALL 14 will be "grandfathered" into the new criteria. All students entering from FA15 forward, will follow new criteria (reducing number of students who are eligible. Removed Priority Reg description from Brochure.
DISABILITY SERVICES	B	Faculty Awareness and Annual Faculty Guide	Development of an annual plan	DSO, Academic Affairs, Printing & Publishing, Marketing		a. Publish first edition (Fall 2014) b. Distribute widely (website and limited print copies) c. Update annually	<b>Solicit feedback from faculty and staff</b> <b>Results: Significant increase in faculty/staff consultations (125)</b> <b>Faculty Staff Guide published and distributed.</b>
DISABILITY SERVICES	E	Annual DSO/Athletics Orientation for Exempt students	Coordinate and co-host orientation program for LD and Athletic exempt students	DSO, Athletics and Admissions		a. Co-host orientation for first year students with Learning Disability OR Athletic Exemption	Student Evaluations Staff Evaluations

<p>b. Key speakers are students athletes registered with the DSO</p>	<p><b>Results:</b> Student evals positive and will continue this annual event.</p>
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**The Strategic Plan 2015-2020**  
Scholarship, Partnership, and Leadership for a Changing World

**GOAL 5**

SUBMITTED BY	Key Strategy or Initiative	Specific Action	Metrics and Milestones for Success	Responsible Department	Implementation Milestones	Resource Requirements	Outcomes/Results
OSILD	F Also, Goal 2: E,F	Continue to expand the use of technology to include expansion of social media, the development of a new commuter portal, improving the office website, and developing a digital signage proposal for the Student Center.	<p>a. Create a commuter "web portal" that includes area attractions, commuter resources, and easy-to-navigate transportation information for both commuter students and residents who would like to explore the greater Worcester area.</p> <p>e. Develop digital signage proposal for the Strategic Initiatives Fund.</p> <p>b. Continue to expand OSILD presence on social media and increase our followers by 500 on Twitter and 100 on Facebook.</p> <p>c. Develop an online Event Planning Training module.</p> <p>d. Evaluate which event planning forms can be put on our website for student leaders and promote this option to them.</p>	OSILD Website Development	<p>a. The OSILD is working with web development on updating the website and adding a commuter portal.</p> <p>b. All social media sites (Twitter, Instagram, and Facebook) promote events weekly. An Instagram account was started in the spring of 2014.</p> <p>c. The initial stages of moving Event Planning Training to an online module began in summer 2014. The OSILD hopes to migrate this information to the website for fall 2015.</p> <p>d. Forms are being reviewed through the website update process and will be available online when the new site launches.</p> <p>e. The OSILD has been meeting with representatives from CESCO, Res Life, and UTS to develop a digital signage proposal to be</p>	<p>Adequate technological resources are needed to complete some of these projects, as well as assistance from Website Development personnel. Significant investment in digital signage infrastructure will be needed as well. We also require training on the new system and will need to identify staff responsible for designing and inputting information for signage.</p>	<p>a. The website design update is currently in process.</p> <p>B. In fall 2014, the OSILD had 898 Facebook followers (an increase of 158), Twitter had 312 followers (an increase of 160), and Instagram had 141 followers (an increase of 131).</p>
ATHLETICS	B and H	Sponsorship Sales Ticket Sales	A few hours per week in the AD work schedule would be dedicated to meeting with potential sponsors, alumni, and organizations to try and secure sponsorships or ticket sales	Michael Mudd	2016-17	A Graduate Assistant to provide administrative support and to also help AD sell in the marketplace	<p>There is the opportunity to sell group tickets to specific athletic events (football, basketball, and ice hockey). There is also the capability to sell sponsorship signage in and around Coughlin Field, Lyons Field, and the Wellness Center Gym</p>

ATHLETICS	B, H	Wellness Center programming and assets. Sponsorship Sales Ticket Sales	Revenue that is raised through programming and building assets A few hours per week in the AD work schedule would be dedicated to meeting with potential sponsors, alumni, and organizations to try and secure sponsorships or ticket sales	Director of Wellness Center Director of Athletics	2016-17	Ability to use the Wellness Center assets to look for revenue opportunities through programming A Graduate Assistant to provide administrative support and to also help AD sell in the marketplace  There is the opportunity to sell group tickets to specific athletic events (football, basketball, and ice hockey). There is also the capability to sell sponsorship signage in and around Coughlin Field, Lyons Field, and the Wellness Center.  There is the opportunity to sell group tickets to specific athletic events (football, basketball, and ice hockey). There is also the capability to sell sponsorship signage in and around Coughlin Field, Lyons Field, and the Wellness Center.	There is the opportunity to generate revenue for the Athletic Department or University through the offering of unique programming at the Wellness Center through such means as yoga/fitness classes, renting out batting cages and golf simulator space, fitness center memberships, etc.
CESO	B	Provide full event support to the University's Special Programs	Establish a baseline revenue number and work to increase that percentage per program	CESO and On campus clients	2015-2016	1 new full time event coordinator	Grow new and additional revenue streams  Increase University led programs and visibility
CESO	B	To significantly contribute to the revenue diversification of the University through increased summer programming	Gain 1 new summer client per fiscal year	CESO	2015 – 2020	None	Grow new and additional revenue streams
CESO	A	Track University event budgets in an effort provide complete budget projections for future event and budgeting needs	Identify levels of event complexity and budget needs Work with on campus clients to understand the need for a complete budget picture Utilizing spreadsheets produce complete event budgets to appropriate on campus clients	CESO and on campus clients	2015-2020	Support from upper administration	Complete budget picture per event  Better ability to plan ahead for expected / unexpected event costs
COUNSELING	B	Collaboration with Advancement to secure grant funded revenue streams for mental health initiatives	Secure grant monies	Director of Counseling Advancement Staff	2015-2016		Monies to apply for JED Foundation Certification for the Counseling Center  Possible professional development monies for counseling center staff  Priorities to implement comprehensive Suicide Prevention programs  Awarded 10,000.00 grant through SHINE- Grant implementation to begin FA15



STUDENT CONDUCT	F	Put past students hard copy conduct records into digital storage	Have all conduct hard copy records of those who are no longer students at WSU digitized and placed into ImageNow in accordance with Federal, State, and University mandates	SOC GA UTS Admin Services	Have all past student hard copy records pulled from file cabinet and prepared for back scanning All non-current student files have been back scanned Had training on how to index back-scanned files SCO GA ongoing indexing of back-scanned files	ImageNow software Training on indexing Back scanning boxes Back scanning funding	All non-students (up through Sept. 2014) have been pulled from filing cabinet and back-scanned Indexing has begun
CAREER SERVICES	A.G	Work with two departments each year to offer assistance with networking and career opportunities. ( upkeep of this will depend on staff)	Continue to collaborate on an event where students will be trained on professional table manners and interviewing techniques at a Dining Etiquette Event.	Career Services Dining Services Business Professor	This is an annual event to continue in 2015-2020	If numbers increase we would need additional resources. <b>\$400 was for the purchase of suits for two senior students</b>	Increased 50 students' knowledge of proper dining manners and interview tactics during a Dining Etiquette event held on 4/6/15. <b>Suits were purchased for two students for professional presentation on how to dress for the interview.</b>
			Continue to work with Alumni Relations to schedule a Fall/Spring event where students become more informed about career/job development skills through networking and mock interviews conducted by selected alumni.	Career Services/University Advancement-Alumni Relations	Fall 2014 cancelled due to staff shortage. Fall 2015 event being planned. This will be an annual event 2015-2020.	In order to continue this and similar events we need: An Employer Relations Coordinator	At a scheduled Spring event students will become more informed about career/job development skills through mock interviews conducted by selected alumni. <b>28 Students registered to participate in a mock interview with alumni and Career Services personal to become more informed about career/job development skills. An additional 8 students from public health were interviewed in the CS department.</b>
			Formal presentations will be made in academic classrooms where students will learn about career and job development skills.	Career Services	2014 These are ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full time Career Counselor Willing academic professors	Formal presentations are made in academic classrooms where students learned about career and job development skills ( <b>180 students</b> )
			Formal lectures and hands on activities will be presented in co-curricular settings where students will become more informed about career and job development skills	Career Services	2014 These are ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full time Career Counselor Willing groups, clubs or organizations.	Students will become more informed about career/job development through presentations and handouts developed and presented for groups, clubs and organizations. ( <b>117 students</b> )
			Collaborate with the Academic Success Center to develop services/resources for the first year student orientation.	Career Services	2015-2020	In order to continue this and similar events we need: An additional full time Career Counselor	Students will learn career development fundamentals and Career Services service provision. ( <b>Summer 2015</b> )

CAREER SERVICES	F	Establish a Career Service presence on social media focusing on LinkedIn.	Create a new marketing social media site for students, alumni and employers.	Career Services UTS Marketing	2015-2016	An additional full time Career Counselor  Monies to create new marketing banners and brochures to educate stakeholders.	Students/Alumni and employers will learn of Career Services offerings and effective online networking tactics.
CAREER SERVICES	A	Create partnerships with local employers for internships and full time positions for various majors.	Proactively recruit employers to list internships and career opportunities in WSU CSO.	Career Services	2014 Ongoing throughout 2015-2020	In order to continue this and similar events we need: An additional full time Employer Relations Coordinator to recruit and respond to potential employers in WSU CSO.  An additional full time Employer Relations Coordinator to recruit and respond to potential employers in WSU CSO.	Increase the known employer opportunities for student and alumni regarding internships and careers.  <b>Created institutional marketing flyer for employers to join CSO. (Lancer Link)</b>  <b>Meet one on one with estimated 200 employers at various job fairs and recruiting events to educate companies on how to locate our employer services via the new website.</b>  <b>133 new employers have registered and begun listing internships and jobs.</b>
			Create opportunities for employers to man recruitment/informational tables and to hold on-campus networking events.	Career Services	2014 Ongoing throughout 2015-2020	An additional full time Employer Relations Coordinator to recruit and respond to, secure and arrange for employer visits	Employers manned recruitment/informational tables or held networking events where they networked with individuals students about available internship/job opportunities.  <b>15 employers provided opportunities for students and alumni regarding internships and careers</b>  Advisory Board meetings were held on 5/12/14 and 9/23/14 where we learned of community career opportunities and services to better counsel students and alumni. <b>Ongoing</b>
			To be more effective with student career development counseling services hold at least 2 Advisory Board meetings annually and invite local employers to present services and needs to Advisory Board. Increase presentations in academic classrooms for advertising when the representative for the Washington Center comes to campus.	Career Services  Service Learning Career Services	2014 Ongoing throughout 2015-2020	Willing faculty to allow CS staff in classroom	Increase student awareness regarding Washington Center Internships. <b>Ongoing</b>
CAREER SERVICES	A	Develop a list serve for	Career Services	Career Services	2015-2016	Partner with UTS	<b>Ongoing</b>

CAREER SERVICES	A	<p>students that will host jobs and opportunities off campus where students may become more engaged.</p> <p>Increase student participation in The Washington Center Internship program</p>	<p>UTS</p> <p>IT Research options for students that will offer a usable resource for internships and job opportunities that reflect trends in University offerings and the global workforce.</p> <p>Increase presentations in academic classrooms for advertising when the representative for the Washington Center comes to campus.</p>	Career Services	Ongoing throughout 2015-2020	Willing faculty to allow CS staff in classroom	Ongoing
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# UNIVERSITY ADVANCEMENT



**The Strategic Plan 2015-2020:  
Scholarship, Partnership, and Leadership for a Changing World**

<b>Office of University Advancement GOAL # 1 Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b>
B	Promote 2x a year the WSF Student Research, Scholarship & Creative Activity Fund	2x yearly analysis of results and reporting to provost and deans	Karen, Louise	2x year call for submissions (Sept. Jan.) Submit info at end of year to ER	None	WSF Board review. Review and analysis by ER team for effect/impact
D	Utilize faculty for informal talks and presentations to alumni and donors	2-3 presentations/collaborations a year. Survey of participants after event to assess interest/satisfaction/engagement	Camilla, Tara, Christina, Nancy	Spring 2015 planning for 2015-2016 event calendar	Stipends / honorarium unless faculty offer to do them for free	FY17 awards results to be submitted to ER for analysis. Data on student's supported sent to ER 5/23/16 Gallery and Chorale directors collaborate annually with Alumni Reunion and Tea events
D	Provide \$50,000 over 5 years to support Honors Program	<ul style="list-style-type: none"> <li>FY disbursement to Honors Program</li> <li>Additional programming enabled (as reported by honors program directors)</li> </ul>	Tom McNamara	Annual Reports from Honors Program Annual Funding from Foundation	Funding from Foundation	See attached report. Updated (May 2016) report attached
G	Provide \$20K a year through CTL for 5 years for student-faculty research	<ul style="list-style-type: none"> <li>FY disbursement to CTL</li> <li># of students/faculty supported</li> </ul>	CTL Sue Foo, Andrea Billics	Call for proposals	Unknown	End of year report due from CTL at close of semester. Requested report 5/23/16
J	Share data on scholarships with appropriate division(s) for assessment of (ER) for assessment of impact on retention	Metrics related to retention to be reported by ER	Louise	Submit scholarship info.	None	End of year report due from ER at close of semester. Requested report 5/23/16

Revised 5/23/16

In 2015-16, we continued to use the Sheehan Seed Grants (which designated \$50,000 to be distributed to the program over five years) for study abroad, student research and travel, and honors course development.

Lt. Col. Sheehan charged us to “nurture the smart ones” and “make a big splash,” and we are pleased to report that we have done so through the following expenditures:

- **Study Abroad Scholarships** (students): \$3000
  - David Carroll (Greece)
  - Danielle Attardo (Costa Rica)
  - Kendall Charpentier (Spain)
- **Research and Travel Grants** (students): \$3,058
  - James Lenoir, fossil radiocarbon dating: \$558
  - Alexis Anderkin and Emily White, Dominican Republic service learning trip: \$600
  - Kristina Ferranto, Nicaragua service learning trip: \$300
  - Elizabeth Eisenbud, study abroad in Australia: \$300
  - Danielle Bavoux, Monica Bhaktri, Micah Klayman, Kelsey Miskis, Spring Break DC Leadership trip: \$1,000

• **Honors Course Development and Programming funds** (faculty): \$3442

- Class field trips
  - FYS (Aldo Guevara): books and bus trip to see author of *Enrique's Journey*: \$563
  - SYS--We the People (Charlotte Haller): CitySpeak theatre outing: \$332
  - Enactus—DC project competition (Joan Mahoney): \$1305
- Course materials: DVDs for Reel American History project (Karen Woods Weierman): \$142.50
- Tickets to Student Immigration Movement Dinner (Aldo Guevara): \$100
- Spring Break Reading Fellowships and Essay Contest (Karen Woods Weierman)—Amy Angell, Micah Klayman, Ryan Lindsey, Kasey Wozniak: \$1,000

• **Commonwealth Honors Project Prizes: \$500**

- First Prize (\$250)
  - Amy Angell: *The Goodbye Moon—A Memoir of Loss*

Faculty advisor: Dr. Elizabeth Bidinger

Second Prize (\$150)

- Kayleigh Berger and Kasey Wozniak: *Introducing Elizabeth Bishop, Poetry, and Writing as a Process*

Faculty advisor: Dr. Heather Treseler

(Summer Undergraduate Research Program)

Third Prize (\$100)

Jim Lenoir: *Lake Sediment Based Insight into the Deglaciation and Post-Glacial Climate and Environmental History of the Mealy Mountains, Southeastern Labrador, Canada*

Faculty advisor: Dr. Tim Cook

(Summer Undergraduate Research Program)

Honorable Mention

Brittany Desilets: *Keyes House Access to Health Care*

Faculty advisor: Dr. Joan Mahoney

(City of Worcester Community Health Improvement Plan WSU summer internship)

We believe these expenditures strongly reflect Lt. Col. Sheehan's priorities (research, study abroad, and scholarships) and that they made a substantial positive impact on the learning opportunities available to a significant number of our honors students. If additional funds were to become available, we would welcome the opportunity to offer more study abroad scholarships and to expand our course development funding.

Respectfully submitted,

Karen Woods Weierman, Director  
Jennifer Hood-DeGrenier, Assistant Director

May 19, 2016

**The Strategic Plan 2015-2020:**  
***Scholarship, Partnership, and Leadership for a Changing World***

<b>Office of University Advancement GOAL # 2 Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results December 2015</b>
E	Expand alumni and local, regional, global network of philanthropic, in-kind and mentoring supporters Launch of the Lifetime Lancer Student-Alumni Council	250 face to face visits 75 proposals submitted	Tom, Jane, Karen, Camilla, Tara	Already in process	Costs related to travel, presentations, collateral, cultivation stewardship	349 face to face visits 149 proposals submitted
G		Hold 8 programs Recruit 10 founding members	Christina	Already in process	Costs related to programming	15 Current members, 3 events. Included a 4 month period without a staff member to manage due to a resignation.
G	Provide \$100,000 in support to Center for Service Learning and Civic Engagement to increase scope and programming Increase Funding for Study Abroad/Study Away Opportunities	FY disbursement to Center. Celebration of the renaming of Center in honor of John Bineida	Tom McNamara, Karen Sharpe, Camilla Caffrey and Sharon McDonald	Already in Progress	Funds from bequest to Foundation	Completed. First presentation of Bineida student award in April 2016.
G	Alumni Business After Hours program and Departmental Reunions	FY 15 disbursement of \$30,000 4x year Business After Hours 4x year Departmental Reunions	Tom McNamara, Karen Sharpe & Sharon McDonald Christina Tara	Already in progress	Funding from Corporate Partners Costs related to mailings, promotional items, cultivation, stewardship	End of year report due from International Programs in May 2017. Requested May 23, 2016 Reformatted as on-campus Alumni Connections networking events with faculty, students, alumni. 2 held in Spring 2016

Revised 5/23/16



**The Strategic Plan 2015-2020:  
Scholarship, Partnership, and Leadership for a Changing World**

<b>Office of University Advancement GOAL # 3: Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b> <b>December 2015</b>
E	Collaborate with Admissions team to pair with alumni for recruitment events, offer fee waiver when recommended by alumni, regional recruitment events	None set for alumni participation- staff member resigned. Admissions metrics not yet submitted to OUA	Admissions staff is the lead on this, working with Alumni staff: Camilla, Christina, Tara	See attached plan from Admissions.	Unknown	Goal would be to have an increased number of qualified applicants who were referred by alumni.
F	Implement Transfer Scholarship Program by providing \$30,000 per year for five years to provide 15 \$1,000 scholarships for incoming transfer students that would be available to them for two years. Advancement would provide funding. Admissions/Enrollment would be responsible for selecting the students and awarding the scholarships	First cohort (Fall 2015) \$15,000 for FY16 and \$15,000 for FY17 Second cohort (Fall 2016) \$15,000 for FY17 and \$15,000 for FY18 Third cohort (Fall 2017) \$15,000 for FY18 and \$15,000 for FY19 Fourth cohort (Fall 2018) \$15,000 for FY19 and \$15,000 for FY20	Advancement for Funding. Admissions/Enrollment Management for selection of students and awarding of funding	First cohort to be selected in fall of 2015 and awarded for FY16	Funding from Foundation	Increased # of Transfer students attending and being retained as reported by Admissions.
F	Changing Lives Campaign Goal for Scholarship Support: <b>\$5 million by 2017</b>	Raise \$5,000,000 in financial support of students in the form of scholarships, research grants, study away grants and scholarships. See attached chart	University Advancement Department (all)	Raise \$750,000 by end of FY 15	Campaign Budget Funding	Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.
F	Launch of Adopt a Scholar program	Goal of 10 new Adopt a Scholar funds for FY15	Tom, Jane, Karen, Camilla with ER	Brochure produced, solicitations underway	None	Goal is to increase enrollment in under enrolled programs by offering scholarships that would follow a student for four years. Two fold goal – increase enrollment/increase retention.
L	Remind and promote the Advancement Division's core values and office operations guide	No phone goes to voice mail, thank you letters within 48 hours, courteous helpful/service to all	Office of University Advancement Staff	Already in place	None	Create a more professional collegial atmosphere that is customer focused/student centric
						As of April 30, 2016 Campaign has raised \$4.6 in total for scholarships
						13 new scholarships for FY15; 6 additional new scholarships in FY16. With Admissions and Financial Aid, a process was developed to accommodate students who drop out or transfer out
						These established OUA best practices have continued and will continue on a daily basis.

**The Strategic Plan 2015-2020:  
Scholarship, Partnership, and Leadership for a Changing World**

<b>Office of University Advancement GOAL # 4: Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and valued.</b>						
<b>Key Strategy or Initiative</b>	<b>Specific Actions</b>	<b>Metrics and milestone for success</b>	<b>Responsible department/person</b>	<b>Implementation milestones</b>	<b>Resource Requirements</b>	<b>Outcomes/Results</b>
A	Personal notes following events, personal phone calls, emails upon gifts; annual stewardship events, development of new stewardship events, launch of Lifetime Lancers Student-Alumni Council, annual DAA Awards, every other year HOF awards,	Personal SMART Goals	Camila, Tara, Christina, Tom, Karen, Jane, Diana, Missy, Dir. Adv. Communications (TBD)	Launch of Lifetime Lancers Student-alumni council; annual stewardship events, new stewardship event for Pillar Society at A.A.;	Departmental budget, Hiring of new Director of Advancement Communications	<b>Outcomes/Results April 2016</b> These established OUA best practices have continued and will continue on a daily basis.
B	Work with Deans upon completion of Academic Programs Reviews to determine funding opportunities Work with various departments, centers to develop funding opps/plans related to campaign	TBD	Tom, Sharon	Launch of capital campaign in May 2015	Highly dependent on availability of campaign budget funding	These established OUA best practices have continued and will continue on a daily basis.
E/K	4-6 Departmental/Affinity (athletics) events for alumni, staff, faculty students per year	# New alumni attendees per event/per semester 4-6 events per year	Camila, Tara, Christina, Karen, Deans, Depart. Chairs, Athletic Director, Coaches	Completion of events per semester	Cooperation of Department Chairs and faculty, coaches and athletic administrators	Ongoing for athletics, see Alumni Connections separate entry below.
H	DAA Awards, HOF Awards, Honorary Degree Nominees, Advancement communications and campaign profiles and features; nominations for local and statewide awards, Scholarship Tea, Scholar-Donor brunch, stewardship events	Annual OUA schedule of recognition/events, See example attached	OUA Staff	OUA schedule of recognition/events	Annual Budget funding and staff time	These established OUA best practices have continued and will continue on a daily basis.
	WSU's Annual Day of Giving	Held first Wednesday of every April	OUA team with Diana Curran as lead staff, students, student groups, and alumni	Follow the Day of Giving 6 month planning schedule, see attached.	OUA budget for Development events	Raised \$77,133.51 from 649 donors one day on April 6, involving more than 90 students and groups involved with campus activities

Launch of new Lancer mascot	Completed & revealed on 4/21 Naming contest completed by 4/15/16	Collaboration between Marketing, OUA, Athletics	Costume design milestones managed by Marketing	Athletics budget	In process	Completed & revealed on 4/21 at public event at WAM Naming contest completed by 4/15/16
Reformat of Business After Hours as Alumni Connections events with students, faculty and alumni for networking on campus	2 per semester, # of alumni participating	Tara	Completion of events	Alumni budget	In process	CJ event held 4/4, Business event to be held 4/14. Final numbers to be analyzed at year end
Thank A Donor Day. WSU students participate on campus signing personal notes of thanks on post cards to be sent to all DD donors	Held in late October each year on same day as Distinguished Donors event	Diana, Christina	Completion of event	Development budget	Completed	Completed
Dr. Kristen Lee Costa, Class of 1996, featured talk on how to navigate academic stress	Event booked for April 26	Tara	Completion of event	Alumni budget	TDB	Will be completed in April
Alumni Connections online career mentoring network	Launch in January 2016	Tara	Launch in January 2016	Campaign budget	Did not launch in January as expected because of issues coming from Procurement	Launched in March 2016
Redesign and launch of new Worcester Statement magazine and new template for Alumni Enews	New design launch Fall 2015	Kris	Survey groups, individuals, campus, for feedback on design, theme, name in summer 2015, set design theme with designer in August, 2015	Campaign budget	First issue launch in Fall 2015 Received first ever letters to the editors as feedback and more opportunity for dialogue with campus community	Spring issue released first week of May
First Sin Qua Non Faculty & Staff giving society event for donors, an event of gratitude and community for campus donors	Attendance by faculty and staff	Karen	Completion of event	Development budget	Unlike alumni donor community, we learned that December is not a good time for campus community to hold event.	Next annual event will be held in September 2016.
First New Student Fall Convocation Event	New in Fall 2015 all incoming 1st year students and transfer students invited to a ceremony attended by faculty, staff and administrators – with key note speaker to welcome students to campus and create a new campus tradition. New students processed into Sullivan Aud lead by Faculty Marshall, President and faculty in academic regalia A reception with food followed.	Collaboration with Academic Affairs, Conference & Event Services and President's Office. DUA team members served on committee	Fall 2015 was first one – creating a new tradition of welcoming new students to campus.	University Advancement budget provided funding for food for the reception. University Advancement Staff arranged to have a recent alumnae as the keynote speaker	Feedback was universally positive. Significant # of first year students attended as did faculty and staff.	Will become an annual event

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Office of University Advancement GOAL # 5 Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value						
Key Strategy or Initiative	Specific Actions	Metrics and milestone for success	Responsible department/person	Implementation milestones	Resource Requirements	Outcomes/Results
B	Continue development of unrestricted giving, strategic planning of grants and major gifts, launch of the Changing Lives capital campaign in FY15 to support University priorities	OUA Dashboard measurements of annual fundraising goals and progress toward goals. Staff SMART goals	Tom, Camilla, Karen, Jane, Diana, Tara, Sharon	Ghosh renovation phase II grant submissions, Worcester State Fund appeal, Fac/Staff appeal, Day of Giving appeal, WSF annual golf tournament, launch of Changing Lives capital campaign in FY15	OUA budget Campaign budget	December 2015 Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.
E	Acquisition of Temple Emmanuel Property and Parking, 71,300 square feet of additional programmable space for WSU and 126 parking spaces	Quarterly meetings with Foundation Real Estate Committee and Temple Leadership and Tom McNamara	Tom McNamara/Real Estate Committee of Foundation	Financing Secured by May, 2015 Closing on Sale by 6/30/15	Funding from the Unrestricted assets of the Foundation for down payment and closing costs.	Completed June 19, 2015
GH	Launch of The Changing Lives Campaign <ul style="list-style-type: none"> <li>\$5 million for scholarship</li> <li>\$5 million for academic development (internships, research endowment, faculty development, departmental funds, academic initiatives)</li> <li>\$3 million for capital projects (Ghosh, Wellness, Temple, Student Center, WCC)</li> <li>\$2 million for area of greatest immediate need (unrestricted)</li> </ul> Creates positioning for philanthropic culture of giving, paying it forward for future years.	\$15 million raised by June 30, 2017 Tracked on OUA Dashboard – See attached report	Office of University Advancement Staff, President Maloney	Public Launch in Spring of 2015 \$3.4 Million raised in FY 15  Campaign total as of March 31, 2016  \$2.1 Million for FY16  \$12.3 Million	Campaign Funding Budget	December 2015 Every dollar donated addresses a pressing need and releases operational funds that can be directed to other urgent needs.  Increased student engagement in the philanthropic process while they are undergraduates will lead to more engaged alumni. Re-engaging alumni will broaden the basis of philanthropic support and alumni donor base.
G	Launch new young alumni giving society, cultivation events, engaging faculty to cultivate, strategic asks with attendance	OUA Dashboard measurements of annual fundraising goals and progress toward goals. See attached.	Office of University Advancement staff	Strategic asks with attendance, eblast follow ups, hand written note follow ups, personal letter follow ups, individual visits. Each gift officer's quarterly benchmark met	Staff time, OUA budget, P&P resources	April 2016 These established OUA best practices have continued and will continue on a daily basis.  Completed June 19, 2015 These established OUA best practices have continued and will continue on a daily basis.  These established OUA best practices have continued and will continue on a daily basis.

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	Secure \$300,000 Gift to Name the Education Department in Memory of Barbara (Hickey) O'Brien '57 creating an endowed fund to support the education department in perpetuity	Gift from long time donor Bob O'Brien in memory of his wife who passed away in April of 2015	Tom McNameara	Discussions on gift to memorialize Mrs. O'Brien took place over the year since her passing – gift was received in March of 2016	Campaign Budget		This gift will provide \$15,000 per year to the Education Department in perpetuity to provide funding for Faculty Development and MTEL tests for students. Event was held on May 3, 2016.
	DeFeudis Challenge - \$250,000 challenge match to go to support Wellness Center. Longtime friend and supporter of WSU. Gene DeFeudis challenged the Advancement Office to raise \$250,000 in money by December 31, 2015 and if they could do that he would match that \$250,000 with a \$250,000 gift bringing the total raised to \$500,000 to support equipment and programming of the new Wellness Facility	Goal was to raise \$250,000 by 12/31/15. By 12/31/15 we had raised \$319,000 surpassing our goal	Tom McNameara	Exceeded goal by deadline of 12/31/15. Utilized a variety of modes and methods to raise funds.	Campaign Budget	Raised \$319,000 by 12/31/15	Uses of funding being developed in conjunction with Athletics