

WORCESTER STATE UNIVERSITY**BOARD OF TRUSTEES MEETING****Tuesday, June 2, 2020****5:30 – 8 PM****REMOTE PARTICIPATION****Join Zoom Meeting**<https://worchester.zoom.us/j/93502874199>**Meeting ID: 935 0287 4199****Meeting Called By:** Craig Blais (Chair)
Kapurch**Minutes:** Nikki**Board Members:** Craig Blais (Chair); Lisa Colombo; Aleta Fazzone; Maryanne Hammond (Vice-Chair); Karen Lafond; Stephen Madaus (Vice-Chair); William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle**WSU Staff:** Barry Maloney; Nikki Kapurch; Carl Herrin; Patrick Hare, Kathy Eichelroth, Tom McNamara, Sarah Strout

All documents considered to be **drafts** until discussed and/or approved by the Board

AGENDA

ITEM	RESPONSIBLE	ACTION
1. <i>Administrative Business</i> A. Call to Order B. Minutes: Full Board - April 7, 2020* C. Minutes: Academic & Student Develop - April 7, 2020* D. Minutes: Nominating Committee - April 27, 2020* E. Minutes: Executive Committee - May 14, 2020*	Craig Blais, Chair	B. Vote required C. Vote required D. Vote required E. Vote required
2. <i>Presentation - 45 minutes</i> A. Strategic Plan Update 1. Powerpoint Presentation* 2. Draft Strategic Plan* 3. Strategic Plan Review Report 2015-2020* 4. Student Survey Results*	Linda Campanella Sarah Strout	1. Informational 2. Informational 3. Informational 4. Informational
5. <i>Human Resources Committee Report</i>	Maryanne Hammond	Informational and vote required
6. <i>Finance & Facilities Committee Report</i>	Stephen Madaus	Informational and vote required
7. <i>Nominating Committee Report</i> A. Approve the 2020- 2021 Slate of Officers*	Aleta Fazzone	Informational and A. vote required
8. <i>Administrative Updates</i> A. Report of the Chairman 1. 2020-2021 Meeting Schedule* 2. Conferring of Degrees B. Report of the President 1. President's Update* 2. COVID-19 Update 3. Refinance of the May Street Note C. Other Business	Craig Blais Barry Maloney Tom McNamara	1. Vote required 2. (2) votes required 1. Informational 2. Informational 3. Informational
9. <i>Adjournment</i>	Craig Blais	9. Vote required

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Meeting Minutes**

CHAIR:	Mr. Craig Blais (Chair)	DATE:	April 7, 2020
LOCATION:	Remote Participation	MINUTES BY:	Nikki Kapurch
TIME:	5:30 PM		
MEMBERS PRESENT:	Craig Blais (Chair); Aleta Fazzone; Maryanne Hammond(Vice-Chair); Karen Lafond; Stephen Madaus (Vice-Chair); William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle		
MEMBERS ABSENT:	Lisa Colombo		
WSU STAFF:	Barry Maloney; Nikki Kapurch; Patrick Hare; Kathy Eichelroth; Carl Herrin; Ryan Forsythe; Julie Kazarian; Tom McNamara; Lois Wims		

The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Board of Trustees was held on Tuesday, April 7, 2020, through a Zoom remote call. Chairman Blais called the meeting to order at 5:31 p.m. Trustee Blais reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business:

APPROVAL OF THE MINUTES - March 10, 2020

Upon a motion made by Trustee Hammond and seconded by Trustee Taylor, it was

VOTED: To approve the March 10, 2020, minutes of the Full Board meeting as presented.

ROLL CALL VOTE: 8 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle
2 abstained - Stephen Madaus and William Mosley (due to not attending the March 10 meeting)

APPROVAL OF THE MINUTES - March 5, 2020

An amendment was made to the agenda. The date on the agenda was incorrect for the Finance and Facilities meeting date. The date should read March 5 Finance and Facilities meeting minutes, not March 10. The Finance and Facilities meeting minutes had the correct date as presented.

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

VOTED: **To approve the March 5, 2020, minutes of the Finance and Facilities meeting as presented.**

ROLL CALL VOTE: **10 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Stephen Madaus; William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle**

Nominating Committee - Chair Blais

- Chairman Blais notified the board that the bylaws require the chair to appoint the Nominating Committee and to charge them with meeting and presenting a slate of officers at the annual meeting.
- The meeting will be held before May 10 and the committee will have a recommendation and report for the June 2 meeting.
- Chair Blais appointed Trustee Fazzone to chair the committee, Trustee Taylor, and himself, Trustee Blais, to the Nominating Committee and charged the group with bringing forth a slate of officers for election at the June 2, 2020, meeting.

Academic & Student Development Committee Report

- Trustee LaFond, chair of the committee, mentioned Provost and Vice President for Academic Affairs Lois Wims provided an informative presentation regarding the process for the awarding of tenure and promotion.
- Provost Wims thoroughly went through the PowerPoint presentation that was included in the packet and highlighted the process for both tenure and promotion and included a brief summary of each candidate's educational background and scholarly activities.
- President Maloney and Provost Wims both assured the trustees that each applicant for promotion and/or tenure was given due and serious consideration as required under the provisions of the collective bargaining agreement.

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

VOTED: **To accept the recommendation of the Academic and Student Development Committee and approve the awarding of tenure, effective September 1, 2020, for the slate of faculty as presented.**

ROLL CALL VOTE: **10 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Stephen Madaus; William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle**

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

VOTED: **To accept the recommendation of the Academic and Student Development**

Committee and approve the following promotion to Full Professor, effective September 1, 2020, for the slate of faculty as presented.

ROLL CALL VOTE: 10 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Stephen Madaus; William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle

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

VOTED: To accept the recommendation of the Academic and Student Development Committee and approve the following promotion to Associate Professor, effective September 1, 2020, for the slate of faculty as presented.

ROLL CALL VOTE: 10 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Stephen Madaus; William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle

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

VOTED: To accept the recommendation of the Academic and Student Development Committee and approve the following promotion to Librarian, effective September 1, 2020, for the slate of faculty as presented.

ROLL CALL VOTE: 10 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond; Stephen Madaus; William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina Taylor; David Tuttle

Administrative Updates:

REPORT OF THE CHAIR

- The Chair informed the full board that as we move into May and prepare for our September semester, the Executive Committee of the board may need to transact business between regular board meetings and will meet as the group deems necessary. Executive Committee meetings have been scheduled.
- The Chair reported that he participated with the nine Massachusetts state universities' board chairs on a comprehensive letter to Secretary Pyser. The ask was for help as the state begins its work to distribute discretionary federal CARES Act Funds to ensure that the mission of our state's public higher education institutions is protected during this crisis.
- We will be taking a pause on the work on redeveloping the May Street Building project, likely until after August. We continue to work at the staff level toward a prospective loan package as well as on refining the scope of the project.

- Chair Blais commended and thanked the group for all their hard work during these unprecedented times.
- Next BOT meeting: Tuesday, June 2, 2020.

REPORT OF THE PRESIDENT

- The President provided a comprehensive special edition COVID-19 'President's Report' in the packet. It focuses on what each division is working on.
- Carl Herrin provided a COVID-19 Response Team Executive Summary and timeline.
- Each Vice President provided a few key bullet points verbally during the meeting.
- Vice President Eichelroth went through the financial implications for the university's budget.
- President Maloney announced that undergraduate Commencement has been moved to August 14 and graduate Commencement to August 28
- Thanked all the campus groups who assisted with the COVID 19 response.
- The WSU COVID website is being updated regularly with new items posted.

OTHER BUSINESS:

With there being no further business, the WSU Board of Trustees meeting was adjourned.

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

VOTED: To adjourn the meeting at 6:51 p.m.

ROLL CALL VOTE: 9 approved. Craig Blais; Aleta Fazzone; Maryanne Hammond; Karen LaFond;
William Mosley; Dina Nichols; Manuel Reyes-Ponce; Marina
Taylor; David Tuttle

Respectfully submitted,



Barry M. Maloney
Secretary, Board of Trustees

WORCESTER STATE UNIVERSITY
ACADEMIC AND STUDENT DEVELOPMENT MEETING
Meeting Minutes

CHAIR:	Ms. Karen LaFond (Chair)	DATE:	April 7, 2020
LOCATION:	Remote Participation	MINUTES BY:	Nikki Kapurch
TIME:	4:00 PM		
COMMITTEE MEMBERS PRESENT:	Karen LaFond; Stephen Madaus (Vice-Chair); William Mosley; Manuel Reyes-Ponce; David Tuttle		
COMMITTEE MEMBERS ABSENT:	Lisa Colombo		
BOARD MEMBERS PRESENT:	Craig Blais (Chair); Maryanne Hammond (Vice-Chair)		
WSU STAFF:	Barry Maloney; Patrick Hare; Nikki Kapurch; Lois Wims		

The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Academic and Student Development Committee was held on Tuesday, April 7, 2020, through a Zoom remote call. Chair LaFond called the meeting to order at 4:05 p.m. Trustee LaFond reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business:

Upon a motion made by Trustee Tuttle and seconded by Trustee Mosley, it was

VOTED: **To approve the March 10, 2020, minutes of the Academic and Student Development meeting, as presented.**

ROLL CALL VOTE: **4 approved. Karen LaFond; William Mosley; Manuel Reyes-Ponce; David Tuttle**
 1 abstained - Stephen Madaus (due to not attending the March 10 meeting)

Academic & Student Development Committee Report

- Trustee Lafond, chair of the committee, introduced Provost and Vice President of Academic Affairs Lois Wims. Provost Wims provided an informative presentation regarding the process for the awarding of tenure and promotion.
- The PowerPoint presentation that was included in the packet highlighted the process for both tenure and promotion and included a brief summary of each candidate's educational background and scholarly activities.
- Also enclosed in our packet of materials is a memo from President Maloney to the trustees and correspondence from Provost Wims to President Maloney, both presenting their recommendations for promotion and tenure.
- Process for promotion and tenure is governed by the MSCA contract.
- President Maloney and Provost Wims both assured the trustees that each applicant for promotion and/or tenure was given due and serious consideration as required under the provisions of the collective bargaining agreement.

- The costs for proposed promotions will be an annual total of \$61,801 and are based on the MSCA contractual rate that was effective September 1, 2020.
- These rates are an increase in the base salary by academic rank, or whichever is the greater amount equal to 5% of the current salary or to the corresponding rate listed and dictated by the contract.
- The administration plans for the annual cost to the best of their ability and budgets accordingly.

Upon a motion made by Trustee Mosley and seconded by Trustee Madaus, it was unanimously

VOTED: to recommend to the full board the approval of the awarding of tenure, effective September 1, 2020, for the slate of faculty as presented.

ROLL CALL VOTE: 5 approved. Karen LaFond; Stephen Madaus; William Mosley; Manuel Reyes-Ponce; David Tuttle

Upon a motion made by Trustee Mosley and seconded by Trustee Madaus, it was unanimously

VOTED: to recommend to the full board the approval of the following promotion to Full Professor, effective September 1, 2020, for the slate of faculty as presented

ROLL CALL VOTE: 5 approved. Karen LaFond; Stephen Madaus; William Mosley; Manuel Reyes-Ponce; David Tuttle

Upon a motion made by Trustee Madaus and seconded by Trustee Mosley, it was unanimously

VOTED: to recommend to the full board the approval of the following promotion to Associate Professor, effective September 1, 2020, for the slate of faculty as presented

ROLL CALL VOTE: 5 approved. Karen LaFond; Stephen Madaus; William Mosley; Manuel Reyes-Ponce; David Tuttle

Upon a motion made by Trustee Tuttle and seconded by Trustee Mosley, it was unanimously

VOTED: to recommend to the full board the approval of the following promotion to Librarian, effective September 1, 2020, for the slate of faculty as presented.

ROLL CALL VOTE: 5 approved. Karen LaFond; Stephen Madaus; William Mosley; Manuel Reyes-Ponce; David Tuttle

Upon a motion made by Trustee Madaus and seconded by Trustee Mosley, it was unanimously

VOTED: To adjourn the meeting at 4:36 p.m.

ROLL CALL VOTE: 5 approved. Karen LaFond; Stephen Madaus; William Mosley; Manuel Reyes-Ponce; David Tuttle

WSU Board of Trustees
April 7, 2020

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Barry M. Maloney", with a stylized flourish extending from the end.

Barry M. Maloney
Secretary, Board of Trustees

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
NOMINATING COMMITTEE MEETING
Meeting Minutes**

CHAIR:	Aleta Fazzone	DATE:	April 27, 2020
LOCATION:	Remote Participation	MINUTES BY:	Nikki Kapurch
TIME:	3:00 PM		
MEMBERS PRESENT:	Craig Blais (Chair); Aleta Fazzone; Marina Taylor		
WSU STAFF:	Nikki Kapurch; Patrick Hare		

The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Board of Trustees Nominating Committee was held on Monday, April 27, 2020, through a Zoom remote call. Chair Fazzone called the meeting to order at 3:00 p.m. Trustee Fazzone reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

The Nominating Committee was appointed by Chair Blais at the April 7 meeting and was charged with bringing forth a slate of officers for election at the full Board meeting in June. Chair Blais appointed Trustee Fazzone to chair the committee, Trustee Taylor, and himself, Trustee Blais, to serve.

Trustee Fazzone acknowledged receipt of the following information provided for the meeting:

- 2019-2020 Elected Officers of the Board
- List of Trustees with Expiration of Terms

Trustee Fazzone asked Chair Blais to go over the process. Chair Blais talked about a succession plan that will prove to be helpful to the Nominating Committee in the future, whereby Vice Chairs could be moved into the Chair position. A discussion was had as to who would serve in each position and recommend the slate of officers.

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

VOTED: to recommend approval to the full Board the following slate of officers for 2020-2021:

Chair: Trustee Stephan Madaus

(2) Vice-Chairs: Trustee Maryanne Hammond
Trustee Marina Taylor

Secretary:	President Barry Maloney
Assistant Secretary:	Ms. Nikki Kapurch
(2) Foundation Board:	Trustee Maryanne Hammond Trustee Dina Nichols
Executive Committee:	Trustee Aleta Fazzone
Alternate:	Trustee Dina Nichols
MA State Colleges Presidents/Trustees Association:	Trustee Stephen Madaus
Alternate (Chair and Vice-Chairs as alternate):	Trustee Maryanne Hammond Trustee Marina Taylor

ROLL CALL VOTE: **3 approved. Craig Blais; Aleta Fazzone; Marina Taylor**

OTHER BUSINESS:

With there being no further business, the WSU Board of Trustees Nominating Committee meeting was adjourned.

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

VOTED: **To adjourn the meeting at 3:25 p.m.**

ROLL CALL VOTE: **3 approved. Craig Blais; Aleta Fazzone; Marina Taylor**

Respectfully submitted,

Nikki Kapurch
Assistant Secretary, Board of Trustees

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
EXECUTIVE COMMITTEE MEETING
Meeting Minutes**

CHAIR: Craig Blais DATE: May 14, 2020

LOCATION: Remote Participation MINUTES BY: Nikki Kapurch

TIME: 3:30 PM

COMMITTEE MEMBERS PRESENT: Craig Blais; Maryanne Hammond (Vice-Chair); Stephen Madaus (Vice-Chair); Aleta Fazzone

MEMBERS PRESENT: Karen LaFond; Dina Nichols; Marina Taylor

WSU STAFF: Barry Maloney; Nikki Kapurch; Patrick Hare; Carl Herrin; Kathy Eichelroth; Ryan Forsythe, Lois Wims; Julie Kazarian; Stacey Luster; Tom McNamara; Maureen Stokes

The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Board of Trustees Executive Committee was held on Tuesday, May 14, 2020, through a Zoom remote call. Chair Blais called the meeting to order at 3:33 p.m. Trustee Blais reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

Executive Committee Report

COVID-19 Update

- President Maloney provided a summary on COVID planning efforts to date.
- We continuing to monitor students' progress with distance learning and we are receiving positive feedback.
- We are planning for the Fall semester by providing personal outreach to every one of our students and future applicants.
- We slowed our spending to essential items only.
- COVID response team has been renamed to the WSU Safe Return Team. The group has been broken down into 10 subgroups, each led by a Cabinet member.
- CARES Act Grant Funding we received is \$4.2 million dollars. \$2.1M is designated as student grants and \$2.1M is for institutional use.
- The student emergency fund has raised approx \$70,000 since the pandemic started.
- We have had two campus conversation Zoom meetings from the president to all members of the campus community and will continue these conversations throughout the summer.

CARES Act Grant

- Higher Education institution allocations are set by a formula prescribed in the CARES Act, which is weighted significantly toward the number of full-time students who are Pell-eligible but also takes into consideration the total population of the school and the number of students who were not enrolled

full-time online before the coronavirus outbreak.

- Vice President Eichelroth went through the process of distributing the CARES ACT funds. The next steps are to submit a report on how we will distribute those funds to the students.
- HEROES Act bill does have some dollars set aside for higher education, but must pass the Senate first.
- We are working as a State University with MSCBA to try to get a debt holiday, which would offer the flexibility to not pay what we owe them for all the beds in the residence hall and to restructure the trust fund.
- President and Enrollment Management are engaged in developing plans to promote WSU to students looking to transfer.

OTHER BUSINESS:

- The goal is to bring students to campus in the fall. We are working on a safe return for all to campus. Decision on opening slated for mid-June.
- We are preparing our FY21 budget with the expectations that we would have a 10 percent reduction in state appropriation and a 10 percent reduction in student enrollment.
- We are preparing all full-time faculty for blended learning classes. Faculty are feeling confident in this type of learning.
- Vice President Forsythe provided an enrollment update. We are currently down in students but the good news is that we are up in new student registrations.
- Are there thoughts from the Board as to how you want to see the university present budget planning as we go forward?
 - Scenarios of 'what if's'
 - Vice President Eichelroth suggested that we move forward with bringing the original FY21 budget to the board that was presented to them in January and proceed with that as a framework and bring along a spending plan. Suspend specifying line spending for the first quarter of the year and work with the 10 percent cut in state appropriation. Then review by quarters.
 - Set-up advance Finance and Facilities meeting.

With there being no further business, the WSU Board of Trustees Executive Committee meeting was adjourned.

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

VOTED: To adjourn the meeting at 5:13 p.m.

ROLL CALL VOTE: 4 approved. Maryanne Hammond (Vice-Chair); Stephen Madaus (Vice-Chair); Aleta Fazzone; Craig Blais (Chair)

Respectfully submitted,



Barry Maloney
Secretary, Board of Trustees

The Draft Strategic Plan

Building from Strength

Discussion with the Board of Trustees
June 2, 2020




1

The “Big Ideas”

SPSC was asked:

- What are the strategic plan’s three to five truly BIG (high-impact, bold, critical, transformative) IDEAS for WSU’s future that you would hope faculty, staff, alumni, trustees, and the BHE will be excited about and rally behind?*



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Building from Strength and a Solid Foundation

SPSC felt no compelling need to recommend goals, strategies or initiatives that could be considered “transformative,” and that is because WSU has undertaken this round of strategic planning from a position of well-established strength.

- WSU does not need to transform itself or pursue change for the sake of change.
- The plan is about making a strong institution even stronger.
- WSU will sustain and leverage its current strengths to bolster its leadership position within the public higher education sector in the Commonwealth and beyond.




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Five Pillars of the Plan

But there ARE five particularly exciting and strategically significant elements of the strategic plan that SPSC thinks will unite and motivate the WSU community.



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1. Holistic Student Support

A fully expressed and widely embraced commitment to holistic student support and to helping every student navigate his/her/their way to **academic success and emotional wellbeing**

- *the whole university*, because student success is everyone’s job
- *the whole person*, because every student has complex and interconnected needs that ultimately affect educational outcomes
- *the whole student body*, because no individual or group should be privileged or under-served or marginalized

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2. Differentiating Opportunities for Students

Even more distinctive **opportunities for students that will differentiate them** from their peers and WSU from its peers

- portfolio initiative
- major-plus
- joint student-faculty research and creative pursuits
- internships, co-ops, experiential learning
- expanded leadership opportunities

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3. Investing in Excellence

Making strategic investments in **academic excellence**

- Office of Sponsored Research
- Additional resources for the Center for Teaching and Learning
- Department of Interdisciplinary Studies
- Expanded international programs and foreign study opportunities

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4. Pioneering Effective Models

Establishing **thought leadership** within the higher ed sector

- equity, diversity and inclusion
- community engagement
- inclusive pedagogy
- holistic student support

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5. Expanding Access and Staying Nimble

Moving toward **multi-modal, remote content delivery** that not only will expand access to educational opportunities under normal circumstances but also will position WSU to respond nimbly to destabilizing crises that may disrupt on-campus operations in the future as the global pandemic has done this year.

- equitable access to technology
- improved connectivity and redundant systems
- faculty comfortable and confident in online course delivery
- sense of community for students in a distance learning environment

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Coronavirus Crisis “Lessons Learned” in the Plan

DESIRED OUTCOMES

- WSU’s **faculty will be equipped with the necessary resources and skills**, informed by best practice and good pedagogical research, to teach many of its courses through multiple modalities.
- A fully prepared Worcester State University **student will have the necessarily resources and skills to successfully undertake courses that may be delivered in one or more instructional modalities**, including remote instruction that might be delivered online or in some similar virtual format.
- Employees will be challenged to innovate and collaborate in a **work environment that expects flexibility and adaptability**.
- As a result of implementing a **remote work plan**, employee productivity, satisfaction and retention will improve; the demand for premium office space that could be better utilized for essential university functions will be reduced; and both demand for parking and the University’s environmental impact will be reduced.

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Coronavirus Crisis “Lessons Learned” in the Plan

STRATEGIES and INITIATIVES

- Institutionalize **policies, practices and procedures** that prepare members of the WSU community to respond nimbly, collaboratively and effectively to unanticipated crises
- Develop and implement redundant **systems and staffing capacities** to protect essential business operations from disruption due to unanticipated events
- Update and re-imagine the University’s **emergency management, response, and preparedness planning** – including new appropriate trainings – in a manner that reasonably addresses contingencies that are not limited to physical safety and property protection
- Reevaluate WSU’s **workplace model** and establish a remote work plan with an expectation that as many as a quarter of full-time administrative staff may not need to be physically present every day
- Recommit to the **requirement that all undergraduate students have a laptop** that meets University standards and program requirements, with the necessary software installed, and strive to ensure that students have reasonably operative internet access when away from campus
- Ensure that each administrative unit has suitable **contingency plans** in place, and for which appropriate training is regularly delivered, that will permit key business functions to be maintained while the University’s regular operations might otherwise be interrupted
- Invest appropriate **resources and training to automate business functions** across the campus consistent with contemporary best practices within higher education

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Worcester State University


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Recommended Priorities for Near-Term Implementation

MUST-Do’s

- Embrace **student-centeredness** as a guiding principle for faculty and staff, and adopt **holistic student support** as a University-wide imperative
- **Equip faculty and staff** to address the diverse and evolving needs of a changing student body
- Enhance **career exploration, internships, and professional opportunities** by connecting students with alumni networks, employers and academic departments
- Ensure resources to the **Center for Teaching and Learning (CTL)** are adequate to support University-wide priorities relating to academic excellence and distinction
- Enhance **support for scholarly work** that is creative, applied, innovative, interdisciplinary, and inclusive of marginalized traditions, AND Establish a fully functioning Office of Sponsored Research
- Significantly enhance **internal communication** to promote transparency, information sharing, and cross-divisional collegiality
- Ensure **technology, facilities and systems** are adequate to support operational needs and strategic goals


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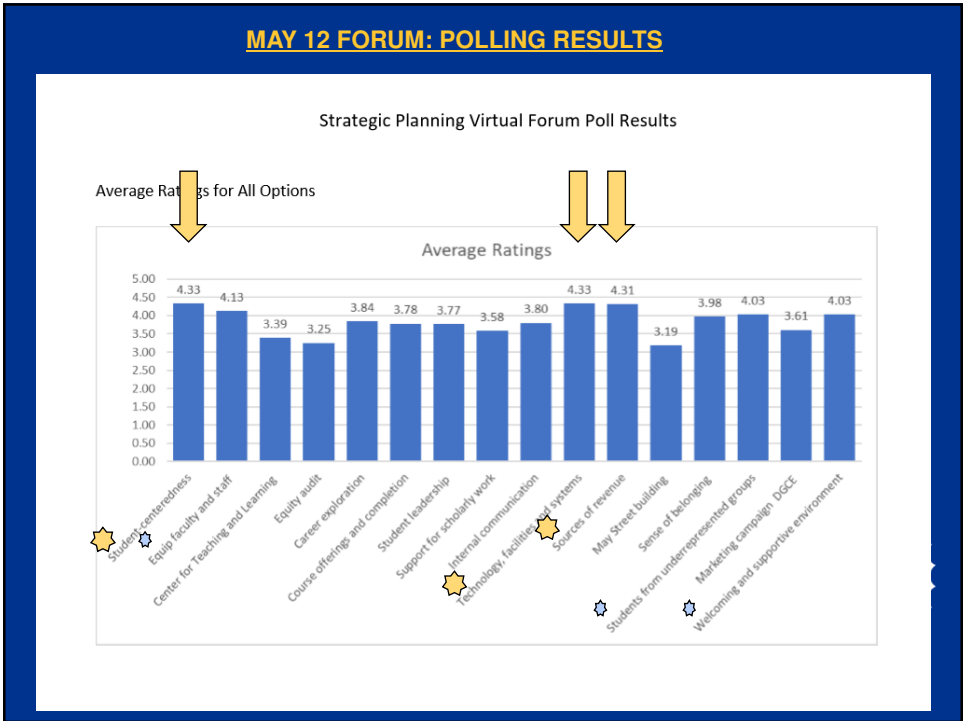
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ADDITIONAL TOP PRIORITIES

- Develop new and sustain existing sources of **revenue**
- Conduct an **“equity audit”**
- Establish WSU as an **even more welcoming and supportive** environment for students from historically under-represented or marginalized groups
- Develop and implement an aggressive **marketing campaign in support of DGCE** enrollment goals, particularly growth of the graduate program (and also to attract non-traditional-age students)
- Identify and remove barriers impeding full and **equitable student access to services and resources**, including for non-traditional students, in any learning environment (on campus or remote)
- Enhance supports for and **sense of belonging by transfer and commuter** students
- Promote **student leadership** development opportunities proactively, inclusively, and equitably
- Revise our Environmental Sustainability Plan with definitive steps to achieve **carbon footprint reduction**
- Develop a comprehensive plan to address future development of the **May Street building and associated sites**



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Key Initiatives with Relatively High Resource Requirements/ High Strategic Impact

Recommended for Short-Term Resource Allocation in Support of Strategic Plan Priorities

University-wide commitment to holistic student support

Shoring up the counseling center

Professional academic advisors

Staff and faculty training in serving a changing student body

Technology resources

IT staff; digital resources for the Library; OER for students

Staff and faculty training in teaching and working remotely/in a distance-learning environment

Equitable technology access for students/laptop initiative

Staffing/resources for the Center for Teaching and Learning

Support for scholarly/creative work, including joint faculty-student research

Reimagining and adapting our scheduling model for classes to enhance student-friendliness and improve efficiency

Equity audit

Financial aid/scholarships for students

Marketing and other resources for DGCE to support enrollment growth

Professional development opportunities for staff

Redundant systems and staffing capacities to protect essential business operations from disruption due to unanticipated events

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Accountable for Progress: Metrics Tied to the Vision and Aligned with BHE Priorities

	A	B	C	D	E	F	G	H	I	J	K	L
1	A vibrant, student-centered community of learning dedicated to preparing students of all backgrounds to succeed and lead											
2	Related Goals and Strategies											
3	Metric	Responsible for Collecting and Reporting	DHE PMRS	Equity	Academic Excellence & Distinction	Student Support & Success	Marketing & Enrollment	Community Engagement & Public Good	People & Culture	Resources & Infrastructure		
4	Number of new programs (majors, minors, concentrations, certificates etc.)	Registrar			1,6	1	1,2,5,6	1,2,3,4	2,3,5	1,2,4,6		
5	Number of programs catering to older-adult learner preferences (evening, online, blended)	Acad Depts		X	1,6	1,4,6	1,2,5,6		1,3,5	1,4		
6	Number of master's pathway programs	Registrar			1,6	1,4	5		3,5	1		
7	Number of dual enrollment/early college courses	IR		X	1,3	4	1,4,5	1,2	1,3,5	1		
8	Percentage of students graduating with a double major major-minor	IR			1,4,6		1,2		5	1,4		
9	Percentage of students from historically underrepresented groups graduating with a double major major-minor	IR		X	1,4,6	4	1,2,5		5	1,4		
10	Number of professional development opportunities for faculty related to pedagogy	CTL, Acad Depts			2,5,6	1,3			1,2,3,5,6	3,4,5		
11	Amount of money spent for external professional development for faculty related to pedagogy	CTL, Acad Depts			2,5,6	1,3			1,2,3,5,6	3,4,5		
12	Funding for the Center for Teaching and Learning	CTL			2,5,6	1,3			1,2,3,5,6	3,4,5		
13	Percentage of courses with experiential learning	IR			1,3,5,6	1,2,3	1,2,4,5	1,2,3,4	3,5			
14	Percentage of students with internships, practica, fieldwork, service learning	IR			1,3,5,6	1,2,3	1,4,5	1,2,3,4	3,5			
15	Percentage of students involved in study away	International Programs			1	2,3	1,5		3,5			
16	Percentage of students from historically underrepresented groups involved in study away	International Programs		X	1	2,3,4	1,5		1,3,5			
17	Number of programs utilizing portfolios	Acad Depts			1,5,6	1,2,3	1,2,5		3			
18	A community of learning whose doors are open to all and whose impact on those who venture through its doors is transformational.											
19	Related Goals and Strategies											
20	Metric	Responsible for Collecting and Reporting	DHE PMRS	Equity	Academic Excellence & Distinction	Student Support & Success	Marketing & Enrollment	Community Engagement & Public Good	People & Culture	Resources & Infrastructure		
21												

All in One Sheet2

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REACTIONS TO THE DRAFT PLAN

- What excites you about the plan?
- Does anything important seem missing or under-emphasized in the draft?
- What, if anything, concerns you? Does anything in the draft make you uncomfortable with the prospect of sharing this draft with Commissioner Santiago and the BHE's Strategic Planning Committee?
- Does the plan clearly and adequately address BHE priorities, and does it meet the Commissioner's expectation that WSU's recent experience with a global pandemic will be reflected in its plans for the future?

17

Worcester State University

17

OUR 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.

OUR CORE VALUES

As a public institution, Worcester State University embraces the belief that widespread access to high-quality educational opportunities is the cornerstone of a democratic society. Members of the Worcester State community share the following 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.

OUR VISION FOR THE FUTURE

Looking ahead to 2025, Worcester State University will be a vibrant, student-centered community of learning dedicated to preparing students of all backgrounds to succeed and lead in their professions, in their communities, and wherever they seek to leave their mark on the world. As the educational and demographic landscapes continue to evolve, WSU will be offering undergraduate, graduate, and continuing education students, as well as lifelong learners of any age, both well-established, proven programs and new, flexible pathways to meeting their educational and career goals—from traditional classroom learning to fully online programs, to competency-based education and prior-learning credits for students who already have been in the workforce, to accelerated degree programs at both the undergraduate and graduate levels. In all its programs, WSU will be preparing students to think creatively, act collaboratively, solve problems with ingenuity, excel in diverse environments, and lead with agility and integrity.

Worcester State will be recognized as a community of learning whose doors are open to all and whose impact on those who venture through its doors is transformational. WSU's dual-enrollment and early-college programs and opportunities will be available to all students who can do the work, not just the well-off who can afford to participate. Students who come to WSU from under-served populations will leave WSU having significantly expanded the number of choices and opportunities open to them. By 2025 the student body will be even more diverse than it is today, and the diversity of WSU's faculty will reflect the diversity of its student body and the wider Worcester region. By 2025, the number of students involved in civic engagement activities and study-away programs will have doubled, helping to ensure that WSU graduates appreciate and seize the opportunity to become engaged citizens of local community and global society.

Worcester State will be known as the university where students finish what they start. WSU will be a model of best practices in promoting persistence and completion across the student body and in empowering students to attain both academic and career goals. By 2025 the University's retention and graduation rates will each have increased by eight percentage points; and retention and graduation rates for historically underserved and underrepresented students will climb to be the highest within the Massachusetts state university system. Worcester State also will have the highest percentage of full-time faculty within the system, a testament to the University's commitment to academic excellence and supporting every individual student's educational goals. WSU's plans and priorities will support the public agenda for higher education in Massachusetts and, in particular, the state's goals relating to promoting equity and closing achievement gaps.

Worcester State will be known as a place where students emerge from their experience ready to lead— as individuals whose leadership potential has been identified, nourished, and demonstrated. WSU undergraduate students will engage in cross-divisional, multidisciplinary and experiential learning as a result of continued co-curricular integration and increased interdisciplinary learning opportunities that deepen their academic experience and expand their horizons. First-time, full-time undergraduates will leave WSU with two valued academic credentials, either two majors or a major and a minor, that will help them stand out in the professional world that awaits them. Evidence of WSU's transformational impact on lives and communities will be apparent in its social mobility index as well as in the impressive and increasing number of WSU alumni leading organizations throughout and beyond the state and across the public, nonprofit and private sectors.

Worcester State will deliver on its promise to provide students a full and rich educational experience in any learning environment—whether on-campus and in-person or virtual and remote through distance learning. WSU's faculty will be equipped with the necessary resources and skills, informed by best practice and good pedagogical research, to teach many of its courses through multiple modalities. A fully prepared Worcester State University student will have the necessary resources and skills to successfully undertake courses that may be delivered in one or more instructional modalities, including remote instruction that might be delivered online or in some similar virtual format.

Worcester State will be celebrated as a public institution that takes its public mission seriously. A dynamic, valued partner with and resource to Worcester, the University will have an impact akin to the impact of a stone tossed into a lake: rippling outward and generating waves. Through scholarship and civic engagement,

WSU faculty, staff, and students will continue to advance and support economic development in Worcester. WSU will be a research hub where scholarly creativity is being channeled in new, exciting, and potentially important directions. The University will be engaged in collaborative pursuit of solutions to some of Worcester's and the region's most vexing social, economic, and other challenges. By 2025 WSU will be awarding more four-year degrees to Worcester residents than any other university in the state. WSU will be the Worcester-based university with the highest percentage of students involved with local-area organizations, as either interns, practicum placements or volunteers. Worcester State will be a robust, reliable pipeline for diverse, highly agile talent for the private sector and public service. WSU alumni will be founding new enterprises and organizations right in the city, having an impact on small business growth and entrepreneurship within Worcester.

Worcester State will be one of the best-run state universities in New England—efficient and lean, but investing adequately in the people, programs, physical spaces, and technological infrastructure to ensure WSU will be able to fulfill its mission and achieve its goals as a leading state university in the region. Employees will be challenged to innovate and collaborate in a work environment that expects flexibility and adaptability, rejects siloing between departments or divisions, encourages professional development, rewards creativity and agility, and rejects a “getting by” or “doing more with less” approach to doing business. Our professional staff will have regular and consistent exposure, through professional development opportunities, to effective models, systems, and practices in the post-secondary higher education sector. All members of the diverse WSU community—faculty, staff, and students—will feel included and valued, and they will hold themselves and each other accountable for achieving common objectives and upholding the University's core values. Effective leadership and transparent communication will encourage the open sharing of information and ensure alignment around shared goals for WSU.

Worcester State will be financially stable and well positioned for long-term organizational sustainability as it marks its 150th anniversary in 2024. Undergraduate enrollments will be holding steady despite the decline in college-age students nationwide, while enrollments in graduate, continuing ed, and other programs will be generating an increasingly significant share of WSU's total revenues. Philanthropic support from alumni and other friends of WSU also will be increasing, and the University's endowment will have grown from slightly more than \$30 million to \$50 million by 2025. These and other strategies to diversify revenues, together with ongoing efforts to contain costs, will yield a more sustainable business model while securing resources that can be invested strategically in WSU's future. Reflecting its longstanding commitment to environmental health, by 2025 WSU will have a smaller carbon footprint and be setting an example of responsible environmental stewardship. As a result of implementing a remote work plan, employee productivity, satisfaction and retention will improve; the demand for premium office space that could be better utilized for essential university functions will be reduced; and both demand for parking and the University's environmental impact will be reduced.

OUR LONG-TERM GOALS AND STRATEGIES FOR ACHIEVING THEM

ACADEMIC EXCELLENCE AND DISTINCTION

Offer high-quality undergraduate and graduate programs that develop the intellectual and personal potential of every student and prepare the next generation of leaders, innovators, and scholars

Strategies

1. Promote University-wide innovation in curricular program offerings, and expand options and accessible modalities for course offerings and course completion
2. Support and celebrate excellent teaching, and expand opportunities for broadening pedagogical expertise through both internal and external professional development
3. Leverage the University's location to create distinctive academic and leadership opportunities
4. Offer a vibrant and rigorous general education curriculum that supports the liberal arts in a 21st-century context
5. Enhance support for scholarly and creative work that is applied, innovative, interdisciplinary, and inclusive of marginalized traditions
6. Create a more vibrant intellectual life on campus and fortify a culture of high academic standards

STUDENT SUPPORT AND SUCCESS

Provide all students a transformative, holistic educational experience with a path to timely degree completion and solid preparation for advanced academic studies or career success

Strategies

1. Increase overall retention and graduation rates and close achievement gaps
2. Promote student leadership development opportunities proactively, inclusively, and equitably
3. Embrace student-centeredness as a guiding principle for faculty and staff, and adopt holistic student support as a University-wide imperative
4. Ensure all students, including non-traditional students and distance learners, have full and equitable access to the academic resources, support services, and technology they need
5. Adopt a mentoring model of advising and ensure faculty and staff are appropriately trained to deliver effective support to a more diverse student body
6. Create a more robust campus life that fully engages all students, and promote a sense of connection and community within WSU's distance-learning environment

MARKETING AND ENROLLMENT

Be attractive and accessible to an increasingly diverse population of students within an increasingly competitive recruitment environment

Strategies

1. Raise regional and national visibility and garner recognition for academic excellence, value, and impact

2. More effectively differentiate WSU from its peers, drawing particular attention to advantages associated with its location
3. Increase the diversity of the faculty and staff to better reflect the WSU student body and applicant pool
4. Expand presence in the local secondary education and community college sectors
5. Position and promote WSU as a first-choice university for students from traditionally under-represented groups
6. Invest resources necessary to grow enrollment in graduate and online programs

COMMUNITY ENGAGEMENT AND PUBLIC GOOD

Have an impact beyond campus through leading-edge scholarship and creative activities, civic engagement, and mutually beneficial partnerships with local, regional and global communities

Strategies
<ol style="list-style-type: none"> 1. Expand and deepen connections between the community and WSU's academic departments, centers, and institutes 2. Foster ongoing interaction between members of the University community and members of the Worcester community 3. Expand relationships with businesses in Worcester and beyond to expand the pipeline for internships, practica, co-ops, and post-graduate employment options 4. Establish WSU as a research and policy hub where faculty, staff and students actively engage in developing solutions to meet regional challenges

PEOPLE AND CULTURE

Nurture an inclusive campus culture that promotes a shared commitment to excellence, innovation, collaboration, and accountability

Strategies
<ol style="list-style-type: none"> 1. Establish WSU as an even more welcoming and supportive environment for students, faculty and staff from historically under-represented or marginalized groups 2. Recruit, retain and reward high-quality and diverse faculty and staff committed to educating and supporting a diverse student body 3. Continue to equip and encourage all faculty and staff to address the diverse and evolving needs of a changing student body 4. Promote greater unity, communication and sense of institutional pride across campus 5. Foster a culture of assessment and data-based decision making 6. Institutionalize policies, practices and procedures that prepare members of the WSU community to respond nimbly, collaboratively and effectively to unanticipated crises

RESOURCES AND INFRASTRUCTURE

Develop sustainable revenue streams adequate to support the University’s academic mission and institutional priorities, and invest in physical infrastructure and technology with a commitment to financial and environmental sustainability

Strategies
<ol style="list-style-type: none">1. Develop new and sustain existing sources of revenue2. Expand philanthropic support and grow the endowment3. Ensure technology, facilities and systems are adequate to support operational needs and strategic goals4. Ensure administrative policies and practices promote greater efficiency, entrepreneurial thinking, and equity5. Develop and implement redundant systems and staffing capacities to protect essential business operations from disruption due to unanticipated events6. As a campus community commit to developing and implementing programs and policies that address the growing challenges of climate change as they affect the campus, the region and the world

SHORT-TERM IMPLEMENTATION PRIORITIES

(RECOMMENDED BY THE STRATEGIC PLANNING STEERING COMMITTEE; NOT LISTED BELOW IN PRIORITY ORDER)

MUST-DO'S

- Promote a University-wide commitment to **holistic student development** and emotional well-being
- **Equip faculty and staff** to address the diverse and evolving needs of a changing student body
- Enhance **career exploration, internships, and professional opportunities** by connecting students with alumni networks, employers and academic departments
- Ensure resources to the **Center for Teaching and Learning (CTL)** are adequate to support University-wide priorities relating to academic excellence and distinction
- Enhance **support for scholarly work** that is creative, applied, innovative, and interdisciplinary AND Establish a fully functioning Office of Grants and Sponsored Research
- Significantly enhance **internal communication** to promote transparency, information sharing, and cross-divisional collegiality
- Ensure **technology, facilities and systems** are adequate to support operational needs and strategic goals

ADDITIONAL TOP PRIORITIES

- Expand opportunities, options, and accessible modalities for course offerings and course completion
- Promote student leadership development opportunities proactively, inclusively, and equitably
- Conduct an “equity audit”
- Establish WSU as an even more welcoming and supportive environment for students from under-represented or marginalized groups
- Enhance supports for and sense of belonging by transfer and commuter students
- Identify and remove barriers impeding full and equitable student access to services and resources, including for non-traditional students
- Position and promote WSU as a first-choice university for students from traditionally underrepresented groups
- Develop and implement an aggressive marketing campaign in support of DGCE enrollment goals, particularly growth of the graduate program
- Develop new and sustain existing sources of revenue
- Revise our Environmental Sustainability Plan with definitive steps to achieve carbon footprint reduction
- Develop a comprehensive plan to address future development of the May Street building and associated sites
- Update and re-imagine the University’s emergency management, response, and preparedness planning – including new appropriate trainings – in a manner that reasonably addresses contingencies that are not limited to physical safety and property protection
- Reevaluate WSU’s workplace model and establish a remote work plan with an expectation that as many as a quarter of full-time administrative staff may not need to be physically present every day
- Recommit to the requirement that all undergraduate students have a laptop that meets University standards and program requirements, with the necessary software installed, and strive to ensure that students have reasonably operative internet access when away from campus

APPENDIX I: GOAL-SUPPORTING KEY INITIATIVES

Included here is a collection or repository of goal-supporting initiatives that were identified at various stages of the planning process when input from the wider WSU community was invited—through surveys, focus groups, open forums, consultation with standing committees on campus, and intensive work by eight multi-constituent working groups convened during the early part of 2020. The SPSC has not prioritized the initiatives in this illustrative (as opposed to exhaustive) list but recommends that all the initiatives in this appendix serve as fodder and a starting point for the administration and specifically the divisions, departments, or offices that will be expected to develop annual strategic plan-supporting action or operational plans in the future. It is SPSC's hope that during the course of the strategic plan's implementation (i.e., through 2025), administrative department-level plans will incorporate many of these ideas, all of which SPSC endorses for consideration.

GOAL 1: ACADEMIC EXCELLENCE AND DISTINCTION

Offer high-quality undergraduate and graduate programs that develop the intellectual and personal potential of every student and prepare the next generation of leaders, innovators, and scholars

- a. Put in place a process to annually review Liberal Arts and Science Curriculum (LASC) goals and outcomes as reflected in student learning outcomes, program reviews, digital portfolio work, and graduation rates
- b. As part of a 21st-century general education curriculum establish a set of targeted areas related to digital literacy for students to gain proficiency
- c. Create a Leadership across the Curriculum general education requirement
- d. Develop and offer more online and blended courses
- e. Offer a degree completion model within Liberal Studies targeting adult learners
- f. Secure necessary external approvals for majors in Art, Political Science, and Theater
- g. Seek support and pursue approvals for offering Occupational Therapy doctorate
- h. Implement the major-plus requirement as reflected in the RASE plan
- i. Develop interdisciplinary concentrations into minors and create a department of interdisciplinary studies
- j. Create new/additional 4+ programs
- k. Develop an accelerated degree completion program for non-traditional students
- l. Create and offer an online track for all LASC classes
- m. Reimagine and adapt WSU's scheduling model for classes to enhance its student-friendliness and increase efficiency
- n. Create a university portfolio initiative that documents and enhances student learning gains and unique skills for all students
- o. Enhance leadership skills programming that challenge and encourage students to become empowered, inclusive, and knowledgeable future community and global leaders
- p. Seek additional funding to support increased graduate assistantship opportunities
- q. Explore faculty exchanges with international partners
- r. Implement a more systematic and intentional method of inviting, securing, and hosting visiting international scholars and faculty
- s. Support and expand domestic exchange experiences
- t. Consider sunsetting graduate programs that are not drawing enrollments
- u. Offer a Life Work Portfolio program for our non-traditional age adult learners who may wish to petition for credit for learning achieved outside the traditional classroom
- v. Make Wintersession 100% online and expand the term

- w. Establish and promote common expectations and evidence-based best practices for the online course experience
- x. Encourage everyone teaching online to be “certified” by some vetting process (e.g., Quality Matters)
- y. Ensure that objectives and guidelines relating to accessibility are addressed in instructional modalities that might be delivered via virtual formats
- z. Make a financial commitment to hiring more full-time faculty members
- aa. Explore the idea of establishing for a “teaching post-doc” program at the University to attract new Ph.D.s (or others with terminal degrees) who aspire to teach
- bb. Ensure resources allocated to the Center for Teaching and Learning (CTL) are adequate to support University-wide priorities relating to academic excellence and distinction
- cc. Increase WSU visibility regionally and nationally in fields where faculty play leadership roles

GOAL 2: STUDENT SUPPORT AND SUCCESS

Provide all students a transformative, holistic educational experience with a path to timely degree completion and solid preparation for advanced academic studies or career success

- a. Adopt a wide-ranging, inclusive definition of leadership for WSU that includes an understanding of equity and the importance of valuing diversity within organizations
- b. Promote a culture in which advising is a year-round process
- c. Provide financial support for and promote opportunities for informal advising interactions between faculty and students
- d. Train faculty for implementation of inclusive teaching strategies
- e. Continue to support current practices such as CLEP testing based on students’ assets, sample bilingual/multilingual skills
- f. Increase the number of full-time faculty involved with the First-Year Seminar and committed to/trained in helping students transition successfully from high school to college
- g. Provide a comprehensive academic support first-year experience either by expanding Summer Bridge or creating a Fall Cluster for first-generation students and students from under-represented groups based on A.I.D. model
- h. Expand FYE services as needed based on RASE Plan recommendations and to meet needs of a changing student body demographic
- i. Offer optional online placement testing in Spanish to incoming students
- j. Provide for appropriate levels of advising in high-enrolled majors
- k. Create greater opportunities for summer IELI programs (including a formalized summer residential program)
- l. Ensure that opportunities for experiential learning are available to all students
- m. Continue to increase study abroad participation rates by identifying institutional and external funding sources to support faculty-led programs
- n. Identify additional resources to support under-represented students in study abroad
- o. Take necessary steps to increase student support services (for undergrad, graduate, and CE students) beyond/outside the traditional 9-to-5 workday
- p. Create a working group to address needs of WSU’s international student population
- q. Improve the registration process and advising for graduate programs
- r. Revisit the graduate coordinator model and ensure support offices throughout campus (e.g., registrar, financial aid, counseling, career services) are adequately staffed to provide graduate student-specific services and meet the needs of a growing graduate student population
- s. Expand and enhance support graduate students receive from the Library/librarians and Student Affairs

- t. Establish more opportunities for graduate students to network with each other and feel a sense of connection to the wider WSU community
- u. Enhance supports for and sense of belonging of transfer and commuter students
- v. Develop non-traditional and creative ways to address non-tuition-related financial challenges impeding students' ability to thrive, and ensure technology tools are available to all students
- w. Provide dedicated support structures and services for LGTBQ+ students
- x. Expand extracurricular and recreational programming to enhance 24/7 campus life for all students
- y. Invest in and utilize institutional financial aid intended to encourage student persistence and retention
- z. Increase awareness and accessibility of resources aligned with the eight domains of student wellness (emotional, social, physical, occupational, financial, intellectual, environmental and spiritual resources)
- aa. Communicate campus commitment to and dedicate resources to addressing student emotional and mental well-being, particularly relating to traumatized and disenfranchised populations
- bb. Promote institutional compliance with student educational accommodations across learning platforms and modalities
- cc. Enhance career exploration, internships, and professional opportunities by connecting students with alumni networks, employers and academic departments
- dd. Ensure all students have access to the technology and learning tools necessary for academic success
- ee. Recommit to the requirement that all undergraduate students have a laptop that meets University standards and program requirements, with the necessary software installed, and strive to ensure that students have reasonably operative internet access when away from campus
- ff. Ensure adequate and appropriate resources and supports are available to degree-seeking and degree-completing non-traditional-age adult learners pursuing education

GOAL 3: MARKETING AND ENROLLMENT

Be attractive and accessible to an increasingly diverse population of students within an increasingly competitive recruitment environment

- a. Create a marketing campaign that showcases a robust offering of educational experiences for a racially diverse undergraduate applicant pool
- b. Implement a comprehensive strategy for attracting and enrolling non-traditional-age students seeking to begin or resume their undergraduate studies or preparing to change career pathways
- c. Develop and implement an aggressive marketing campaign in support of DGCE enrollment goals, particularly growth of the graduate program
- d. Evaluate whether staffing for graduate admissions and recruitment is adequate to support attainment of enrollment goals and adjust as necessary
- e. Re-platform and enhance content on the web site to serve more effectively as a marketing and recruitment tool
- f. Continue to implement and support Early College and dual enrollment programs
- g. Coordinate across campus departments to strategically communicate student and faculty accomplishments
- h. Implement programs that bring greater numbers of prospective and accepted students to campus, targeting in particular underrepresented groups
- i. Ensure marketing and recruitment materials are translated into foreign languages prevalent in WSU's local population, and highlight the breadth of opportunity and support at WSU for students of diverse backgrounds
- j. Raise funds to increase financial aid and scholarship support available to qualifying students

- k. Implement and assess success of virtual information sessions for prospective freshmen students, prospective transfer students, and admitted students
- l. Create and deploy online campus tour with video, making sure to highlight areas of campus that would be important for prospective students from under-represented groups
- m. Test and measure success of “Meet a Faculty Member” programs for yield purposes
- n. Implement virtual financial aid sessions with Q&A for accepted and current students
- o. Align traditional advertising with and capitalize upon online program advertising to strengthen overall marketing effectiveness
- p. Boldly promote the major-plus, leadership, campus life, and other aspects of the RASE Plan

GOAL 4: COMMUNITY ENGAGEMENT AND PUBLIC GOOD

Have an impact beyond campus through leading-edge scholarship and creative activities, civic engagement, and mutually beneficial partnerships with local, regional and global communities

- a. Establish the Community Collaborative within Academic Affairs to support community-focused academic endeavors that connect faculty and students with the Worcester-area community to address challenges inter-disciplinarily and collaboratively
- b. Build a cohort of Community Engaged Scholars
- c. Establish a fully functioning Office of Grants and Sponsored Research
- d. Implement a Volunteer Day for employees to contribute to Worcester and local areas in a visible way
- e. Annually offer bus tours of Worcester for all new staff and faculty as well as members of Leadership Council
- f. In collaboration with HECCMA support efforts to establish Worcester as a vibrant location for students to study and play, faculty and staff to work and live, and graduates to stay and serve
- g. Expand connection, engagement, and networking opportunities, as well as ongoing career support, for alumni
- h. Maintain an open, neighborly campus environment
- i. Pursue partnerships that support goals for student recruitment
- j. Providing educational opportunities deemed to be of strategic value to the region based on employment trends
- k. Expand utilization of external advisory bodies (e.g., departmental advisory groups)
- l. Partner with the community (WPS) to promote international dialogues and experiences

GOAL 5: PEOPLE AND CULTURE

Nurture an inclusive campus culture that promotes a shared commitment to excellence, innovation, collaboration, and accountability

- a. Conduct an “equity audit”
- b. Promote campus-wide cultural fluency, anchored in WSU’s core values, to foster greater understanding and inclusion of the diverse cultures represented in the WSU community
- c. Implement a strategic recruitment and retention strategy for under-represented faculty and staff, including visiting faculty, adjuncts, and international hires
- d. Improve onboarding for new employees
- e. Engage in succession planning for key positions across the organization
- f. Expand and support interdisciplinary teaching

- g. Create a formal mentoring program for faculty and staff, offering high-quality, discipline-specific training from peers
- h. Create new awards to recognize faculty and staff accomplishments and milestones
- i. Expand internal, cross-divisional awareness of the key roles, value-adding activities, and accomplishments of departments, offices, centers, and individual contributors across campus
- j. Create a Core 3-credit graduation course requirement for diversity
- k. Offer multiple levels of staff and faculty training, from beginner to advanced, on issues relating to diversity, equity and inclusion
- l. Invest resources as may be necessary to establish the Library as the center of academic pursuits at WSU
- m. Expand affinity-based connections across the campus community
- n. Introduce new optional social activities and potentially new gathering spaces that bring faculty and staff together and strengthen sense of community
- o. Promote a shared sense of ownership among deans and department chairs for contributing to the campus climate strategy and related recommendations
- p. Increase diversity in certain academic departments as well as key administrative departments that affect the recruitment, retention, and leadership development of students from under-represented or marginalized groups
- q. Establish a more formal vetting process for hiring adjunct faculty
- r. Increase professional development and career growth opportunities available to staff
- s. Offer competitive compensation and contemporary employment options for faculty and staff
- t. Significantly enhance internal communication to promote transparency, information sharing, and cross-divisional collegiality
- u. Work toward making all University spaces ADA-compliant, and provide assistive technology and processes that make it easier for all students, employees and guests to experience our campus similarly
- v. Reevaluate our workplace model and establish a remote work plan with an expectation that as many as a quarter of full-time administrative staff may not need to be physically present every day

GOAL 6: RESOURCES AND INFRASTRUCTURE

Develop sustainable revenue streams adequate to support the University's academic mission and institutional priorities, and invest in physical infrastructure and technology with a commitment to financial and environmental sustainability

- a. Develop multi-year enrollment management plans
- b. Address the bifurcated structure distinguishing the day program from the grad/evening school and consider separating the continuing ed functions from the graduate school
- c. Invest in DGCE marketing and staffing levels appropriately to increase graduate, online/evening/Center for Business and Industry initiatives that generate incremental revenue
- d. Create an instructional design position in the Center for Teaching and Learning (CTL)
- e. Create accelerated hybrid degree completion programs for non-traditional students
- f. Develop more non-credit courses and programs (online, pre-college, education adventures) to be taught through the Center for Business and Industry
- g. Address risk management in study abroad using a cross-divisional approach
- h. Evaluate the organizational structure of IT and assess the need for additional resources and/or staffing
- i. Move more administrative forms and functions online (to increase efficiency and reduce use of paper)

- j. Acquire and deploy communication technology for the purposes of improving awareness of campus activities, improving advising communication, and improving web presence for students and advisors (as well as the FYE program)
- k. Broaden and increase base of alumni donors
- l. Increase unrestricted endowment to 20-25 percent of total endowment value
- m. Create a more transparent budgeting process that evaluates existing funding levels and requires administrative and academic departments to develop multi-year budgets
- n. Develop a new process that decreases redundant technology purchased by requiring acquisition of new technology to be approved by the Administrative Technology Committee
- o. Develop and regularly reassess emergency preparedness plans for buildings and communications
- p. Establish a dedicated emergency response fund – beyond the reserves – perhaps structured like our capital adaptation budget mechanism
- q. Update and re-imagine the University's emergency management, response, and preparedness planning – including new appropriate trainings and regular practical exercise – in a manner that reasonably addresses contingencies that are not limited to physical safety and property protection
- r. Ensure that each administrative unit has suitable contingency plans in place, and for which appropriate training is regularly delivered, that will permit key business functions to be maintained while the University's regular operations might otherwise be interrupted
- s. Recommit to ensuring redundant systems and staffing capacities to protect essential business operations from disruption due to unanticipated events
- t. Invest appropriate resources and training to automate business functions across the campus consistent with contemporary best practices within higher education
- u. Create additional green landscape on campus
- v. Assess current space utilization and re-allocate space in a purposeful manner to meet current and future demands
- w. Develop a comprehensive plan to address future development of the May Street building and associated site
- x. Work with the Massachusetts Department of Capital Asset Management to develop a comprehensive plan to address programs needs and necessary infrastructure improvements to the Learning Resource Center and the Student Center
- y. Work with the Massachusetts State College Building Authority to develop a comprehensive plan to address infrastructure deficiencies of Chandler Village while continuing to meet student demands for residential housing
- z. Address accelerated end-of-useful-life and higher deferred maintenance costs due to heavy use of physical assets by both WSU and non-WSU constituencies
- aa. Develop plans for classroom technology, furnishings and fixtures that maximize flexibility to meet diverse teaching and learning needs in active learning spaces
- bb. Take creative approaches to increasing available parking, viewing this as an investment in student retention
- cc. Revise our Climate Action Plan with definitive steps to achieve carbon footprint reduction
- dd. Join organizations related to climate change efforts in higher education to learn about best practices for institutions of higher learning
- ee. Evaluate net zero or near net zero building for any new building projects as soon as projects are being considered
- ff. Plan for replacement fleet vehicles to be fully electric or hybrid vehicles
- gg. Increase the number of buildings that have options to off-set electricity

A photograph of an ornate black wrought-iron gate with a central shield emblem, set against a backdrop of lush green trees. A blue semi-transparent banner is overlaid across the middle of the image.

Strategic Plan Final Progress Report 2015-2020



WORCESTER
STATE
UNIVERSITY



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Introduction

As we move forward with the development of our next strategic plan, it is imperative that we reflect on the successes and challenges of the current strategic plan.

The past five years have been tumultuous, starting with enrolling the largest class in Worcester State University history, and ending with a national decline in enrollment, a recession, and global pandemic. Through it all, Worcester State University has remained strong.

This five-year review of the Worcester State Strategic Plan 2015-2020 demonstrates the strength of the Worcester State community, re-affirms our core values, and highlights areas where there is still work to be done.



Strategic Plan 2015-2020

Introduction

During the 2014-2015 academic year, a steering committee of faculty, staff, administrators, students, alumni, and trustees was convened to develop a new strategic plan.

Worcester State University's 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. It was approved by the Board of Trustees in October 2015.

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.

Core Values

Academic
Excellence

Engaged
Citizenship

Open Exchange
of Ideas

Diversity
and
Inclusiveness

Civility
and
Integrity

The Strategic Planning Review Committee



Laura Caswell

Data Administrator
Information Technology

Kristina Curro

Assistant Professor
Communication Sciences
and Disorders

Jennifer English

Associate Director
Financial Aid

Sean Morrow

Assistant Director
University Advancement

Michael Mudd

Director
Athletics

Nancy Ramsdell

Director
Facilities Operations and
Planning Support Services

Brandi Silver

Professor
Psychology

Sarah Strout, Chair

Assistant Vice President
Assessment and Planning

The Strategic Planning Review Process

In the 2019-2020 academic year, the Strategic Plan Review Committee, comprised of faculty and staff from all divisions of the University, reviewed the progress of the Strategic Plan for the last five years.

Each committee member was assigned to work on reviewing materials for one goal. The entire committee then evaluated each goal's progress, determining whether minimal, moderate, or significant progress had been made. This determination was made by evaluating both quantitative and qualitative measures associated with the goal.

For each goal, an executive summary, hallmark achievements, and key performance indicators are presented.





Academic Program and Excellence

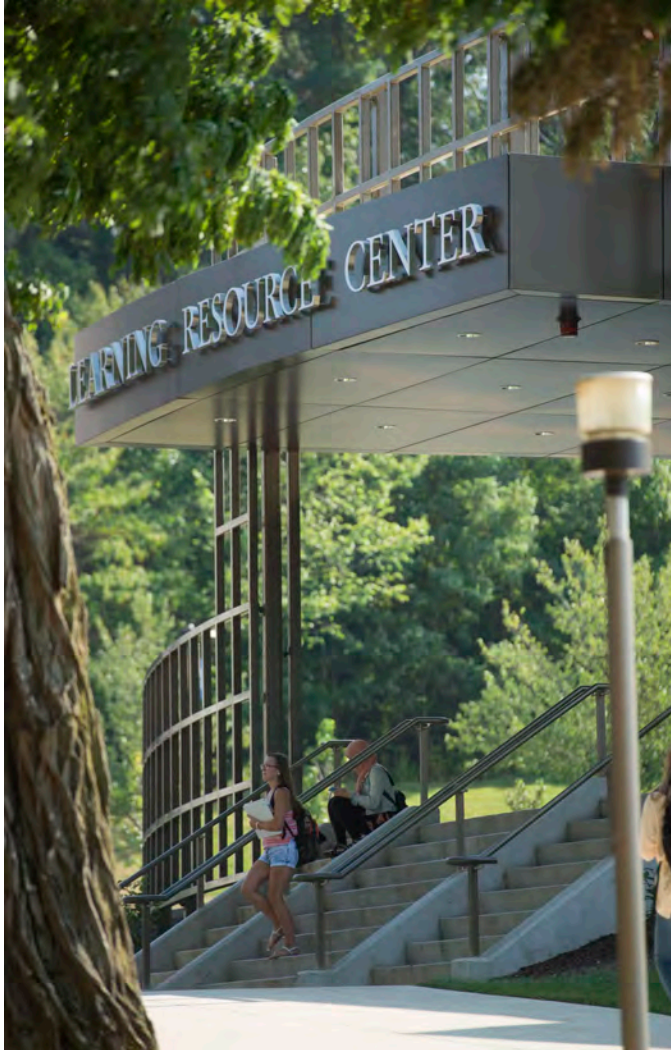
Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation



Significant Progress



Executive Summary



Worcester State University has made **significant progress** towards the goal of academic excellence.

New undergraduate and graduate programs have been created in response to student interest and work-force alignment.

Increased support for research and creativity for both faculty and students, careful development of library resources, and an increase in the number of high-impact practices utilized by our faculty has helped to change WSU's reputation from a 'back-up school' to a regional university with high caliber faculty and students.



Curriculum

New majors in Liberal Studies and Environmental Science

New minors in Forensic Science, Psychobiology, Substance Abuse Counseling, and Spanish for Health Professionals

New concentrations in Women's Gender and Sexuality Studies, Global Studies, Ethnic Studies, and Environment and Sustainability Studies

New graduate programs in Master of Public Policy/Administration and Public Management

A post-professional doctorate degree in Occupational Therapy submitted to the DHE



Articulation Agreements with:
Massachusetts College of Pharmacy and Health Sciences, Mount Wachusett Community College, Nichols College, Quinsigamond Community College, Springfield Technical Community College, UMass Dartmouth School of Law, and Western New England University School of Law



High-Impact Practices



60% increase in the number of students participating in **study away** since 2014

Increased the number of faculty led **short-term study away opportunities**

Built prototypes of **interactive learning spaces**



9,263 students participating in **experiential learning courses** in 2019-2020

3,820 students participating in an **internship, practicum, fieldwork, or individual research** course in 2019-2020



Research and Creativity

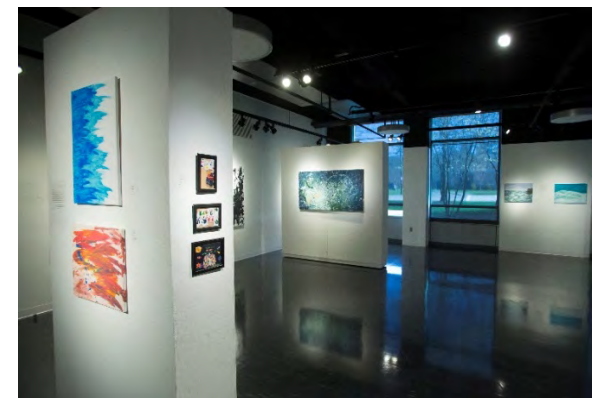
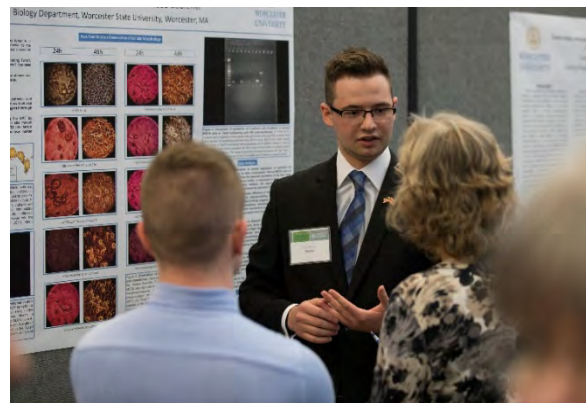
Established the **Aisiko Stem Center** which supports the Peer Assisted Learning (PAL) initiative, Summer Research Fellowships, the Bridge to Excellence Program, and the AISIKO Interdisciplinary Research Program Award

Celebration of Scholarship and Creativity expanded to include interactive displays of student research projects

Provost's **Faculty Scholarship Travel Fund** increased by \$30,000

WSU Foundation **Faculty Scholarship, Research, and Creative Activity Grant Program** launched

The Mary Cosgrove Dolphin Gallery offers 3 to 4 exhibits per year of current renowned artists and Worcester State faculty and students





Library



Hired 5 librarians as **department liaisons** offering information literacy and instructional services

Awarded a **\$150,000 Performance Incentive Grant** with other MA institutions to advance the adoption of open educational resources (OER)

\$191,000 saved by students through **OER courses** since Spring 2018

Created a dedicated space for **WSU Archives and Special Collections**

Avoided cutting **library subscriptions** by negotiating lower pricing and instituting multi-year contracts





Differentiation and Impact in the Wider World

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of differentiation and impact on the wider world.

Progress has been made capitalizing on our urban location by increasing the number of partnerships with Worcester area organizations and the number of civic engagement opportunities for students.

However, recent surveys show that students want more career preparation opportunities, including career advising, networking opportunities, internships, and training related to job-seeking.

More relationships with organizations in the area will increase the likelihood that our students are able to find appropriate internships and employment following graduation.



Community Involvement

Developed **new partnerships** with Worcester area businesses, hospitals, schools, and non-profits

Created **CityLab**, which collaborates with Worcester Public Schools to research voting patterns

Created **CitySpeak**, which uses theatre to analyze and propose solutions to urban problems, and VITA, which provides free tax services for the local community

Launched **100 Males to College**, a cross-campus effort Multicultural Affairs, LEI, and Enrollment Management and long with city partners Worcester Public Schools and QCC

Increased the number of students participating in **civic engagement** opportunities

The **Latino Education Institute** serves over 2,000 students and families in K-12 through academic enrichment and college/career readiness





Student Leadership



Launched a leadership **rebranding campaign** designed to increase awareness of student involvement opportunities outside of the classroom

Focus on **leadership skills programming** that challenge students to become empowered, inclusive, and knowledgeable future leaders



Implemented a new three-phase **student leadership** training model, Circle of Leadership: Emerge, Engage, and Excel

Residence Life and the Binienda Center for Civic Engagement developed the **Community Leadership Experience (CLEWS)** living-learning community



Initiated **Jumpstart AmeriCorps** Program

Athletics hosts **Captain's Leadership Breakfasts** 1-2 times each semester to discuss what it means to be the captain of a team and the responsibilities that are associated with it



Career Preparation

Increased the number of opportunities for career preparation through interdivisional collaborations including **mock interviews**, **Backpack to Briefcase**, **career fairs**, and in class **presentations**

Initiated new database called **Lancer Link**, which posts job and internship opportunities for students



Increased the number of workforce related trainings offered by the **Center for Business and Industry**

Inter-divisional collaboration to create event where students are trained on **professional table manners**, **interviewing techniques**, and **networking**





Enrollment, Retention, and Student Success

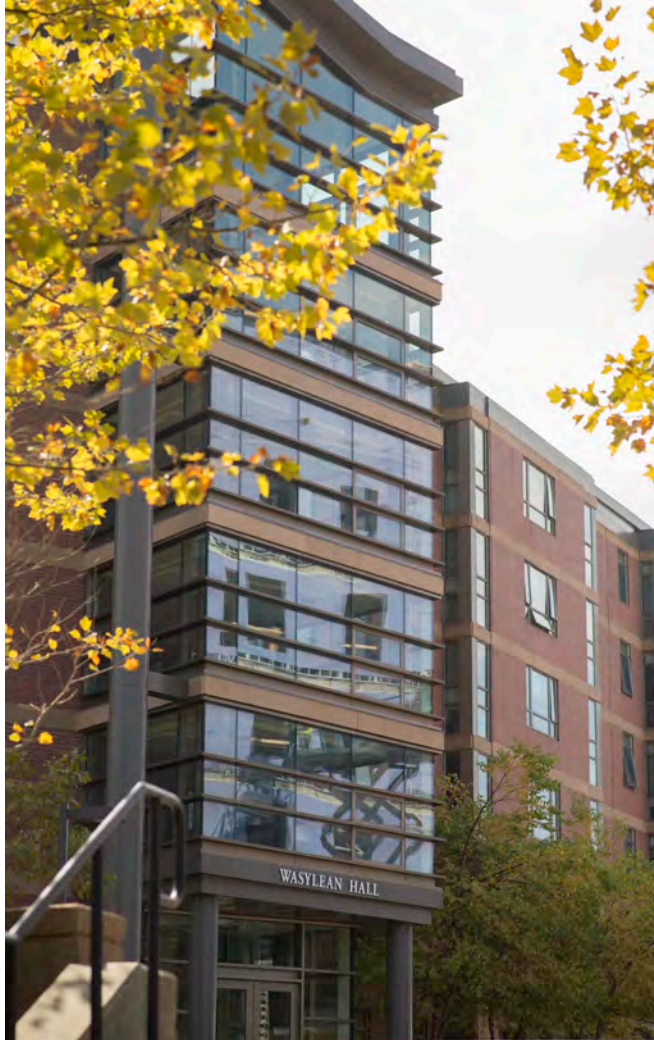
Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success



Significant Progress



Executive Summary



Worcester State University has made **significant progress** towards the goal of enrolling, retaining, and ensuring the success of students.

While other Massachusetts public universities have seen a significant decrease in enrollment, our enrollment has remained steady.

Our retention and graduate rates continue to rise, and a majority of our students reported finding employment or beginning further education within one year of graduation.

With the addition of new online graduate programs and a focus on non-traditional students, we will be able to recruit students despite the decline of traditional-age students nationally.

Major efforts relating to recruitment, marketing, scholarships, and advising have contributed to our success.



Recruitment and Enrollment

Stable enrollment compared to other MA State Universities

Improvement in the **HS GPA** of incoming students

SAT Optional Admissions approved

Creation of dual-enrollment and **early college** partnerships with QCC and K-12 schools

Collaboration with Academic Partnerships on launching **100% online graduate programs** in Nursing and Education

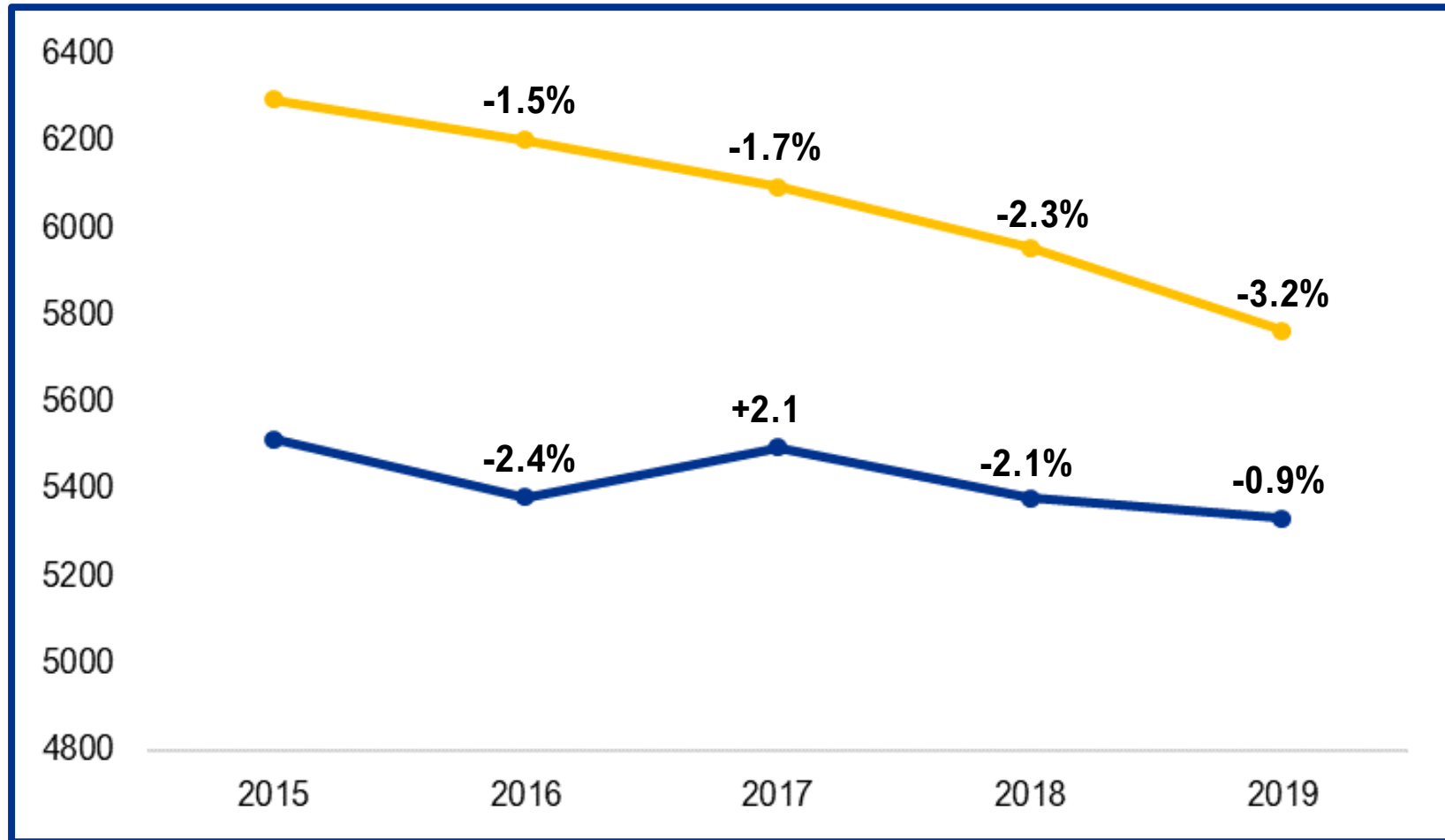
Featured in Princeton Review as a **Best College in the Northeast** since 2005





Recruitment and Enrollment

Enrollment Change 2015-2020



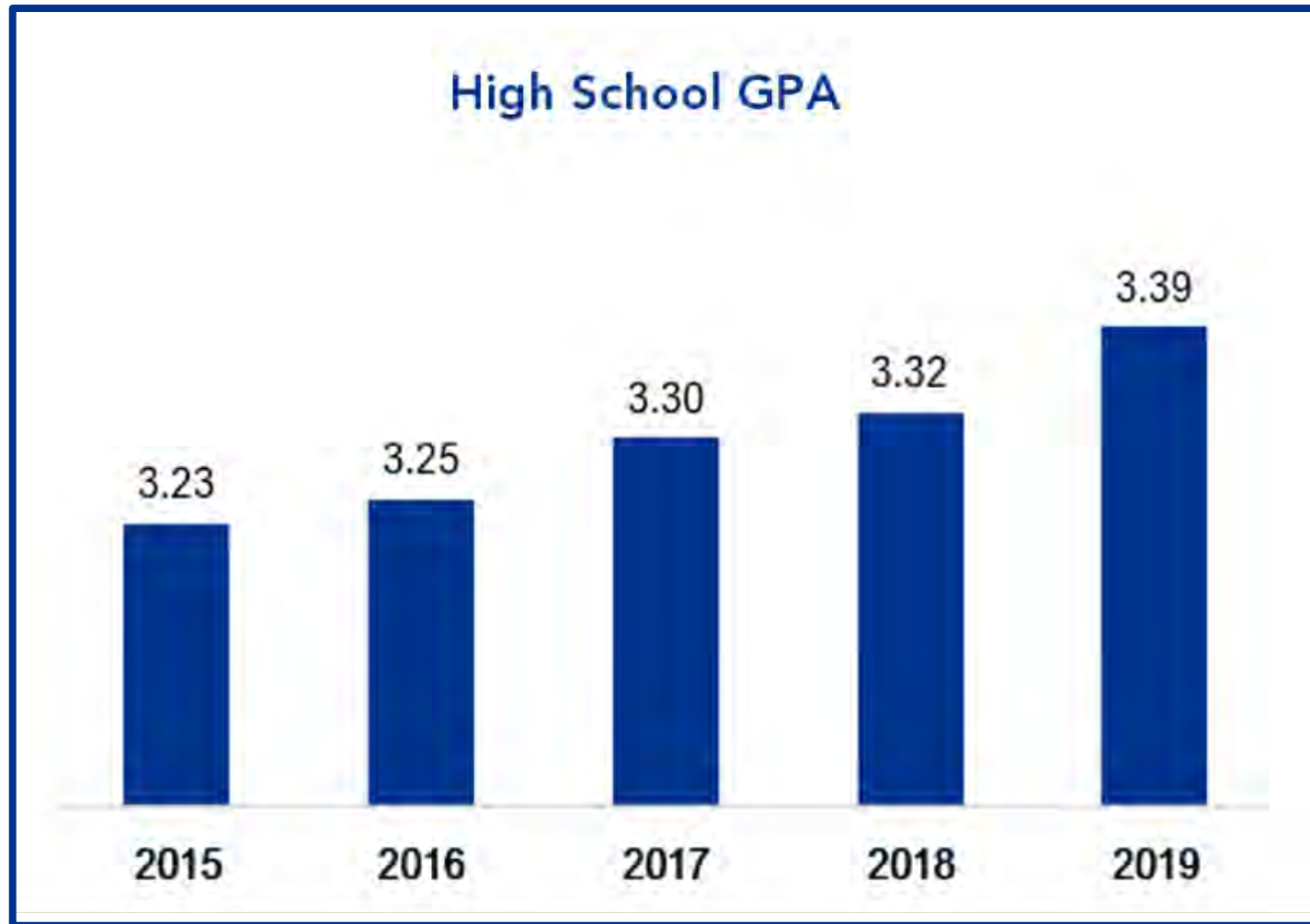
MA State Universities*
Overall Change
-8.4%

WSU
Overall Change
-3.3%

*Bridgewater, Fitchburg, Framingham, Salem, Westfield



Recruitment and Enrollment





Retention

Continued increase in **retention** rates

Early intervention and warning systems developed and utilized by the Retention Office in coordination with faculty

Creation of **Success Coach Program** with all incoming freshman being assigned a Success Coach

\$100,000 **Higher Education Innovation Fund Grant** to boost completion rates, close achievement gaps, and attract, enroll, and graduate students from underserved populations

Created the **1st Generation celebration** to recognize and support first generation students, faculty, and staff

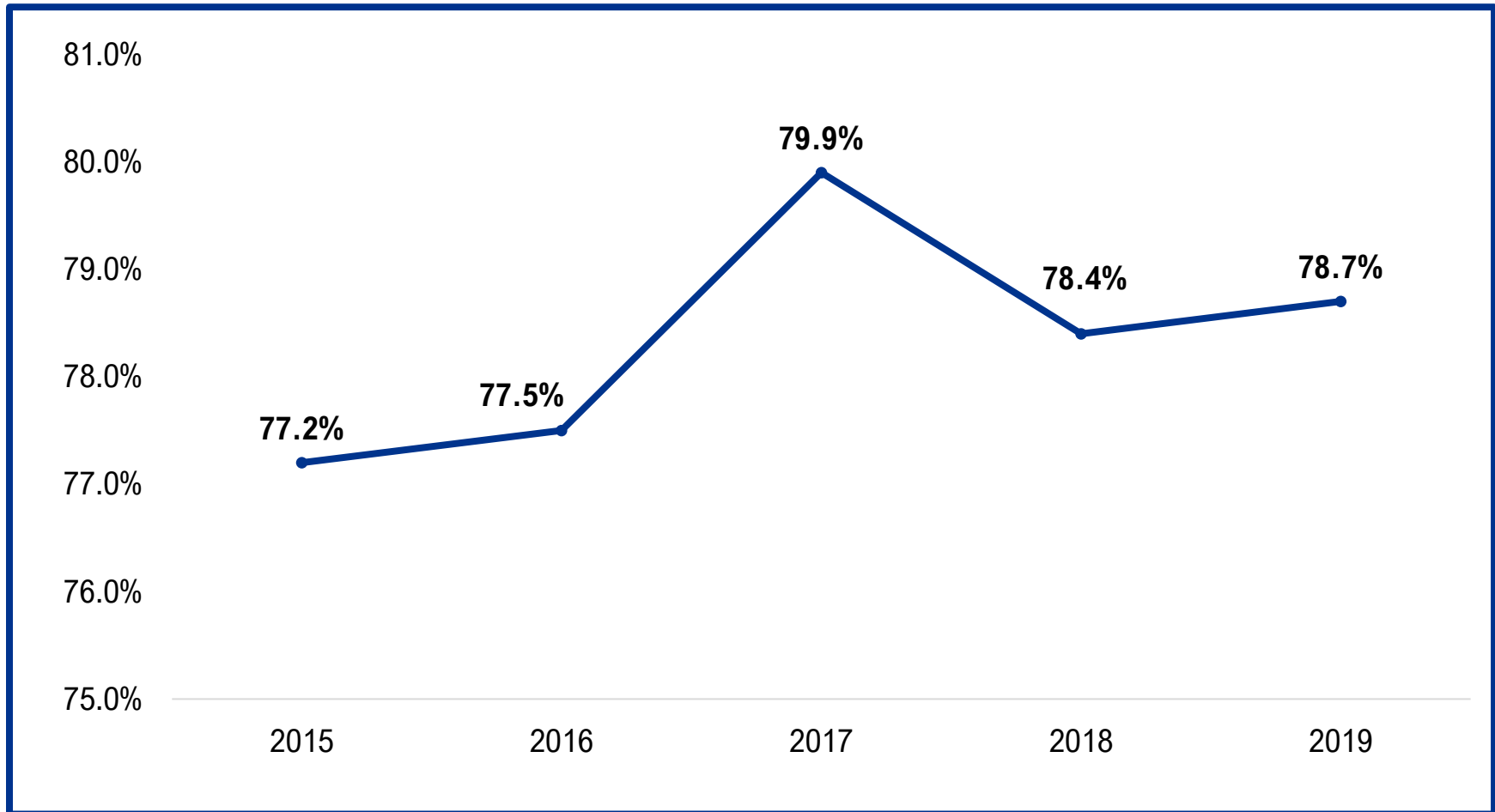
New guidelines created for coaches when recruiting student-athletes to increase retention and graduation rates





Retention

1st Year Retention Rate





Advising



Academic Success Center provides intensive academic support to first-year students identified as developmental level based on placement tests - 66% increased their scores

Created the **Advising Innovation Grant Program**, which funds faculty members and teams for developing new advising approaches



New advising resource materials and workshops have been created, including a web page for faculty advisors that outlines **best practices for advising** different populations of students



Student Support

Full-time enrollment for **graduate programs** moved from 9 credits to 6 credits to allow students to qualify for more **financial aid**

Creation of the **WSU Emergency Fund**

Student Accessibility Services, Health Services, and Counseling Services and other student-facing offices have increased the number of **evening hours**

Hired new Non-Matriculated/ Adult Student Advisor to assist **non-traditional student populations**

Created two **food pantries**: Thea's Pantry and the DGCE Pop up Pantry





Student Success



Continued increase in **retention** and **graduation** rates

94% of the Class of 2018 is **employed**, pursuing **further education** or both within one year of graduating

90% of the Class of 2018 has remained in **Massachusetts** following graduating

Featured in U.S. News & World Report as a **Top Performer on Social Mobility**

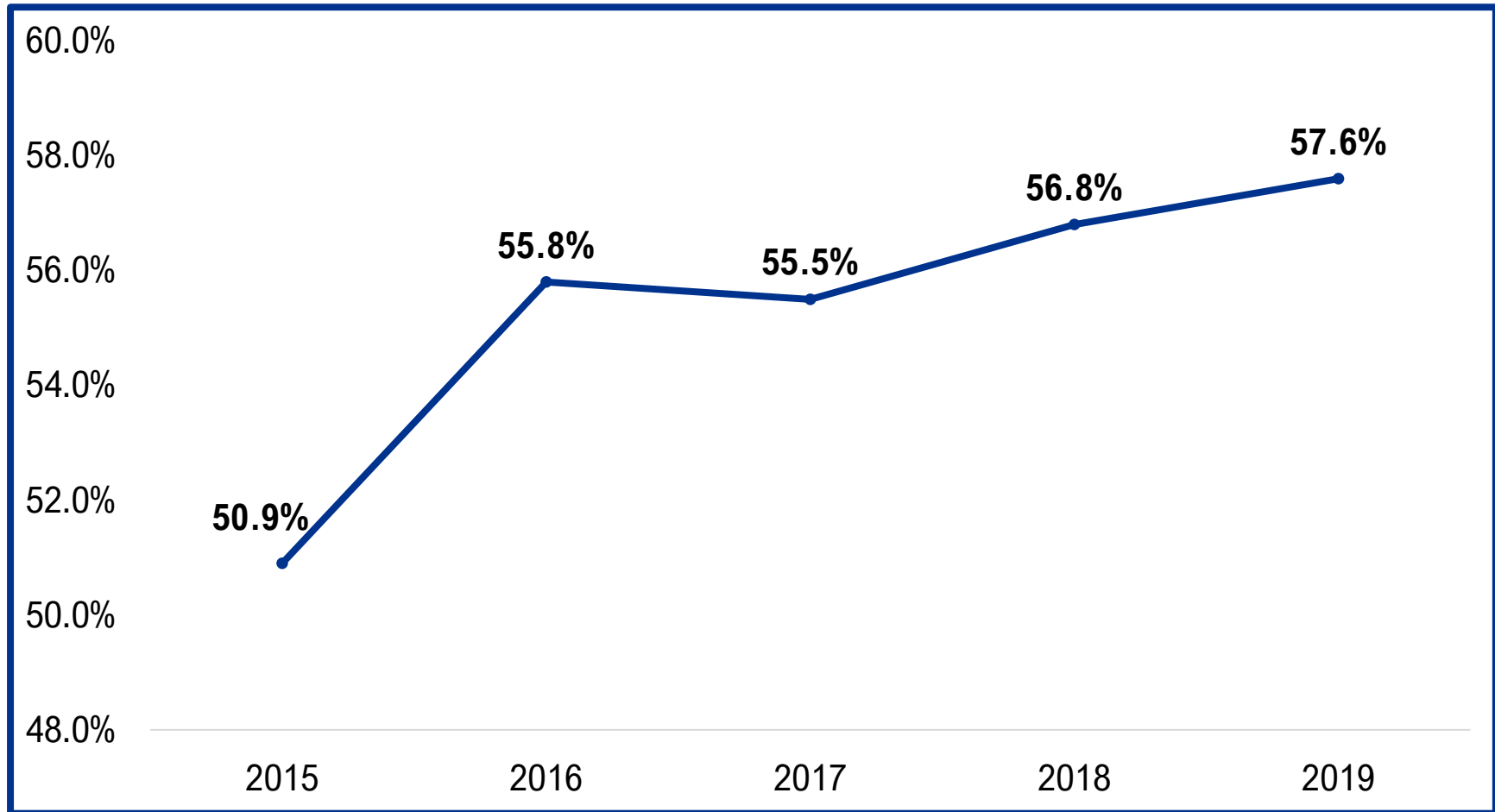
100% pass rates for Nursing, Occupational Therapy, and Speech Language Pathology program national examinations





Student Success

6 Year Graduation Rate





Community and Campus Life

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of community and campus life.

While progress has been made in diversity, equity, and inclusion, as demonstrated in the increase in ALANA representation and initiatives to support marginalized groups, we continue to struggle with internal communication and sense of belonging on campus.

In addition, commuter students, transfer students, graduate students, and older-adult learners reported a low sense of belonging.

The equity gap for some of our students was highlighted during the Coronavirus pandemic, with a significant number of our students not having access to reliable devices or internet, as well as having to manage schoolwork with other responsibilities.



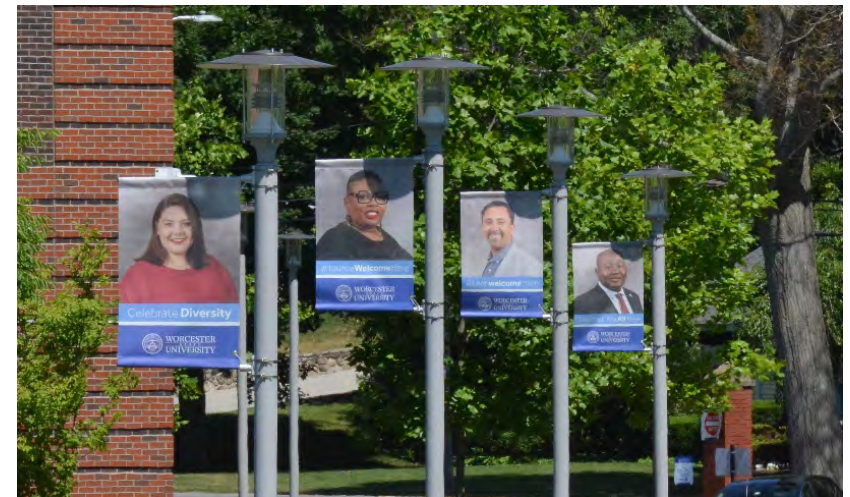
Diversity, Equity, and Inclusion

Launched **Five Points of Action** Toward a More Inclusive Campus Climate in 2016

Created the **Campus Climate Committee** (CCC); the **Bias Incident Response Team** (BIRT), the Advisory Committee for **Equal Opportunity, Diversity & Affirmative Action**, and the **LGBTQ+ Advisory Group**

Created a policy to allow faculty, students, and staff to use a **chosen name** and indicate pronouns

Creation of visual representations to highlight **diverse images** of students, staff, and faculty and flags on display that represent the 206 countries of **national origin** of WSU community members





Diversity, Equity, and Inclusion

ALANA faculty, staff, and student representation has increased

Implementation of the **Equal Opportunity, Diversity and Affirmative Action Plan** and achieving overall faculty diversity goals

Student Accessibility Services provides assistance to over 550 students each year

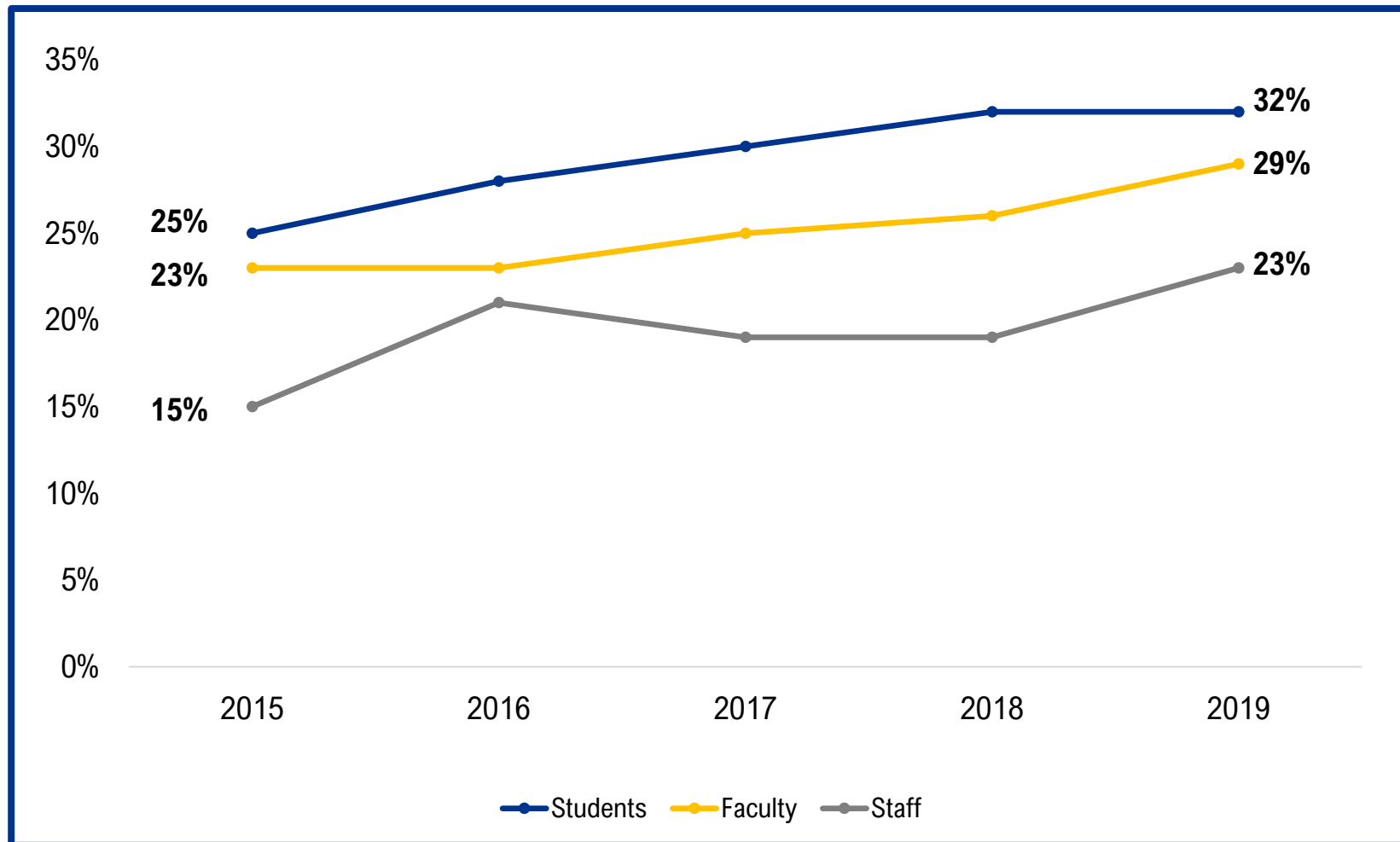
Increase in the number of **public speakers** related to diversity, equity, and inclusion





Diversity, Equity, and Inclusion

ALANA Representation Students, Faculty and Staff





Faculty, Staff, and Student Recognition



Creation and expansion of opportunities to recognize faculty and staff including the **Employee Service Recognition and Retirement Celebration** and **Employee Fun Day**

Resumed participation in the **Commonwealth Performance Recognition Program**

Began celebrating adjunct faculty through the annual **Adjunct Faculty Dinner** and through **adjunct faculty teaching and research awards**

Academic achievement awards are given to students each year and celebrated at **Academic Achievement Awards Ceremony**

Creation of the **Showcase of Faculty Scholarship and Creativity**





Campus Life

Sponsored campus-wide **International Food Festival**

Department of Visual and Performing Arts mounts three **theatrical productions** annually, including one student-directed production

More **evening and weekend** events and events targeting **commuter students**

Instituted the annual **Global Action Fair**

Multicultural Affairs celebrates Latin Heritage Month, Black History Month, Asian Heritage Month and more

Increased the number of local, national, and international opportunities for **alumni** to connect with Worcester State





Resources, Revenue, and Sustainability

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of financial strength.

Although we have made significant progress in increasing our endowment, financial concerns remain. Despite our ten-year increase in enrollment state appropriations have remained the same.

To alleviate reliance on state funding, a higher investment in revenue-generating programs is needed. In addition, more resources for grants would assist in growing new revenue as well as promoting a reputation for academic excellence and innovation.

Lastly, the recent Coronavirus pandemic has highlighted our need to invest more heavily in technology through funding and staffing levels, including support for faculty for online course development.



Financial Stability

Wellness Center is on pace to generate about \$100,000 in **net revenue**

Center for Business and Industry increased the number of trainings offered and revenue obtained

\$1,416,907 **grant funds** received in 2019

Best College Value by Kiplinger's Personal Finance

Featured as a **Best College for your Money** by Money Magazine in 2017, 2018, and 2019

Convened a cross-divisional **Budget Working Group** to evaluate opportunities for efficiencies, cost-savings, and improvements to operating procedures and reporting





Infrastructure



Secured the largest allocation of five-year **critical repair funds** for State Universities in the Commonwealth; funding will be used for large scale building renovations focusing on the LRC and Student Center

Acquisition of Temple Emmanuel Property (**May St. Building**) and parking, the property at the 537 Chandler Street location which currently houses the **Latino Education Institute (LEI)**, and 531 May Street which houses the **WSU Teaching Garden**, run by the Urban Action Institute



Construction of the **Wellness Center**

All new or renovated buildings will have **gender-neutral facilities** to provide all students with the opportunity to belong to the Worcester State community



Sustainability

Achieved **LEED Gold** certification for four buildings

Created **hydration stations**, **recycling** initiatives, **charging stations** for electric vehicles (EVs), and **rainwater collection**

Purchased fitness equipment that, when used, **generates electricity** that goes back into the Wellness Center's power

Transitioned to copy paper is 30% and notepads that are 50% **post-consumer recycled**

Supporting **two solar fields** by purchasing net metering credits totaling 6.5 megawatts

Featured in **Princeton Review's Green College Guide** for 6 years in a row





Giving



Continued increase in **endowment**

Implemented **Changing Lives Campaign** for scholarship support, the **Transfer Scholarship** program, **Giving Tuesday** and the **Adopt a Scholar** program

Creation of the **Young Alumni President's Circle**, an exclusive incremental giving society for recent graduates

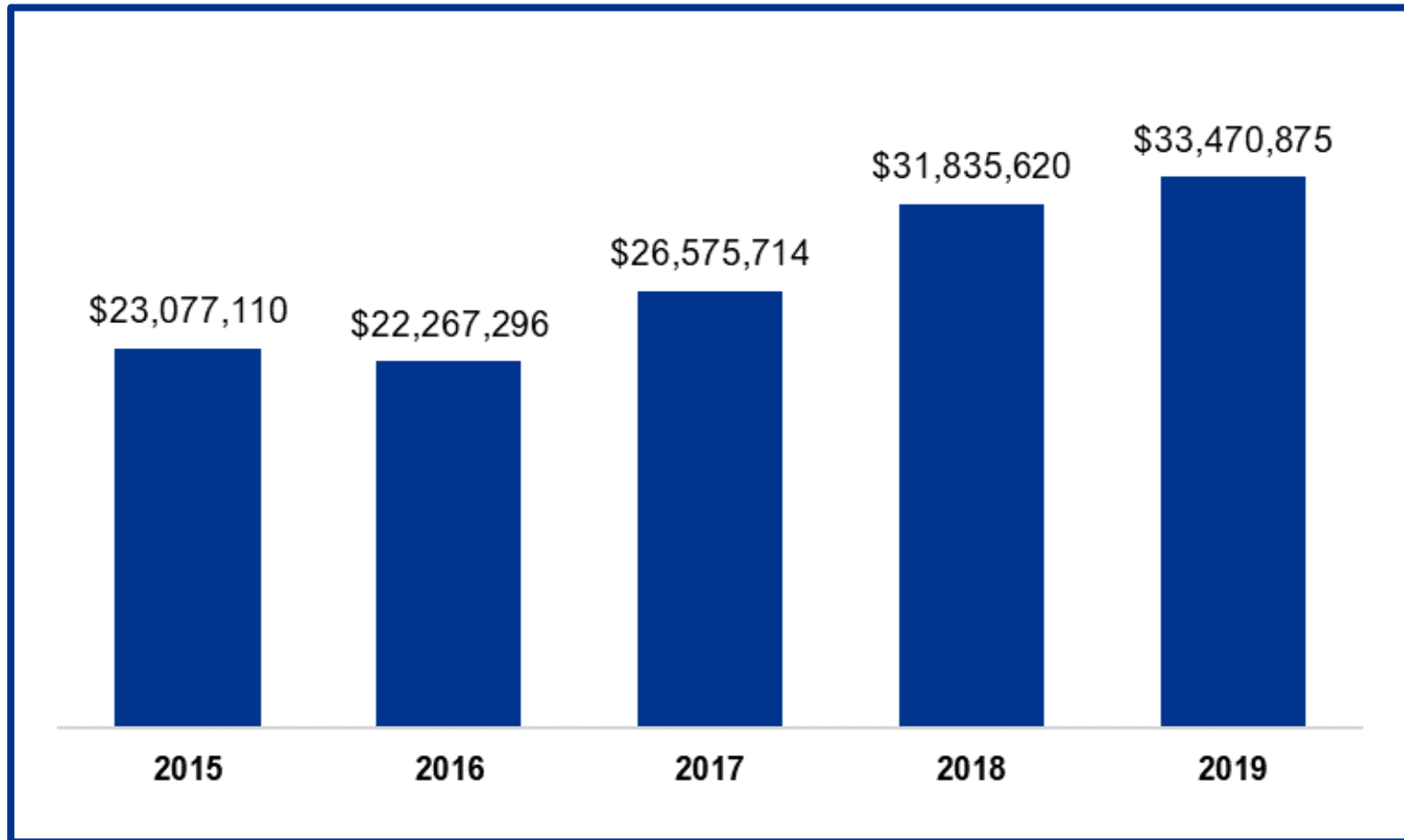
Highest **alumni participation** in annual giving among Massachusetts state universities

Recognized with a **2019 CASE Educational Fundraising Award**, which honors exceptional fundraising programs at educational institutions in the United States





Endowment Growth





WORCESTER
STATE
UNIVERSITY

Worcester State University

486 Chandler St.

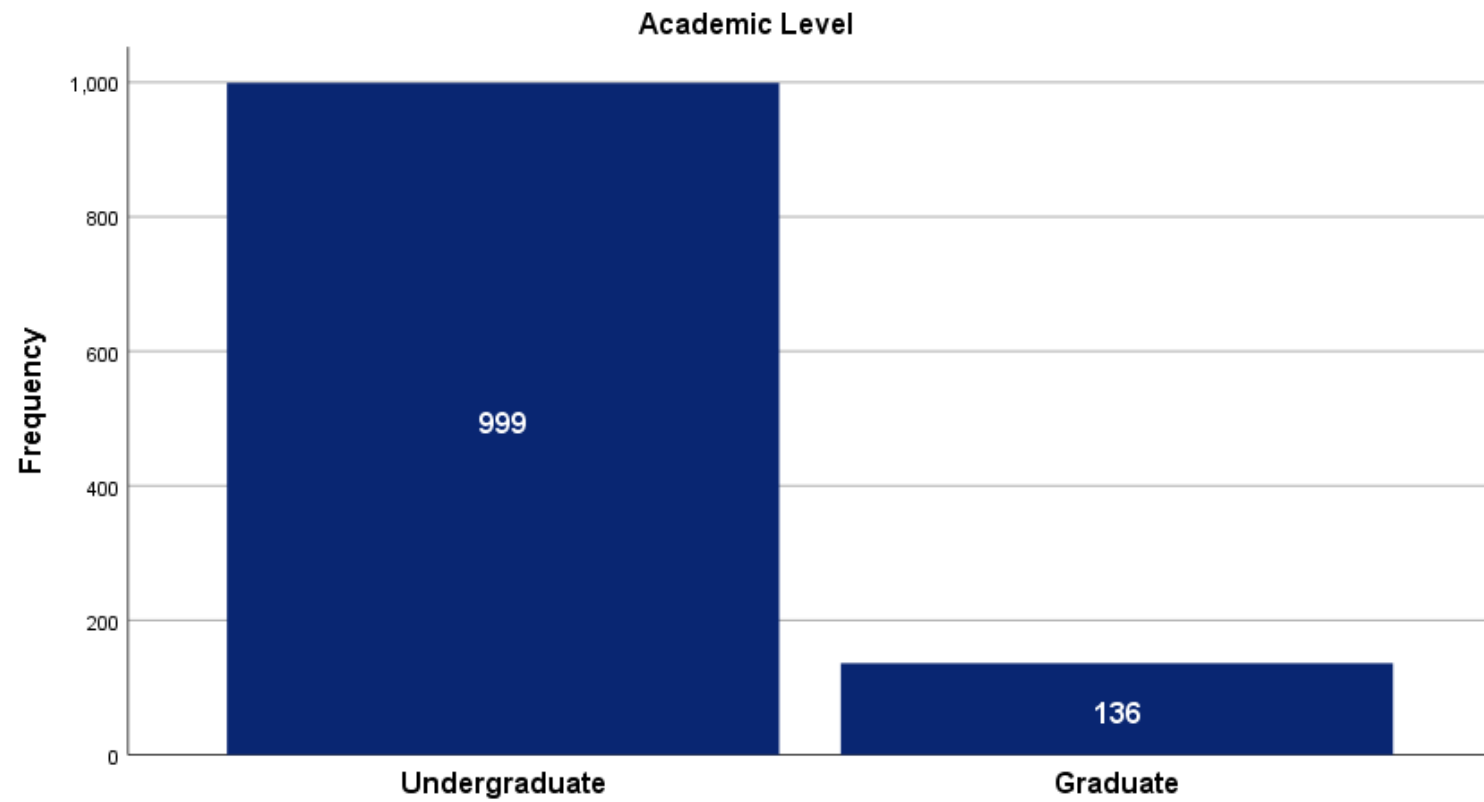
Worcester, MA 01602

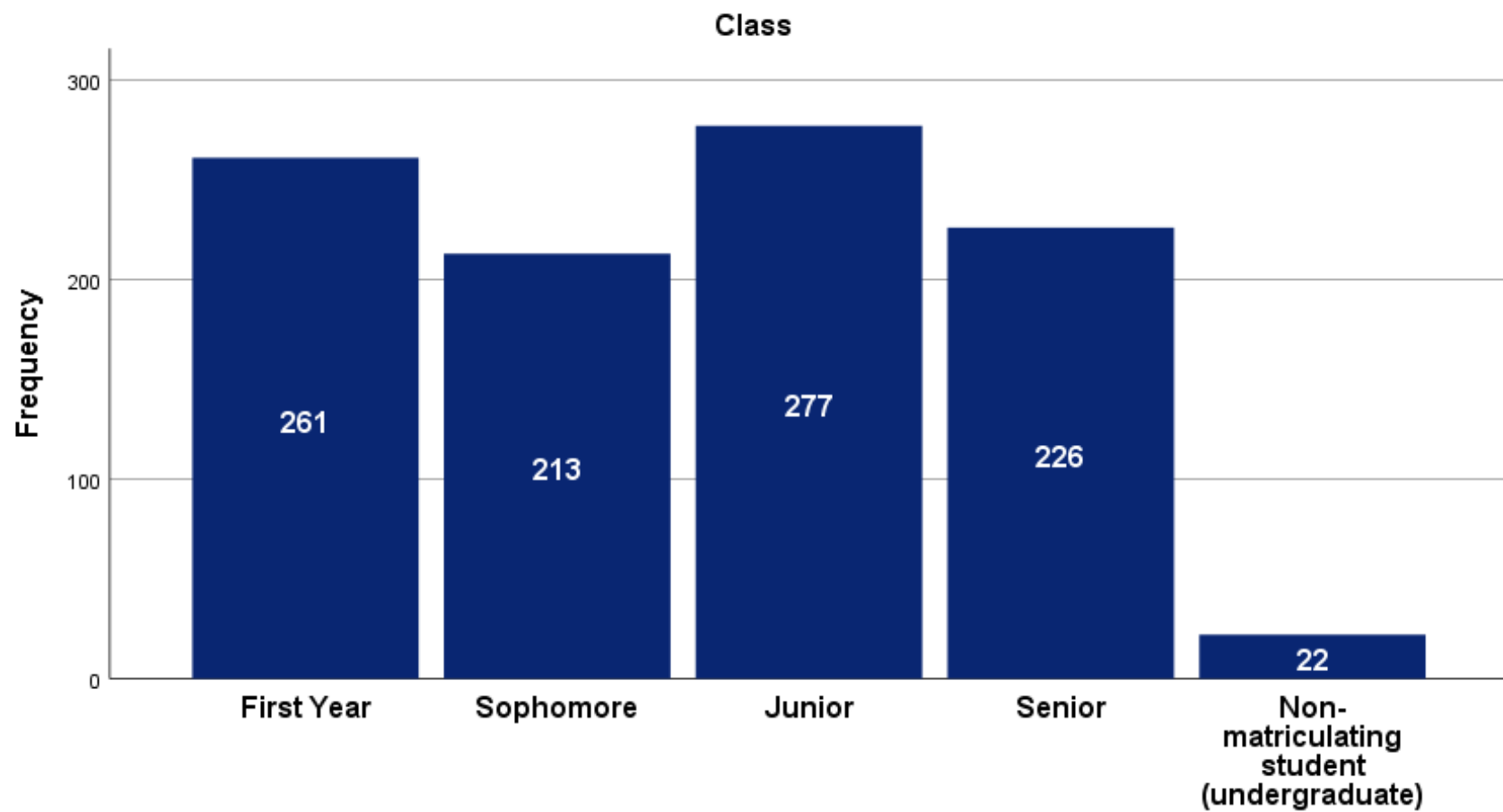
508-929-8000

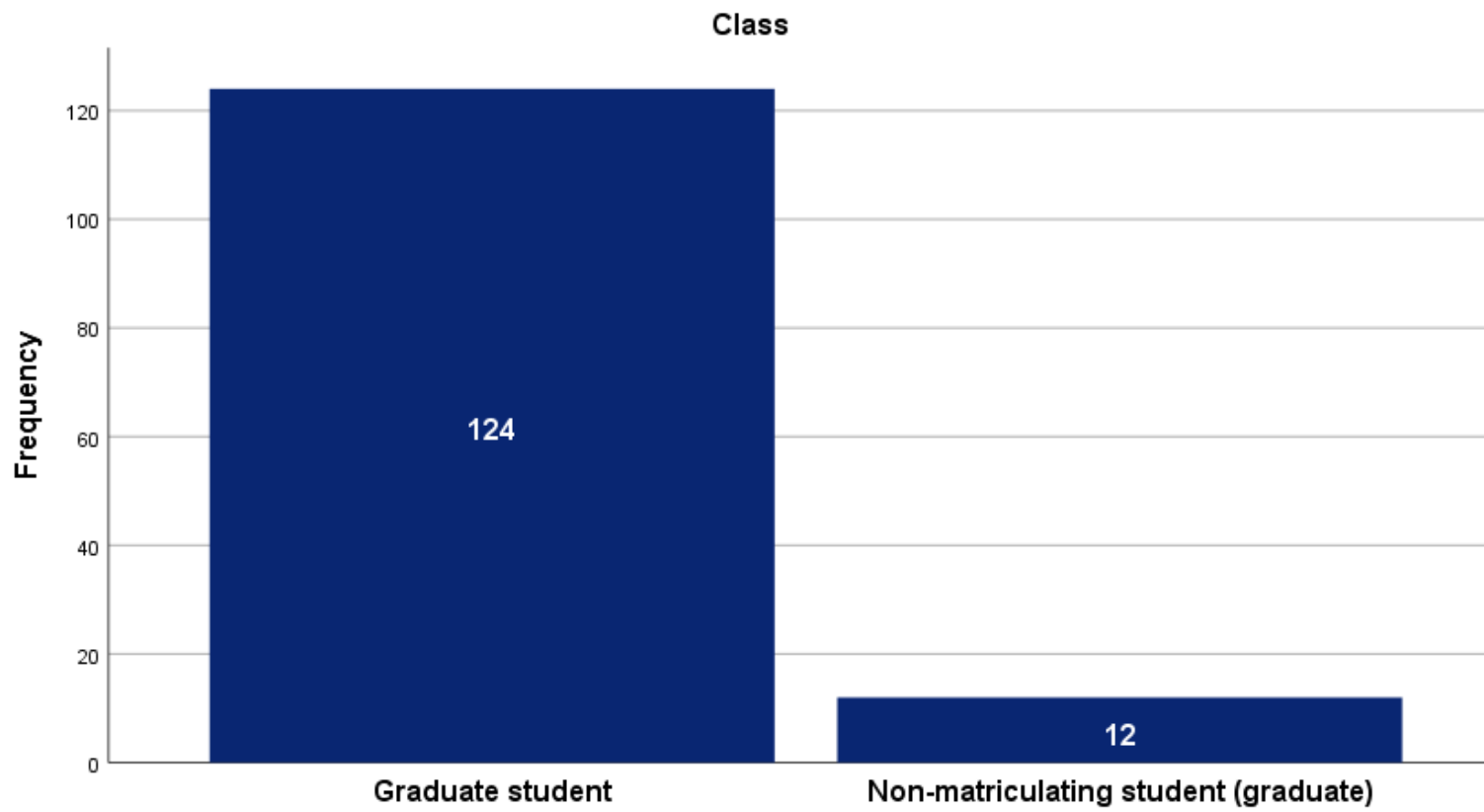
Worcester.edu

Transition to Remote Learning Student Survey

DEMOGRAPHIC INFORMATION

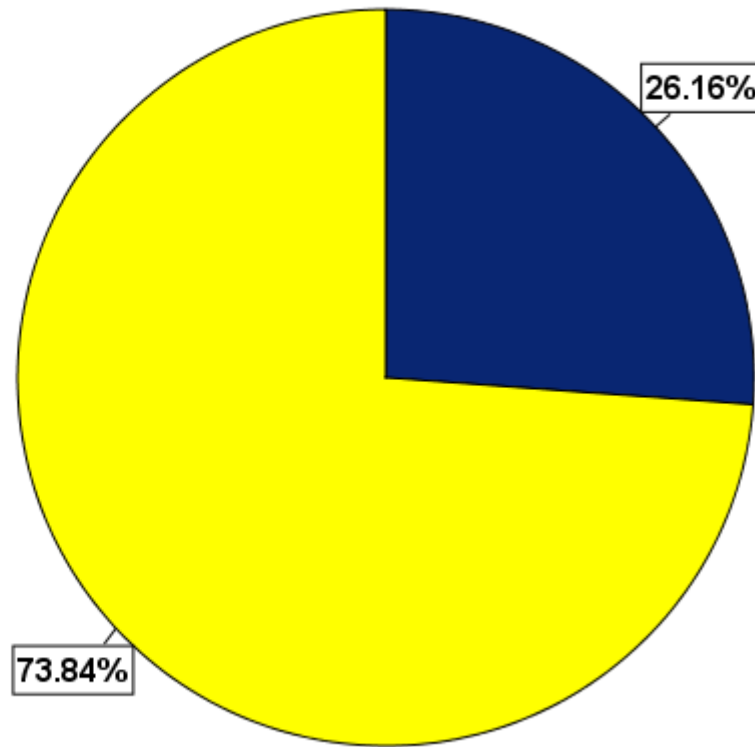


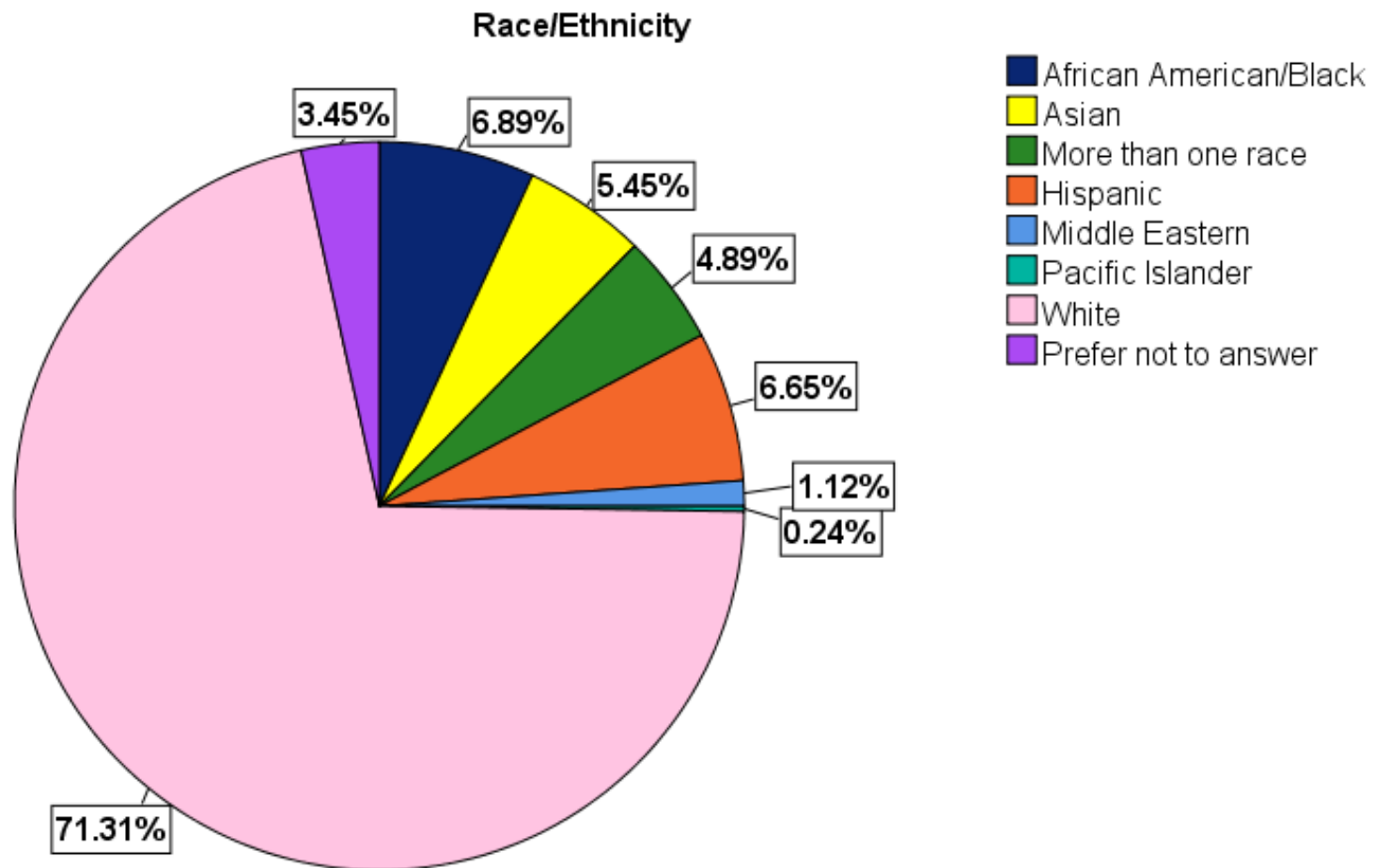




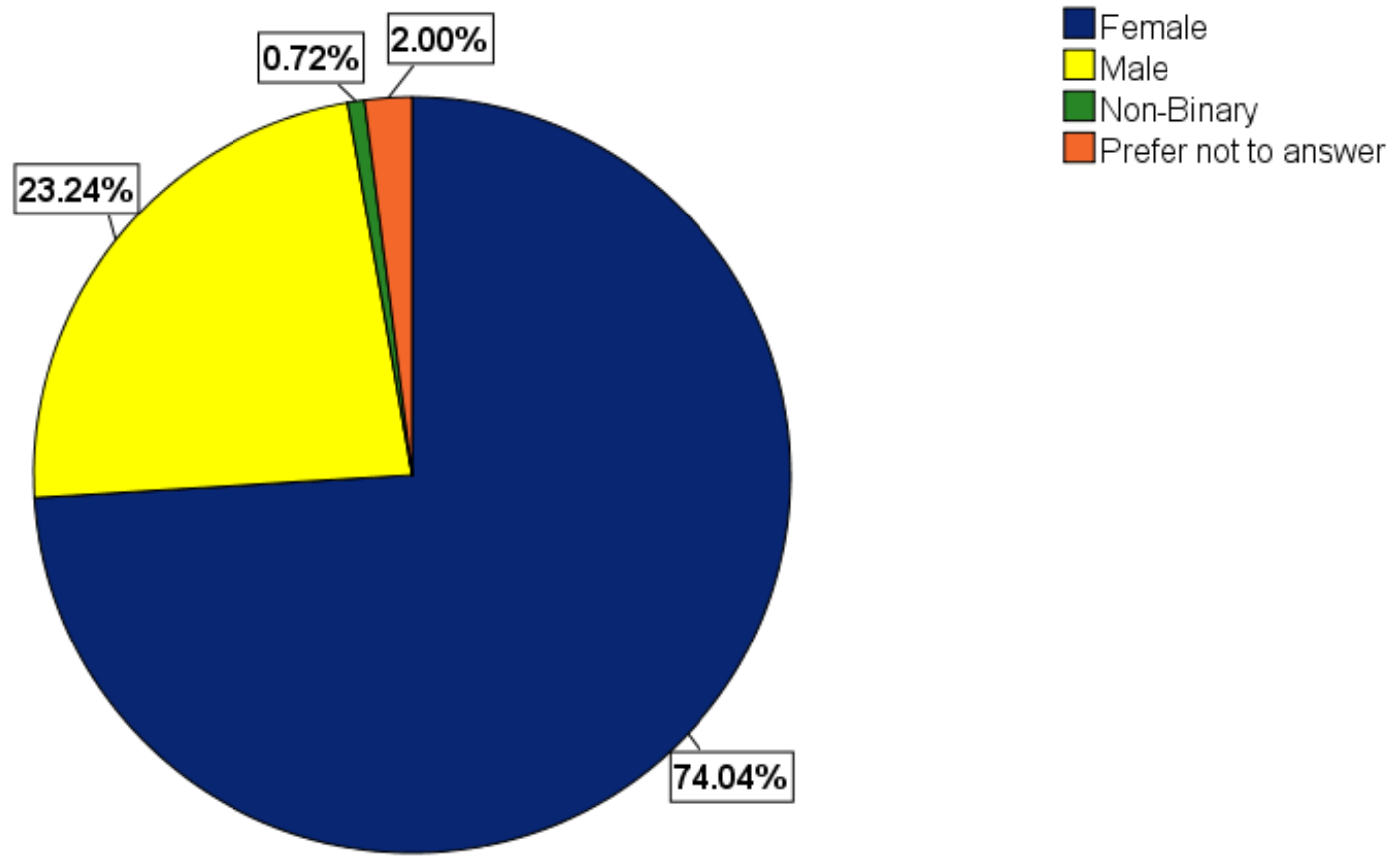
ALANA/White

■ ALANA
■ White

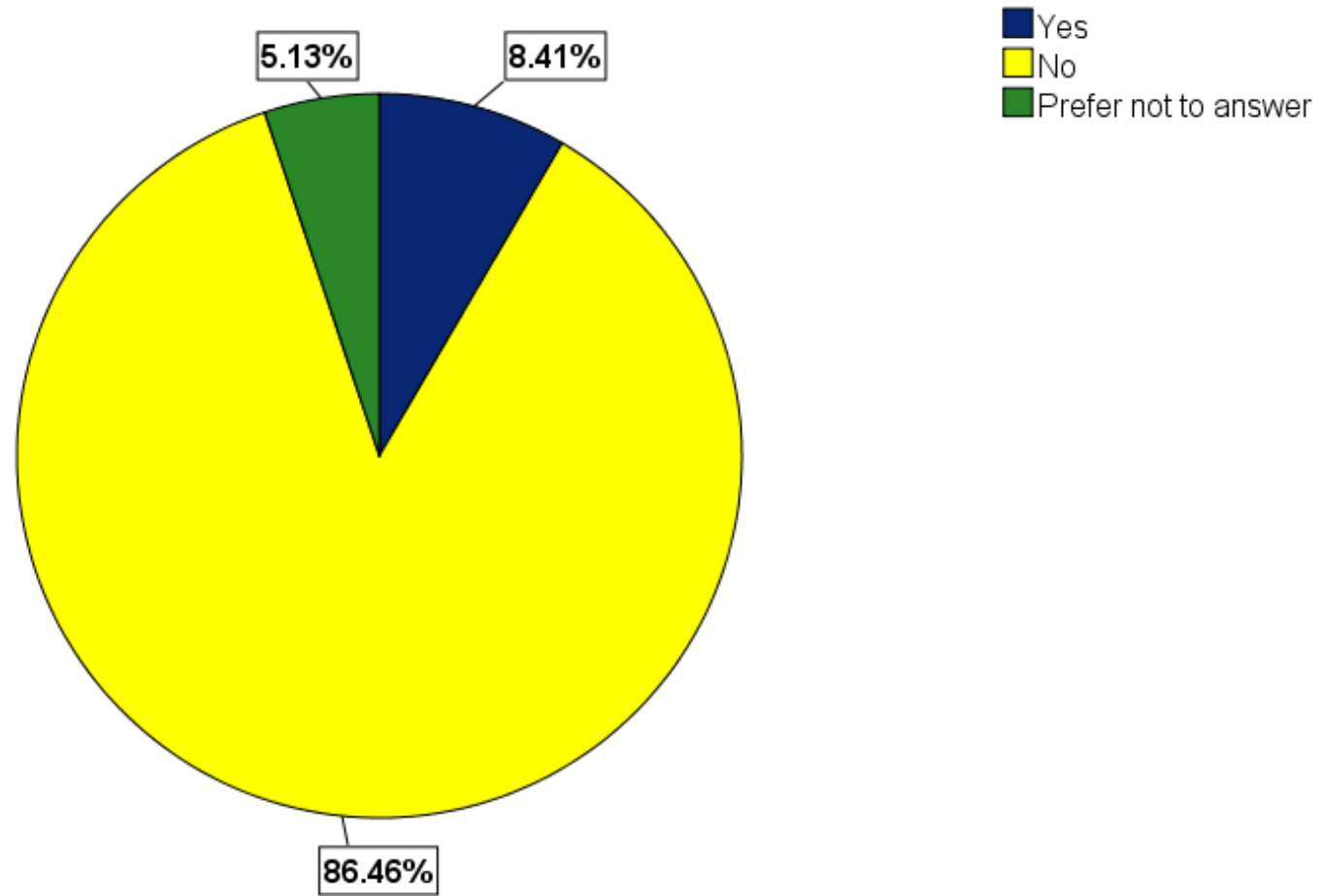




Gender

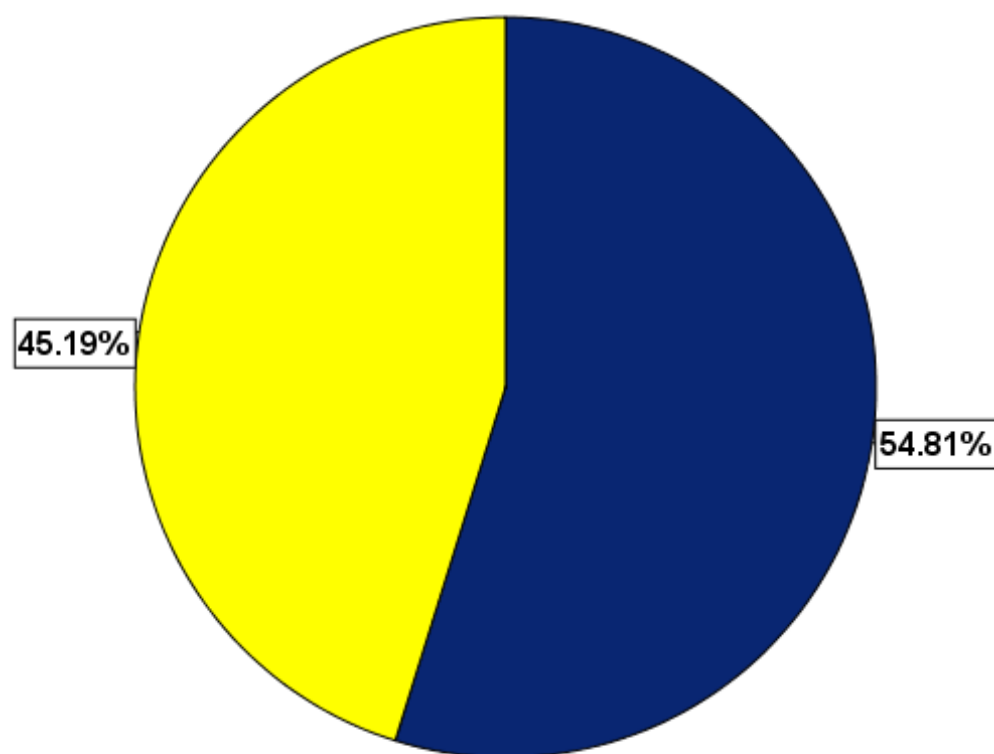


Do you have a documented disability?

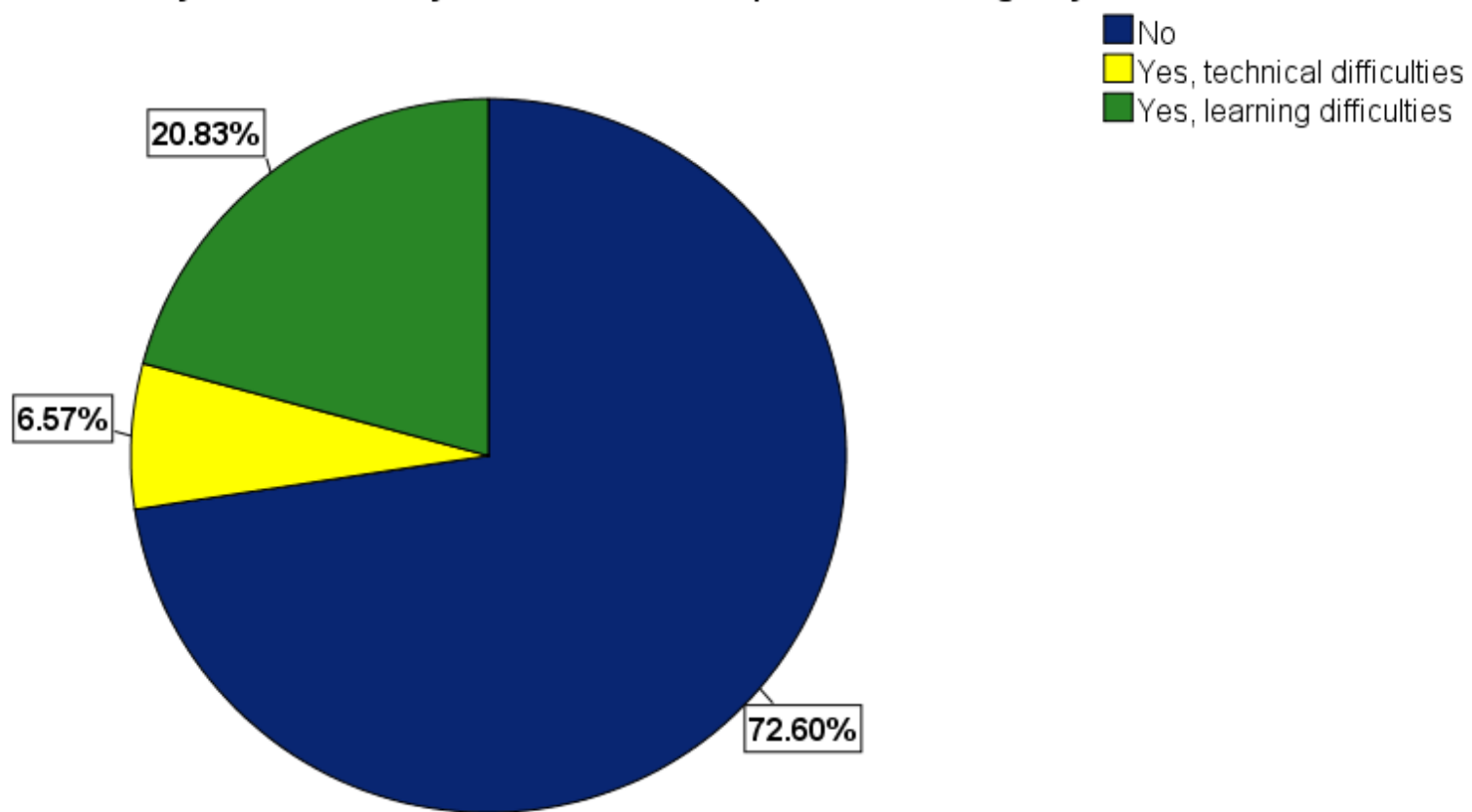


Did you take any online courses prior to this emergency transition?

■ Yes
■ No

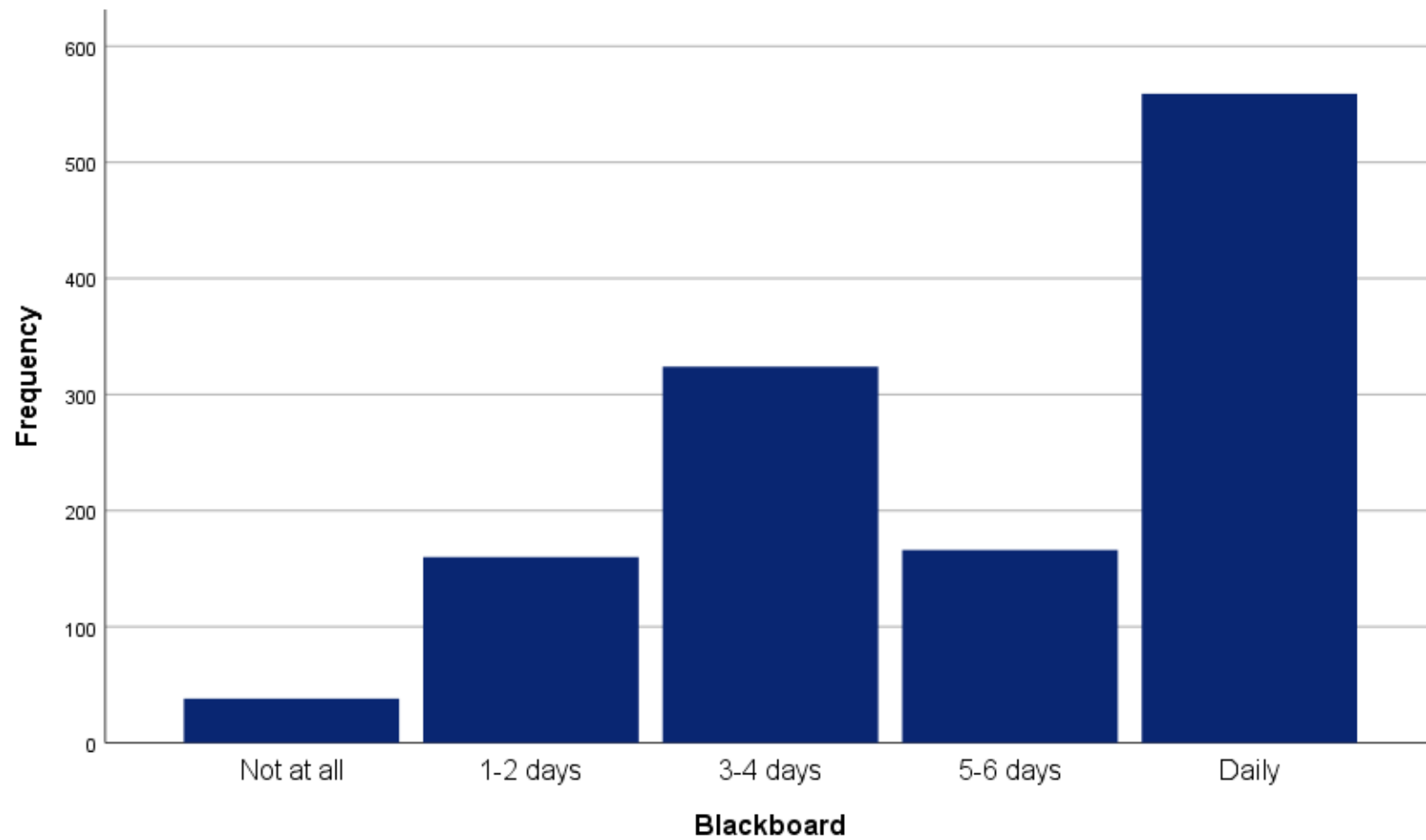


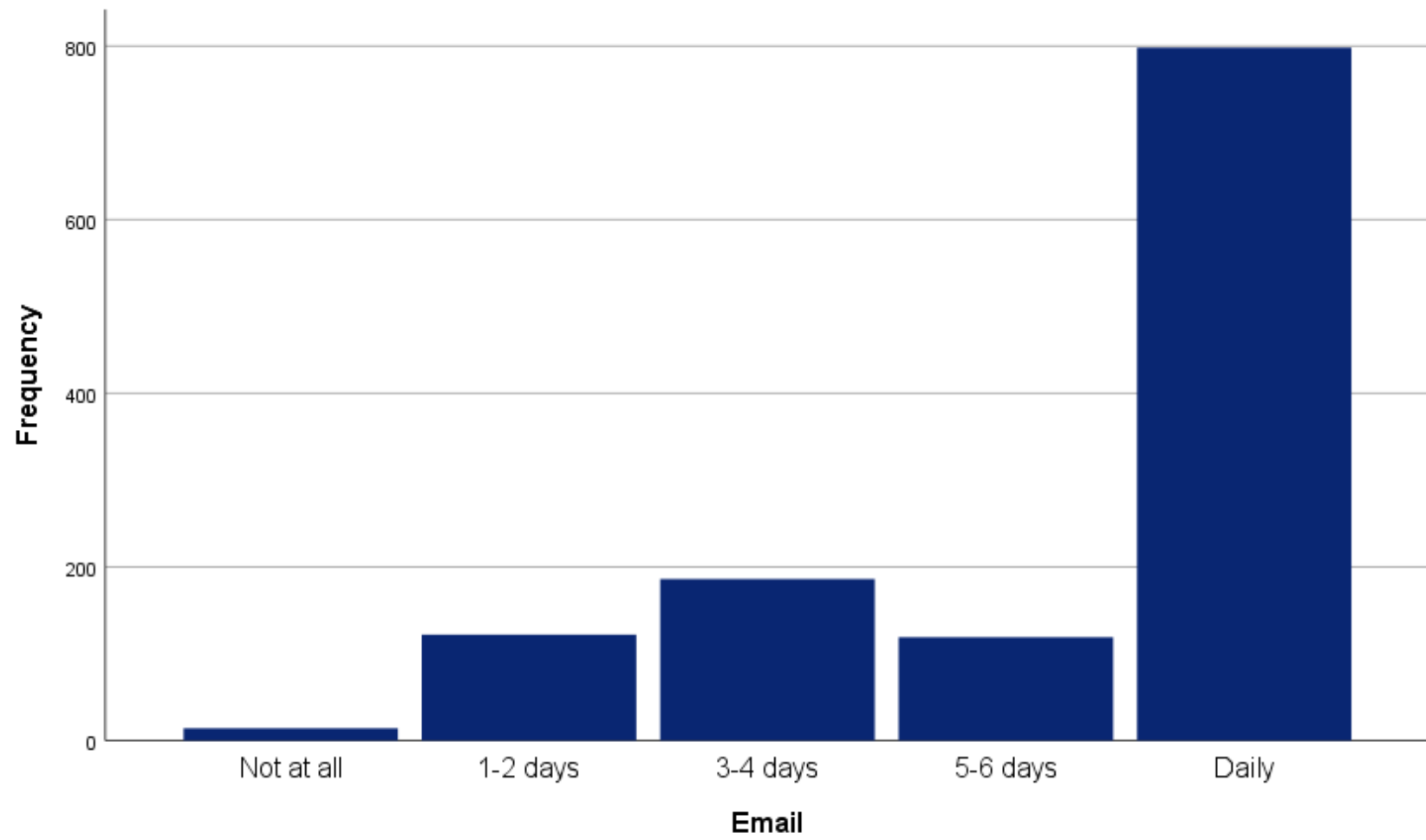
Did you have difficulty with online courses prior to the emergency transition?

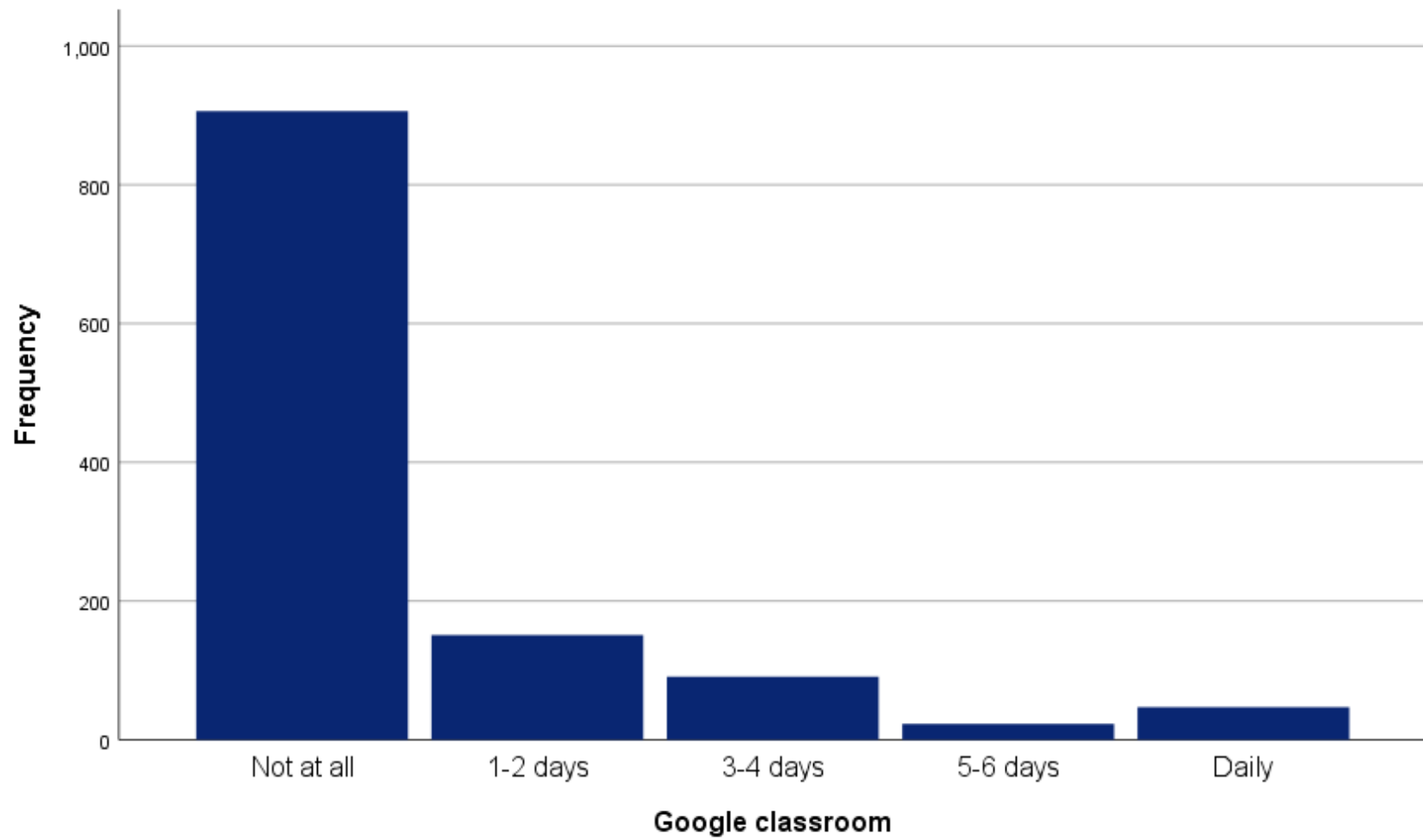


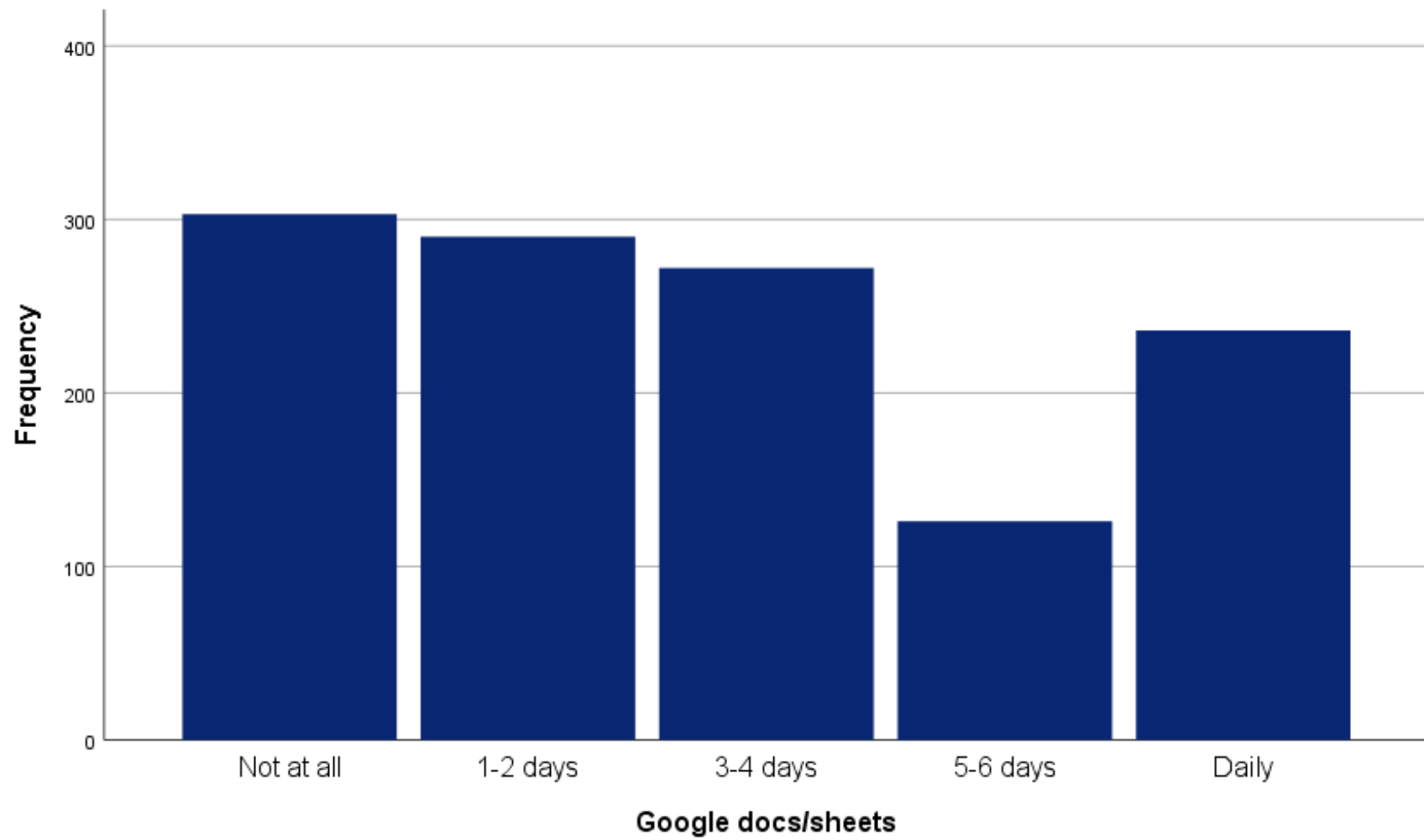
TECHNOLOGY TOOLS

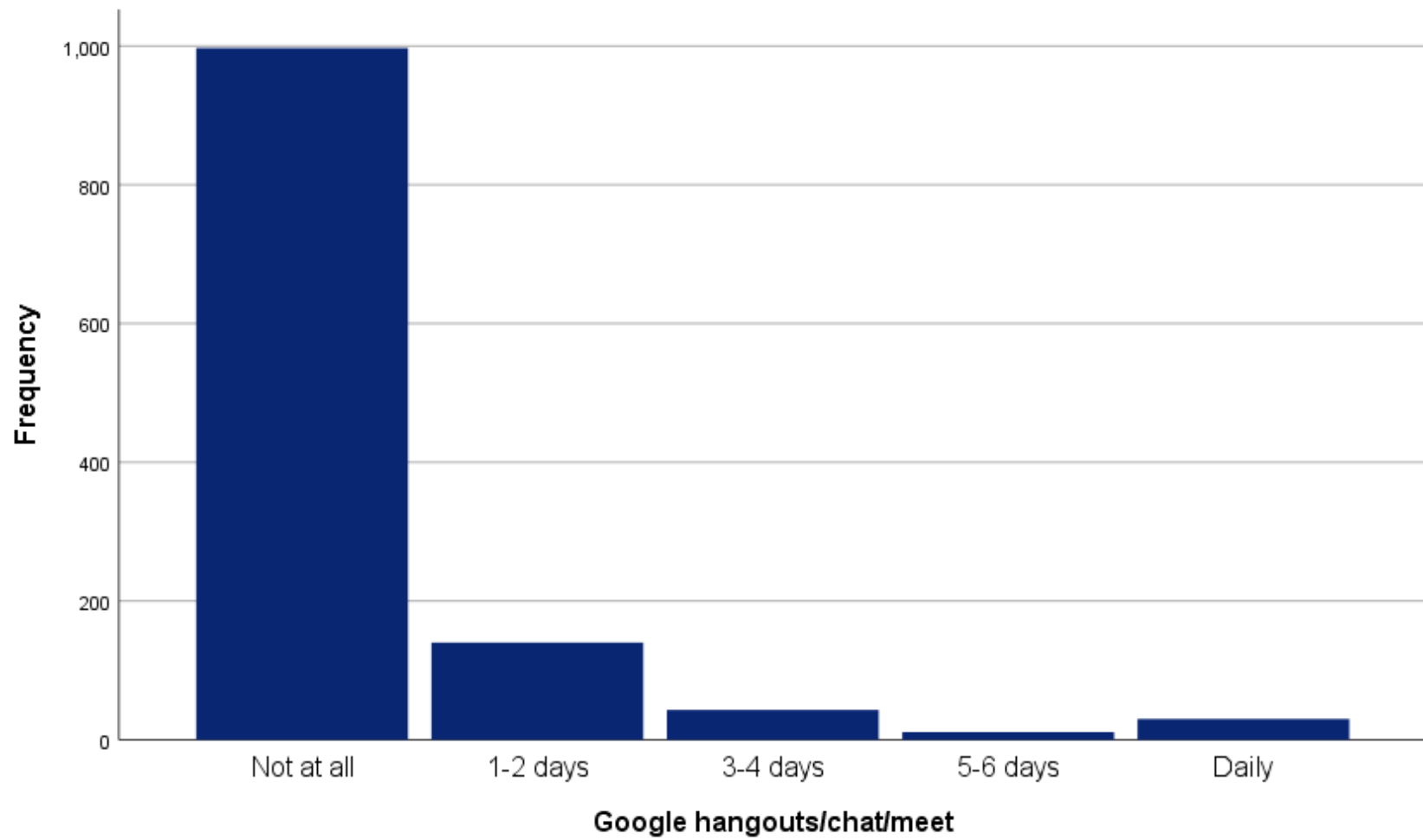
How many days a week do you use the following:

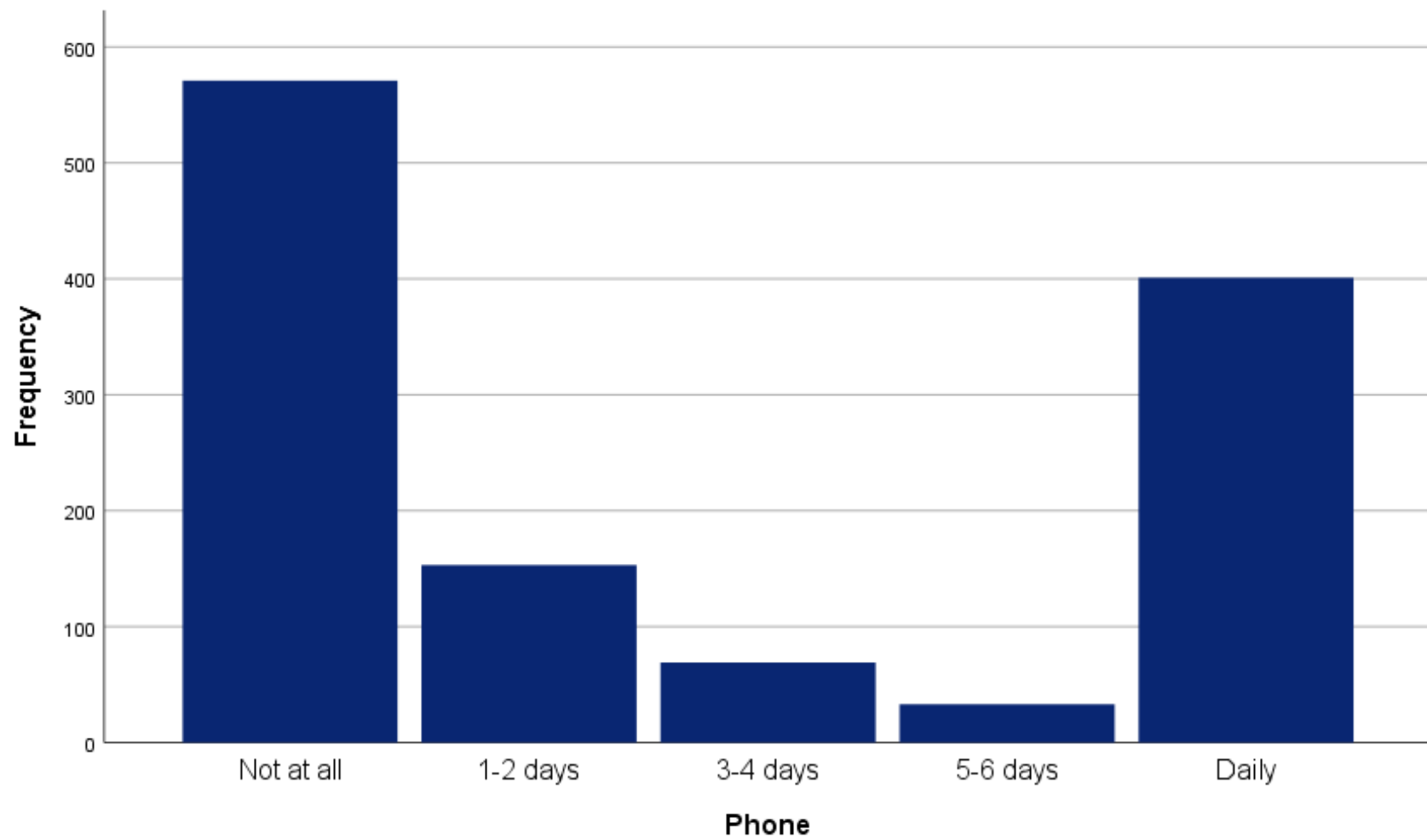


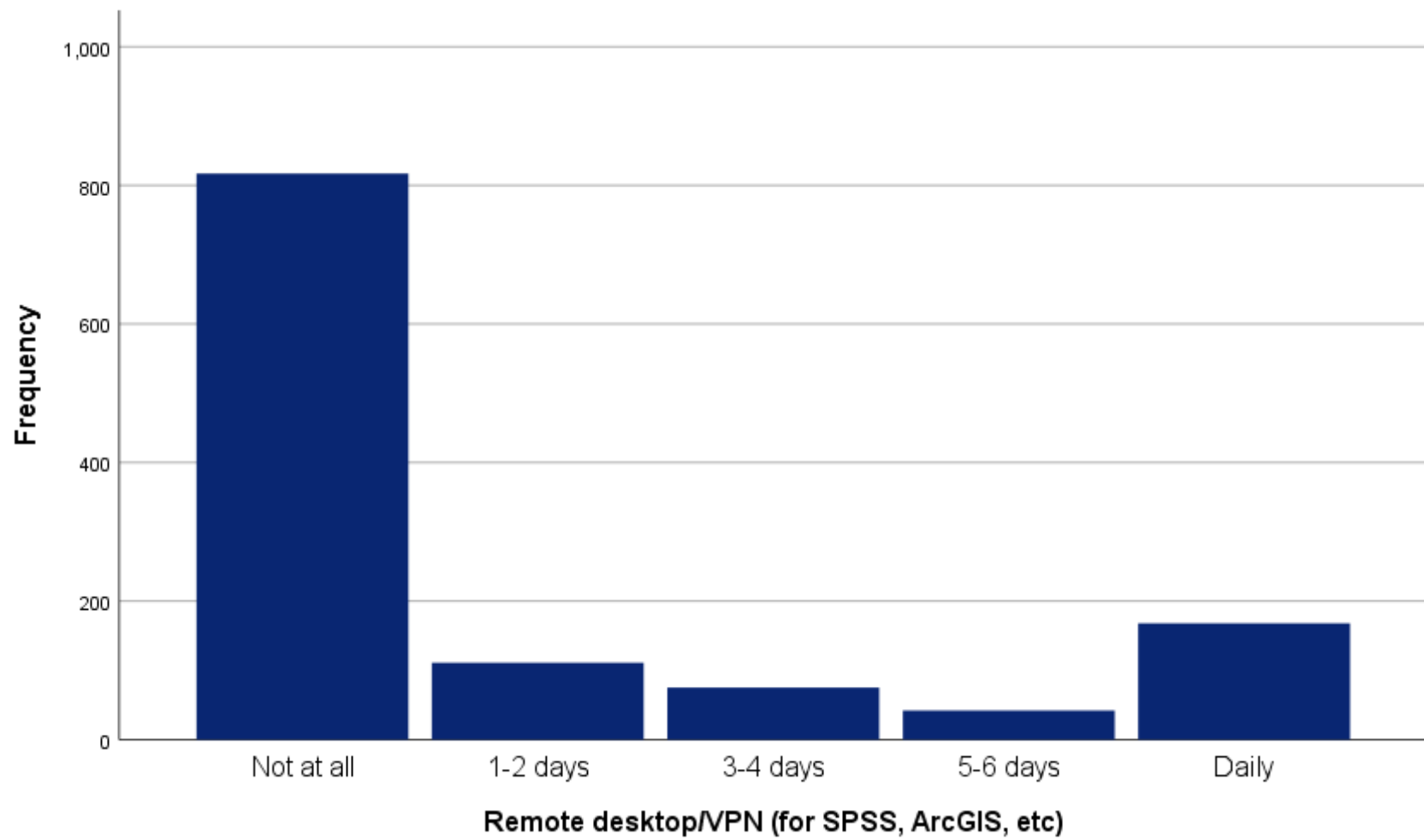


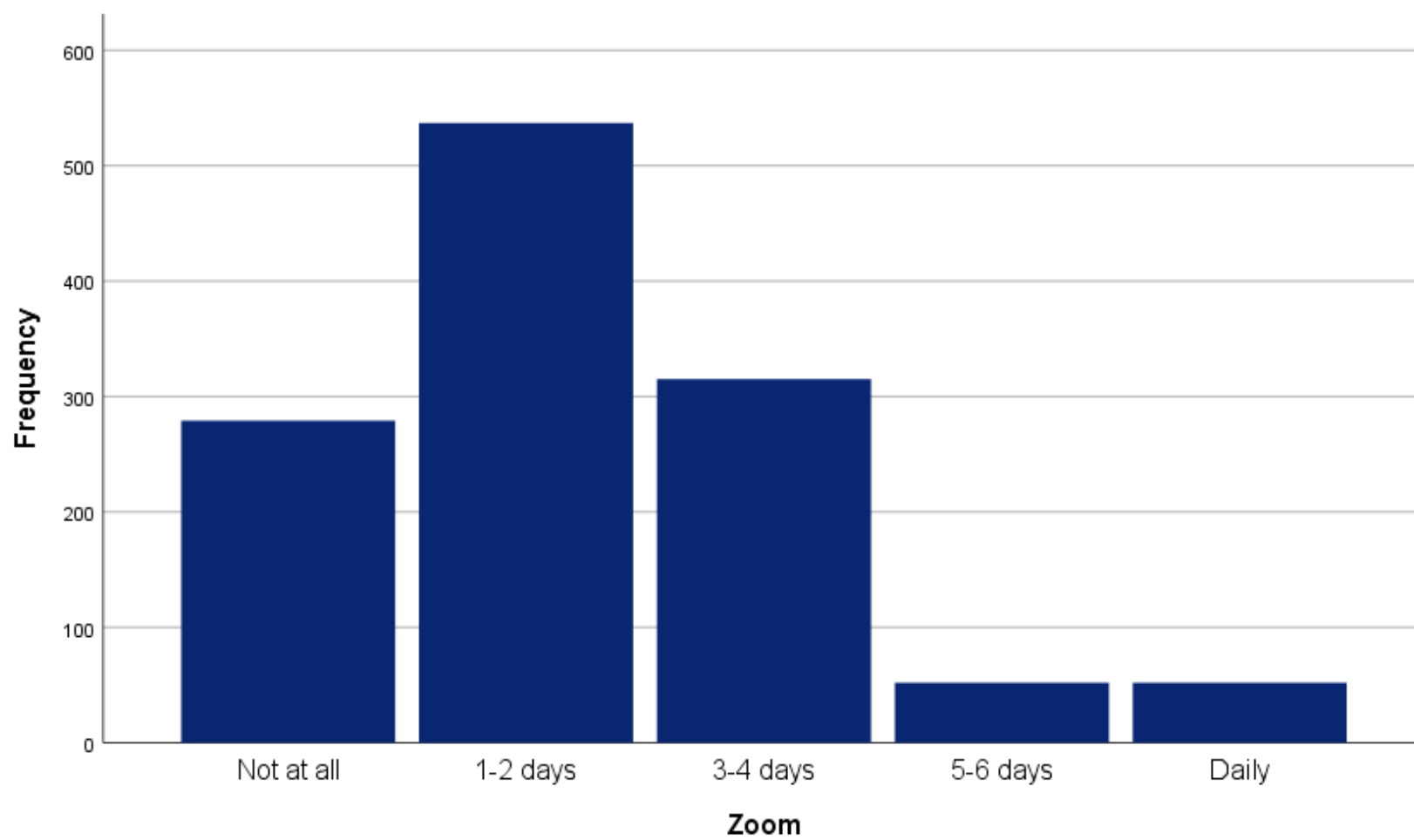








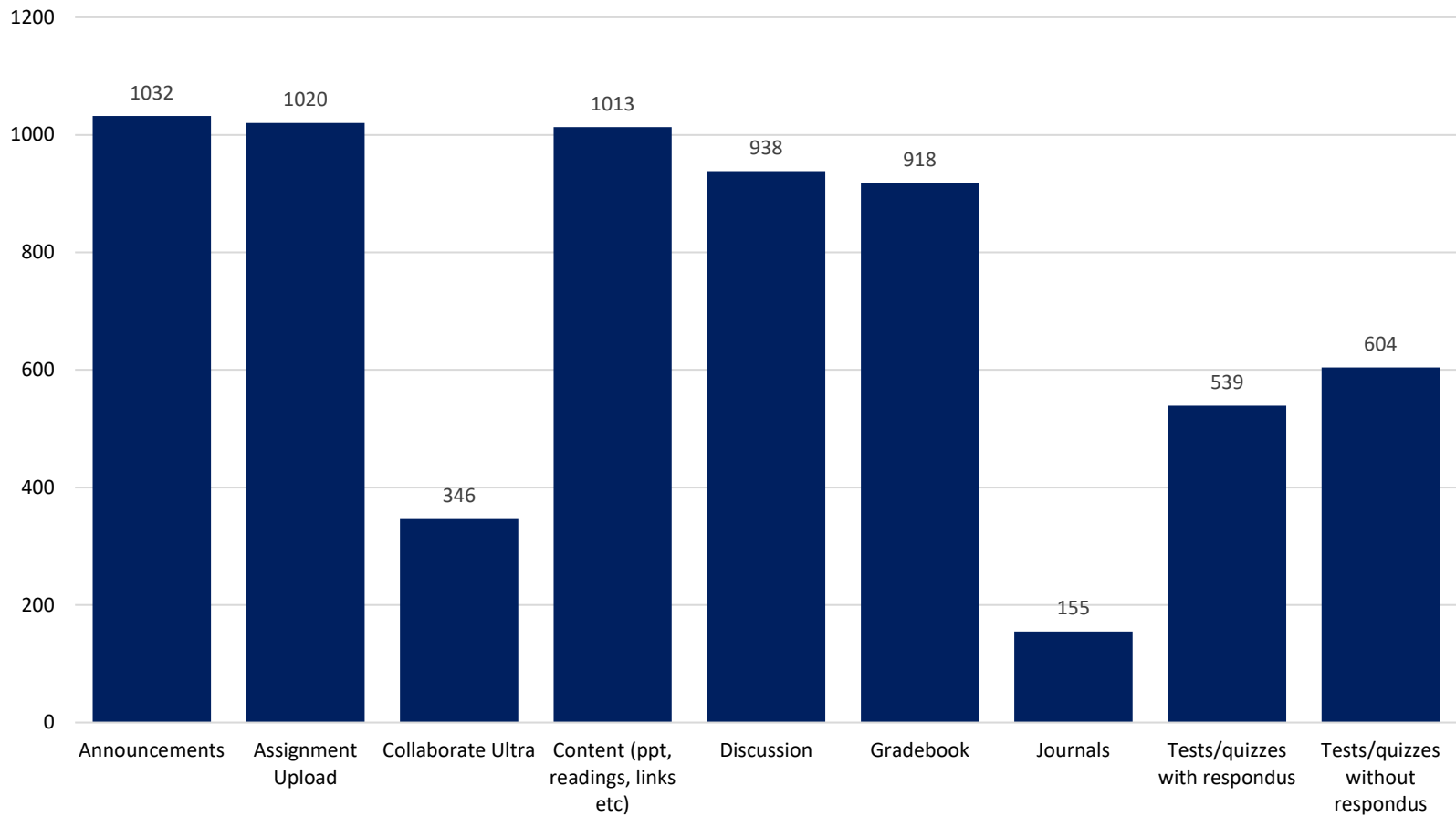




Other technologies not mentioned?

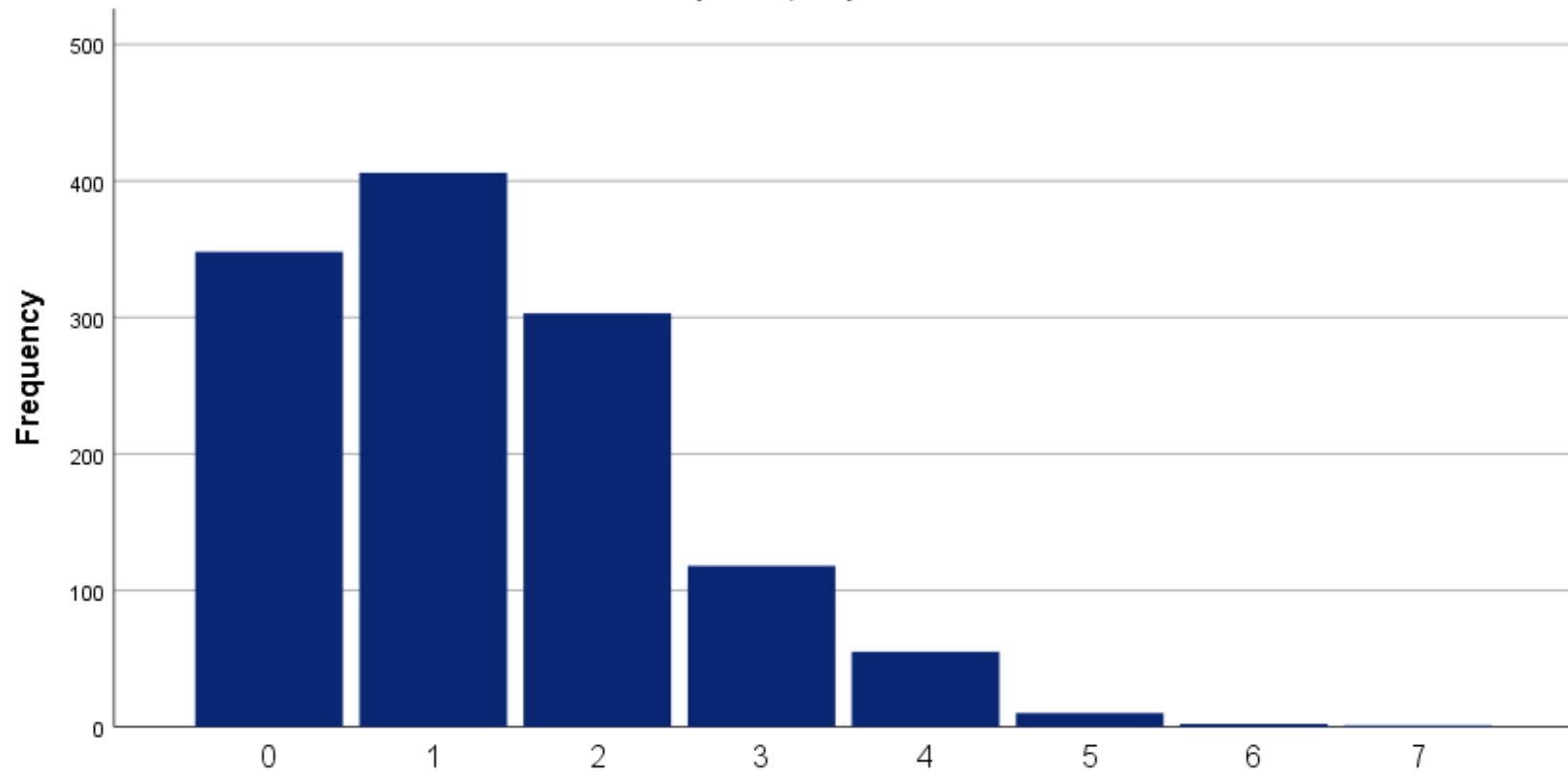
- Textbook Publisher Software/Websites
- Youtube
- Facebook
- Discord

What Bb Tools are you using?

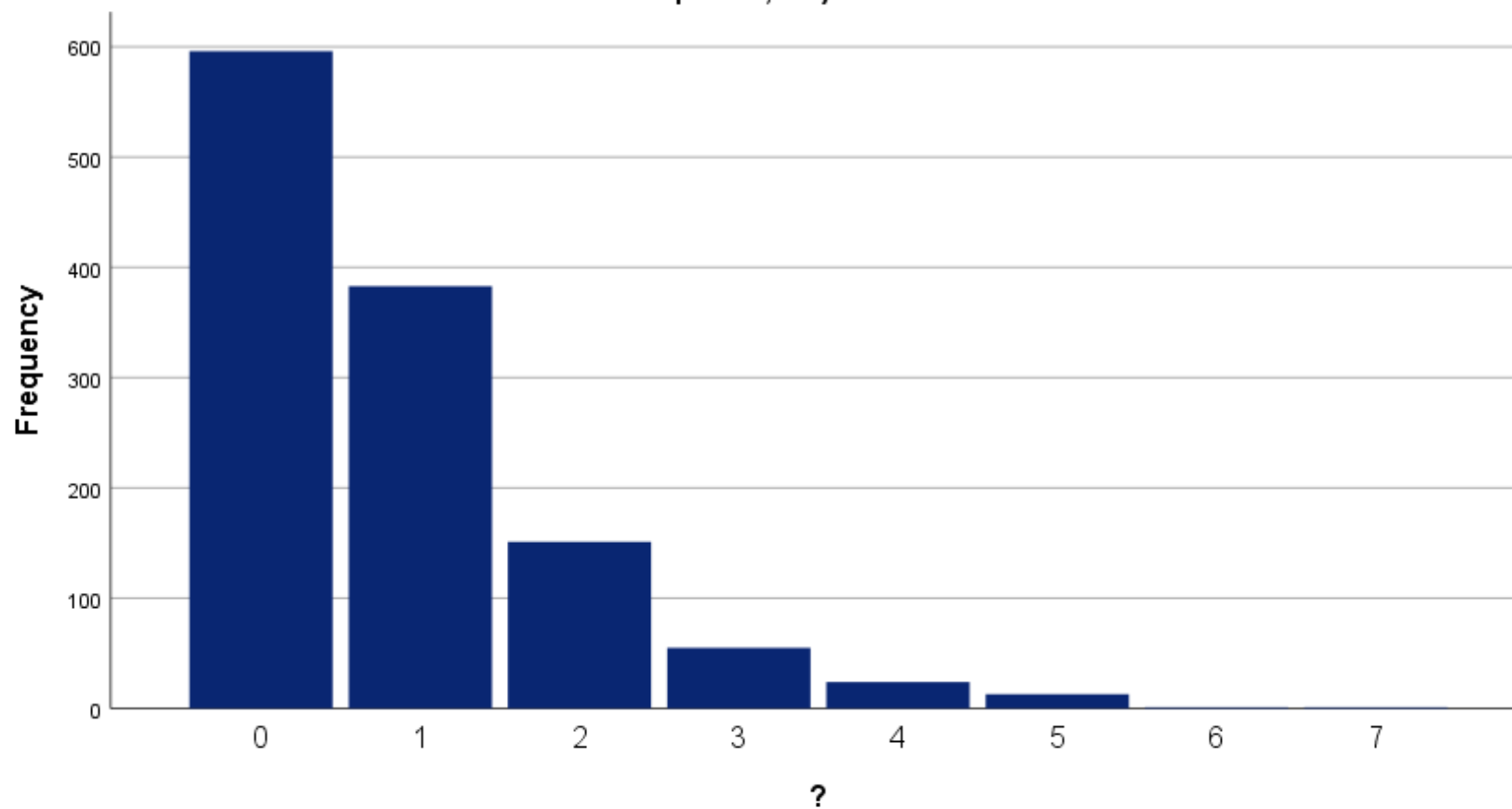


COURSE INFORMATION

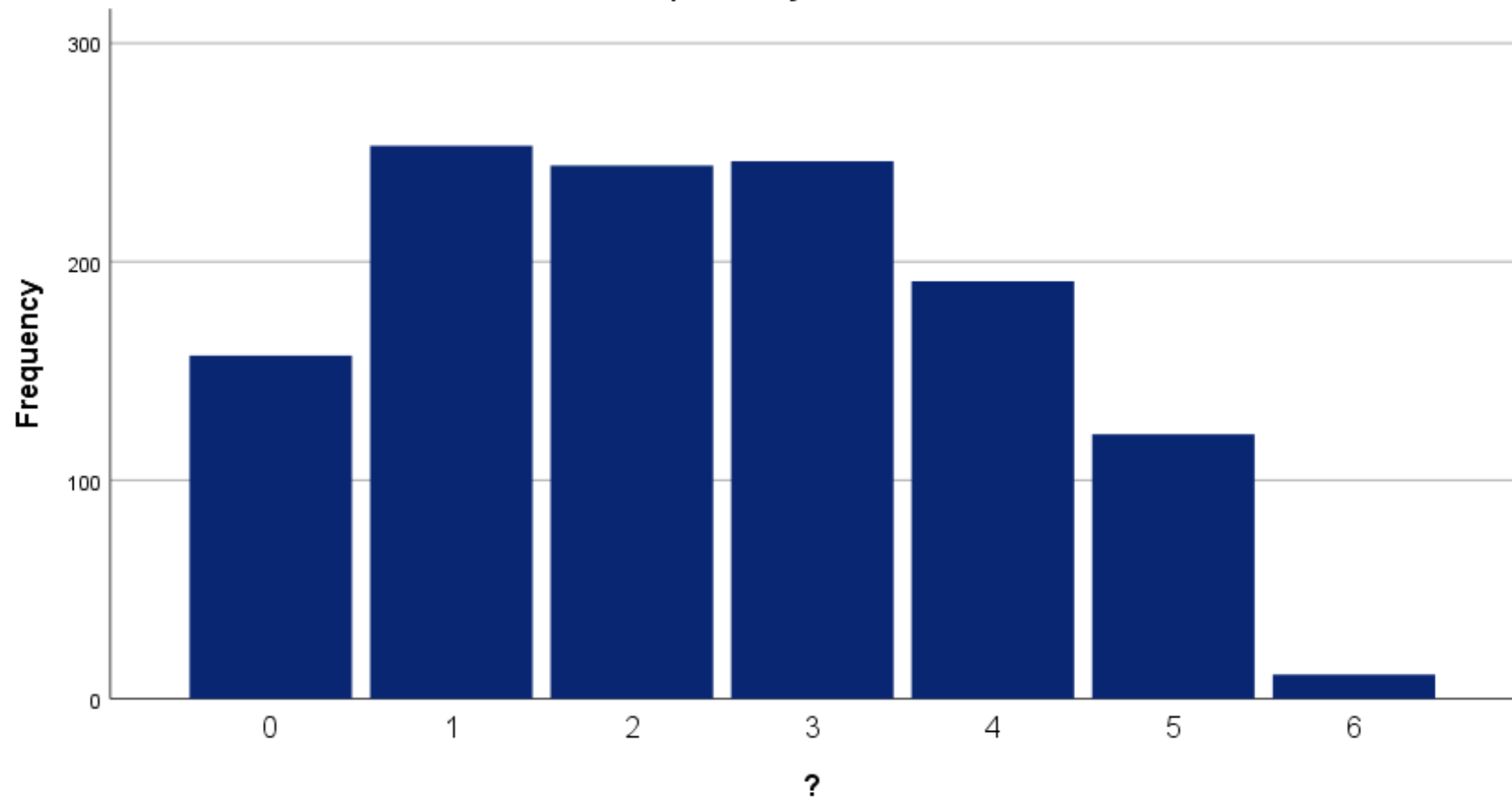
How many of your courses have a required specific meeting time for class (through video conferencing, phone, etc)?



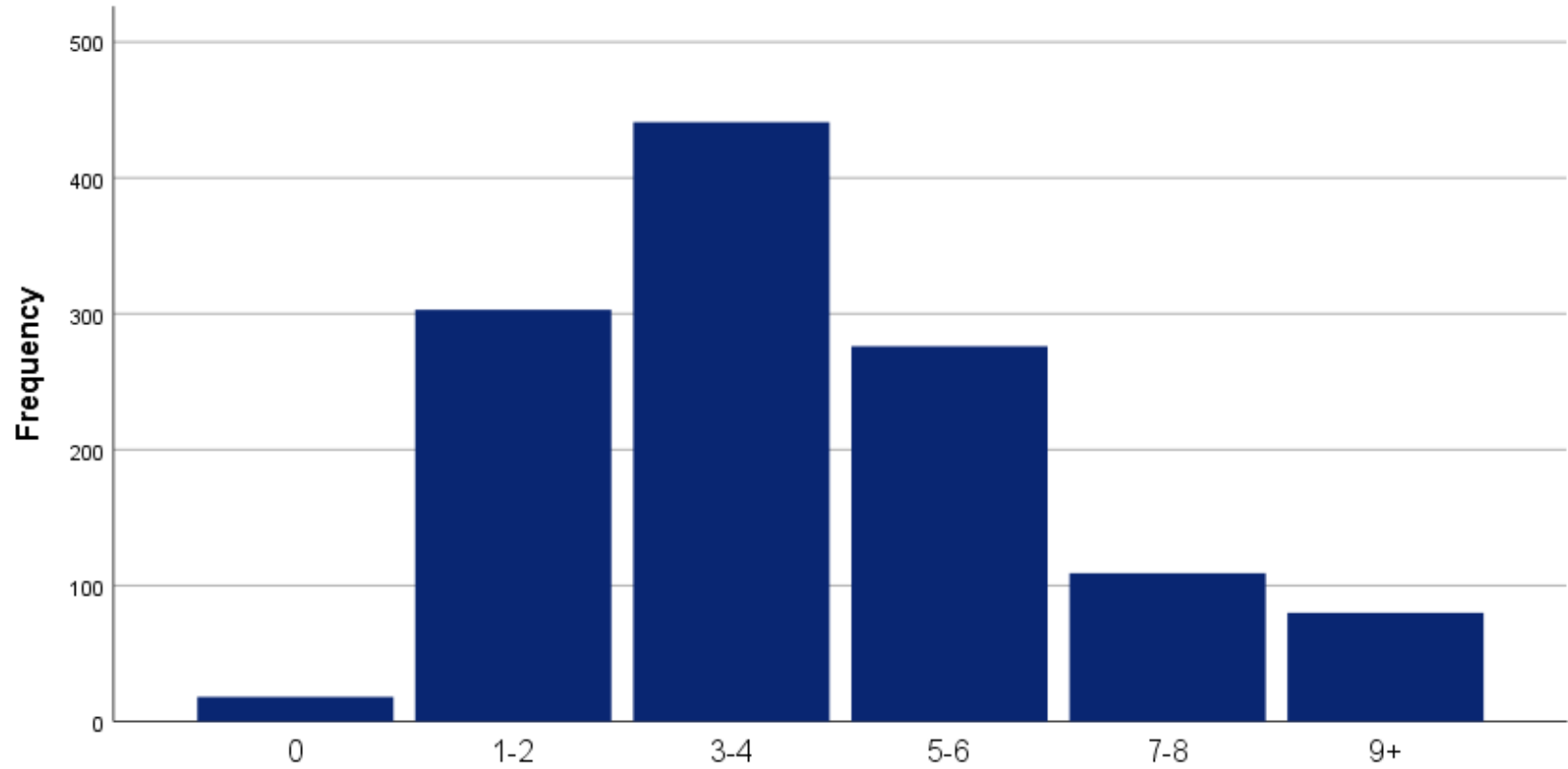
How many of your courses have an optional specific meeting time for class (through video conferencing, phone, etc)?



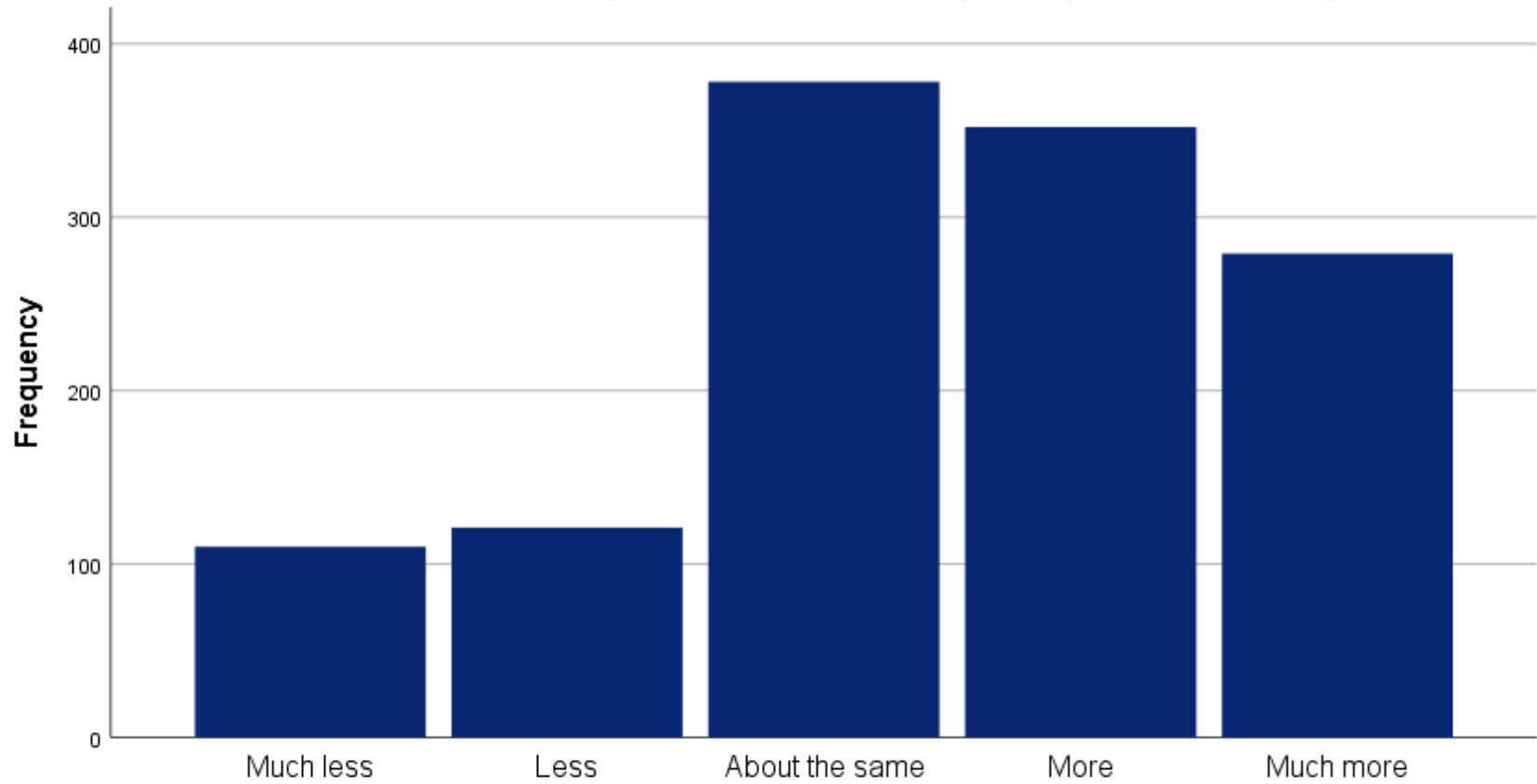
How many of your courses do not have a specific meeting time, but have assignments with deadlines for you to complete on your own?



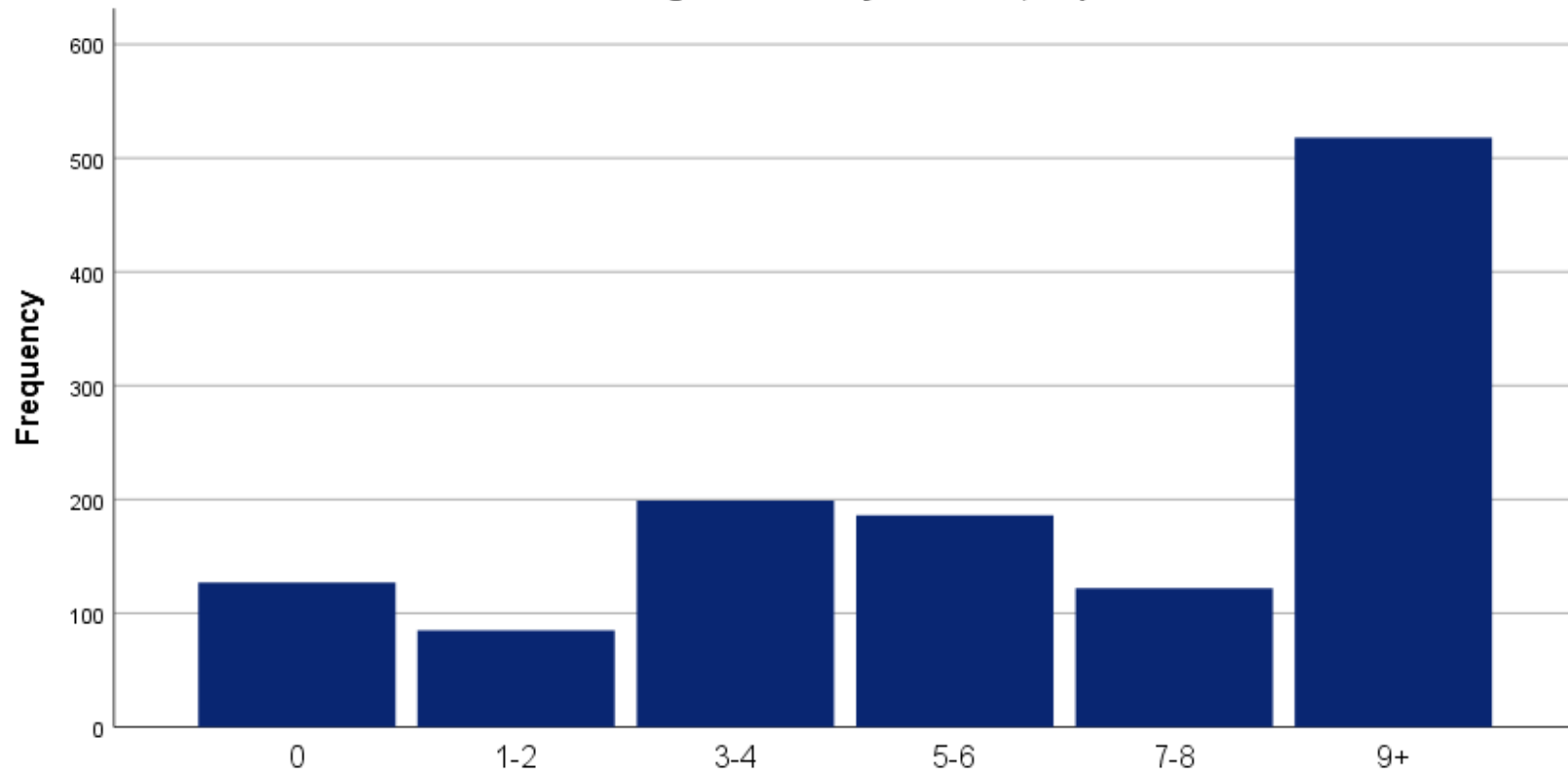
On average, how many hours a day are you spending on coursework and course preparation (reading, watching videos, etc) for each course?



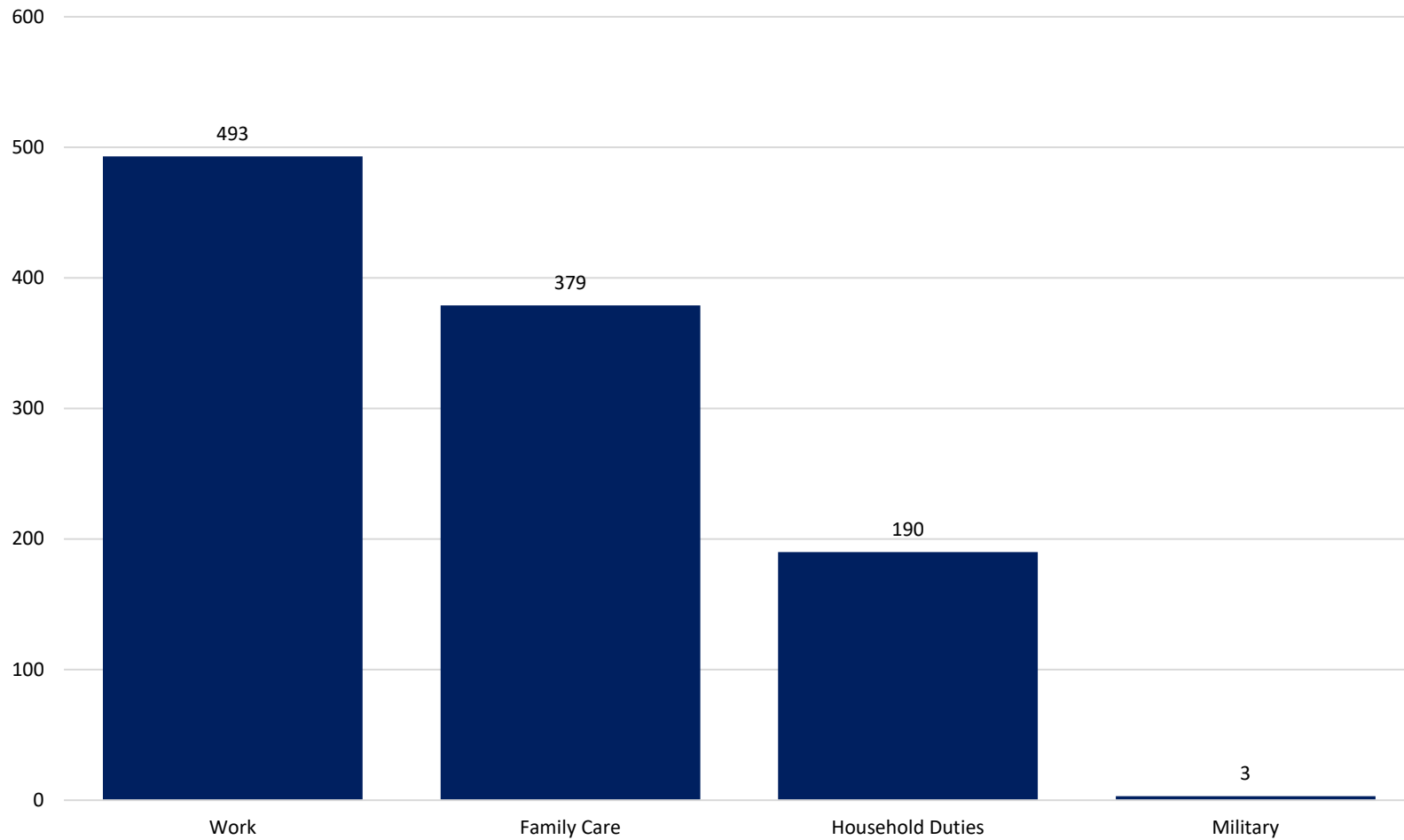
How does the amount of time spent on coursework compare to pre-remote learning?



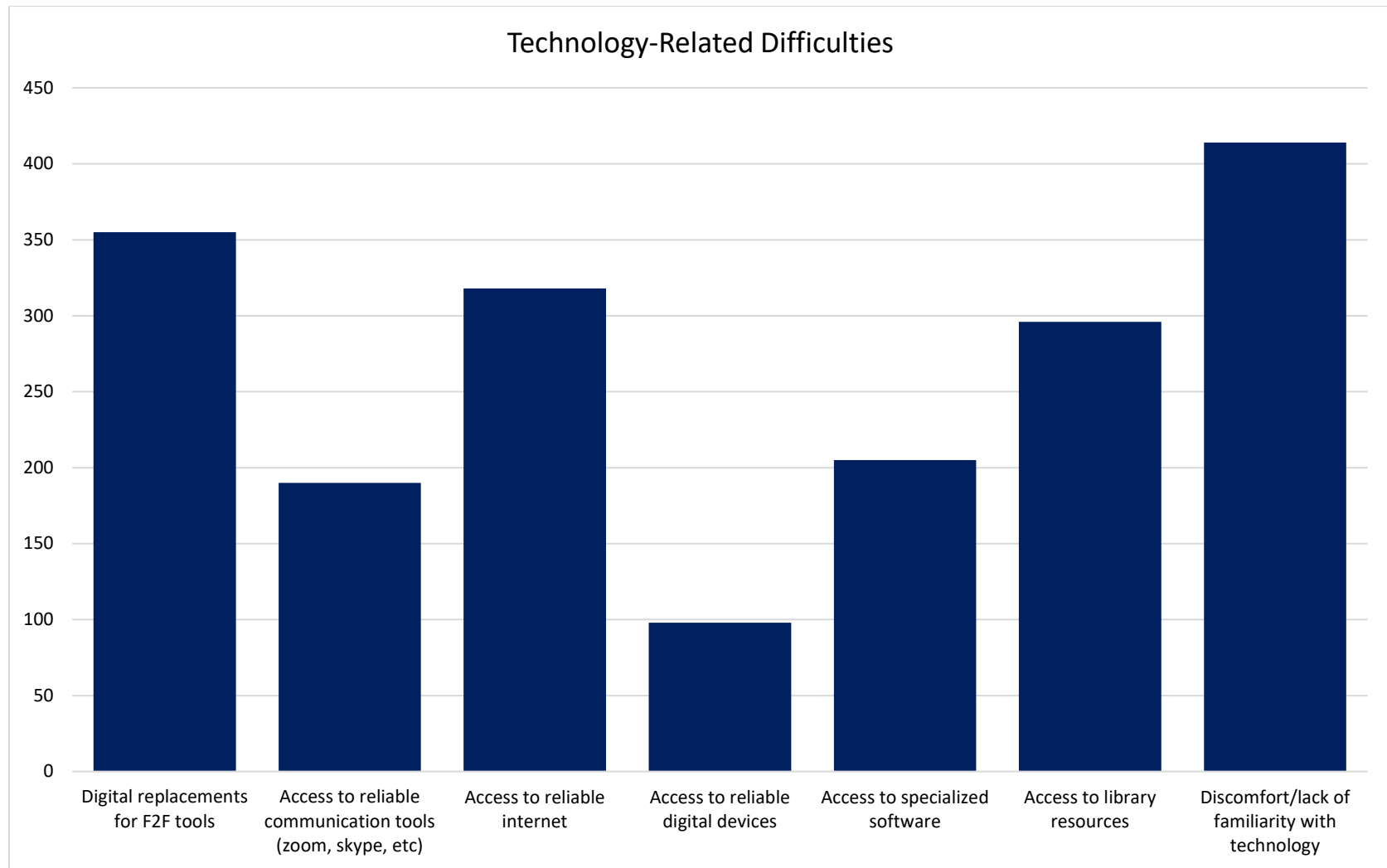
On average, how many hours a week are you spending on other responsibilities (work, taking care of children/siblings/other family members, etc)?



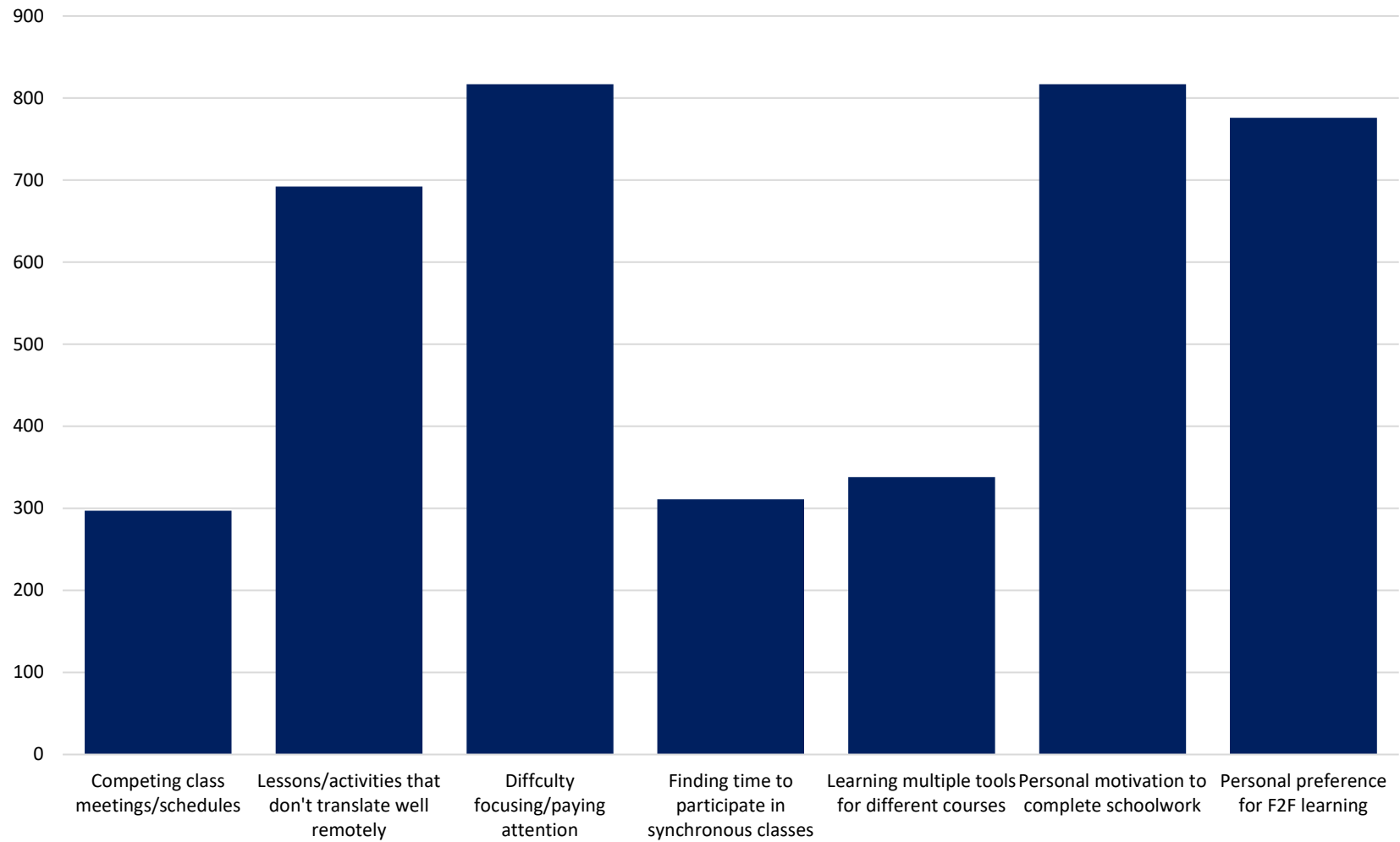
What other responsibilities do you have currently?



TRANSITION DIFFICULTIES



Learning-Related Difficulties



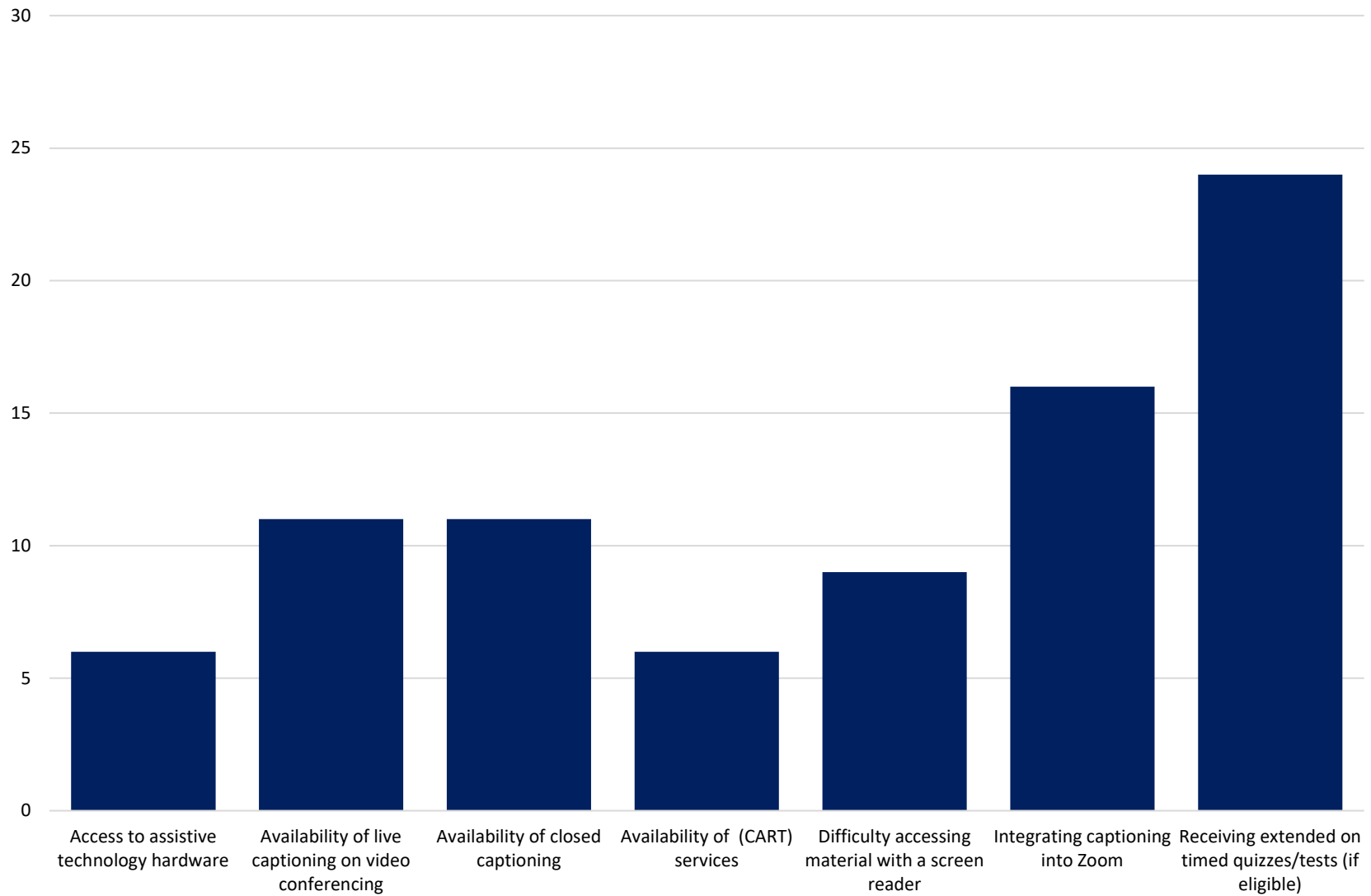
Other technology-related difficulties

Other learning-related difficulties

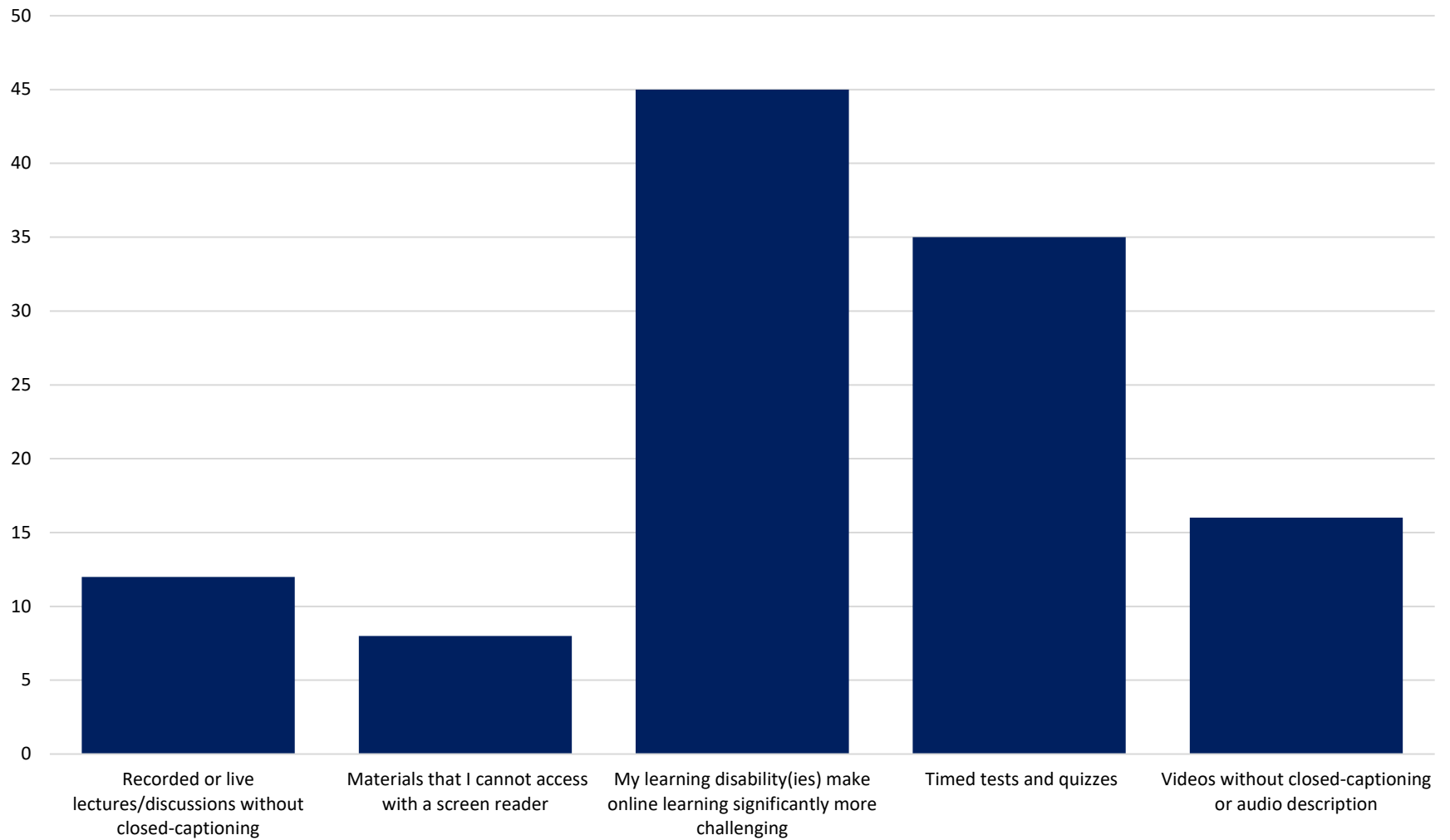
- Not having a quiet/private workspace to complete schoolwork
- General anxiety and stress affecting my ability to learn/pay attention
- Needing more communication and direction from instructors
- Needing more flexibility/later due dates to complete work

ACCESSABILITY DIFFICULTIES

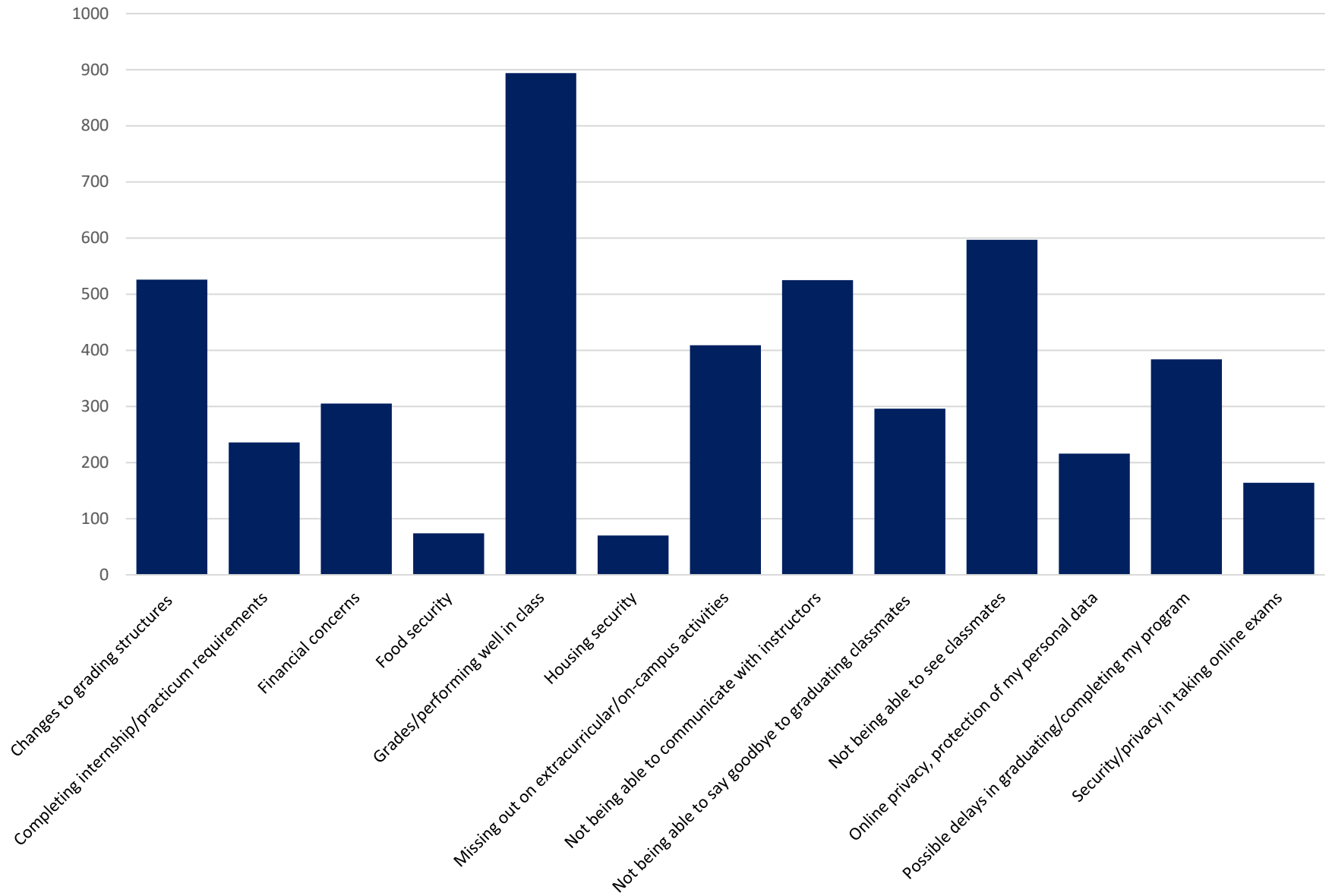
Technology-Related Accessibility Difficulties



Learning-Related Accessibility Difficulties



Biggest Concerns with Transition



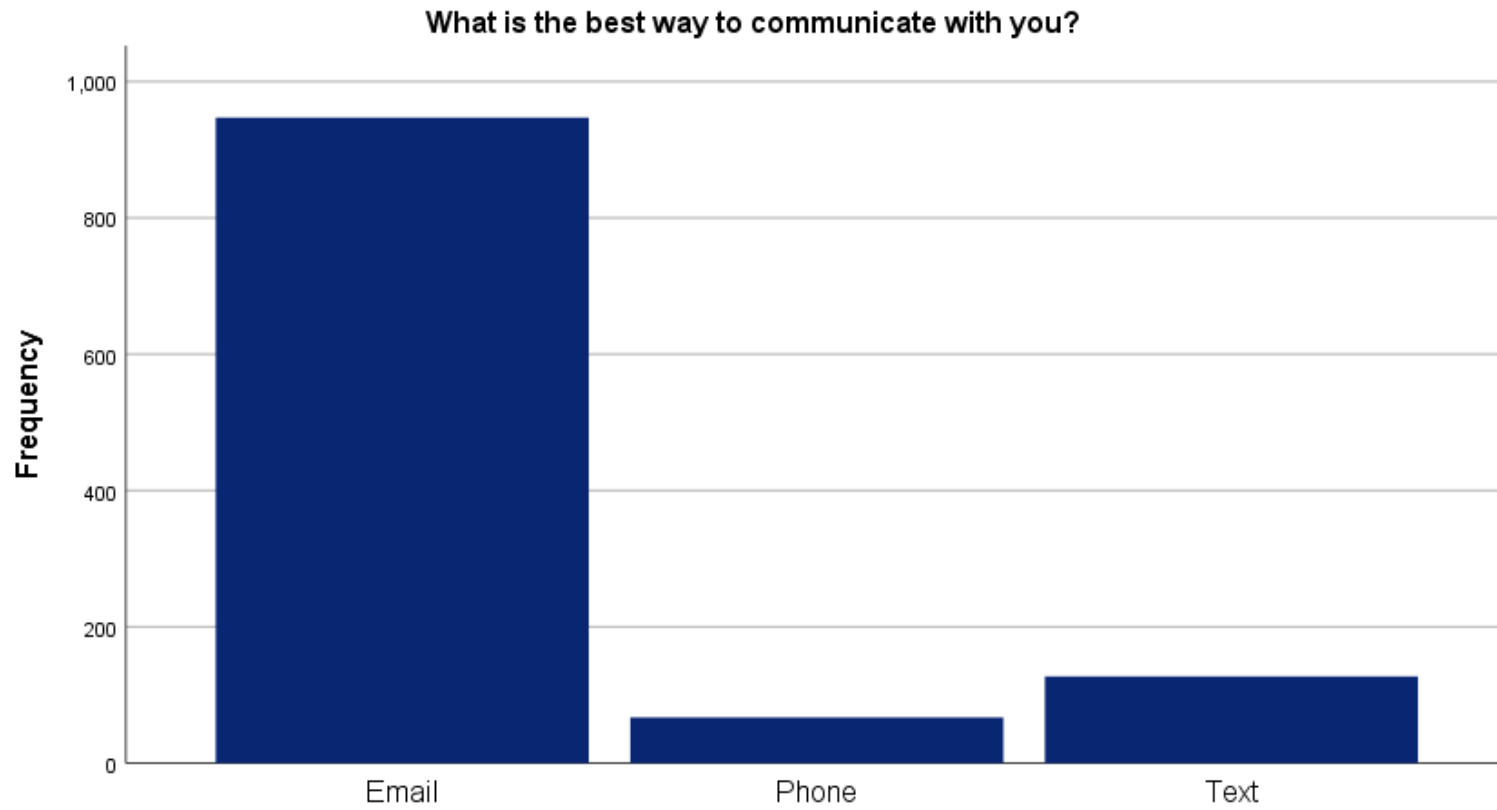
Other concerns:

- Worried about getting into grad school/getting a job in the fall
- Needing more instruction/lecture
- Instructors adding assignments

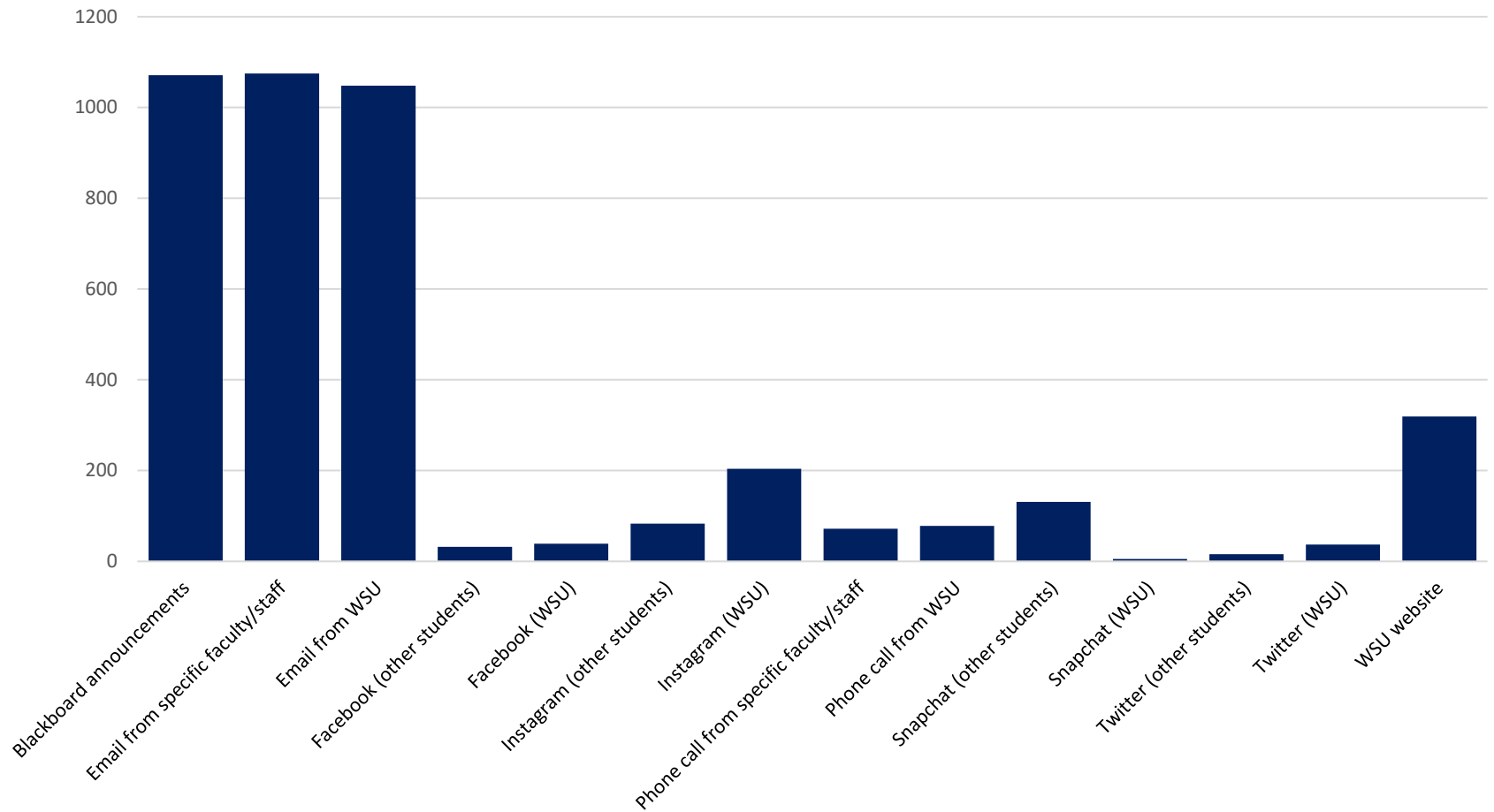
What is currently missing from your courses that could enhance your distance learning experience?

- Consistency across courses (all courses should use Bb and Zoom, not other platforms)
- More frequent and one on one communication from instructors
- More flexibility in due dates
- More instruction/lectures (even if pre-recorded)
- More opportunities to socialize with classmates
- Virtual labs to replace in-person lab requirements

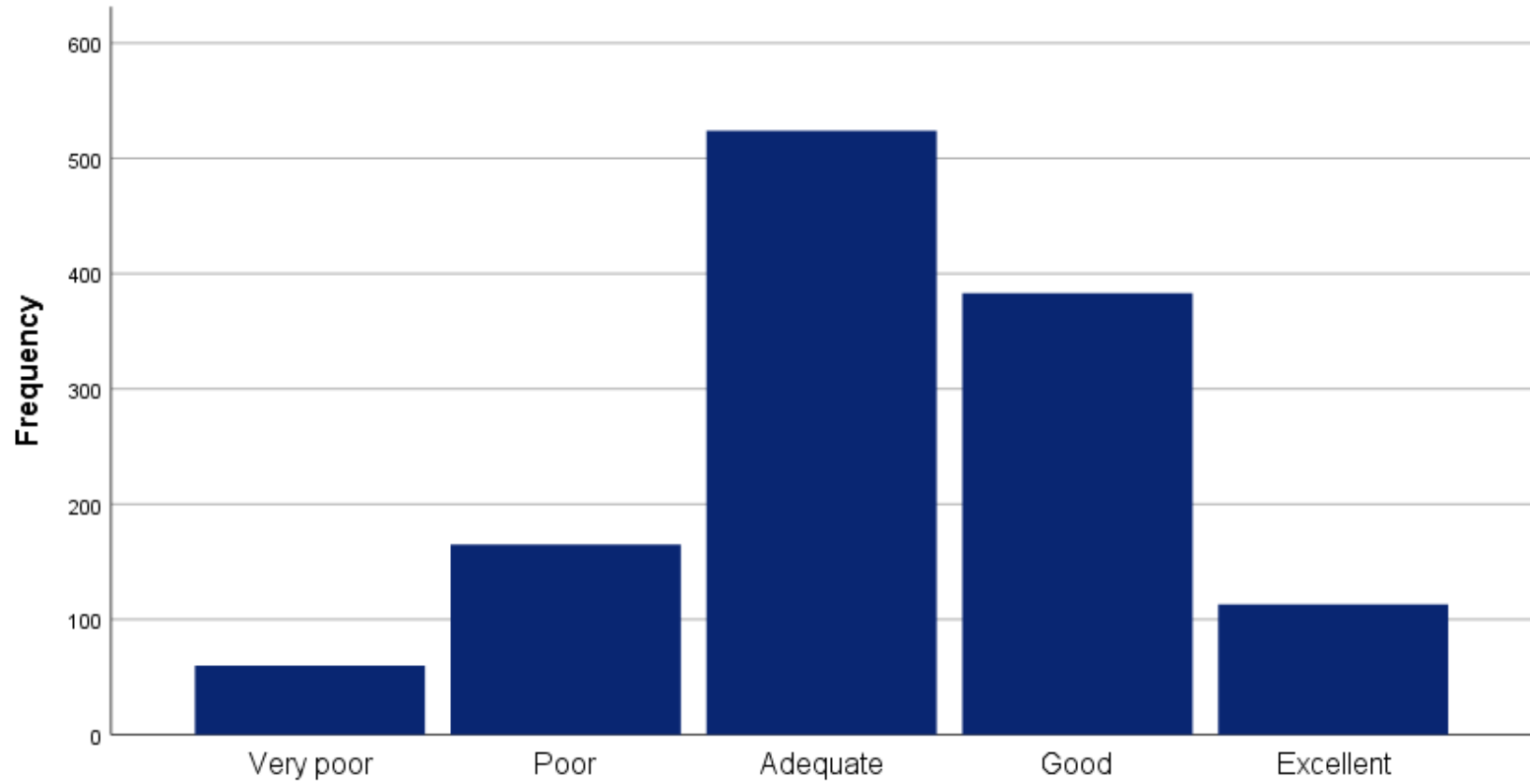
COMMUNICATION



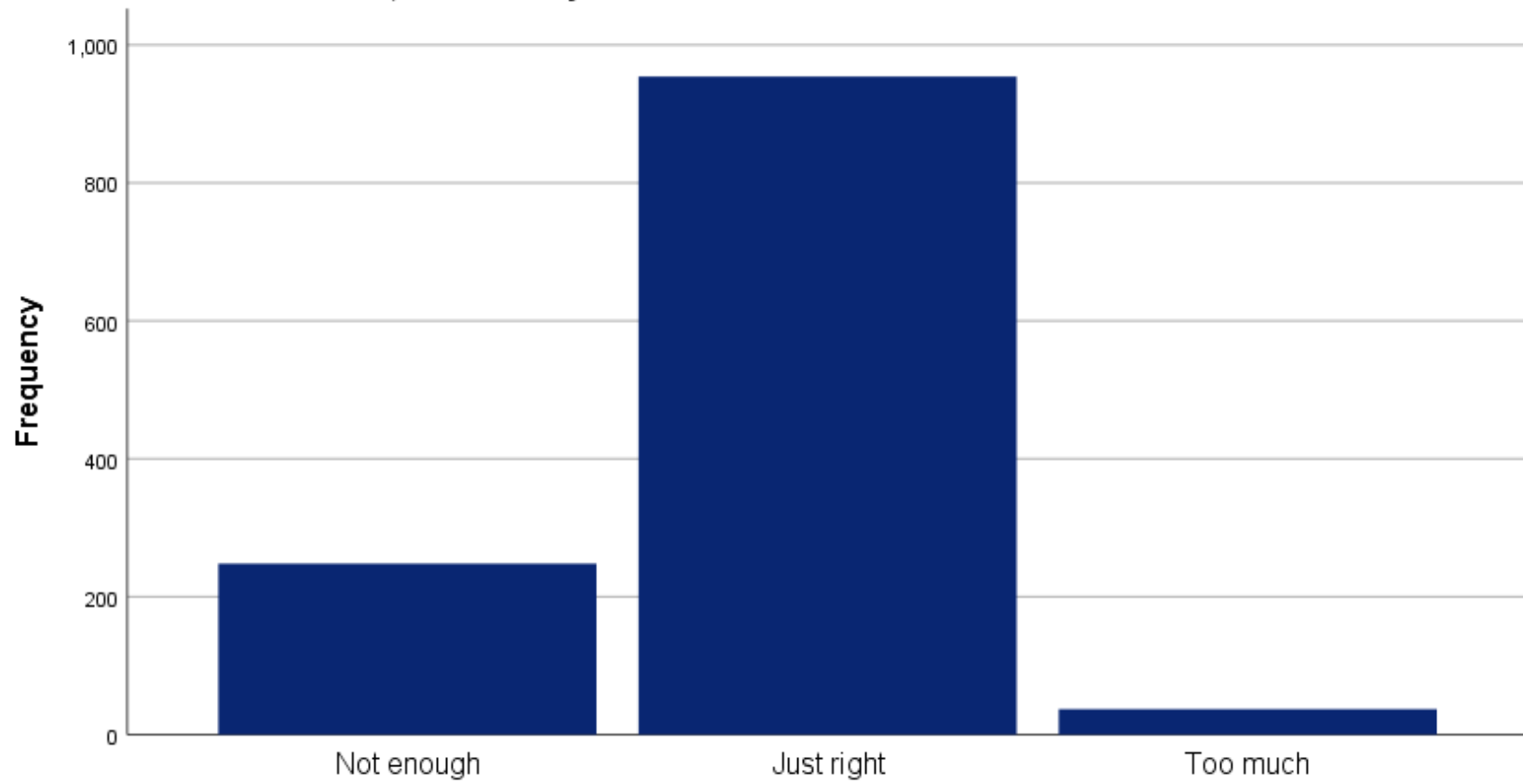
How are you getting information about WSU and your courses?



How would you rate WSU's transition to remote learning so far?



Overall, how would you rate the level of communication from WSU?



?

DIFFERENCES BETWEEN GROUPS

ALANA/White Students

- ALANA students more likely to report difficulties with not having reliable internet and/or devices, and finding time to participate in synchronous classes than white students
- ALANA students were less likely than white students to prefer face to face classes
- ALANA students were more concerned about changes in grading structures, financial concerns, food security, and housing security

Taken an online course before/not taken

- Students who have taken an online class before rated WSU's response higher than those who did not
- Students who have taken an online class before were less likely to report difficulties with personal motivation, paying attention to remote learning, and having a preference for face to face learning

Undergraduate/Graduate Students

- Graduate students rated WSU's response higher than undergraduates
- Graduate students were more likely to have taken an online course before
- Graduate students were less likely to use Blackboard, more likely to use google sheets/docs
- Graduate students were less likely to report having more work assigned
- Graduate students were more likely to have access to reliable internet and devices
- Graduate students were less likely to report discomfort with technology
- Graduate students were less likely in general to report any problems during the transition

Students with a Disability/no disability

- Students who reported having a disability rated WSU's response lower and reported wanting more communication from WSU than students who did not report a disability

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
HUMAN RESOURCES COMMITTEE MEETING

Tuesday, June 2, 2020

3-4 pm

REMOTE PARTICIPATION

Join Zoom Meeting

<https://worcester.zoom.us/j/93502874199>

Meeting ID: 935 0287 4199

Meeting Called By: Maryanne Hammond(Chair)

Minutes: Nikki Kapurch

Board Members: Maryanne Hammond(Chair); Karen LaFond; Dina Nichols; Marina Taylor

WSU Staff: Barry Maloney; Nikki Kapurch; Patrick Hare

AGENDA		
ITEM	RESPONSIBLE	ACTION
1. <i>Administrative Business</i> A. Call to Order	Maryanne Hammond	
2. <i>Human Resources Committee Report</i> A. 2020 self-evaluation* B. Strategic Plan Review Report 2015-2020* C. 2019 – 2020 WSU Climate Committee final report* D. 2020 WSU Capital Finance report*	Maryanne Hammond	A. Informational and Vote Required B. Informational C. Informational D. Informational
3. <i>Administrative Updates</i> A. Other Business	Maryanne Hammond	A. Informational
4. <i>Adjournment</i>	Maryanne Hammond	4. Vote Required

*Attachments

Barry M. Maloney

Self-Evaluation

Evaluation period July 2019 – June 2020

I write for the purpose of submitting my 2019 – 2020 Self-Evaluation. The information below is presented in the agreed upon format, is directly tied to my current Presidential goals and represents a summary of my performance since my last review of June 2019. Additionally, to assist the Board with its review, I have attached the following year-end reports: 2020 Strategic Planning Advisory Review Committee (SPARC) report pertaining to every division; WSU Climate Committee final report; and the 2020 Financial Planning update. The reports are included to provide greater detail for the work in which I have been engaged in the key areas of planning, budget and equity over the past academic year.

1. Retention and Student Success (Numeric rating 5)

Since my arrival, I have been clear that improving the University's retention is the most important issue facing Worcester State University. By Fall 2017, the University's six-year graduation rate achieved the prescribed segmental goal of 56% set by the Department of Higher Education. This year's average demonstrates a slight change from last year and represents a ten-point improvement since I arrived in 2011. As the development of WSU's next strategic plan continues, I will now turn my efforts towards making sure that our work is directly connected to the State's Equity Agenda and, more importantly, that no WSU student is left behind (**See Appendix 1 for ALANA student success information**).

Highlights:

- Increased 6-Year Graduation Rate to a university high of 57.6%.
- Increased 4-Year Graduation Rate to a university high of 46.7%.
- Completed 819 College Student Inventory surveys of the Fall 2019 new student cohort (a 93.3% completion rate). These survey responses are used to address students' retention risks.
- Secured \$484K in grants to support retention scholarships, student laptops, and texting system.
- After an initial dip in occupancy rates with the addition of Sheehan Hall, the residence halls have opened at full or close to full occupancy for the past three years. According to a report issued by the Massachusetts State College Building Authority in September 2019, only one other campus in the state university system can report a higher occupancy rate during this time period.
- WSU led the MASCAC with the highest number of MASCAC All Academic award winners (3.2 or higher) at 209 student athletes. Additionally, WSU had 15 out of 20 teams with a 3.0 grade point average or higher. This figure includes **ALL** 11 of the women's teams.
- Sustained Student Success Coaching for **ALL** new students in Fall 2019 (a university high).
- Installed Financial Aid Self-Service, the University's first online service system for financial aid.
- Created and deployed University's first early tuition and fee billing notification for Fall 2019.
- Established WSU as a destination campus for the Federal TEACH Grant program.
- Converted financial aid budgeting, tracking, and awarding to match needs of new online programs.
- Began the installation of the University's first SMS texting system and online chatbot system, called AdmitHub.
- Successful implementation of the CLSS course scheduling software allowing for a formatted approach to departmental course scheduling.

- Installed the University's first online transcript ordering service.
- Creation of online fillable forms for all Registrar processes.
- Hosted successful NEACAC college fair on September 29, 2019.
- Thirteen percent increase in early action applications for Fall 2020.
- Hosted 25 virtual accepted student events in April 2020 with 762 event registrations, and 480 event attendees during the COVID-19 pandemic.

Challenges/Opportunities:

- While the campus celebrated achieving the 56% graduation rate milestone, we must be dedicated towards our new goal – a 62% six-year graduation rate by 2020. The biggest challenge has always been, and will continue to be, getting the entire campus engaged and focused on this objective.
- Our recently formulated out-of-state scholarship incentive and international MOUs represent an opportunity for enrollment growth and tapping new markets. Our goal of 200 new out-of-state, including international, students enrolled at WSU by 2022 is ambitious.
- Continue to see improvement in recruitment, retention and graduation rate efforts of underrepresented groups. Industry-wide, this has proven to be a complex issue to address.

2. Academic Management and Leadership (Numeric rating 4)

The largest, and most significant, assessment work this past year was focused on what the University has dubbed the WSU Positioning Study. The findings are being reviewed, incorporating campus feedback obtained this past spring, and next steps for assessment and implementation are being developed. The University has collected feedback from those sessions, and next steps are underway. The findings are to be integrated as part of the University's upcoming strategic planning process.

Highlights:

- First Dean's Lecture awardees celebrated at November event: Dr. Karen Woods Weierman and Dr. Margarita Perez. This new award emphasizes career research and scholarly activity and joins continuing awards in teaching such as the George I. Alden Award and the Adjunct Faculty Teaching Awards.
- Launched the Master's of Public Management and Master's of Public Administration Policy in Fall of 2019 with a kickoff dinner and first enrollments.
- Submitted new majors in Theater, Art, and Political Science to the DHE; enrolled first students in minor and certificate program in Addiction Counseling.
- Launch of first two fully online Master's in Education programs with Academic Partnerships this May; Nursing scheduled for Fall 2020.
- Major Plus graduation requirement passed through governance after a year-long process. All students entering in Fall of 2021 will be required to have a major plus a minor or a double major to graduate.
- Improvements to the academic minors as part of the RASE plan passed through governance after a year-long process.
- LASC and Diversity Across the Curriculum components of the RASE plan currently in governance.

- New Minor in Civic Engagement approved by the All University Committee, which will be hosted in the Political Science Department.
- Summer academic calendar altered to include both full semester and concentrated semester terms of 14 and 7 weeks, respectively.
- Academic Research Fellow position initiated, with Dr. Doug Kowalewski, recently returned from an NSF fellowship, to aid faculty in navigating research infrastructure at WSU.
- Review of the internship process which included: site evaluations, credit determination and grading.
- Early College expansion with Worcester High Schools, Springfield, and Winchester.
- Academic leadership of the Strategic Planning Process (co-chairs Julie Frechette and Edgar Moros, Sarah Strout in Institutional Research) fostered active participation and vetting at each stage of the process, even as the shift to remote modes occurred this spring.
- WSU was awarded \$100,000 to build an Equity & Engagement Consortium of faculty leaders and administrators across the state university system to create campus cultures, recognize the new contract language and support community engaged scholarship. The initial teams of this project included Fitchburg State, Salem State, and Worcester State with a primary goal to gather research and resources to highlight ongoing community engaged scholarship and how that influences equity and diversity.

Challenges/Opportunities:

- Submitted a letter of intent to the Department of Higher Education in 2108 proposing that WSU offer its first clinical doctorate degree in Occupational Therapy. To date, the process has not moved significantly. The WSU BOT approved the proposal in September 2019 and then we will pursue a formal program submission to BHE for Fall 2020.
- On the horizon are new majors in political science, art, and theatre, as well as a minor in public history and a translation track within Spanish.
- Training has begun so we can begin implementation of two fully online graduate programs to increase the flexibility of course offerings and increase revenue to the University.
- To better realize new revenue streams, as well augment our faculty and student research opportunities, we will develop a cohesive campus-wide strategy to support faculty and student research.
- We seek to fund the International Education program coordinator jointly with other Massachusetts State Universities. This should result in growth in enrollment for that sector of the University's student population.

3. Assessment (Numeric rating 4)

The year began with the formal kickoff of our efforts to develop the 2020 – 2025 WSU Strategic Plan. A steering committee Co-Chaired by Dr. Julie Frechette (Communication) and Dr. Edgar Moros (DGCE), led a group of faculty, administrator and Board members on a process to develop a new five-year plan for the University. The committee's work has been presented, as prescribed by DHE, through the state's strategic planning process and has included multiple meetings and forums with the entire campus community.

We continued the assessment work of our current Strategic Plan with the assistance of a 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, meets with divisional and department heads throughout the year to assess progress towards divisional action steps and university goals. The group's final report is included with this packet.

Worcester State University's reaccreditation process with the New England Commission of Higher Education (NECHE, formerly NEASC) must begin soon. Broad campus participation in a self-study will kick off in Fall 2020 with the formation of a steering committee, organized around NECHE's nine standards for accreditation: mission and purposes; planning and evaluation; organization and governance; the academic program; students; teaching, learning, and scholarship; institutional resources; educational effectiveness; and integrity, transparency, and public disclosure. (Read more here: <https://www.neche.org/resources/standards-for-accreditation/>.) We will be examining progress the campus has made on these standards since 2012. This study would set the stage for NECHE's 2022 Comprehensive Visit.

To prepare for this fall work, I am pleased to announce that Dr. Emily Soltano, director of the Center for Teaching and Learning and Psychology faculty member, and Dr. Noah Dion, director of Academic Affairs support, will co-chair the NECHE Self-Study Steering Committee.

Highlights:

- Engaged with Vantage Technologies to review Instructional Technology's organization, security, classroom technology and delivery of support. Classroom technology was assessed and prototype technology-enhanced classrooms developed. Current pandemic crisis furthered our assessment of the need for hovercam technology for more than the originally planned five classroom conversion this summer. IT engaged the campus throughout the year on increased threats to security of data with daily reminders, anonymous testing of phishing attempts, and continued reporting to the campus of new potential threats.
- Research infrastructure was assessed with consultant Copley Raff, Inc. to review grants and sponsored projects administration and processes at WSU. Consultant report, when finalized, will provide a blueprint for improvement.

Challenges/Opportunities:

- Completion and implementation of the 2020 -2025 WSU Strategic Plan.
- Launch, Fall of 2020, Worcester State University's reaccreditation process with the New England Commission of Higher Education.

4. Infrastructure (Numeric rating 4)

During the evaluation period, and for several years to come, I continue to focus my attention on the May Street Building site (former Temple Emanuel property). We developed usage plans and an initial architectural design for the property with a funding strategy to follow in FY21. However, because of the COVID pandemic, in April I informed the Board of Trustees and the WSU Foundation that the project needed to be put on hold until at least the fall. Additionally, I worked with state officials – in Administration and Finance and DCAMM – to develop the state's new funding strategies for capital planning and deferred maintenance.

Highlights:

- Completed study for Chandler Village complex weighing renewal vs. replacement of the residence hall.
- Completed first phase of programming study for May Street Building. Study began in March 2019 and was completed December 2019. The study included an evaluation of campus programming in addition to building due diligence, site options, and initial cost estimates.
- Completed first phase of programming study for replacement/refurbishment of LRC and Student Center with DCAMM and A&E team.
- Continued to implement campus-wide Chemical Hygiene Plan as well as established a safety committee comprised of Science Department faculty, Department Chairs, and Deans of both Schools.
- Completed \$7.9 million of capital and deferred maintenance projects including:
 - Refurbishment of Coughlin Field,
 - Campus paving of multiple roadways and parking lots including accessibility upgrades,
 - Refurbished all public bathrooms in the Ghosh Science & Technology Center,
 - Phase II of the Ghosh Roof Top Unit replacement project,
 - Various upgrades to campus mechanical equipment,
 - Replacement of Dowden Hall elevators, and
 - Construction of Pavilion at 535 Chandler Street.

Challenges/Opportunities:

- COVID-19.
- Creation of a comprehensive Sustainability Plan.
- Finalizing development of funding strategies to implement May Street renovations and campus classroom technology work.

5. Fiscal Management and Budgeting (Numeric rating 5)

The University continues to be a financially healthy organization. With strong reserves, solid leadership from Vice President Kathleen Eichelroth, solid enrollment, and a good market position, Worcester State continues to be a viable, thriving 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 online business plan supporting two fully online Master's programs were both priorities in the past year.

Highlights:

- We were able to reserve \$1.2 million dollars to support future capital investment.
- We balanced the University budget and had another successful, clean audit for both the University and the Foundation.
- We maintained the University's "A" bond rating with Standard & Poor's.
- Set up financials for accelerated online programs.
- Average of 61% reduction in non-pay registration deletes for 2019-2020 academic year.
- In terms of Conference Service (CESO) revenue, the University was on its way towards the strongest year ever. Unfortunately, the COVID disruption significantly cut our ability to host events on the campus, beginning in March.

The following represents the work put in by CESO of the past two fiscal years:

FY 19:

- Gross - \$708,420.00
- Net - \$180,787.00

FY20:

- Gross - \$540,231.50 (without COVID cancellations - \$862,484.50).
- Net - \$89,274 (approximately \$215K without COVID cancellations).

In summary, we were having a very successful year up until March 13 - despite losing a major revenue source – for the Coughlin Field renovation -- during peak rental season.

Challenges/Opportunities include:

- Develop a COVID-19 budget response and management strategy
- Developing a cost/benefit grid to assess the true cost of all academic programs;
- Developing a financing plan for the renovations of the May Street building.

6. Communication (Numeric rating 4)

It was clear, starting in my first year, 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. The expectation was amplified with the arrival of COVID pandemic.

Highlights:

- I continued a monthly forum - **Campus Conversations** - for faculty, staff and students to discuss pertinent internal and external topics directly with the President.
- Launched multi-channel COVID-19 response awareness campaign for counseling/mental health & wellness: social media, web graphics, page updates, etc.
- Produced a video message to alumni. The message was focused on student hardships to encourage giving. Alumni were targeted first, then the message was sent to faculty and staff, and to students.
- This was the sixth year of our neighborhood council, through which we discuss neighborhood issues and civic engagement opportunities.
- Worcester State Magazines sent to 11,500 homes for the fall and 13,000 homes for the spring and posted online (magazine.worcester.edu).
- Collaboration between Marketing and Counseling Center to begin to market emotional wellbeing and wellness support at WSU both internally and externally; i.e. social media campaigns, Spring 2020 Worcester State Magazine article, Website wellness landing page development in progress.
- Conducted a new digital recruitment campaign for winter/spring with 19 million impressions, 150,000 clicks, and 352 applications started with a 61% lower cost per conversion than education benchmarks.
- We continued to use the President's home for University gatherings and related business activities; this year we held five such events.

- Completed first phase of comprehensive update / overhaul to brand guidelines and writing style guide.
- Reactivated ad hoc Social Media Administrators group with 92% attendance rate.
- Created and implemented a “Non-Academic Color/BW Print and Reprint Policy,” which has reduced the amount of unnecessary color copies by 61,807 copies for a total savings to Worcester State of \$3,708.42.

Challenges/Opportunities:

- COVID-19 response messaging.
- Develop a funding strategy and create a WSU webpage.
- We seek more exposure in all forms of media – social, web, print, etc.

7. Administrative Management and Leadership (Numeric rating 4)

My leadership style is one that I would call *participatory*: it is my goal to involve my colleagues directly in the decisions that affect this institution on a daily basis. No longer will choices be made, solely, using a top-down approach. Decisions will be crafted in any direction necessary to achieve successful outcomes. During the past year, those involved broader actions and decisions – examples: expansion of the Cabinet composition with the addition of two faculty members, more regularized meetings with students, academic department Chairs and Union Leadership – all have been aided in building campus-wide relationships and achieving better overall decision making. All the while reminding myself and other senior leaders that those involved will be held accountable for their work. Additionally, I have set an expectation that all members of the senior leadership will engage in annual professional development activities.

Highlights:

- Created the COVID-19 Response Team (now known as the WSU Safe Return Team) to play a significant role in setting direction for WSU’s pandemic emergency response strategy.
- We provided several professional development trainings for campus leadership, including annual campus retreats for Cabinet and Vice Presidents groups, and a Board of Trustee retreat.
- Completed Facilities Department restructuring plan: realignment of Maintainer workforce to best serve University needs and adjusted supervisory oversight.
- University Police is in the process of rolling out a draft of the new emergency management plan to the campus. The document will be reviewed by a group of faculty and staff reviewers in the coming weeks. The goal is to have the plan and trainings available to the campus community by the fall semester.
- Development of a standardized field trip policy and procedure. This includes liability waivers and coordination with UPD and driver’s license checks/safe driver courses.
- Development of a process to 'onboard' volunteers and visitors (e.g., external individual, such as a family member who attends a university sponsored overnight trip). This is pending review by policy committee.

Challenges/Opportunities include:

- Develop a data warehouse to meet new DHE standards.
- Continuing to orientate Board of Trustees – especially, newly appointed members.
- Continuing to develop a team that is supportive of each other and the mission of the institution.
- COVID-19.

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

Decision making gets magnified during times of crisis. It is in this area that I think that I have 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:

- As of March 1st, I immediately pulled back on all travel and expenditures in the face of the pandemic.
- Safety brought home all students who were studying abroad and refunded all students for their out of pocket expenses.
- As of March 1st, shutdown all planned domestic and international travel.
- In a response to a 30% increase in students requesting services, the Counseling Center implemented a walk-in triage process. This process was designed to meet the demand for services while simultaneously identifying and treating significantly at-risk students in an immediate fashion. Also, this change in staffing approach allows others a same-day brief support session to enhance short-term coping skills and develop a plan for future appointments.

Challenges/Opportunities:

- Review and revise WSU Travel Policy.
- COVID-19.

9. Fundraising (Numeric rating 4)

University Advancement continues to be an area at which I have stayed closely connected to the division's success. While there was significant staffing turnover, our fundraising efforts did not fall off. Growth of scholarship dollars continues to be a significant factor in our retention efforts as students who receive even one scholarship award graduate at a significantly higher percentage rate.

Highlights:

- Several – 25 - unique group opportunities for engagement with alumni, donors, friends and students to date (includes events and personal visits while traveling) with over 1,800 attendees.
- \$3,004,236: amount raised (cash and pledges) from 3,669 donors (36% alumni donors- 11% of alumni donors are new or recovered alumni supporters).
- A total of 31 new funds created.
- Donor support of the Worcester State Foundation increased 8% versus the same time last year (4/30/19 vs. 4/30/20).
- In collaboration with the Athletics, generated a little over \$5,000 through a Seat Licensing initiative for the chairback seats at the John P. Brissette '88 Competition Court.

Scholarship and Academic Award Support

- Over \$250,000 in cash and pledges towards newly formed scholarships and academic awards within the fiscal year. This accounts for more than 30% of scholarship and academic awards given for the fiscal year.
- The Worcester State Foundation now has more than 400 named awards directly supporting students.

Major gift highlights

- \$1,300,000 gift from the estate of Phillip Wasylean III '63.
- \$100,000 gift from the Esler Family Foundation to support the Center for Entrepreneurship.
- \$100,000 anonymous gift to support the creation of a business scholarship.
- \$96,250 from Imoigele P. Aisiku, M.D., '92 in support of the Imoigele P. Aisiku, M.D., '92 STEM Center and its initiatives.
- \$75,000 in support from Gene and Julianne DeFeudis to support their scholarship, Student Emergency Fund, and other initiatives.
- \$50,000 gift from Dr. GB and Lexi Singh for the The Dr. GB and Lexi Singh Simulation Center.

Major grants highlights

- \$393,000 from Strategic Grant Partners to support students during COVID-19.
- \$90,000 anonymous pledge of grant support for Admission's AdmitHub platform.
- \$60,000 from Digital Federal Credit Union to support campus and community-based programs led by The WSU Speech-Language-Hearing Center (SLHC), The WSU Urban Action Institute (UAI), The WSU Latino Education Institute (LEI), and The WSU Office of Student Accessibility Services.
- Greater Worcester Community Foundation awarded grants totaling \$41,500 in support of campus initiatives.
- \$30,000 grant from the American Student Assistance (ASA) for the Latino Education Institute (LEI).
- \$30,000 from the Nellie Mae Education Foundation to the LEI.
- \$25,000 grant from Santander Bank, N.A. to support scholarships for students studying Business Administration and Entrepreneurial Studies.
- \$18,225 grant from Reliant Foundation in support of the new Addictions Counseling Interdisciplinary Minor and Certificate programs.
- The Foundation has already provided \$1.6 million dollars in support of University priorities.
- Named scholarship support will exceed \$500,000 for the first time ever.
- The Worcester State Foundation projects to award \$800,000 in direct-student financial support through WSF scholarships, awards, and internship funding by the end of FY20. This is 27% more than last year.

Challenges/Opportunities:

- Fundraise in a COVID-19 environment.

10. Equity work/Campus Climate (Numeric rating 4)

Internal campus climate and the promotion of the University's goal towards creating a welcoming environment was a focal point of the past year. Several steps were employed to engage the campus in way that would make all feel welcome. The WSU Campus Climate Committee (CCC), which includes the AVP for Institutional Research, designed and implemented a campus climate survey for staff. The CCC also endorsed definitions of Diversity, Equity and Inclusion for campus-wide usage, which were adapted from the definitions used by the Independent Sector, a national membership organization that brings

together the charitable community—a diverse set of nonprofits, foundations, and corporations—to advance the common good. These definitions were shared with the Strategic Planning Committee and workgroups in February 2020 and have gone through the administrative policy review and Cabinet approval process. With approval, these definitions will be included in the course catalogue as well as on the WSU webpage. Attached along with my self-evaluation is the 2019 – 2020 report of the WSU Climate Committee. I am proud of their work.

Highlights:

- WSU has successfully recruited and hired 14 tenure track faculty, 4 of whom identify as racial minorities. As of March 2020, WSU has achieved a modest increase in the diversity of its faculty, currently employing almost 22% minority faculty, which is slightly above the 2010 U.S. Census labor market benchmark for Massachusetts.
- The CCC also recommended the implementation of a scaffolded (tiered) workshop series. These workshops could be taken individually or as part of a comprehensive certificate program. Course options may include the following:
 - ✓ Diversity & Inclusion for a Welcoming Environment,
 - ✓ Power & Privilege in Higher Education,
 - ✓ The Impact of Bias,
 - ✓ Mindfulness as a Catalyst for Equity & Social Justice, and
 - ✓ Inclusive Pedagogies (Faculty-led).
- Utilized the Bias Incident Response Team (BIRT) in responding to incidents of discriminatory graffiti on campus beginning in mid-December 2019. The response included a day-long session on Anti-Semitism led by the ADL and Jewish Federation of Central Massachusetts; promoting campus efforts such as the Rally for Unity: WSU Stands Against Hate; and collaborated with students and faculty to begin a Chabad chapter on campus. BIRT also developed an updated brochure to promote BIRT's role around campus and led the re-launch of the Hate Has No Home Here campaign in early spring 2020, with the support of all Diversity & Inclusion committees and the distribution of 100 magnets, which were placed at the top left of each classroom whiteboard.
- This year, the Office of Student Involvement and Leadership Development held the first ever Leadership Symposium for WSU students. This day long leadership conference held in March exposed students to many topics within leadership through conference sessions, keynote speakers, book and resource recommendations, and alumni connections. This event was a cross-divisional collaboration with Student Affairs, Academic Affairs and University Advancement.
- Faculty and staff responded to incidents on campus in early winter with a Day of Unity activities and continuing focus on Campus Climate.
- The LGBTQ+ Advisory Group Education subcommittee, developed in fall 2019 and soft launched in January 2020, developed a Train the Trainer Safe Space comprehensive program. The LGBTQ+ subcommittee continues to refine the program delivery by strengthening the train the trainer manual and resources provided within.
- The hiring of the LGBTQ+ Coordinator position and the opening of the LGBTQ+ Center in response to student body request and need to serve this marginalized population. This Center is all part of creating a caring and inclusive environment for our LGBTQ+ community at WSU.
- The AAEO Committee focused some of its work on exploring a Diversity Advocate Initiative on campus. Under this model, Diversity Advocates would educate themselves and others on issues of discrimination, privilege, social justice issues as well as matters related to the context of search committees, through an AA/EO lens.
- Established a First-Generation Working Group, made up of representatives of staff and faculty to focus on how to better serve the first-generation student population - almost half of enrolled students - at WSU.

Challenges/Opportunities:

- Currently exploring a possible collaboration with Clark University, through which WSU faculty and staff would be eligible to participate in Clark University's Diversity and Inclusion Certificate Program.
- Establishing a subcommittee of the Board of Trustees dedicated to climate and equity on campus.
- COVID-19.

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

Civic engagement continues to be a major thread across the University. Whether service learning, internships, community-based research or volunteerism, these projects bring great value to the community and to the learning experience of our students. Classified by the Carnegie Foundation as a community-engaged campus, 35-40 percent of students volunteer every year, and well over a hundred run more than 45 organizations. Leadership training is provided for them. Despite the disruption, the community engagement participation numbers continue to be very strong (see Appendix 2 for Civic Engagement success data).

During my ninth year on the job, I continue to make developing external relationships a significant portion of my job. 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.

Highlights:

- Hosted Fall 2019 Statewide LatinX conference. Conference drew approximately 500 attendees and focused on achievement gaps for ALANA students across the three segments of education. (PreK, K12 & Higher Education).
- For the sixteenth 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. Worcester magazine voted WSU as the Best College in Worcester.
- **Money magazine** has recognized Worcester State as one of the country's best colleges for educational quality, affordability, and alumni success.
- Traveled to Washington, DC and presented to entire Massachusetts Congressional delegation re: State University federal agenda. Topics included: Early College, Higher Education Reauthorization Act, proposed Title IX changes and extension of SNAP benefits to college students.
- Named to the State's Equity Agenda Advisory committee.
- Named Chair of the Board of Campus Compact's Southern New England Region.
- Board Member selected to serve on the following boards: Chair, Campus Compact, St. Vincent's Hospital, Greater Worcester Foundation, Worcester Regional Research Bureau, Worcester Chamber of Commerce, and Wilbraham and Monson Academy.

Challenges/Opportunities:

- Raise visibility of WSU inside and outside of Central Massachusetts market in COVID-19 market.

- Develop and maintain Latino Education Institute presence in other markets in Massachusetts (Springfield, Lawrence or Boston).
- Balance community needs against limited resources of WSU.

12. COVID-19 - Challenges Met (Numeric rating, TBD)

What began in January with monitoring of the novel coronavirus became something else altogether by late February. Bringing home students studying abroad and canceling university-sponsored Spring Break travel were first-wave decisions. By early March, we had established a COVID-19 Response Team that began meeting daily, and we created a robust web site for all essential information (<https://www.worcester.edu/Public-Health-Information/>).

As government officials issued increasingly restrictive orders, we initially suspended classes for an additional week after Spring Break. Then on March 16, I, along all Massachusetts state universities, announced classes would be delivered remotely starting March 30, and residence halls would be vacated for the remainder of the semester.

Faculty immediately began revamping courses so they could be delivered remotely, working collaboratively through our Center for Teaching and Learning with vital help from our information technology staff to provide the training necessary to make that changeover. This was no small undertaking, but one they handled with aplomb.

When staff left their offices on Friday, March 13, they had no idea they would be returning the following Monday to collect relevant materials so that they could work from home for an undetermined period of time.

Maintainers and other essential employees required to work on site began staggering work spaces and schedules to comply with gathering-size limitations. The formidable challenge of moving out our 1,500-plus resident students rested upon the capable shoulders of our residence life staff.

Containment, Prevention, and Response

- Emergency meetings of governance committees made a more flexible Pass/Fail option available to students facing learning interruptions from the pandemic and experiencing stressful conditions. Unlike other institutions, WSU faculty approved an “opt in” Pass/Fail recommendation, empowering students to elect Pass/Fail at the end of the semester.
- Following Massachusetts state gathering guidelines, moved out 1500-plus resident students out of their dorm rooms. All moves were safely completed in a one-week time period.
- Safely transitioned all employees from their on-campus work spaces to and created work-from-home format and protocol within one week in March.
- Completed an Admissions Outreach Campaign to over 4,500 students to encourage persistence during the COVID-19 pandemic.
- Quality Matters training is scheduled for all full-time faculty in late May and early June. Quality Matters is a gold standard for conversion of face-to-face to blended and remote learning excellence.

- Since moving remote, the University has been able to maintain its high-level donor and engagement efforts. In fact, more than 16,000 alumni and friends have received outreach from a member of the Advancement team since March 17, 2020.
- The University Advancement Services office has updated more than 3,000 alumni records using LinkedIn and nearly 1,900 donors have received a personalized video thanking them for their current and/or past support of WSU.
- Over \$85,000 is expected to be raised for the Student Emergency fund this fiscal year, with more than \$40,000 raised so far as the result of a special COVID-19 fundraising campaign. Approximately \$30,000 has already been awarded to support students as of May 7, 2020.
- In a span of approximately three weeks, faculty converted face-to-face courses into remote delivery systems by participating actively in workshops delivered by the Center for Teaching and Learning, the Information Technology Department, and multiple experienced faculty mentor volunteers.
- Celebration of Scholarship and Creativity moved to a virtual format through the efforts of Dr. Henry Theriault, Dr. Noah Dion, and Ms. Nathalie Torres-Serrano. This major event in Academic Affairs is now available online for the broader community.
- The Academic Achievement Award ceremony converted as well to a social media delivery of award and video clips of donors and recipients.
- During the crisis, the Office of International Programs and particularly Ms. Katey Palumbo, worked to secure the safety and return of multiple students studying abroad at the time of the various shutdowns of travel.
- In response to remote learning, counselors moved to a telehealth model to service students in March. Of the students served, 23.5% were ALANA population; 2.5% Transgender (significant number).
- Worked with various campus departments on providing support for student move-out, and subsequent front-line care worker move-in.
- Campus sanitizing efforts put in place and consistent with new CDC & Massachusetts DPH standards.
- Procurement of inventory for sanitizing campus.
- Create and implement plan for campus operations to continue during work from home period.
- Commencement planning in consultation with Academic Affairs, department chairs, and senior class officers. I made the decision to move the ceremony to August 14th.
- Regular contact with MEMA and the Executive Office of Education (EOE) in calls regarding the possibility of housing different affected populations (not the general public). Populations could include those who are mildly symptomatic and those under investigation, especially affected first responders who do not want to expose their families. WSU ended up housing 60 first responders from St. Vincent's Hospital and Fallon Healthcare.
- Process prorated reimbursements for all WSU students for meal plans, and, where applicable, housing and parking costs.

Appendix 1 – ALANA Student Success

STUDENT PROFILE

Degree-Seeking Undergraduate Students

Longitudinal Enrollment by Race/Ethnicity

	2015	2016	2017	2018	2019
American Indian or Alaska Native	17	18	13	18	15
Asian	200	208	228	241	241
Black or African American	379	390	435	439	422
Hispanic or Latino (of any Race)	466	527	621	661	664
Native Hawaiian or Other Pacific Islander	3	2	2	4	2
Non-Resident Alien	39	35	43	52	54
Race or Ethnicity Unknown	209	216	215	202	179
Two or more Races	150	145	144	140	157
White	3,586	3,350	3,334	3,239	3,185
Total:	5,049	4,891	5,035	4,996	4,919
ALANA Total:	1,215	1,290	1,443	1,503	1,501
ALANA Percentage:	25%	28%	30%	32%	32%

ALANA: Excludes White, Non-Resident Alien and Unknown
ALANA percentage is calculated by dividing ALANA over the sum of ALANA and White

Fall 2017 and 2018 Cohorts

	African American		Latinx		Cohort	
	Fall 2017 Cohort	Fall 2018 Cohort	Fall 2017 Cohort	Fall 2018 Cohort	Fall 2017 Cohort	Fall 2018 Cohort
	N = 47	N = 60	N = 136	N = 141	N = 906	N = 887
1st-Year FTF Retention	74%	77%	77%	70%	78%	79%

The chart above regards access:

- Note, WSU has seen an increase in the number Latinx students from last year, but fewer African American students than last year.

First-time, Full-time Freshman Graduation Rates

Fall 2012 and 2013 Cohorts

	African American		Latinx		Cohort	
	Fall 2012 Cohort	Fall 2013 Cohort	Fall 2012 Cohort	Fall 2013 Cohort	Fall 2012 Cohort	Fall 2013 Cohort
	N = 36	N = 27	N = 59	N = 77	N = 777	N = 769
Four-Year Graduation Rate	14%	22%	27%	25%	39%	41%
Six-Year Graduation Rate	47%	59%	41%	45%	57%	58%

The second chart above regards success:

- Higher African American student one-year retention, but lower Latinx student one-year retention.
- Higher six-year graduation rates for both African American students and Latinx students.
- Higher four-year graduation rate for African American students, but lower Latinx four-year graduation rate.

Appendix 2 – Civic Engagement

Tracking WSU's Civic Engagement: 2019 – 20

Worcester State University (WSU) has continued to embrace its role as an anchor institution within greater Worcester and Massachusetts' communities. Engaged Citizenship remains one of our five core values, promoting community service, social justice, the democratic process, environmental sustainability, and global awareness to prepare students to be active and informed citizens. WSU is one of two state universities in Massachusetts with the Carnegie Classification in Community Engagement. Despite the disruption brought by COVID-19 in Spring '20, we highlight below civic learning, clinical placements, practicums, internships, field work, and volunteerism and service carried out by faculty and staff and students in the 2019-20 academic year.

Civic Learning: In keeping with the Department of Higher Education's assessment of Civic Learning and Engagement, WSU is in its third-year tracking courses as

- CL (civic learning): 370 course sections were coded as CL, with 5529 seats filled for a total of 16,531 credit hours
- CLEO (civic learning with engagement optional): 91 sections with 1624 seats for 4271 credit hours
- CLER (civic learning with engaged required): 70 sections with 210 seats with 370 credit hours

+/- 24% of our 2232 undergraduate classes are coded as CL, CLEO or CLER. These courses are aimed in part at creating a civic ethos across the campus and educational culture, making civic literacy and agency a core expectation for students. (Source: Institutional Research)

Nursing Clinical Placements: 270 undergraduate Nursing students completed a total of 40,180 clinical hours in 32 different facilities. (Source: Nursing Department)

Practicums: Communication Sciences and Disorders, Health Science, and Education Practicums: 210 students in 175 placements 1143 credit hours: 46,435 practicum hours. (Sources: CSD, Health Science, and Education Licensure Office.)

Internships: The Office of Career Services and Institutional Research reports 69 sections of internships, with 219 seats and 919 credit hours, contributing +/- 28,920 hours of community engagement and public scholarship. Students enrolled in internships, who are Massachusetts residents in good academic standing, are also eligible for the State Internship Incentive Fund. 45 students from the Fall Term qualified for State Internship Incentive Fund. Internship projects are now registered in 16 of our 21 departments. (Source: Institutional Research, Financial Aid, and Career Services.)

Fieldwork: Various departments, such as Education, Sociology and Psychology, provide Field Work Opportunities for undergraduate and graduate students. This year, WSU offered 122 sections with 1173 students that included 2885 credit hours providing approximately 115,000 hours of research and community engaged scholarship (Source: Institutional Research).

Community Engaged Scholarship: There are many examples of community engaged scholarship. Here are some examples:

City Lab / Urban Action Institute Practicums: The Urban Action Institute offers community engaged practicums that include The Teaching Garden, SNAP Program - Hunger Outreach Team, English Language Learning, and Youth Leadership.

Community Media's The Beat: In the studio each week during the fall and spring semesters, WSU brings outside guests to campus and interview WSU faculty and staff. Our program broadcasts on WCCA-TV on Sunday evenings. In addition, students recorded podcasts and created videos for different community partners on and off campus.

Volunteerism and Service: Volunteerism at WSU continues to grow because of Jumpstart, Enactus, and Woo Serve, a student organization devoted to community engagement, which has earned Major organization status for the 2017-18 year.

Jumpstart: This is our fifth year hosting the AmeriCorps program Jumpstart. This year, 55 total enrolled: WSU - 36, Clark - 1, Assumption - 9 and Holy Cross - 9. We had 45 AmeriCorps members (with 12 exiting early), meaning 33 received the \$1300 Segal Award from AmeriCorps. 20 of our AmeriCorps students completed Jumpstart as a work study program as well. The combined award for the AmeriCorps Scholarship with Work Study is \$2800 per student.

ENACTUS: Worcester State Enactus reported 4317 volunteer hours by 40+ students in programs that include financial literacy workshops in the Worcester County Jail and Reyes House, a residential facility for men reentering society after addiction and incarceration (Source: Binienda Center for Civic Engagement).

Totals: In recognizing the difficulties presented by COVID 19 on our spring term, for the academic year 2019-2020, WSU reports:

- 1967 students engaged at 270 sites completing +/- 172,255 hours of engaged learning.
- +/- 30% of our undergraduate students are engaged in community engaged scholarship, civic or experiential learning, volunteerism and service.

A photograph of an ornate black wrought-iron gate with a central shield emblem, set against a backdrop of lush green trees. A blue semi-transparent banner is overlaid across the middle of the image.

Strategic Plan Final Progress Report 2015-2020



WORCESTER
STATE
UNIVERSITY



CONTENTS

- **Strategic Plan 2015-2020**
- **The Strategic Plan Review Process**
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- **Differentiation and Impact in the Wider World**
- **Enrollment, Retention, and Student Success**
- **Community and Campus Life**
- **Resources, Revenue, and Sustainability**

Introduction

As we move forward with the development of our next strategic plan, it is imperative that we reflect on the successes and challenges of the current strategic plan.

The past five years have been tumultuous, starting with enrolling the largest class in Worcester State University history, and ending with a national decline in enrollment, a recession, and global pandemic. Through it all, Worcester State University has remained strong.

This five-year review of the Worcester State Strategic Plan 2015-2020 demonstrates the strength of the Worcester State community, re-affirms our core values, and highlights areas where there is still work to be done.



Strategic Plan 2015-2020

Introduction

During the 2014-2015 academic year, a steering committee of faculty, staff, administrators, students, alumni, and trustees was convened to develop a new strategic plan.

Worcester State University's 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. It was approved by the Board of Trustees in October 2015.

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.

Core Values

Academic
Excellence

Engaged
Citizenship

Open Exchange
of Ideas

Diversity
and
Inclusiveness

Civility
and
Integrity

The Strategic Planning Review Committee



Laura Caswell

Data Administrator
Information Technology

Kristina Curro

Assistant Professor
Communication Sciences
and Disorders

Jennifer English

Associate Director
Financial Aid

Sean Morrow

Assistant Director
University Advancement

Michael Mudd

Director
Athletics

Nancy Ramsdell

Director
Facilities Operations and
Planning Support Services

Brandi Silver

Professor
Psychology

Sarah Strout, Chair

Assistant Vice President
Assessment and Planning

The Strategic Planning Review Process

In the 2019-2020 academic year, the Strategic Plan Review Committee, comprised of faculty and staff from all divisions of the University, reviewed the progress of the Strategic Plan for the last five years.

Each committee member was assigned to work on reviewing materials for one goal. The entire committee then evaluated each goal's progress, determining whether minimal, moderate, or significant progress had been made. This determination was made by evaluating both quantitative and qualitative measures associated with the goal.

For each goal, an executive summary, hallmark achievements, and key performance indicators are presented.





Academic Program and Excellence

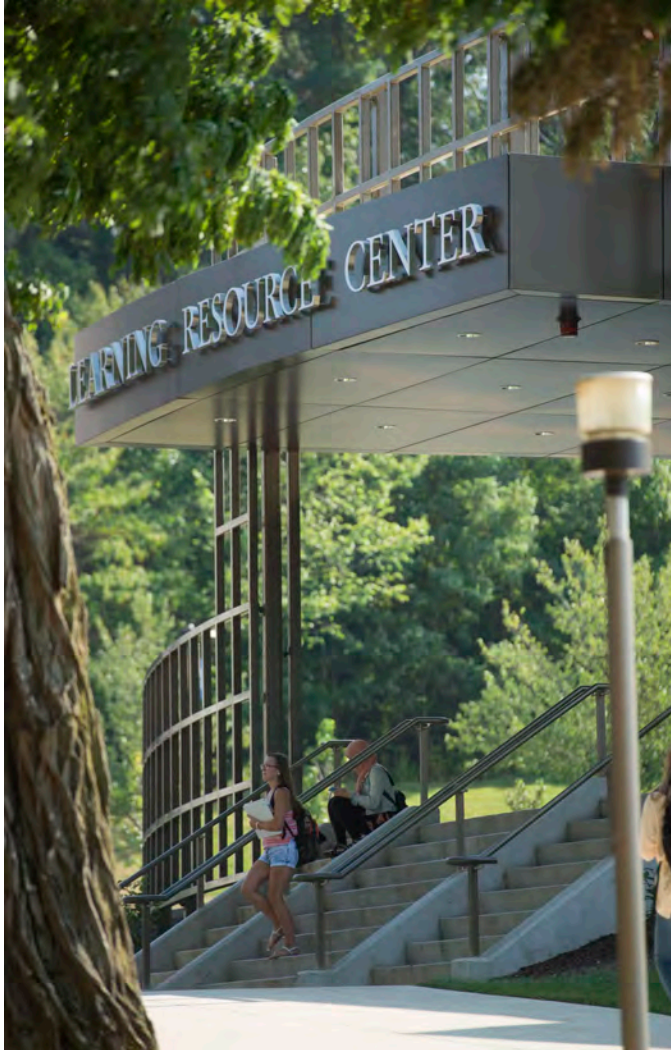
Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation



Significant Progress



Executive Summary



Worcester State University has made **significant progress** towards the goal of academic excellence.

New undergraduate and graduate programs have been created in response to student interest and work-force alignment.

Increased support for research and creativity for both faculty and students, careful development of library resources, and an increase in the number of high-impact practices utilized by our faculty has helped to change WSU's reputation from a 'back-up school' to a regional university with high caliber faculty and students.



Curriculum

New majors in Liberal Studies and Environmental Science

New minors in Forensic Science, Psychobiology, Substance Abuse Counseling, and Spanish for Health Professionals

New concentrations in Women's Gender and Sexuality Studies, Global Studies, Ethnic Studies, and Environment and Sustainability Studies

New graduate programs in Master of Public Policy/Administration and Public Management

A post-professional doctorate degree in Occupational Therapy submitted to the DHE



Articulation Agreements with:
Massachusetts College of Pharmacy and Health Sciences, Mount Wachusett Community College, Nichols College, Quinsigamond Community College, Springfield Technical Community College, UMass Dartmouth School of Law, and Western New England University School of Law



High-Impact Practices



60% increase in the number of students participating in **study away** since 2014

Increased the number of faculty led **short-term study away opportunities**

Built prototypes of **interactive learning spaces**



9,263 students participating in **experiential learning courses** in 2019-2020

3,820 students participating in an **internship, practicum, fieldwork, or individual research** course in 2019-2020



Research and Creativity

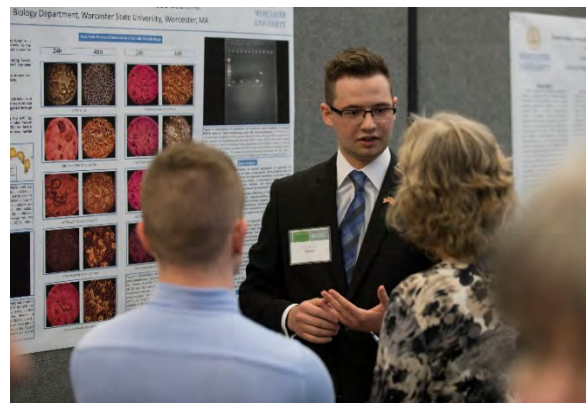
Established the **Aisiko Stem Center** which supports the Peer Assisted Learning (PAL) initiative, Summer Research Fellowships, the Bridge to Excellence Program, and the AISIKO Interdisciplinary Research Program Award

Celebration of Scholarship and Creativity expanded to include interactive displays of student research projects

Provost's **Faculty Scholarship Travel Fund** increased by \$30,000

WSU Foundation **Faculty Scholarship, Research, and Creative Activity Grant Program** launched

The Mary Cosgrove Dolphin Gallery offers 3 to 4 exhibits per year of current renowned artists and Worcester State faculty and students





Library



Hired 5 librarians as **department liaisons** offering information literacy and instructional services

Awarded a **\$150,000 Performance Incentive Grant** with other MA institutions to advance the adoption of open educational resources (OER)

\$191,000 saved by students through **OER courses** since Spring 2018

Created a dedicated space for **WSU Archives and Special Collections**

Avoided cutting **library subscriptions** by negotiating lower pricing and instituting multi-year contracts





Differentiation and Impact in the Wider World

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of differentiation and impact on the wider world.

Progress has been made capitalizing on our urban location by increasing the number of partnerships with Worcester area organizations and the number of civic engagement opportunities for students.

However, recent surveys show that students want more career preparation opportunities, including career advising, networking opportunities, internships, and training related to job-seeking.

More relationships with organizations in the area will increase the likelihood that our students are able to find appropriate internships and employment following graduation.



Community Involvement

Developed **new partnerships** with Worcester area businesses, hospitals, schools, and non-profits

Created **CityLab**, which collaborates with Worcester Public Schools to research voting patterns

Created **CitySpeak**, which uses theatre to analyze and propose solutions to urban problems, and VITA, which provides free tax services for the local community

Launched **100 Males to College**, a cross-campus effort Multicultural Affairs, LEI, and Enrollment Management and long with city partners Worcester Public Schools and QCC

Increased the number of students participating in **civic engagement** opportunities

The **Latino Education Institute** serves over 2,000 students and families in K-12 through academic enrichment and college/career readiness





Student Leadership



Launched a leadership **rebranding campaign** designed to increase awareness of student involvement opportunities outside of the classroom

Focus on **leadership skills programming** that challenge students to become empowered, inclusive, and knowledgeable future leaders



Implemented a new three-phase **student leadership** training model, Circle of Leadership: Emerge, Engage, and Excel

Residence Life and the Binienda Center for Civic Engagement developed the **Community Leadership Experience (CLEWS)** living-learning community



Initiated **Jumpstart AmeriCorps** Program

Athletics hosts **Captain's Leadership Breakfasts** 1-2 times each semester to discuss what it means to be the captain of a team and the responsibilities that are associated with it



Career Preparation

Increased the number of opportunities for career preparation through interdivisional collaborations including **mock interviews**, **Backpack to Briefcase**, **career fairs**, and in class **presentations**

Initiated new database called **Lancer Link**, which posts job and internship opportunities for students



Increased the number of workforce related trainings offered by the **Center for Business and Industry**

Inter-divisional collaboration to create event where students are trained on **professional table manners**, **interviewing techniques**, and **networking**





Enrollment, Retention, and Student Success

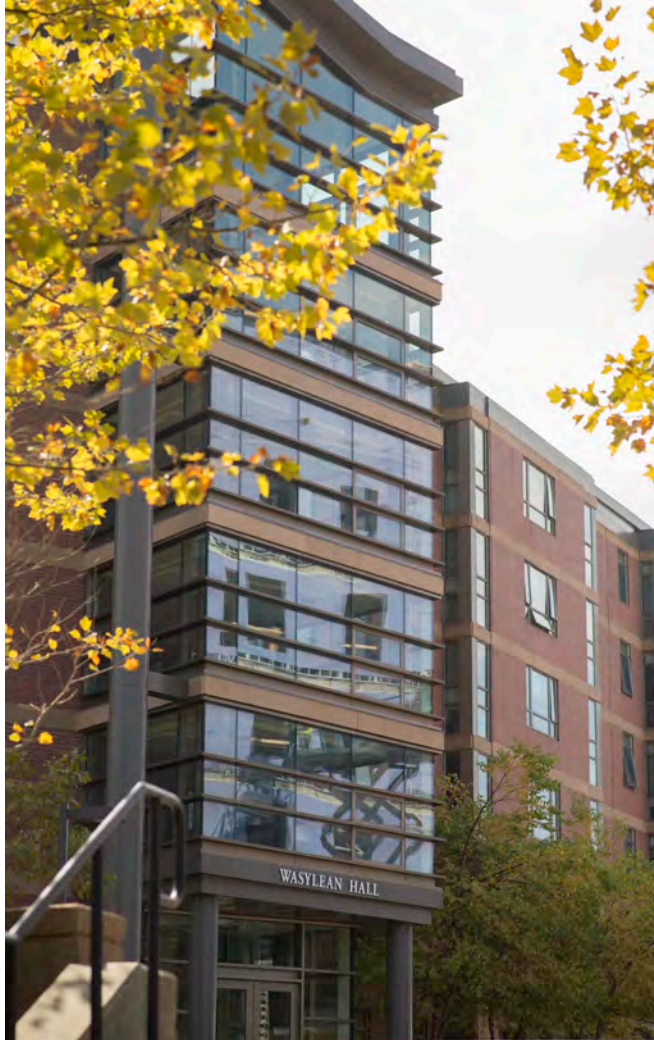
Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success



Significant Progress



Executive Summary



Worcester State University has made **significant progress** towards the goal of enrolling, retaining, and ensuring the success of students.

While other Massachusetts public universities have seen a significant decrease in enrollment, our enrollment has remained steady.

Our retention and graduate rates continue to rise, and a majority of our students reported finding employment or beginning further education within one year of graduation.

With the addition of new online graduate programs and a focus on non-traditional students, we will be able to recruit students despite the decline of traditional-age students nationally.

Major efforts relating to recruitment, marketing, scholarships, and advising have contributed to our success.



Recruitment and Enrollment

Stable enrollment compared to other MA State Universities

Improvement in the **HS GPA** of incoming students

SAT Optional Admissions approved

Creation of dual-enrollment and **early college** partnerships with QCC and K-12 schools

Collaboration with Academic Partnerships on launching **100% online graduate programs** in Nursing and Education

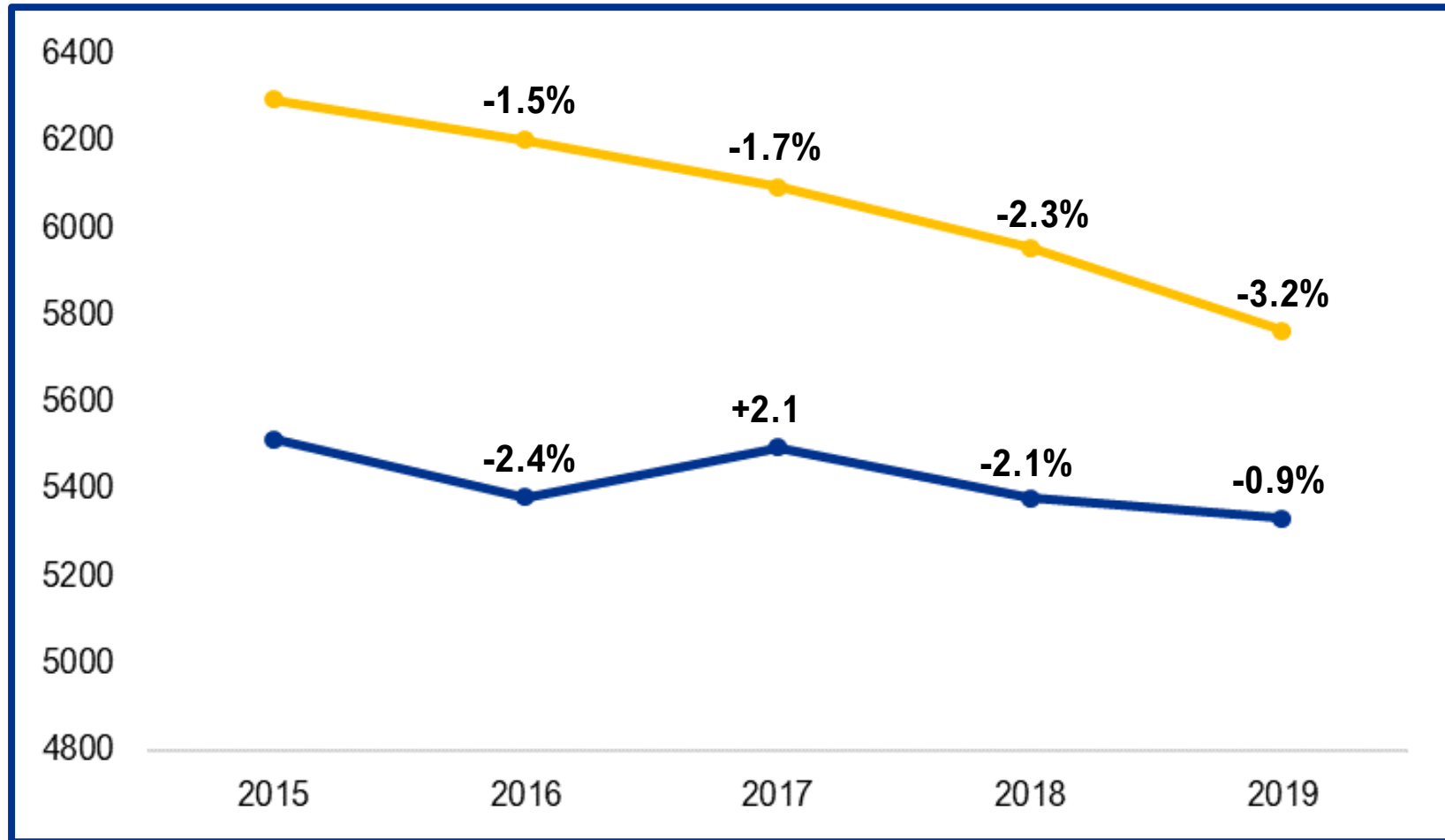
Featured in Princeton Review as a **Best College in the Northeast** since 2005





Recruitment and Enrollment

Enrollment Change 2015-2020



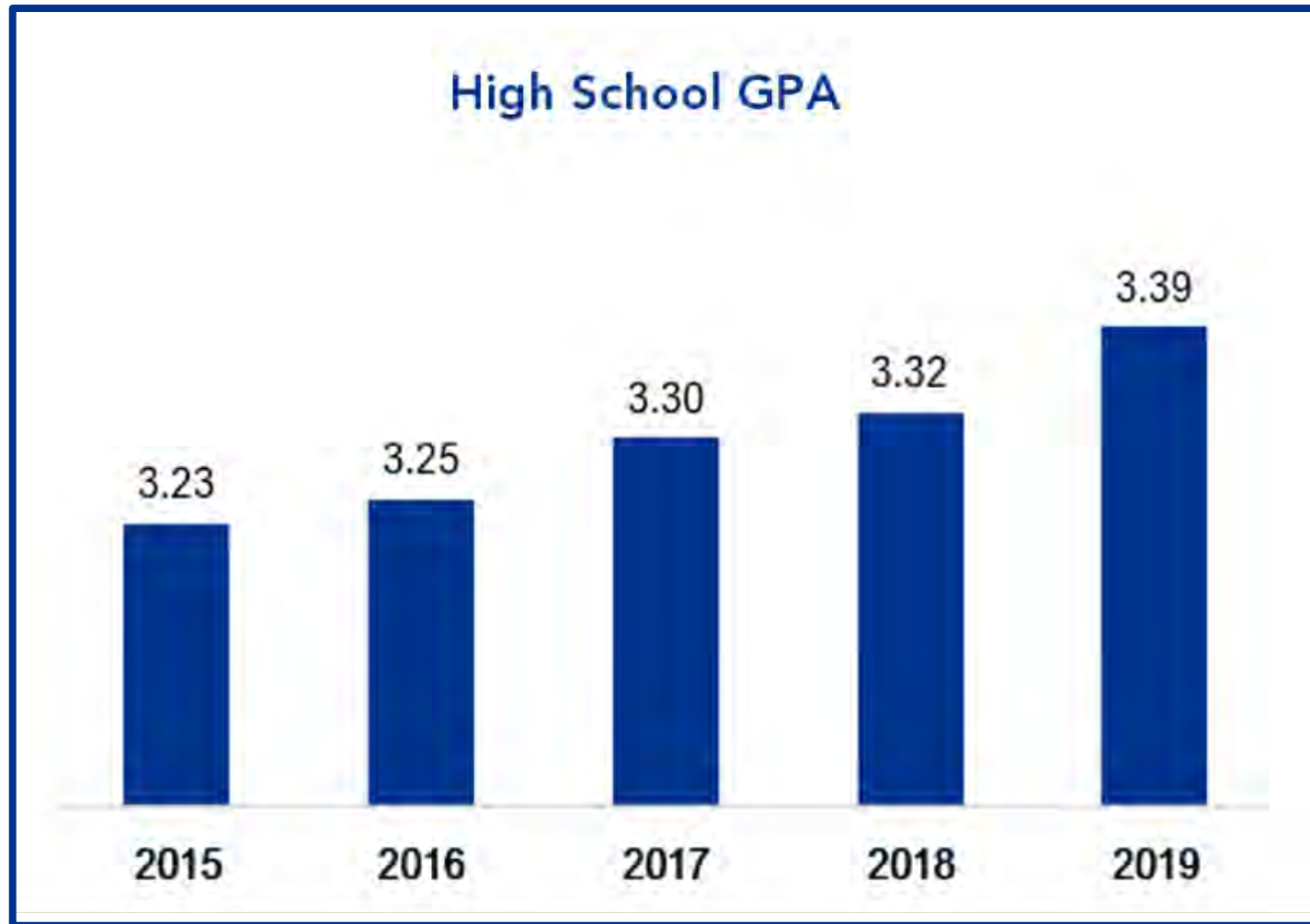
MA State Universities*
Overall Change
-8.4%

WSU
Overall Change
-3.3%

*Bridgewater, Fitchburg, Framingham, Salem, Westfield



Recruitment and Enrollment





Retention

Continued increase in **retention** rates

Early intervention and warning systems developed and utilized by the Retention Office in coordination with faculty

Creation of **Success Coach Program** with all incoming freshman being assigned a Success Coach

\$100,000 **Higher Education Innovation Fund Grant** to boost completion rates, close achievement gaps, and attract, enroll, and graduate students from underserved populations

Created the **1st Generation celebration** to recognize and support first generation students, faculty, and staff

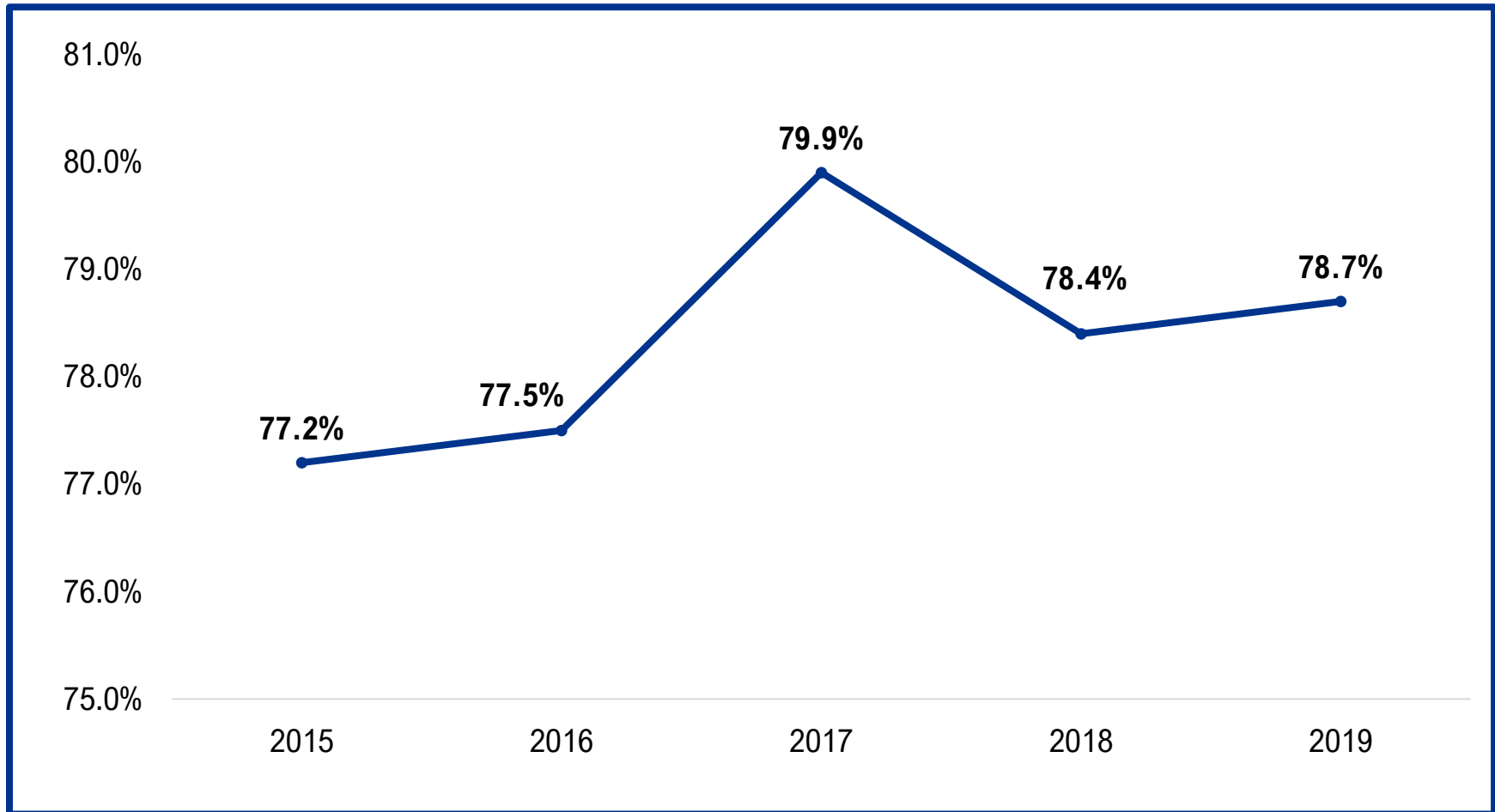
New guidelines created for coaches when recruiting student-athletes to increase retention and graduation rates





Retention

1st Year Retention Rate





Advising



Academic Success Center provides intensive academic support to first-year students identified as developmental level based on placement tests - 66% increased their scores

Created the **Advising Innovation Grant Program**, which funds faculty members and teams for developing new advising approaches



New advising resource materials and workshops have been created, including a web page for faculty advisors that outlines **best practices for advising** different populations of students



Student Support

Full-time enrollment for **graduate programs** moved from 9 credits to 6 credits to allow students to qualify for more **financial aid**

Creation of the **WSU Emergency Fund**

Student Accessibility Services, Health Services, and Counseling Services and other student-facing offices have increased the number of **evening hours**

Hired new Non-Matriculated/ Adult Student Advisor to assist **non-traditional student populations**

Created two **food pantries**: Thea's Pantry and the DGCE Pop up Pantry





Student Success



Continued increase in **retention** and **graduation** rates

94% of the Class of 2018 is **employed**, pursuing **further education** or both within one year of graduating

90% of the Class of 2018 has remained in **Massachusetts** following graduating

Featured in U.S. News & World Report as a **Top Performer on Social Mobility**

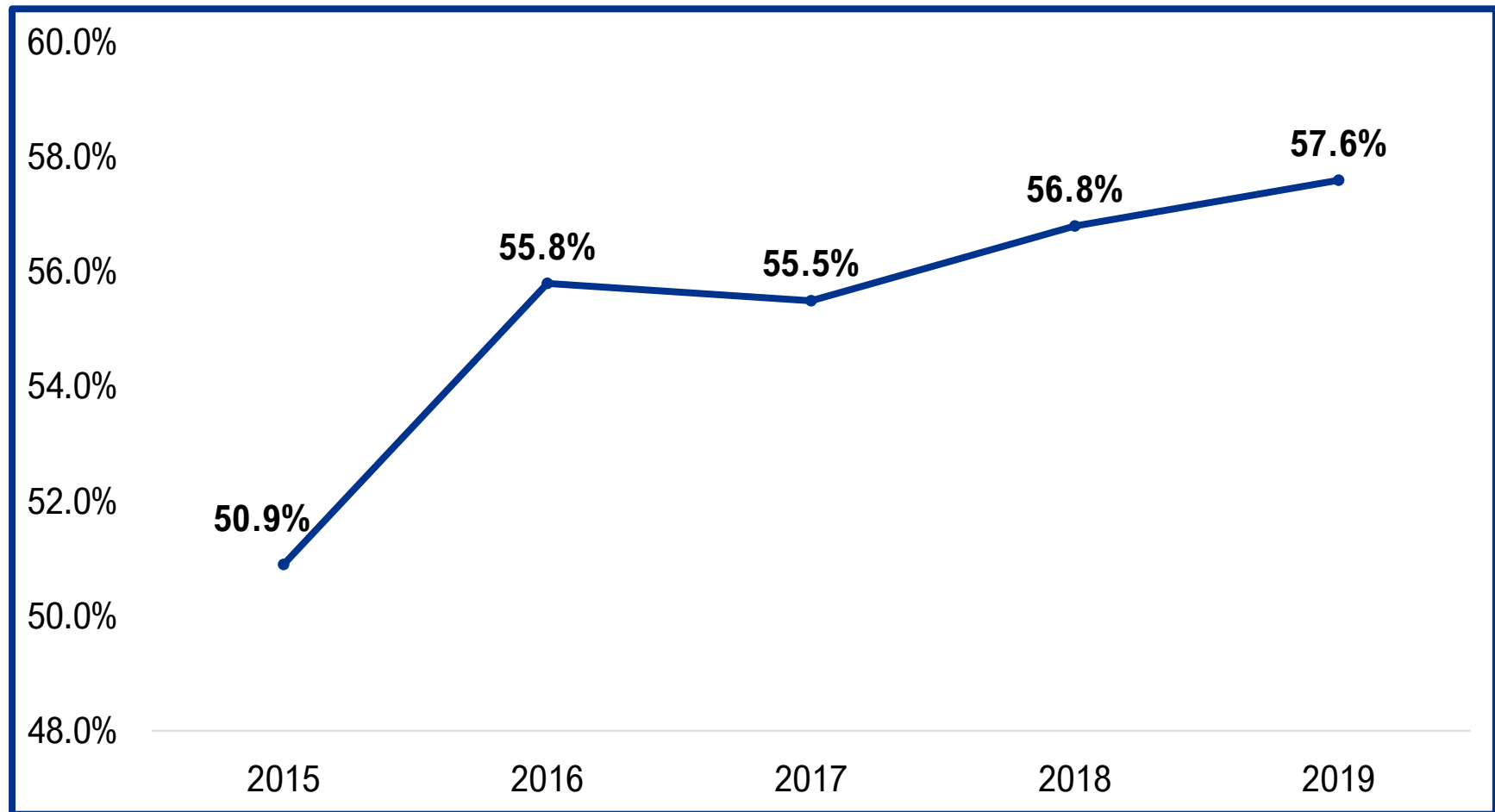
100% pass rates for Nursing, Occupational Therapy, and Speech Language Pathology program national examinations





Student Success

6 Year Graduation Rate





Community and Campus Life

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of community and campus life.

While progress has been made in diversity, equity, and inclusion, as demonstrated in the increase in ALANA representation and initiatives to support marginalized groups, we continue to struggle with internal communication and sense of belonging on campus.

In addition, commuter students, transfer students, graduate students, and older-adult learners reported a low sense of belonging.

The equity gap for some of our students was highlighted during the Coronavirus pandemic, with a significant number of our students not having access to reliable devices or internet, as well as having to manage schoolwork with other responsibilities.



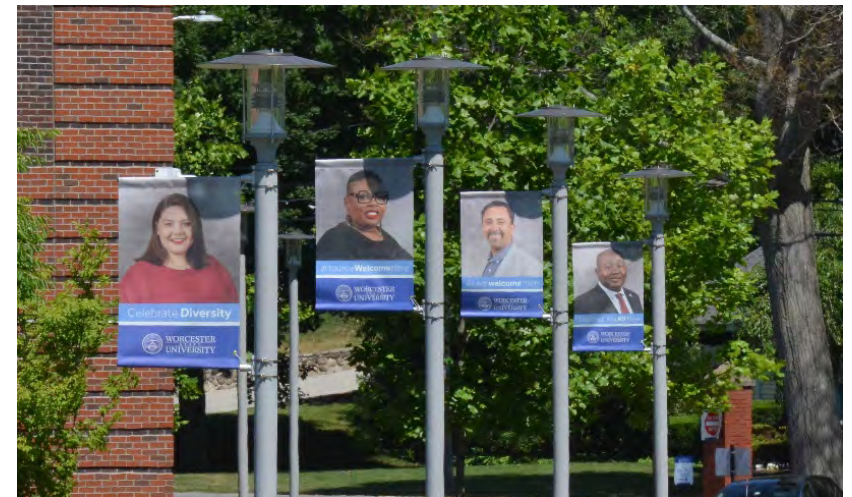
Diversity, Equity, and Inclusion

Launched **Five Points of Action** Toward a More Inclusive Campus Climate in 2016

Created the **Campus Climate Committee** (CCC); the **Bias Incident Response Team** (BIRT), the Advisory Committee for **Equal Opportunity, Diversity & Affirmative Action**, and the **LGBTQ+ Advisory Group**

Created a policy to allow faculty, students, and staff to use a **chosen name** and indicate pronouns

Creation of visual representations to highlight **diverse images** of students, staff, and faculty and flags on display that represent the 206 countries of **national origin** of WSU community members





Diversity, Equity, and Inclusion

ALANA faculty, staff, and student representation has increased

Implementation of the **Equal Opportunity, Diversity and Affirmative Action Plan** and achieving overall faculty diversity goals

Student Accessibility Services provides assistance to over 550 students each year

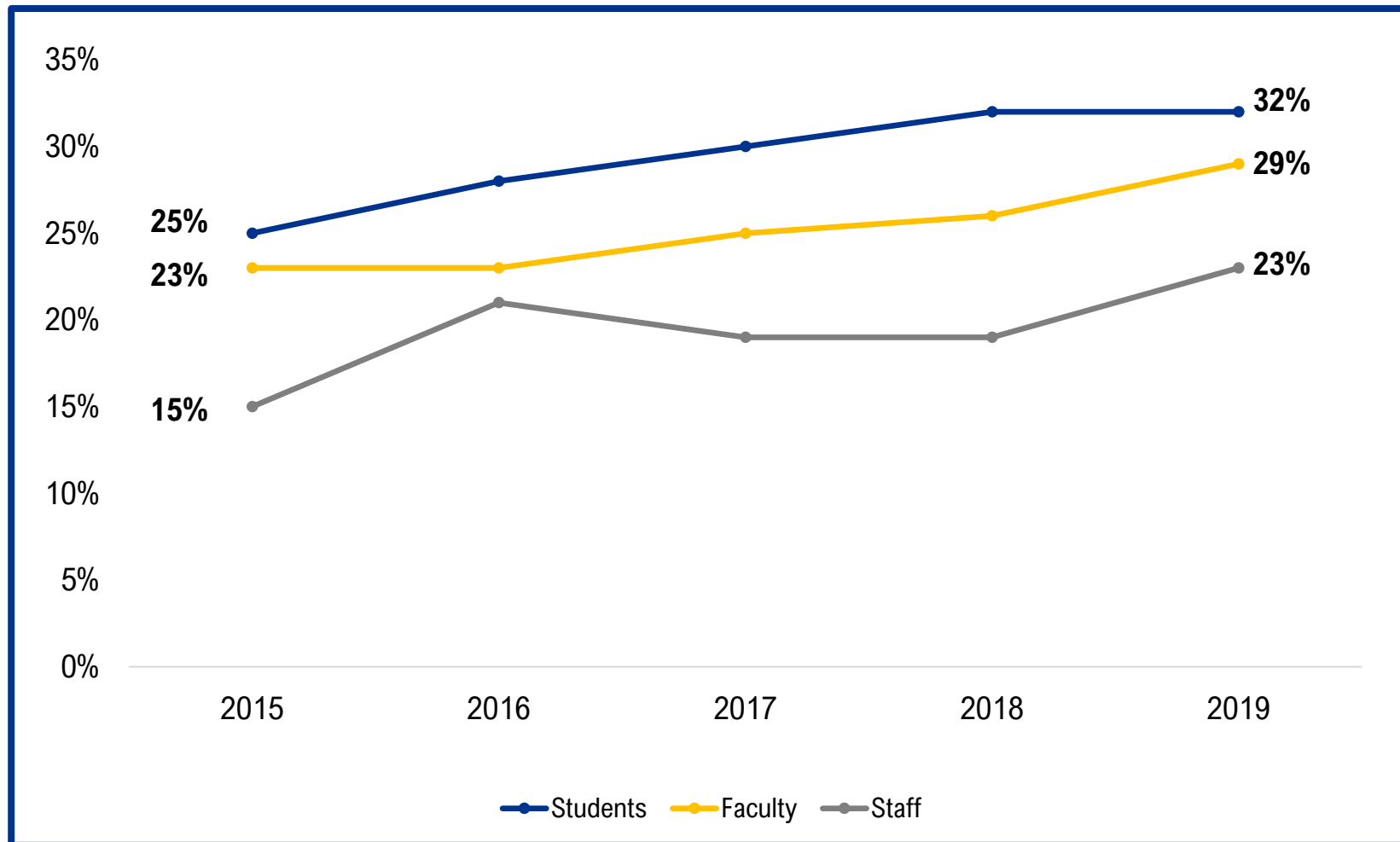
Increase in the number of **public speakers** related to diversity, equity, and inclusion





Diversity, Equity, and Inclusion

ALANA Representation Students, Faculty and Staff





Faculty, Staff, and Student Recognition



Creation and expansion of opportunities to recognize faculty and staff including the **Employee Service Recognition and Retirement Celebration** and **Employee Fun Day**

Resumed participation in the **Commonwealth Performance Recognition Program**

Began celebrating adjunct faculty through the annual **Adjunct Faculty Dinner** and through **adjunct faculty teaching and research awards**

Academic achievement awards are given to students each year and celebrated at **Academic Achievement Awards Ceremony**

Creation of the **Showcase of Faculty Scholarship and Creativity**





Campus Life

Sponsored campus-wide **International Food Festival**

Department of Visual and Performing Arts mounts three **theatrical productions** annually, including one student-directed production

More **evening and weekend** events and events targeting **commuter students**

Instituted the annual **Global Action Fair**

Multicultural Affairs celebrates Latin Heritage Month, Black History Month, Asian Heritage Month and more

Increased the number of local, national, and international opportunities for **alumni** to connect with Worcester State





Resources, Revenue, and Sustainability

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



Moderate Progress



Executive Summary



Worcester State University has made **moderate progress** towards the goal of financial strength.

Although we have made significant progress in increasing our endowment, financial concerns remain. Despite our ten-year increase in enrollment state appropriations have remained the same.

To alleviate reliance on state funding, a higher investment in revenue-generating programs is needed. In addition, more resources for grants would assist in growing new revenue as well as promoting a reputation for academic excellence and innovation.

Lastly, the recent Coronavirus pandemic has highlighted our need to invest more heavily in technology through funding and staffing levels, including support for faculty for online course development.



Financial Stability

Wellness Center is on pace to generate about \$100,000 in **net revenue**

Center for Business and Industry increased the number of trainings offered and revenue obtained

\$1,416,907 **grant funds** received in 2019

Best College Value by Kiplinger's Personal Finance

Featured as a **Best College for your Money** by Money Magazine in 2017, 2018, and 2019

Convened a cross-divisional **Budget Working Group** to evaluate opportunities for efficiencies, cost-savings, and improvements to operating procedures and reporting





Infrastructure



Secured the largest allocation of five-year **critical repair funds** for State Universities in the Commonwealth; funding will be used for large scale building renovations focusing on the LRC and Student Center

Acquisition of Temple Emmanuel Property (**May St. Building**) and parking, the property at the 537 Chandler Street location which currently houses the **Latino Education Institute (LEI)**, and 531 May Street which houses the **WSU Teaching Garden**, run by the Urban Action Institute



Construction of the **Wellness Center**

All new or renovated buildings will have **gender-neutral facilities** to provide all students with the opportunity to belong to the Worcester State community



Sustainability

Achieved **LEED Gold** certification for four buildings

Created **hydration stations**, **recycling** initiatives, **charging stations** for electric vehicles (EVs), and **rainwater collection**

Purchased fitness equipment that, when used, **generates electricity** that goes back into the Wellness Center's power

Transitioned to copy paper is 30% and notepads that are 50% **post-consumer recycled**

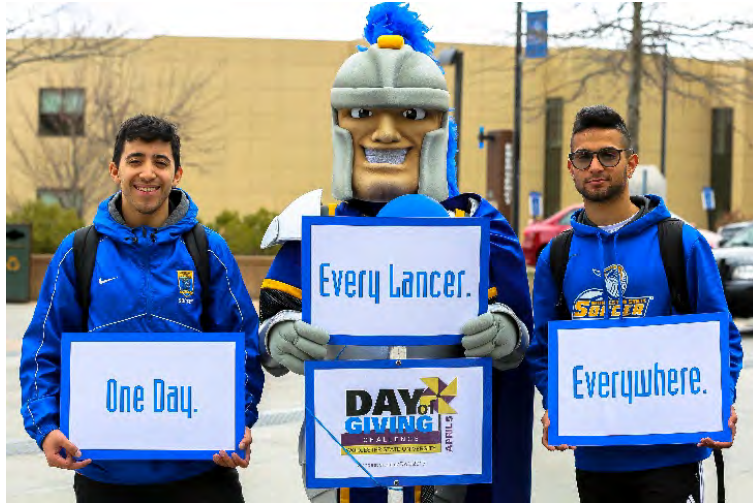
Supporting **two solar fields** by purchasing net metering credits totaling 6.5 megawatts

Featured in **Princeton Review's Green College Guide** for 6 years in a row





Giving



Continued increase in **endowment**

Implemented **Changing Lives Campaign** for scholarship support, the **Transfer Scholarship** program, **Giving Tuesday** and the **Adopt a Scholar** program

Creation of the **Young Alumni President's Circle**, an exclusive incremental giving society for recent graduates

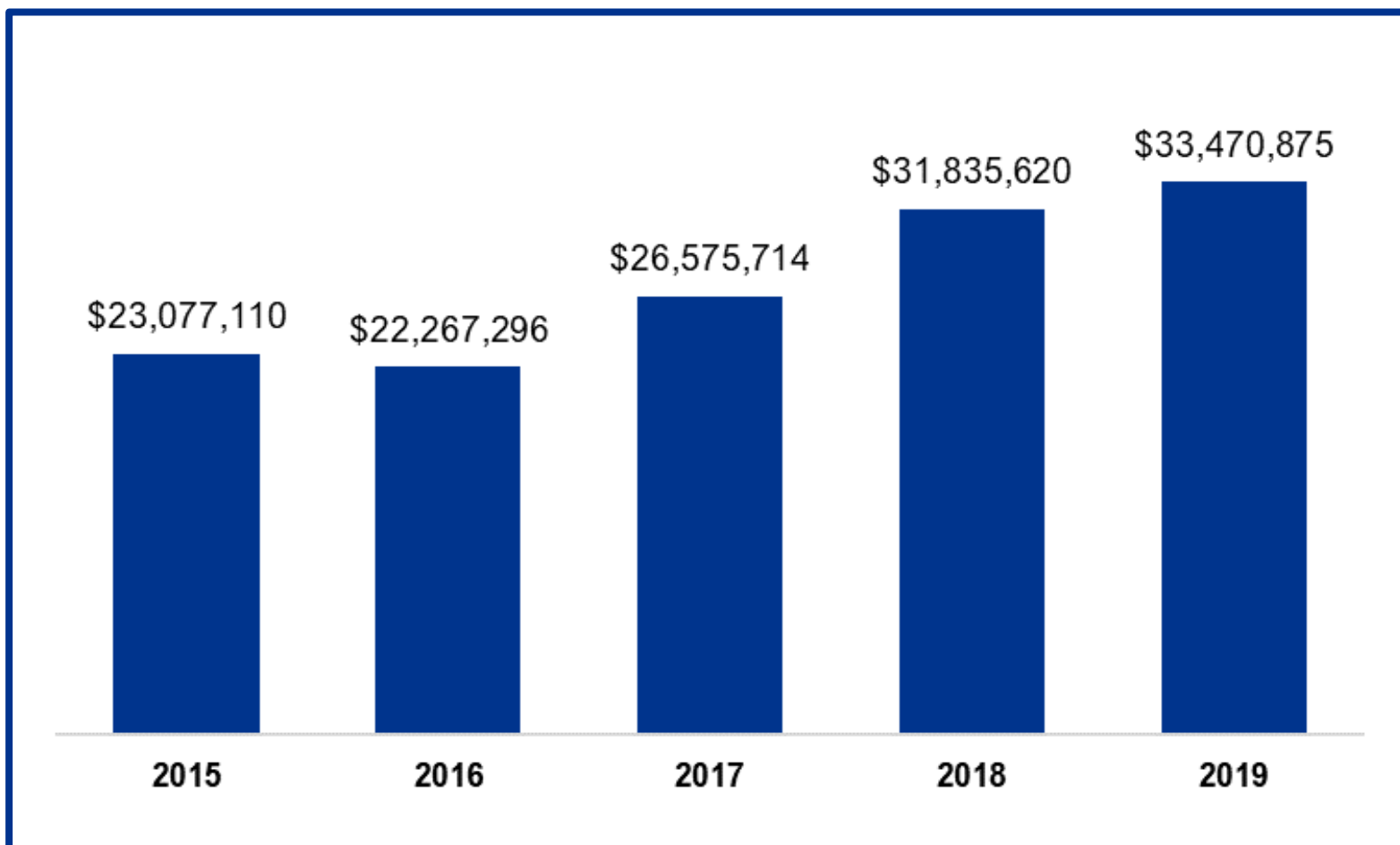
Highest **alumni participation** in annual giving among Massachusetts state universities

Recognized with a **2019 CASE Educational Fundraising Award**, which honors exceptional fundraising programs at educational institutions in the United States





Endowment Growth





WORCESTER
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Worcester State University

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Worcester State University Campus Climate Committee

Academic Year 2019-2020 Final Report

Submitted May 11, 2020

Committee Membership

Executive Chair: Lois Wims

Co-Chairs: MaryJo Marion and Johnathan Flowers

Committee Members: Matt Bejune, Lori Dawson, Elaine Dukes, Dawn Eades, Adrian Gage, Joanne Jaber-Gauvin, Sarah McMaster, Susan Monaghan, Emanuel Nneji, Victoria Porteiro-Cejas, Manuel Reyes-Ponce, and Sarah Strout

Ex-Officio: Alex Briesacher, Maria Isabel Gariepy and Stacey Luster

Introduction

During the spring 2016 semester, President Maloney announced his Five-Point Plan of Action toward a more inclusive campus climate and stated that he would like to pursue a data-driven approach to evaluating WSU's campus climate. To that end, WSU partnered with NERCHE (New England Resource Center for Higher Education) at UMASS Boston and the National Institute for Transformation and Equity (NITE) at Indiana University. For two years, WSU pursued a multifaceted approach toward an institutional cultural climate assessment. In the spring 2018, one of the recommendations adopted was the formalization of three committees, including the Campus Climate Committee (CCC). The CCC has been actively pursuing its agenda and purpose as designed, and it has also pursued other matters of climate on campus. This report is intended to review existing campus climate efforts, highlight the work of the CCC, outline committee recommendations, and continue to engage the campus community in a plan toward a more inclusive campus climate; while we underline the importance of the conversation around how equity considerations are moving forward. Finally, we provide a status update on surveys and plans for future climate assessment while we recognize the impact of the current Covid-19 global pandemic. The committee continues its steadfast commitment to driving our institutional vision on principles of Diversity, Equity and Inclusion.

Surveys and Focus Groups Overview

The CCC efforts to survey different segments of the campus population through a student survey in 2016 and a Faculty survey in 2018; the Staff Survey was administered in February 2020 and

approximately 15% of eligible respondents completed it. The Staff Survey Results were prepared by Dr. Sarah L. Strout on March 10, 2020.

- ❖ Responses from marginalized staff members demonstrates a broad variety of experiences of discrimination and marginalization at the university. Highlights:
 - LGBTQ+ members were less likely to agree that their department considers a diverse range of opinions.
 - ALANA staff were more likely to have had discriminatory remarks/behaviors directed at them.
 - Staff who have a disability had lower ratings for many items including easily obtaining materials to do their job efficiently, meeting their supervisor's expectations, and feeling respected by their supervisor.
- ❖ Comments demonstrated a lack of consensus concerning diversity and equity as well as oppositional attitudes towards diversity as a value and WSU diversity efforts broadly, so we should definitely have open-ended questions on the next survey. Some highlights include:
 - There were a few negative comments regarding equity as only being for whichever group the administration has chosen, that diversity, equity, and inclusion has led to hiring practices that elevate diversity over competence, that white privilege as a term is racist.
 - Comments show that most people equate equity with 'treating everyone the same.'
 - A subset of people answered they were not sure how equity, diversity, and inclusion affected their activities.
 - Regarding sense of belonging, there were more negative comments than positive comments.
 - Regarding what WSU can do to improve Diversity, Inclusion and Equity, quite a few comments were related to hiring practices focusing on diversity over competence.

Survey and Focus Group Issues and Resolutions

- ❖ Participation in the Campus Climate Staff Survey was low (15%).
- ❖ The CCC needs to identify a single instrument for annual surveys of Faculty, Staff and Students. Currently, we are exploring the viability to re-engage with CECE, Modern Think and WSU Institutional Research to develop such survey tools going forward. The goal is for the three surveys to be administered once per year, at the same time.
- ❖ Similarly, we need to identify and define the administration of Faculty and Staff focus groups in the near future; and of Students focus groups in the next cycle of surveys/focus groups to take place. In relation to Faculty and Staff focus groups, a consultant that

previously worked with WSU at the beginning of this process has provided a quote (Renga Consulting).

- ❖ The start date for administering focus groups could be uncertain due to COVID-19.
- ❖ The CCC does not yet know what / if any budget will be available for focus groups administration/ design/ delivery in the 2020-2021 academic year. The committee recognizes the need for creative funding through this time.

Next Steps for the Survey and Focus Groups

- ❖ By fall 2020, the CCC Research subcommittee will finalize exploring the viability to re-engage with Renga (formerly NERCHE), WSU CCC or other vendors responding to RFP.
- ❖ A draft RFP has been created for external organizations to assist with administering focus groups for the faculty and staff surveys.
- ❖ The Research subcommittee developed Goals for the upcoming single instrument Campus Climate Survey, which incorporated specific experiences, by groups of students, faculty and staff. See attachment.
- ❖ To improve survey response in the future the CCC should engage with survey. participants in multiple ways (i.e. emails, reminders in listservs, personalized reminders to directors, department chairs, etc. so that they remind their colleagues). Depending on the budget, the CCC may also want to consider entering survey participants into a drawing to win a prize.
- ❖ The CCC should continue to seek a vendor to design and conduct Focus Groups, in person and/or remotely. The CCC should secure a vendor and be ready to begin the research as soon as protocols regarding return to campus are clarified.
- ❖ Ensuring the CCC has sufficient funds in order to cover the cost of the external organization who will administer the faculty focus groups.
- ❖ The CCC will seek a vendor to design and conduct Faculty Focus Group Discussions to understand faculty perspectives on issues of diversity, inclusion, and equity so as to identify responsive strategies to improve campus climate. With support from CCC, the vendor will take the lead in developing, planning, and conducting the 5 focus groups discussions with WSU adjunct and full-time faculty.
- ❖ The tasks of the vendor are to:
 - recruit focus group participants for 5 Focus Groups for a total of 50 participants;
 - identify and secure a focus group location;
 - ensure cultural responsiveness of the focus group materials;
 - conduct focus groups;
 - interpret and summarize the data from the focus groups; and
 - develop reports.

Proposed Recommendations /New Initiatives & Resources Needed

Campus Climate Committee Composition

Currently, the CCC is composed of 1 executive chair (Provost) and 2 co-chairs who will assist in convening meetings, lead data-based conversations, and ensure committee work is completed. The Assistant Vice President of Human Resources, Payroll, AA/EO and the Director of Diversity, Inclusion, and AA/EO will serve as ex-officio members and work closely with the executive chair and the co-chairs of the CCC. Ideally, the CCC will have approximately 4 faculty, 4 staff, and 3 students.

The CCC proposes that the committee composition indicated in the Purpose and Charge of the committee be treated as the minimum composition of the committee and that the committee should achieve parity among stakeholders, staff, faculty, and students, to ensure full representation of the campus community. Moreover, the committee believes that staggered membership, or multi-year terms, to ensure continuity would best enable the work of the committee.

University Wide Committee Composition

The CCC recommends that all university wide committees strive to represent, in their composition, the diversity of the campus community and the employee groups (classified/ non classified). Committee appointments should, ideally, ensure an opportunity for all members of the campus community to serve.

Diversity tiered training

The committee proposes efforts to provide tiered Diversity & Inclusion training for Staff and Faculty. These sessions may be available individually or as part of a comprehensive Certificate program. Currently, the Office of Diversity and Inclusion is evaluating comprehensive proposals that include different options offered as a scaffolded type of larger/ ongoing session, or on an individual basis, such as:

- Diversity & Inclusion for a Welcoming Environment
- Power & Privilege in Higher Education
- The Impact of Bias
- Mindfulness as a Catalyst for Equity & Social Justice
- Inclusive Pedagogies (Faculty led)

SLOs- RASE Plan/ Diversity as its own Content Area

On January 17, 2020 the CCC met with RASE Plan leadership in order to provide feedback and input in regards to the prospective changes to LASC per the RASE Plan. Discussions included the need for clear definitions of Diversity and Diversity across the curriculum to measure effectiveness of current and prospective initiatives. In order to assist with this issue, on February 14, 2020 the

CCC endorsed the definitions of Diversity, Equity and Inclusion for campus wide usage (definitions can be found below under the Definitions section).

LASC did not have operationalized SLOs but rather general ‘overarching goals’ that do not lend themselves to program assessment. In order to create a solution to the problem, Faculty committee members created nine SLOs and assisted with drafting the new diversity content area proposal, which was finalized on Monday, April 20 and submitted as a separate but concurrent proposal. The proposal was approved with modifications by UCC and was set to be discussed by AUC at its May 5th meeting.

At the May 5th meeting, AUC chose to table the Diversity Content Area pending its review by APC. The earliest the Diversity Content Area could be reviewed is October or November, depending on the ongoing COVID-19 situation.

Definitions of Diversity, Equity and Inclusion

During the February 14, 2020 meeting, the CCC endorsed the definitions of Diversity, Equity and Inclusion for campus wide usage. Resources needed will involve publicizing these definitions on the WSU webpage as well as distribution as needed by the different committees and the Office of Diversity & Inclusion as it relates to ongoing efforts. These definitions were shared with the Strategic Planning Committee and workgroups in February 2020; and have been referred to the Cabinet Policy Committee in an effort to implement them university wide. The CCC recommends that, after the Cabinet approval process, these definitions undergo support from the Board of Trustees and be incorporated into the upcoming 2020-2021 Catalogue in an effort to further institutionalize them. They are:

- **Diversity** includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, sex, and gender, we embrace a broader definition of diversity that also includes age, national origin, religion, disability, sexual orientation, gender identity, socioeconomic status, first-generation status, education, marital status, veteran status, language, and physical appearance. Our definition also includes diversity of thought: ideas, perspectives, and values. We also recognize that individuals affiliate with multiple identities.
- **Equity** is the fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. Improving equity involves increasing justice and fairness within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society.

- **Inclusion** is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people. It's important to note that while an inclusive group is by definition diverse, a diverse group isn't always inclusive. Increasingly, recognition of unconscious or 'implicit bias' helps organizations to be deliberate about addressing issues of inclusivity.

Definitions were adapted from the definitions used by the Independent Sector, a national membership organization that brings together the charitable community—a diverse set of nonprofits, foundations, and corporations—to advance the common good.

<https://independentsector.org/resource/why-diversity-equity-and-inclusion-matter/>

Other Committee Contributions

- ❖ Feedback to Enrollment Management regarding the Spring College Marketing Plan:
 - Ryan Forsythe solicited feedback from the CCC re: a new WSU Marketing Campaign scheduled to launch in March 2020. The campaign, which was developed by Vision Point in conjunction with WSU, targets prospective students who are currently juniors in high school. Enrollment Management received negative feedback about the campaign tagline—From Grit to Great—as well as the affiliated advertising copy. The feedback addressed racist undertones associated with the use of the word grit. Ryan referred to an article written by Andre Perry about the problems associated with grit. The CCC discussed the concerns from the faculty and found the use of the word grit to be problematic. Enrollment Management and Marketing worked with the vendor to redevelop/ relaunch an alternate campaign.
 - Ryan Forsythe e-mail to the CCC on March 6th: “All WSU marketing efforts seek to gain the attention and interest of our target audiences while also representing the university well. On Thurs., Feb. 20th, when we first became aware that members of our campus community did not believe the proposed campaign did the latter, it caused us to rethink our message. It is common for marketing efforts to receive a range of positive and negative feedback; however, when questions about the campaign message’s inclusivity were raised, that was a different story. After reviewing the campaign with you all and learning of the multiple interpretations of the message, we have decided to discard the From Grit to Great campaign message and move in a different direction.”

- ❖ The Hate Has No Home Here campaign was re-launched at WSU in early spring 2020 by placing posters around campus as well as distributing magnets to be placed at the top left of each classroom whiteboard. 100 magnets were distributed around campus. This initiative was signed off by all Diversity & Inclusion committees on campus, and communicated to the campus community by WSU Provost.
 - While the campaign was presented to the CCC, the committee did not have approval authority over the implementation of the campaign. The committee acknowledged the value of the campaign.
- ❖ The CCC has been actively involved with the Strategic Planning Group to ensure that WSU's strategic planning activities are aligned with the broader institutional goals of diversity, inclusion, and equity. This work is ongoing with multiple committee members as active participants of different Strategic Planning working groups as well as the different RASE Plan subgroups.
- ❖ Covid-19 committee related campus awareness and committee members involvement around equity and inclusion efforts. The university needs an equity centered commitment through all its Covid-19 related efforts. Responses to the Covid-19 crisis need to be addressed through the lens of direct implications on all campus populations: students, staff and faculty, rather than merely focusing on one group or subgroup of the campus population.
- ❖ The CCC underscores the importance of students' requests to address and provide institutional response and support regarding microaggressions and bias incidents on campus.
- ❖ The CCC looks forward to collaborating with the soon to be established Board of Trustees Diversity and Inclusion/ Campus Climate subcommittee, and awaits further guidance from President Maloney to work together.

In Closing

The Campus Climate Committee recognizes the challenging current and upcoming environment due to the Covid-19 global pandemic, which has exacerbated existing institutional inequalities in society and on campus. As a result, the work of the CCC is all the more urgent and must be a critical part of Worcester State's ongoing strategic planning processes broadly understood. The equity work of the CCC should be taken in consideration as the campus prepares to return to a new normal.

Insofar as individual members of the committee participated in both the strategic planning and COVID-19 Response Groups, the committee feels that a more systemic and concerted involvement of the committee with these activities is necessary in order to ensure they proceed from an equity centered starting point, rather than equity being included after the fact.

ATTACHMENT

Goals for new WSU Campus Climate Survey

1. Understand the ways in which the lived experiences of power minority and power majority individuals differ.
2. Assess the extent to which individuals feel a sense of belonging-- welcome, safe, and supported at WSU
3. Create a survey that can be used for all WSU constituents with minor modifications/branching in order to make more direct comparisons about the ways in which these experiences are similar/different across roles
4. Provide an opportunity for open responses/qualitative data not captured in standardized questions.
5. Principal component analysis/factor analysis to see trends/clusters
6. Examine lived experience based on:
 - a. Role at WSU
 - i. Student
 1. Resident vs. Commuter
 2. Full time vs. part time
 3. Age
 - ii. Faculty
 1. Tenured vs Non-tenured
 2. Full time vs. part time
 3. Age
 4. Length of employment at WSU
 - iii. Staff
 1. Full-time vs part time
 2. Do you have supervisory capacity over other employees?
Students?
 3. Do you have the ability authority to make independent policy
decisions?
 4. Union: APA, AFSCME, MSCA, NUP
 - b. Power minority statuses
 - i. Race
 - ii. Gender
 - iii. Sexual orientation
 - iv. Gender identity

- v. Ability status
- vi. Religion
- vii. Age
- viii. Physical appearance
- ix. Socio-economic status
 - x. Immigrant/Non-native English speaker, Accent
 - xi. Education level/parents education level- students and faculty and staff

- 7. How we are addressing limitation of previous surveys
 - a. Timeliness
 - b. Focus on lived experience- positive and negative
 - c. Previous surveys were general, perceptions of WSU
 - d. Address experiences and desired remedies/suggestions for improvement



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Financial Planning Update

March 2020



Discussion Items

- Financial Ratio Trend Analysis
- Debt Policy
- Moody's Higher Education Rating Methodology
 - Historical Trends
 - FY 2019 Quantitative Scorecard

Financial Ratios

5 year review



Primary Reserve Ratio

Are the resources sufficient and flexible enough to support the College's mission?

This ratio provides a snapshot of financial strength and flexibility by indicating how long the institution could function using its expendable reserves without relying on additional net assets generated by operations.

FY 2019 Analysis:

WSU continues to grow its unrestricted reserve balance to support the long term financial stability of the institution and to accomplish the goals of the university wide capital plan. Unrestricted net assets are reported exclusive of the accumulated OPEB and Pension obligations passed down to the University's financials statements as required by the Commonwealth.

	FY 2019	FY 2018	FY 2017	FY 2016	FY 2015
PRIMARY RESERVE RATIO					
Unrestricted Net Assets from operations	40,687,978.00	36,393,787.00	34,745,510.00	32,494,088.00	33,462,206.00
Expendable restricted net assets	603,322.00	221,020.00	305,250.00	3,365,187.00	2,630,207.00
Expendable Net Assets	41,291,300.00	36,614,807.00	35,050,760.00	35,859,275.00	36,092,413.00
Total Operating Expenses	112,628,847.00	105,778,610.00	101,408,848.00	96,975,083.00	90,084,965.00
Interest Expense					
Total Expenses	112,628,847.00	105,778,610.00	101,408,848.00	96,975,083.00	90,084,965.00
PRIMARY RESERVE RATIO	0.3666	0.3461	0.3456	0.3698	0.4006

Return on Net Asset Ratio

Does financial asset performance support the strategic direction of the College?

This ratio determines whether the institution is financially better off than in previous years by measuring total economic return. A temporary decline in this ratio may be appropriate and even warranted if it reflects a strategy to better fulfill the institution's mission.

FY 2019 Analysis:

Return on net asset ratio was high as we completed construction of the Wellness Center . The decline in FY 2017 and FY 2018 is the result of the GASB required postretirement benefit accruals to reflect the campus share of the Commonwealth's liability related to the third party management of the retirement assets. In FY 2019 the University closed the year with a slight increase in net assets despite the magnitude of the accrual adjustment related to the post retirement benefit plans. We had positive operating results in FY 2019, including the receipt of collective bargaining funds that had not been anticipated and positive return on investment assets.

	FY 2019	FY 2018	FY 2017	FY 2016	FY 2015
RETURN ON TOTAL NET ASSETS					
Change in Total Net Assets	89,625.00	(4,993,357.00)	(4,433,143.00)	21,407,611.00	1,971,897.00
Total Net Assets - Beginning of Year	62,608,757.00	67,602,114.00	104,279,193.00	82,871,582.00	80,899,685.00
RETURN ON TOTAL NET ASSETS	0.14%	-7.39%	-4.25%	25.83%	2.44%

Net Operating Revenue Ratio

Do the operating results indicate that the College is living within available resources?
This ratio indicates whether total operating activities resulted in a surplus or deficit.
A positive ratio indicates that the institution experienced an operating surplus for the year.

FY 2019 Analysis:

Return on Net Asset ratio was high in FY 2016 as we completed construction of the Wellness Center. The precipitous decline in FY 2017 and FY 2018 is the result of the GASB required post retirement benefit accruals to reflect the campus share of the Commonwealth's liability related to the third party management of the retirement assets. In FY 2019 the University closed the year with a slight increase in net assets despite the magnitude of the accrual adjustment related to the post retirement benefit plans. We had positive operating results in FY 2019 including the receipt of collective bargaining funds that had not been anticipated and positive return on investment assets.

	FY 2019	FY 2018	FY 2017	FY 2016	FY 2015
NET OPERATING REVENUES RATIO					
Operating Revenues	67,461,960.00	65,056,221.00	61,931,790.00	60,926,417.00	57,098,983.00
less Operating Expenses	(112,628,847.00)	(105,778,610.00)	(101,408,848.00)	(96,975,083.00)	(90,084,965.00)
Plus Net Nonoperating Revenues	45,256,512.00	35,729,032.00	34,981,263.00	34,417,747.00	32,312,517.00
Oper. Inc (loss) plus Non-Op Rev (Exp)	89,625.00	(4,993,357.00)	(4,495,795.00)	(1,630,919.00)	(673,465.00)
Operating Revenues	67,461,960.00	65,056,221.00	61,931,790.00	60,926,417.00	57,098,983.00
Plus Net Nonoperating Revenues	45,256,512.00	35,729,032.00	34,981,263.00	34,417,747.00	32,312,517.00
Interest					
Oper Revenues plus Oper Expn	112,718,472.00	100,785,253.00	96,913,053.00	95,344,164.00	89,411,500.00
NET OPERATING REVENUE RATIO	0.08%	-4.95%	-4.64%	-1.71%	-0.75%

Viability Ratio

Is debt managed strategically to advance the College's mission?

This ratio measures one of the most basic determinants of clear financial health - the availability of expendable net assets to cover debt should the institution need to settle its obligations as of the balance sheet date. We have made a distinction between Net Unrestricted Reserves and Unrestricted Net Assets from Operations since the implementation of GASB 68 in order to accurately reflect the availability of expendable resources from year to year.

FY 2019 Analysis:

The results are consistent with the University's five year capital financing plan which focuses on growth of unrestricted reserves from operations through net revenue accumulation in the Capital Improvement Trust Fund and a targeted annual operating surplus in the General Purpose Trust Fund. While Net Unrestricted Reserves and Total Net Position are significantly impacted by depreciation expense and the required allocation of retirement plan accruals to the University, we are progressing toward University goals with regard to the growth of unrestricted cash within the campus based trust funds.

	FY 2019	FY 2018	FY 2017	FY 2016	FY 2015
VIABILITY RATIO					
Unrestricted Net Assets from operations	40,687,978.00	36,393,787.00	34,745,510.00	32,494,088.00	33,462,206.00
Expendable restricted net assets	603,323.00	221,020.00	305,250.00	3,365,187.00	2,630,207.00
Expendable Net Assets	41,291,301.00	36,614,807.00	35,050,760.00	35,859,275.00	36,092,413.00
Current Liabilities					
Current Portion of Cap Lease	275,694.00	115,923.38	412,606.00	467,514.00	197,403.00
Current Portion of bonds, notes pay	705,666.67	680,667.00	660,667.00	635,667.00	615,667.00
Noncurrent Liabilities					
Capital Lease Obligations	296,514.61	40,211.06	115,572.00	451,100.00	303,600.00
Bonds, notes payable, & other	21,991,774.00	22,733,135.00	23,449,497.00	24,145,858.00	24,817,219.00
Long Term Debt	22,697,440.67	23,413,802.00	24,110,164.00	24,781,525.00	25,432,886.00
VIABILITY RATIO	1.82	1.56	1.45	1.45	1.42

Debt Capacity Ratio

Debt capacity analysis evaluates the College's long-term obligations and the institution's ability to meet debt service demands.

The debt capacity ratio is used by rating agencies and assesses an institution's ability to meet future debt service obligations with current unrestricted resources.

The ratio equals the maximum annual debt service divided by unrestricted current fund expenditures less mandatory transfers.

	<u>Annual Debt Service</u>	<u>Ratio</u>	<u>With MSCBA debt</u>
<u>Actual</u>			
FY 2015	1,384,979	1.5%	8,491,000
FY 2016	1,384,979	1.4%	9,208,000
FY 2017	1,385,779	1.4%	8,416,000
FY 2018	1,385,779	1.3%	9,023,000
FY 2019	1,387,204	1.3%	8,909,000
CY benchmark	<u>5,631,442</u>	5% oper exp.	

Debt Burden Ratio

This ratio expresses annual debt service payments as a percent of total expenses. It measures an institution's ability to repay debt service on all outstanding debt and its impact on the institution's overall budget.

<u>Actual</u>	<u>Annual Debt Service</u>	<u>Total Expenses</u>	<u>Ratio</u>
FY 2015	1,384,979	90,084,965	1.54%
FY 2016	1,384,979	96,975,083	1.43%
FY 2017	1,385,779	101,408,848	1.37%
FY 2018	1,385,779	105,778,610	1.31%
FY 2019	1,387,204	112,628,847	1.23%



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Debt Management Policy





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Moody's Higher Education Rating Methodology



Historic Trends



Issuer Name:	Worcester State University, MA						
Balance Sheet (\$000)	2013	2014	2015	2016	2017	2018	2019
Assets							
Cash & Investments	44,850	52,653	51,818	50,136	41,509	43,528	53,339
Foundation Cash & Investments	17,088	20,755	20,304	20,526	23,128	28,883	23,128
Total Cash & Investments	61,938	73,408	72,122	70,662	64,637	72,411	76,467
Liabilities							
Total Direct Debt	155,462	154,740	153,731	150,719	146,741	140,515	136,933
Total Demand Debt							
Cash							
Cash & Investments	44,850	52,653	51,818	50,136	41,509	43,528	53,339
Foundation Cash & Investments	17,088	20,755	20,304	20,526	23,128	28,883	23,128
Funds Held In Trust by Others (Included as Investment Income)							
Funds Held in Trust by Others (Income Included as Contributions in Audit) Pledges							
Receivable Reported in Permanently Restricted Net Assets	-	-	-	-	0	0	0
Foundation Pledges Receivable Reported in Permanently Restricted Net Assets				0	0	0	0
Foundation Permanently Restricted Net Assets	11,247	11,835	12,309	13,010	14,248	17,561	14,248
Total Permanently Restricted Net Assets							
Spendable Cash & Investments	50,691	61,573	59,813	57,653	50,389	54,850	62,219
Income Statement (\$000)	2013	2014	2015	2016	2017	2018	2019
Revenues							
Scholarship Aid	7,252	7,558	8,350	8,752	8,414	9,262	8,427
Net Tuition Revenue	32,964	33,399	34,214	35,230	36,647	38,193	39,938
Government Student Grant Revenue	5,834	6,306	7,158	8,003	8,035	8,888	9,046
Government Student Loan Revenue	0	0	0	0	0	0	0
Scholarship Expense	(1,208)	(1,034)	(730)	(1,171)	(2,763)	(2,635)	(2,089)
Total Net Tuition and Fees	37,590	38,672	40,642	42,062	41,918	44,446	46,895
Net Auxiliary Enterprises	9,121	9,348	11,251	12,143	12,278	12,960	13,292
Patient Care Revenue							
Tax Revenue							
Government Operating Appropriations	26,484	30,056	31,841	33,606	35,170	35,415	39,400
Grants and Contracts	2,630	3,098	3,417	2,922	3,898	3,759	3,686
Contributions for Operations							
Endowment Spending / Investment Income	1,939	2,114	2,342	969	896	982	1,300
Net Assets Released From Restrictions	1,281	1,575	1,059	1,146	1,032	1,265	1,469
Other Revenue							
Other Investment Income							
Total Operating Revenue	79,045	84,862	90,552	92,848	95,191	98,827	106,042
Expenses							
Interest	(4,163)	(4,514)	(5,253)	(5,159)	(5,255)	(5,461)	(5,326)
Pension		(1,490)	(1,662)	(1,304)	(2,656)	(2,436)	(3,030)
FAS 106/Post Retirement Health Expense		0	0	0	0	(2,969)	(3,175)
Research							
Auxiliary	(3,190)	(3,338)	(5,004)	(4,533)	(4,832)	(4,832)	(4,832)
Recurring Transfer to Affiliated Entity							
Other	(69,270)	(71,319)	(75,123)	(80,889)	(81,736)	(78,397)	(78,397)
Total Expense	(76,623)	(80,660)	(87,042)	(91,885)	(94,478)	(94,094)	(94,759)
Operating Income	2,421	4,202	3,510	963	713	4,733	11,283
Operating Cash Flow	10,760	12,875	12,988	10,786	11,296	15,849	22,057
Cash Flow (\$000)	2013	2014	2015	2016	2017	2018	2019
Principal payments on debt (regularly scheduled)	(1,175)	(1,489)	(3,158)	(3,514)	(3,086)	(3,562)	(3,583)
Interest Paid	(3,885)	(3,939)	(5,333)	(5,694)	(5,330)	(5,461)	(5,326)
Additional, unusually large non-cash expenses	4,175	4,159	0	0	0	0	0
Depreciation Expense			4,225	4,665	5,328	5,655	5,448
Liquidity Data (\$000)	2013	2014	2015	2016	2017	2018	2019
Monthly Liquidity (Operating)	44,850	52,675	51,818	50,001	41,509	43,528	53,339
Monthly Liquidity (Endowment)	0	0	0	0	0	0	0
Unrestricted Board Designated Endowment	0	0	0	0	0	0	0
Unrestricted Working Capital (or Other Unrestricted Funds) Commingled with the Endowment (Operating)	30,723	34,051	33,462	32,494	34,746	36,394	40,688
Operational Data	2013	2014	2015	2016	2017	2018	2019
Total Enrollment FTE	5,337	5,437	5,373	5,339	5,409	5,449	5,465
Total Primary Market Applications	5,632	5,662	4,828	4,963	4,822	5,123	5,479
Total Primary Market Acceptances	3,467	3,479	3,458	3,651	3,742	4,062	3,922
Total Primary Market Matriculants	1,415	1,409	1,454	1,366	1,494	1,461	1,463

KEY RATIOS	2013	2014	2015	2016	2017	2018	2019
Financial Leverage (Spendable Cash & Investments to Total Debt) (x)	0.33	0.40	0.39	0.38	0.34	0.39	0.45
Operating Reserve (Spendable Cash & Investments to Operating Expenses) (x)	0.66	0.76	0.69	0.63	0.53	0.58	0.66
Operating Margin (%)	3.1	5.0	3.9	1.0	0.7	4.8	10.6
Reputation and Pricing Power (Annual Change in Operating Revenue) (%)	4.9	7.4	6.7	2.5	2.5	3.8	7.3
Operating Cash Flow Margin	13.6	15.2	14.3	11.6	14.3	11.6	11.9
Debt Service Coverage	2.02	2.14	1.54	1.24	1.35	1.76	2.48
Three-Year Average Debt Service Coverage (x)	2.36	2.12	1.85	1.59	1.38	1.46	1.87
Debt Affordability (Total Debt to Cash Flow) (x)	14.45	12.02	11.84	13.97	12.99	8.87	6.21
Revenue Diversity (Max Single Contribution) (%)	59.1	56.6	57.3	58.4	56.9	58.1	56.8
Monthly Liquidity (\$000)	44,850	52,653	51,818	50,136	41,509	43,528	53,339
Monthly Days Cash on Hand (x)	226.0	251.2	228.4	209.8	169.9	179.6	218.0
Monthly Liquidity to Demand Debt (%)	No DD	No DD	No DD	No DD	No DD	No DD	No DD
Net Tuition per Student (\$)	7,043	7,113	7,564	7,878	7,750	8,157	8,581
Government Appropriations per Student (\$)	4,962	5,528	5,926	6,294	6,502	6,499	7,210
Total Tuition Discount (%)	18.4	18.2	18.3	19.1	21.1	21.1	18.3
Primary Market Selectivity (%)	61.6	61.4	71.6	73.6	77.6	79.3	71.6
Primary Market Matriculation (%)	40.8	40.5	42.0	37.4	39.9	36.0	37.3

SOURCES OF REVENUE	2013	2014	2015	2016	2017	2018	2019
Tuition and Auxiliaries (%)	59.1	56.6	57.3	58.4	56.9	58.1	56.8
Investment Income (%)	2.5	2.5	2.6	1.0	0.9	1.0	1.2
Gifts (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Grants and Contracts (%)	3.3	3.7	3.8	3.1	4.1	3.8	3.5
Government Appropriations (%)	33.5	35.4	35.2	36.2	36.9	35.8	37.2
Tax Revenue (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Patient care (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other (%)	1.6	1.9	1.2	1.2	1.1	1.3	1.4

Financial Leverage: spendable cash and investments to total debt highlights the ability of a university to repay bondholders from wealth that can be accessed over time or for a specific purpose.

Operating Reserve: spendable cash and investments to operating expenses indicates the extent to which a university can rely on wealth that can be accessed over time or for a specific purpose to operate without earning any additional revenue. This measure is of particular importance during periods of financial stress when

revenue may be subject to volatility.

Operating Margin: operating income divided by total operating revenue. Indicates the amount of cash a university generates to support its strategic and capital investments

Reputation and Pricing Power: Annual change in operating revenue reflects the ability of a university to translate its brand into income. A university's reputation directly influences its ability to charge a particular level of tuition and fees while maintaining its optimal enrollment in terms of quality and size.

Operating Cash Flow Margin: compares net income before non-cash expenses relative to operating revenue to indicate the amount of cash a university generates to support strategic and capital investments.

Debt Service Coverage: Annual debt payments to cash flow measures the ability of a university to repay its annual debt obligations from the profitability of its current operations, as opposed to financial reserves, and is a measure of debt affordability

Debt Affordability: Total debt to cash flow measures the ability of a university to repay its debt from the profitability of its current operations, as opposed to financial reserves, and is a measure of debt affordability

Revenue Diversity: Captures a university's highest reliance on a single source of revenue such as student charges, government appropriations or research grants. Generally greater revenue diversity is a positive, reducing vulnerability to fluctuations in any single source of revenue.

Monthly Days Cash on Hand: Measures the number of days a university could continue to pay operating expenses from existing unrestricted cash and investments in

the absence of additional revenue, assuming equal daily expenditures

FY 2019 Summary:

The majority of analytics are trending positive in FY 2019. There was a slight decline in selectivity in FY 2019 during the same year that enrollment increased.

FY 2019 Quantitative Scorecard



Appendix C: Public University Quantitative Scorecard Ranges – Worcester State University 6/30/2019

	WSU	Sub-factor Weight	Aaa	Aa	A	Baa	Ba	B	Caa	Ca
Factor 1: Market Profile (30%)										
Scope of Operations	\$106,000	15%	≥ 2,700,000	< 2,700,000	< 400,000	< 75,000	< 40,000	< 30,000	< 15,000	< 8,000
Operating Revenue (\$000)				≥ 400,000	≥ 75,000	≥ 40,000	≥ 30,000	≥ 15,000	≥ 8,000	
Reputation and Pricing Power	7.3	5%	≥ 8	< 8	< 6	< 4	< 2	< 0	< -6	< -11
Annual Change in Operating Revenue (%)				≥ 6	≥ 4	≥ 2	≥ 0	≥ -6	≥ -11	
Strategic Positioning	V.Good	10%	Exceptional	Excellent	Very Good	Good	Fair	Poor	Very Poor	*
Factor 2: Operating Performance (25%)										
Operating Results	10.6	10%	≥ 20	< 20	< 11	< 4.5	< 1	< -2	< -3.5	< -5
Operating Cash Flow Margin (%)				≥ 11	≥ 4.5	≥ 1	≥ -2	≥ -3.5	≥ -5	
Revenue Diversity	56.8	15%	≤ 35	> 35	> 50	> 67	> 75	> 82	> 88	> 95
Maximum Single Contribution (%)				≤ 50	≤ 67	≤ 75	≤ 82	≤ 88	≤ 95	
Factor 3: Wealth & Liquidity (25%)										
Total Wealth	76,467	10%	≥ 2,500,000	< 2,500,000	< 100,000	< 25,000	< 10,000	< 2,300	< 900	< 350
Total Cash & Investments (\$000)				≥ 100,000	≥ 25,000	≥ 10,000	≥ 2,300	≥ 900	≥ 350	
Operating Reserve	.66	10%	≥ 1	< 1	< 0.5	< 0.15	< 0.05	< 0.044	< 0.038	< 0.032
Spendable Cash & Investments to Operating Expenses (x)				≥ 0.5	≥ 0.15	≥ 0.05	≥ 0.044	≥ 0.038	≥ 0.032	
Liquidity	218	5%	≥ 260	< 260	< 140	< 50	< 25	< 14	< 8	< 6
Monthly Days Cash on Hand				≥ 140	≥ 50	≥ 25	≥ 14	≥ 8	≥ 6	
Factor 4: Leverage (20%)										
Financial Leverage	.45	10%	≥ 3	< 3	< 0.75	< 0.2	< 0.12	< 0.06	< 0.035	< 0.021
Spendable Cash & Investments to Total Debt (x)				≥ 0.75	≥ 0.2	≥ 0.12	≥ 0.06	≥ 0.035	≥ 0.021	
Debt Affordability	6.21	10%	> 0	> 4	> 10	> 16	> 22	> 34	> 46	> 58
Total Debt to Cash Flow (x)			≤ 4	≤ 10	≤ 16	≤ 22	≤ 34	≤ 46	≤ 58	< 0

* We have opted to merge the Caa & below rating categories for Strategic Positioning given the similar characteristics at these rating categories.

Appendix D: Strategic Positioning Assessment Criteria – Worcester State University June 30, 2019

	Weight	Aaa Exceptional	Aa Excellent	A Very Good	Ba Good	B Fair	B Poor	Caa & below Very Poor
Strategic Positioning	10%	<ul style="list-style-type: none"> » Well integrated and sustainable strategic, capital, and financial plans supported by detailed financial forecasts » Proven ability to consistently execute and adjust plans through economic cycles » Highly diversified and consistent reinvestment funding sources » Annual capital investment ensures well-maintained and updated facilities » Systematized review and annual adjustments of academic programs » Annual self-assessment and benchmarking 	<ul style="list-style-type: none"> » Clearly articulated multi-year strategic, capital, and financial plans with associated cost forecasts » Stress-testing identifying ability to adjust plans with some demonstrated history of doing so » Strong diversification and consistency of reinvestment funding sources » Regular capital investment over a multi-year period with limited deferred maintenance » Regular review and adjustment of academic programs » Regular self-assessment and benchmarking 	<ul style="list-style-type: none"> » Periodic comprehensive multi-year strategic planning with associated cost forecasting » Good diversification of reinvestment funding sources over a multi-year period » Periodic capital investment with modest amounts of deferred maintenance » Periodic academic program adjustments » Demonstrated knowledge of competitive position 	<ul style="list-style-type: none"> » Strategic planning limited to medium-term time horizon » Less diversified but adequate reinvestment funding sources » Sporadic capital investments and moderate deferred maintenance » Sporadic review and adjustment of academic programs » Limited self-assessment and benchmarking 	<ul style="list-style-type: none"> » Limited and less comprehensive operating and capital planning and forecasting » Modest reinvestment funding sources with some reliance on external committed financings » Irregular capital investments with growing deferred maintenance » Few programmatic adjustments made to respond to market demand and conditions » Lack of self-assessment and benchmarking 	<ul style="list-style-type: none"> » Weak or ineffective operating and capital forecasting » High reliance on capital markets and external funding for non-discretionary capital and reinvestment expenditures » Growing deferred maintenance of facilities and infrastructure » Limited meaningful academic program review and adjustments » Accreditation warning or probation 	<ul style="list-style-type: none"> » Absence of detailed operational and financial planning and forecasting » No identifiable reinvestment funding sources » Significant deferred maintenance » No demonstrated academic program review » Substantive risk of loss of accreditation » No self-assessment, benchmarking, or competitive awareness

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES

FINANCE & FACILITIES MEETING

Tuesday, June 2, 2020

4 - 5pm

REMOTE PARTICIPATION

Join Zoom Meeting

<https://worcester.zoom.us/j/93502874199>

Meeting ID: 935 0287 4199

Meeting Called By: Stephen Madaus (Chair)

Minutes: Nikki Kapurch

Board Members: Stephen Madaus (Chair); Lisa Colombo; Aleta Fazzone; Dina Nichols; Marina Taylor

WSU Staff: Barry Maloney; Nikki Kapurch; Carl Herrin; Patrick Hare, Kathy Eichelroth

AGENDA		
ITEM	RESPONSIBLE	ACTION
1. <i>Administrative Business</i> A. Call to Order	Stephen Madaus	
2. <i>Finance & Facilities Committee Report</i> A. FY2021 Comprehensive University Budget*	Stephen Madaus Kathy Eichelroth	 A. Vote Required
3. <i>Administrative Updates</i> A. Other Business	Stephen Madaus	A. Informational
4. <i>Adjournment</i>	Stephen Madaus	4. Vote Required

*Attachments



WORCESTER
S T A T E
UNIVERSITY

FY 2021

**Comprehensive
University Budget**

Worcester State University
FY 2021 Budget Package

I Fiscal Year 2021 Budget Overview

II Fiscal Year 2021 Budget

- 1 Summary FY2021 Budget - Sources and Uses of Funds
- 2 Pie Chart: Source of Funds
- 3 Bar Chart: Use of Funds
- 4 FY 2021 Summary of Sources of Funds
- 5 FY2021 Trust Fund Summary
- 6 Pie Chart: Trust Fund Summary
- 7 Operating Revenue Budget

III Individual Fund Budgets compared with FY2020 Budget

- 8 General Operating Budget (111 & 400 Combined)
- 9 General Operating Budget - Expenditures by Division and Pie Chart
- 10 State Maintenance Appropriation (111)
- 11 General Trust Fund (400)
- 12 Capital Improvement Trust Fund (405)
- 13 Parking Garage Operating Fund (408)
- 14 Strategic Plan Trust Fund (410)
- 15 Wellness Center Trust Fund (429)
- 16 Parking Fines Scholarship Fund (439)
- 17 Health Services Trust Fund (442)
- 18 Residence Halls Trust Fund (445)
- 19 Student Activities Trust Fund (446)
- 20 Residence Hall Technology and Equipment Trust Fund (448)

IV Quarter 1 Spending Plan: 7/01/2020 - 9/30/2020

V Appendix

- A Budget Fee Package
- B Capital Adaptation and Renewal spending plan
- C FY 2021 Tuition and Fee Schedule

I. Fiscal Year 2021 Budget Overview



Memorandum

DATE: MAY 21, 2020
TO: Barry M. Maloney, President
FROM: Kathleen Eichelroth, Vice President for Administration and Finance
RE: PRESENTATION OF COMPREHENSIVE FY 2021 BUDGET

Enclosed is the comprehensive budget for FY 2021. The \$118,941,748 budget includes state appropriations and state funded fringe benefits, in addition to eight trust funds. An annual payroll budget of \$43,598,657 provides for 595 full time employee positions. The campus is further supported by an \$8,920,895 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 57% 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 10%.

The budget as presented for approval represents the revenue assumptions that were presented to the Board of Trustees at the January board meeting. Based on anticipated declining demographics of traditional college age students in our region, the budget reflects a 2% reduction in undergraduate day enrollment. In a similar fashion other revenue sources were evaluated against historical performance and anticipated trends, and reduced where appropriate. Growth in expenditure categories was experienced in the employment related accounts reflecting cost of living adjustments as provided for in collective bargaining agreements, an increase in minimum wage and an increase in the fringe benefit and payroll tax assessments by the Commonwealth of Massachusetts.

The administration continued to evaluate operating costs as the budget planning subgroup to Cabinet explored options to reduce the reliance on part-time employees and ways to increase operating efficiencies in the areas of travel, student field experiences, internships, and grants and research administration. This work continued until early March when the University, along with the rest of the country, began to react to the outbreak of Covid – 19.

The entire WSU community is currently engaged in a collective response to this worldwide pandemic. We are actively gathering information and discussing options regarding class offerings in the fall and what the overall operating plan for the University will look like in the coming weeks, months and year. Since we are still gathering pertinent data necessary to drive decisions that will impact the FY 2021 budget it is not practical at this time to offer a reliable budget for your approval formulated on our collective expectations. What we have provided is the original budget for FY2021 pre-pandemic. This budget will be amended once decisions have been made on our approach to the academic year. We intend to present the plan, inclusive of budget revisions, at a Board meeting in July.

In the mean time we do not intend to release the entire FY 2021 operating budget in an active fashion. The budget package as presented includes a detail spending plan for the first quarter of FY 2021. In section IV of the package there is a summary spending plan that combines all trust fund and state appropriation accounts. Following the summary are the spending plans for the individual trust funds. First quarter spending plans have been prepared based on previous year actual spending by trust fund for the first quarter. The release of limited spending authority by quarter will provide the administration with the flexibility to adjust the overall annual budget through a formal amendment process as we respond to changing circumstances due to this unprecedented pandemic. The allotment of spending authorization is a unique situation and will require some adjustments on an ongoing basis to address certain operational issues. We will work with departments to address the change in business practice. The budget amendment required to re-align spending with our plans for post-pandemic operations will include revisions to the spending plans.

We intend to keep the line of communications open with the Board, and the various sub-committees of the Board, as planning continues and scenarios evolve and become solidified. We request that the Board of Trustees support this plan as presented for setting a budget for FY 2021.

II. Fiscal Year 2021 Budget

Worcester State University
Summary of Sources and Uses of Funds
FY 2021 - All Sources and Trust Funds

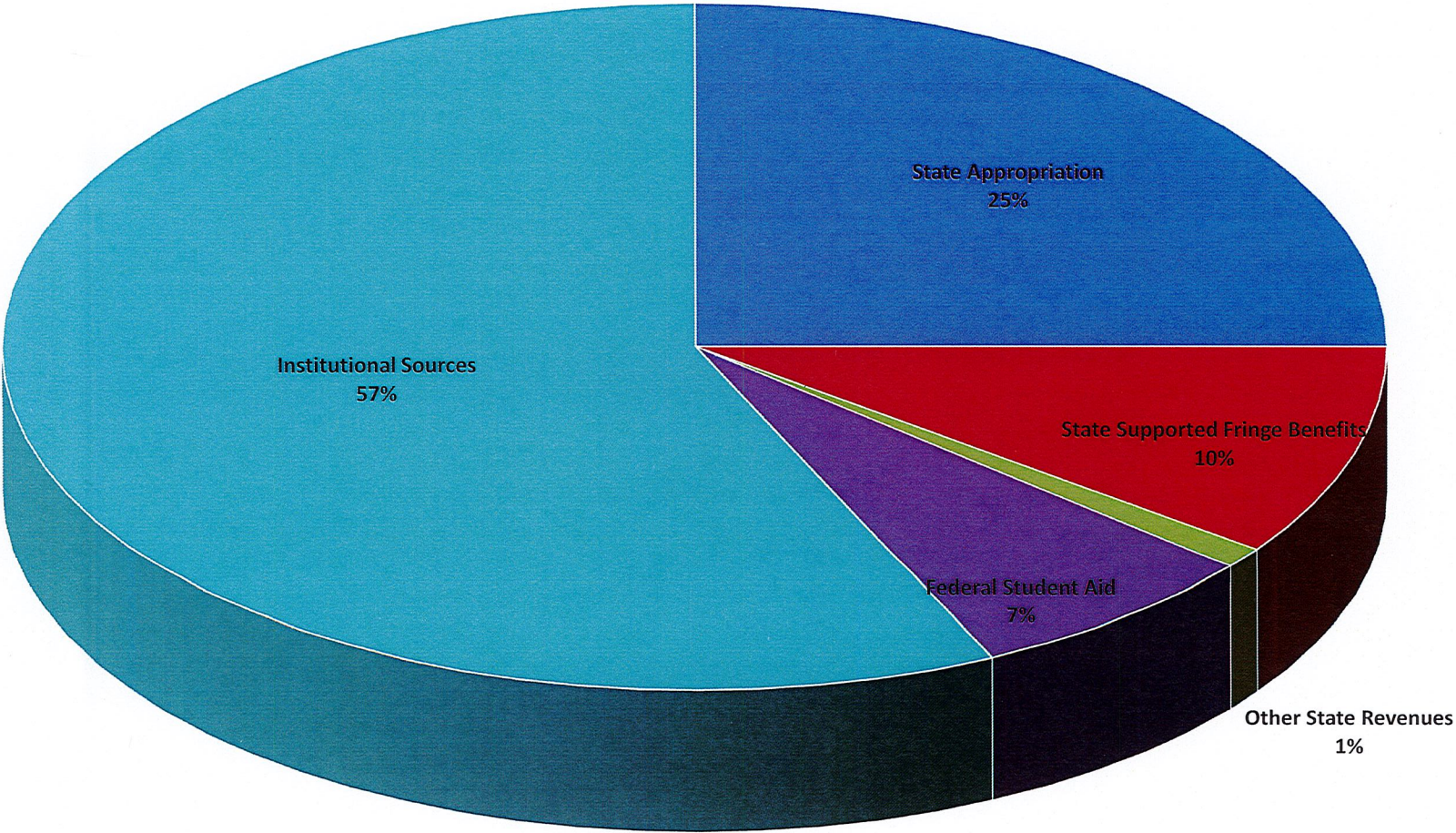
Sources of Funds:

State Appropriation	\$ 30,042,733
State Supported Fringe Benefits	11,680,615
Other State Revenues	1,017,277
Federal Student Aid	7,975,556
Institutional Sources	68,225,567
Total Sources	<u><u>\$ 118,941,748</u></u>

Uses of Funds:

AA	Regular Employees	\$ 43,598,657
BB	Employee Related Expenses	756,662
CC	Temporary Part-Time Employees	8,920,895
DD	Staff Benefit Expenses	17,005,504
EE	Administrative Expenses	2,850,945
FF	Facility Operation Supplies	2,393,906
GG	Energy/Space Rental	12,158,949
HH	Professional Services	1,487,818
JJ	Operational Services	931,383
KK	Equipment Purchase	54,000
LL	Equipment Lease, Maintenance, Repair	1,456,457
NN	Infrastructure & Building Improvements	6,026,119
RR	Educational Assistance	12,236,488
SS	Debt Service	986,100
UU	Information Technology	2,429,424
XX	Unallocated	524,831
	Transfer Out	5,123,610
	Transfer to Reserves	-
	Total Uses	<u><u>\$ 118,941,748</u></u>

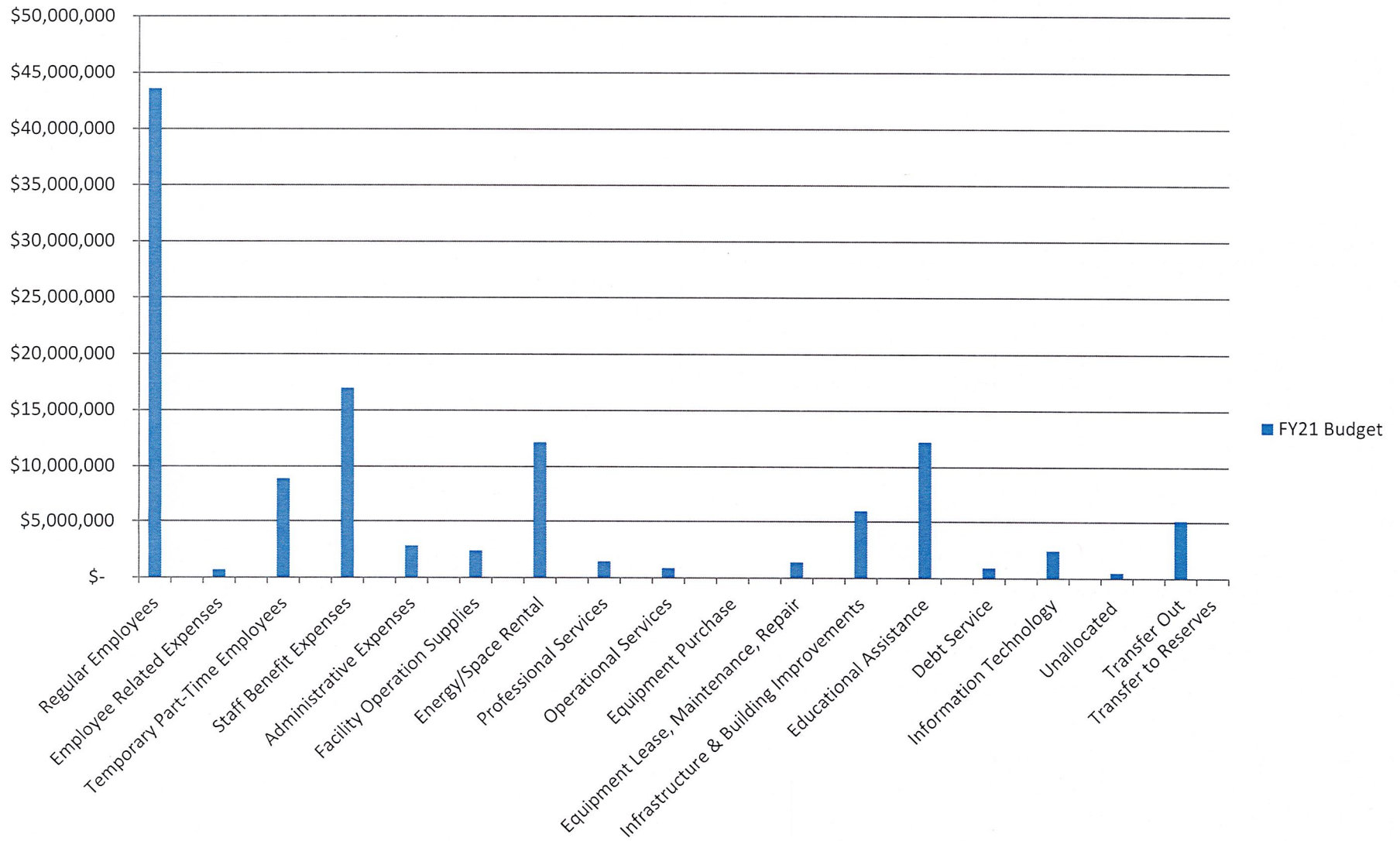
Worcester State University
Sources Of Funds
FY 2021 Budget



Worcester State University

Uses of Funds

FY 2021 Budget



Worcester State University

Summary of Sources

FY 2021 - All Sources and Trust Funds

State Sources

Annual State Maintenance Appropriation		\$	30,042,733
State Supported Fringe Benefits	11,680,615		
Student Aid Program (Cash Grant & PT Student)	1,017,277		
Total Other State Sources			12,697,892
Total State Sources			42,740,625

Federal Sources

SEOG Program	225,853		
College Work Study Program	113,447		
Pell Grants	7,522,901		
Local match (Transfer from General Trust Fund Reserve)	113,355		
Total Federal Sources			7,975,556

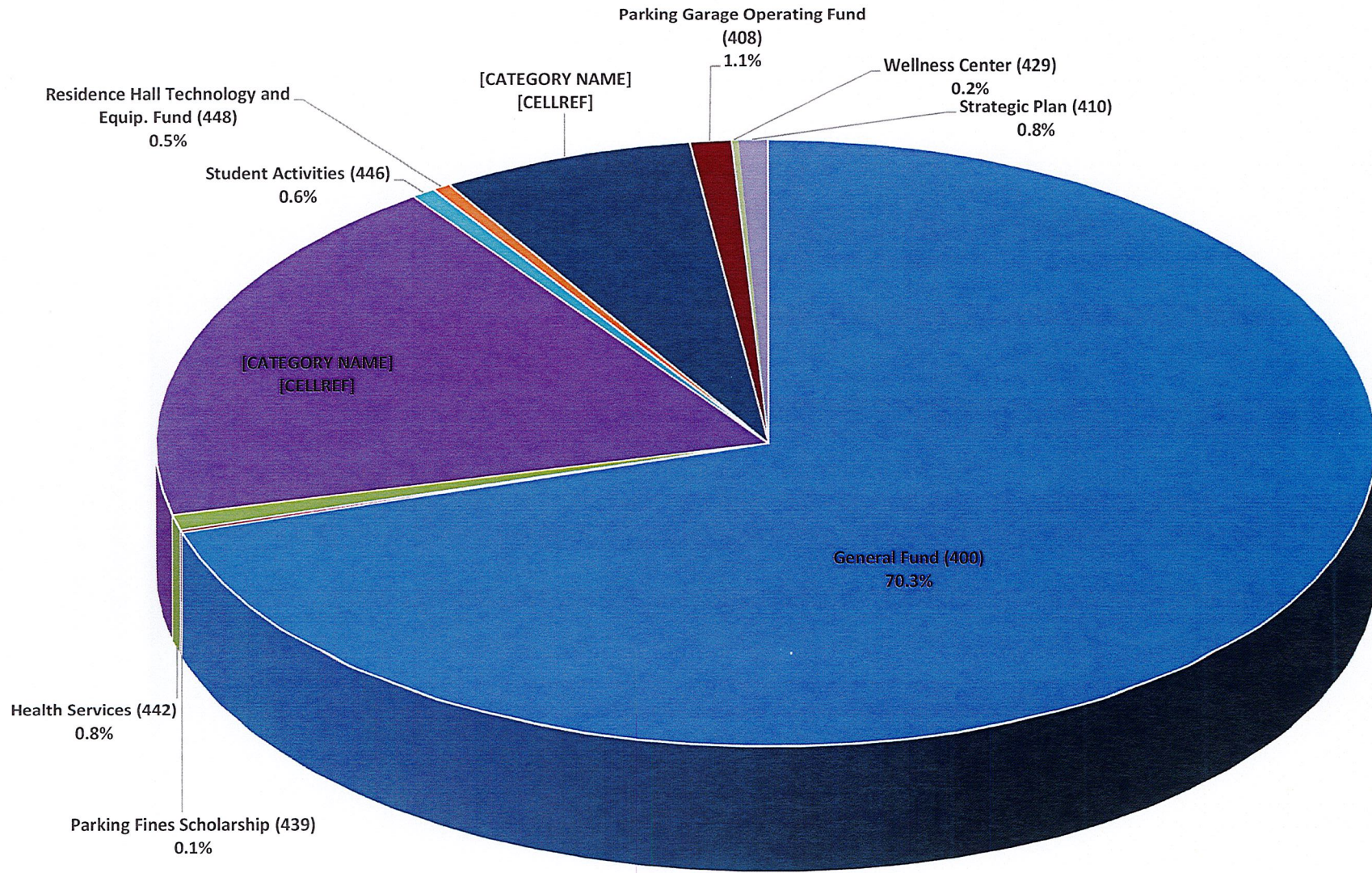
Institutional Sources

Revenue			
General Fund	47,965,057		
Parking Fines Scholarship Fund	96,896		
Health Services Fund	445,573		
Residence Halls Fund	12,909,144		
Student Activities Fund	295,913		
Residence Hall Technology and Equip. Fund	327,580		
Capital Improvement Fund	4,553,124		
Wellness Center Trust Fund	125,000		
Transfers In			
*Transfer from Health Services Fund Reserve	104,188		
*Transfer from Student Activities Trust Fund Reserve	134,087		
*Transfer from Capital Improvement Trust Fund	744,174		
*Transfer from Reserves	524,831		
*Transfer from Reserves	-		
Total Institutional Sources			68,225,567
Total Sources		\$	118,941,748

Worcester State UniversityTrust Fund Summary
FY 2021 Requested Budget

	Budget FY 2021		
	Sources	Uses	
General Fund (400)	\$47,965,057	\$ 47,965,057	70.3%
Parking Fines Scholarship (439)	96,896	96,896	0.1%
Health Services (442)	549,761	549,761	0.8%
Residence Hall (445)	12,909,144	12,909,144	18.9%
Student Activities (446)	430,000	430,000	0.6%
Residence Hall Technology and Equip. Fund (448)	327,580	327,580	0.5%
Capital Improvement Fund (405)	4,553,124	4,553,124	6.7%
Parking Garage Operating Fund (408)	744,174	744,174	1.1%
Wellness Center (429)	125,000	125,000	0.2%
Strategic Plan (410)	524,831	524,831	0.8%
Total Trust Fund Budget	<u>\$68,225,567</u>	<u>\$ 68,225,567</u>	

Worcester State University
Trust Fund Summary
FY 2021 Budget



Worcester State University
Operating Revenue
FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
State Sources		
State Maintenance	41,723,348	41,339,070
collective bargaining	-	-
increased funding	-	-
Total State Sources	<u>41,723,348</u>	<u>41,339,070</u>
Institutional Sources		
General Trust Fund		
Tuition/ In state Undergraduate	4,283,392	4,370,808
Tuition/ Graduate	1,708,605	1,764,882
Tuition/ Out of State Undergraduate	1,288,377	1,314,670
Total Tuition	<u>7,280,374</u>	<u>7,450,360</u>
Waivers/Undergraduate	(173,468)	(177,008)
Waivers/Graduate	(248,839)	(239,207)
Total Tuition Waivers	(422,307)	(416,215)
Net Tuition	<u>6,858,067</u>	<u>7,034,145</u>
Undergraduate Day Division	35,084,253	34,036,000
Undergraduate Eve/Summer Programs	2,556,563	2,608,738
Graduate School	1,328,694	1,389,717
Total Fees	<u>38,969,510</u>	<u>38,034,455</u>
Undergraduate Day Division waivers	(936,697)	(955,813)
Undergraduate Eve/Summer Programs/waiver:	(67,634)	(69,014)
Graduate Fee waiver	(160,753)	(144,688)
Total Fees Waivers	(1,165,084)	(1,169,515)
Net Fees	<u>37,804,426</u>	<u>36,864,940</u>
Application Fees	119,700	119,700
Special fees	332,708	332,708
Commencement Fees	3,825	3,825
Transcript Fees	53,250	53,250
Orientation Fees	137,865	137,865
Testing Fees	12,070	12,070
Libr. fines/ copier inc.	835	835
Activity income	50,310	50,310
Commissions	302,568	302,568
Non-Credit Courses incl Restricted	537,497	587,372
Center for Effective Instruction	268,209	293,304
Intensive English Institute	487,982	503,609
Center for Business & Industry	300,000	50,000
Facilities rentals	480,745	480,746
Miscellaneous	215,000	188,651
Other income	<u>3,302,564</u>	<u>3,116,813</u>
Total General Trust Fund Source	<u>47,965,057</u>	<u>47,015,898</u>
General Operating Budget Income	<u>89,688,405</u>	<u>88,354,968</u>

III. Individual Fund Budgets

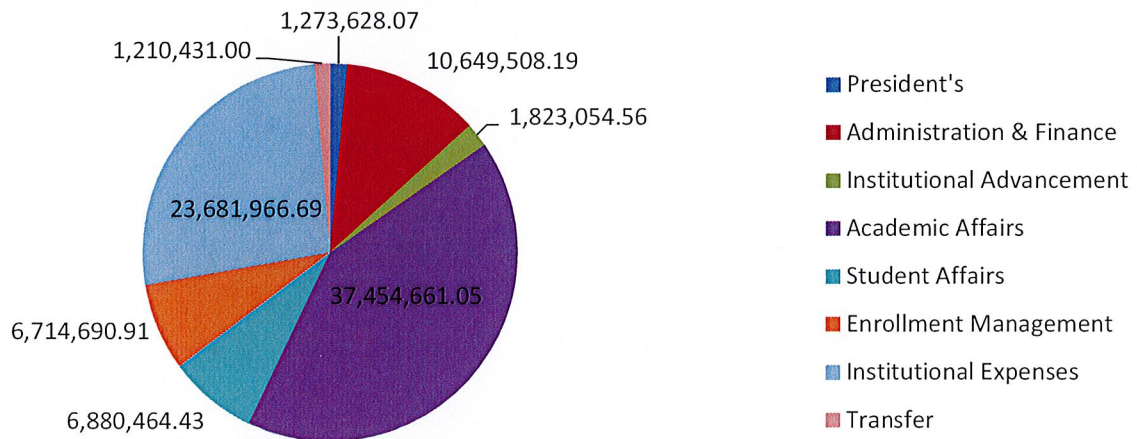
Worcester State University
General Operating Budget (111 & 400)
FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>		
Revenues	\$ 78,007,790	\$ 76,698,607
State Funded Fringe Benefits	\$ 11,680,615	\$ 11,656,361
Transfer in -Reserves		\$ 225,195
Total Sources	<u>\$ 89,688,405</u>	<u>\$ 88,580,163</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 42,133,903	\$ 41,761,654
BB Employee Related Expenses	733,162	733,163
CC Temporary Part-Time Employees	8,612,145	8,403,476
DD Staff Benefit Expenses	16,450,154	16,123,008
EE Administrative Expenses	2,629,549	2,614,549
FF Facility Operation Supplies	1,891,406	1,886,106
GG Energy/Space Rental	2,460,910	2,389,498
HH Professional Services	1,001,188	951,188
JJ Operational Services	915,383	771,333
KK Equipment Purchase	-	61,412
LL Equipment Lease, Maintenance, Repair	1,253,157	1,253,157
NN Infrastructure & Building Improvements	5,207,619	5,366,969
RR Educational Assistance	2,490,961	2,490,961
SS Debt Service	307,013	307,013
UU Technology Expenses	2,391,424	2,256,245
Transfer to - Capital Improvement Trust Fund	1,210,431	1,210,431
Transfer to - Strategic Plan Trust Fund		
Transfer to - Reserves		
Total Uses	<u>\$ 89,688,405</u>	<u>\$ 88,580,163</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

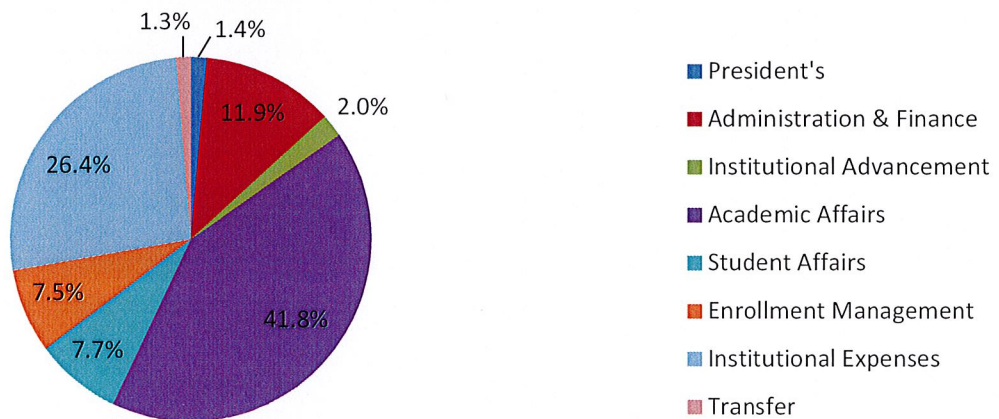
**Worcester State University
400/111 Expenditures by Division
FY 2021 Budget**

Class	Division	Budget FY21 Subtotals	Budget FY21 Exp %
2	President's	1,273,628.07	1.4%
3	Administration & Finance	10,649,508.19	11.9%
4	Institutional Advancement	1,823,054.56	2.0%
6	Academic Affairs	37,454,661.05	41.8%
7	Student Affairs	6,880,464.43	7.7%
8	Enrollment Management	6,714,690.91	7.5%
3	Institutional Expenses	23,681,966.69	26.4%
	Transfer	1,210,431.00	1.3%
		<u>\$89,688,404.89</u>	<u>100.0%</u>

**Budget FY2021
Subtotals by Division**



**Budget FY2021
Expense % by Division**



Worcester State University
State Maintenance Appropriation (111)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	State Appropriation	\$30,042,733	\$ 29,682,709
	State Funded Fringe Benefits	11,680,615	11,656,361
	Total Sources	<u>\$41,723,348</u>	<u>\$ 41,339,070</u>
<u>Uses of Funds:</u>			
AA	Regular Employees	\$30,042,733	\$ 29,682,709
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	11,680,615	11,656,361
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	-
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
KK	Equipment Purchase	-	-
NN	Infrastructure & Building Improvements	-	-
	Total Uses	<u>\$41,723,348</u>	<u>\$ 41,339,070</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University

General Trust Fund (400)

FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>		
Revenues	\$ 47,965,057	\$ 47,015,898
Transfer in - Reserves		\$ 225,195
Total Sources	<u>\$ 47,965,057</u>	<u>\$ 47,241,093</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 12,091,170	\$ 12,078,945
BB Employee Related Expenses	733,162	733,163
CC Temporary Part-Time Employees	8,612,145	8,403,476
DD Staff Benefit Expenses	4,769,539	4,466,647
EE Administrative Expenses	2,629,549	2,614,549
FF Facility Operation Supplies	1,891,406	1,886,106
GG Energy/Space Rental	2,389,498	2,389,498
HH Professional Services	1,001,188	951,188
JJ Operational Services	915,383	771,333
KK Equipment Purchase	71,412	61,412
LL Equipment Lease, Maintenance, Repair	1,253,157	1,253,157
NN Infrastructure & Building Improvements	5,207,619	5,366,969
RR Educational Assistance	2,490,961	2,490,961
SS Debt Service	307,013	307,013
UU Technology Expenses	2,391,424	2,256,245
Transfer to - Capital Improvement Trust Fund	1,210,431	1,210,431
Total Uses	<u>\$ 47,965,057</u>	<u>\$ 47,241,093</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Capital Improvement Trust Fund (405)
FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>		
Capital Improvement Fee	\$ 3,281,678	\$ 3,281,678
Transfer In - General Fund	1,210,431	1,210,431
Parking Revenue	61,015	61,015
Total Sources	<u>\$ 4,553,124</u>	<u>\$ 4,553,124</u>
<u>Uses of Funds:</u>		
SS - Debt Service	\$ 679,087	\$ 679,087
Transfer Out - Parking Garage Oper. Fund	744,174	744,174
Transfer Out - To Reserves	3,129,863	3,129,863
Total Uses	<u>\$ 4,553,124</u>	<u>\$ 4,553,124</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Parking Garage Operating Fund (408)
FY 2021 Requested Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Transfer In - Capital Improvement T. F.	\$ 744,174	\$ 744,174
	Total Sources	<u>\$ 744,174</u>	<u>\$ 744,174</u>
<u>Uses of Funds:</u>			
FF	Facility operating supplies	\$ -	\$ -
GG	Energy and space rental	703,044	703,044
HH	Professional services	630	630
JJ	Operational services	-	-
LL	Equipment lease, maint and repair	2,500	2,500
NN	Construction/Maintenance/Improvements	\$ 38,000	\$ 38,000
	Total Uses	<u>\$ 744,174</u>	<u>\$ 744,174</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Strategic Plan Trust Fund (410)
FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>		
Transfer in -Reserves	\$ 524,831	\$ 562,582
Total Sources	<u>\$ 524,831</u>	<u>\$ 562,582</u>
<u>Uses of Funds:</u>		
BB Employee Related Expenses	\$ -	\$ -
CC Temporary Part-Time Employees	-	-
DD Staff Benefit Expenses	-	-
EE Administrative Expenses	-	-
FF Facility Operation Supplies	-	-
GG Energy/Space Rental	-	-
HH Professional Services	-	-
JJ Operational Services	-	-
KK Equipment Purchase	-	-
LL Equipment Lease, Maintenance, Repair	-	-
NN Construction/Maintenance/Improvements	-	-
XX Unallocated	524,831	562,582
Total Uses	<u>\$ 524,831</u>	<u>\$ 562,582</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Wellness Center Trust Fund (429)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Revenues	\$ 125,000	\$ 125,000
	Total Sources	<u>\$ 125,000</u>	<u>\$ 125,000</u>
<u>Uses of Funds:</u>			
BB	Employee Related Expenses	\$ -	\$ -
CC	Temporary Part-Time Employees	9,000	9,000
DD	Staff Benefit Expenses	-	-
EE	Administrative Expenses	25,000	25,000
FF	Facility Operation Supplies	9,000	9,000
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
KK	Equipment Purchase	40,000	40,000
LL	Equipment Lease, Maintenance, Repair	30,000	30,000
NN	Construction/Maintenance/Improvements	-	-
	Transfer Out - To Reserves	12,000	12,000
	Total Uses	<u>\$ 125,000</u>	<u>\$ 125,000</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Parking Fines Scholarship Fund (439)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Fines and Other Income	\$ 78,205	\$ 78,205
	Transfer in - Reserves	18,691	18,691
	Total Sources	<u>\$ 96,896</u>	<u>\$ 96,896</u>
<u>Uses of Funds:</u>			
EE	Administrative Supplies	36,896	36,896
RR	Educational Assistance	60,000	60,000
	Transfer Out - To Reserves	-	-
	Total Uses	<u>\$ 96,896</u>	<u>\$ 96,896</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Health Services Trust Fund (442)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Fees and Other Income	\$ 445,573	\$ 445,573
	Transfer In - reserves	\$ 104,188	\$ 104,188
	Total Sources	<u>\$ 549,761</u>	<u>\$ 549,761</u>
<u>Uses of Funds:</u>			
AA	Regular Employees	\$ 77,731	\$ 77,731
BB	Employee Related Expenses	3,500	3,500
CC	Temporary Part-Time Employees	12,750	12,750
DD	Staff Benefit Expenses	29,530	29,530
EE	Administrative Expenses	2,500	2,500
FF	Facility Operation Supplies	18,000	18,000
HH	Professional Services	400,000	400,000
LL	Equipment Lease, Maintenance, Repair	800	800
RR	Client Medical Services	950	950
UU	Technology Expenses	4,000	4,000
	Total Uses	<u>\$ 549,761</u>	<u>\$ 549,761</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Resident Hall Trust Fund (445)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Fees and Other Income	\$ 12,909,144	\$ 12,602,892
	Total Sources	<u>\$ 12,909,144</u>	<u>\$ 12,602,892</u>
<u>Uses of Funds:</u>			
AA	Regular Employees	\$ 1,387,023	\$ 1,327,233
BB	Employee Related Expenses	12,000	35,000
CC	Temporary Part-Time Employees	257,000	257,000
DD	Staff Benefit Expenses	525,820	504,216
EE	Administrative Expenses	127,000	127,000
FF	Facility Operation Supplies	245,000	267,500
GG	Energy/Space Rental	8,694,557	8,461,395
HH	Professional Services	16,000	31,000
JJ	Operational Services	10,000	15,000
KK	Equipment Purchase	9,000	25,000
LL	Equipment Lease, Maintenance, Repair	120,000	118,000
NN	Infrastructure & Building Improvements	780,000	770,784
RR	Educational Assistance	691,744	629,764
UU	Technology Related Expenses	34,000	34,000
	Total Uses	<u>\$ 12,909,144</u>	<u>\$ 12,602,892</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Student Activities Trust Fund (446)
FY 2021 Budget

		FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>			
	Fees	\$ 295,913	\$ 295,913
	Transfer In - Reserves	\$ 134,087	\$ 134,087
	Total Sources	<u>\$ 430,000</u>	<u>\$ 430,000</u>
<u>Uses of Funds:</u>			
BB	Employee Related Expenses	\$ 8,000	\$ 8,000
CC	Temporary Part-Time Employees	30,000	30,000
DD	Staff Benefit Expenses	-	-
EE	Administrative Expenses	30,000	30,000
FF	Facility Operation Supplies	230,500	230,500
GG	Energy/Space Rental	-	-
HH	Professional Services	70,000	70,000
JJ	Operational Services	6,000	6,000
KK	Equipment Purchase	5,000	5,000
LL	Equipment Lease, Maintenance, Repair	50,000	50,000
NN	Construction/Maintenance/Improvements	500	500
	Total Uses	<u>\$ 430,000</u>	<u>\$ 430,000</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University

Residence Hall Technology and Equipment Trust Fund (448)
FY 2021 Budget

	FY2021 Requested Budget	FY2020 Approved Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 327,580	\$ 327,580
Total Sources	<u>\$ 327,580</u>	<u>\$ 327,580</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ -	\$ -
DD Staff Benefits Expense	-	-
EE Administrative Expenses	-	-
GG Energy/Space Rental	300,438	300,438
LL Equipment Lease, Maintenance, Repair	-	-
UU Technology Expenses	-	-
Transfer Out - To Reserves	27,142	27,142
Total Uses	<u>\$ 327,580</u>	<u>\$ 327,580</u>

IV. Quarter 1 Spending Plan
7/01/2020 – 9/30/2020

Worcester State University

FY 2021 Budget Package

1st Quarter Spending Plan

7/01/2020 - 9/30/2020

- 1 Summary of Trust Funds and State Appropriations
- 2 General Operating Budget (111 & 400 Combined)
- 3 Capital Improvement Trust Fund (405)
- 4 Parking Garage Operating Fund (408)
- 5 Strategic Plan Trust Fund (410)
- 6 Wellness Center Trust Fund (429)
- 7 Parking Fines Scholarship Fund (439)
- 8 Health Services Trust Fund (442)
- 9 Residence Halls Trust Fund (445)
- 10 Student Activities Trust Fund (446)
- 11 Residence Hall Technology and Equipment Trust Fund (448)

Worcester State University
FY 2021 Budget
1st Quarter Consolidated Spending Plan
7/01/2020 - 9/30/2020
Trust Funds and State Operating Appropriation

		Q1 Spending	Q1 percentage	FY 2021 Budget
AA	Regular Employees	10,706,691	25%	43,538,867
BB	Employee Related Expenses	106,661	14%	779,662
CC	Temporary Part-Time Employees	791,846	9%	8,920,895
DD	Staff Benefit Expenses	4,204,457	25%	16,983,900
EE	Administrative Expenses	804,496	28%	2,850,945
FF	Facility Operation Supplies	466,310	19%	2,416,406
GG	Energy/Space Rental	4,759,330	40%	11,925,787
HH	Professional Services	232,291	15%	1,502,818
JJ	Operational Services	166,329	18%	936,383
KK	Equipment Purchase	-	0%	70,000
LL	Equipment Lease, Maint., & Repair	256,505	18%	1,454,457
NN	Infrastructure & Building Imprvts	727,368	12%	6,016,903
RR	Educational Assistance	50,381	2%	3,181,675
SS	Debt Service	196,935	20%	986,100
UU	Information Technology	1,155,024	48%	2,429,424
XX	Unallocated	-	0%	524,831
	Total Uses	<u>\$ 24,624,624</u>	24%	<u>\$ 104,519,053</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
General Operating Budget (111 & 400)

		<u>Q1</u> <u>Spending</u>	<u>FY2021 Budget</u> <u>Released</u>	<u>FY2021</u> <u>Requested</u>
	<u>Q1 Spending</u>	<u>Plan %</u>	<u>7/01/2020</u>	<u>Budget</u>
AA Regular Employees	\$ 10,450,688	25%	\$ 41,802,752	\$42,133,903
BB Employee Related Expenses	106,611	31%	343,907	733,162
CC Temporary Part-Time Employees	724,596	13%	5,573,813	8,612,145
DD Staff Benefit Expenses	4,112,539	25%	16,450,154	16,450,154
EE Administrative Expenses	762,569	29%	2,629,549	2,629,549
FF Facility Operation Supplies	397,195	21%	1,891,406	1,891,406
GG Energy/Space Rental	442,964	18%	2,460,910	2,460,910
HH Professional Services	220,261	22%	1,001,188	1,001,188
JJ Operational Services	164,769	18%	915,383	915,383
LL Equipment Lease, Maint. Repair	175,442	14%	1,253,157	1,253,157
NN Infrastructure & Building Improvts	416,610	8%	5,207,619	5,207,619
RR Educational Assistance	-	0%	2,490,961	2,490,961
SS Debt Service	-	0%	307,013	307,013
UU Technology Expenses	1,147,884	48%	2,391,424	2,391,424
Transfer to - Capital Improvement Trust Fund	-		-	1,210,431
Total Uses	<u>\$ 19,122,128</u>		<u>\$ 84,719,236</u>	<u>\$89,688,405</u>

Worcester State University

FY 2021 Budget

1st Quarter Spending Plan: 7/01/2020 - 9/30/2020

Capital Improvement Trust Fund (405)

	<u>Q1 Spending</u>	<u>Q1 Spending Plan %</u>	<u>FY2021 Budget Released 7/01/2020</u>	<u>FY2021 Requested Budget</u>
SS - Debt Service	\$ 196,935	29%	\$ 679,087	\$ 679,087
Total Uses	<u>\$ 196,935</u>		<u>\$ 679,087</u>	<u>\$ 679,087</u>

Worcester State University

FY 2021 Budget

1st Quarter Spending Plan: 7/01/2020 - 9/30/2020

Parking Garage Operating Fund (408)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
	Q1 Spending			
FF	Facility operating supplies	\$ -	0%	\$ -
GG	Energy and space rental	182,791	26%	703,044
HH	Professional services	-	0%	630
JJ	Operational services	-	0%	-
LL	Equipment lease, maint and repair	1,225	49%	2,500
NN	Construction/Mainten./Improvements	17,860	47%	38,000
	Total Uses	<u>\$ 201,876</u>		<u>\$ 744,174</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Strategic Plan Trust Fund (410)

		Q1 Spending Q1 Spending	Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
BB	Employee Related Expenses	\$	-	0%	\$ - \$ -
CC	Temporary Part-Time Employees		-	0%	- -
DD	Staff Benefit Expenses		-	0%	- -
EE	Administrative Expenses		-	0%	- -
FF	Facility Operation Supplies		-	0%	- -
GG	Energy/Space Rental		-	0%	- -
HH	Professional Services		-	0%	- -
JJ	Operational Services		-	0%	- -
KK	Equipment Purchase		-	0%	- -
LL	Equipment Lease, Maintenance, Repair		-	0%	- -
NN	Construction/Maint./Improvements		-	0%	- -
XX	Unallocated		-	0%	- 524,831
	Total Uses	<u>\$</u>	<u>-</u>	<u>\$</u>	<u>- \$ 524,831</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Wellness Center Trust Fund (429)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
	Q1 Spending			
BB	Employee Related Expenses	\$ - 0%	\$ -	\$ -
CC	Temporary Part-Time Employees	- 0%	9,000	9,000
DD	Staff Benefit Expenses	- 0%	-	-
EE	Administrative Expenses	- 0%	25,000	25,000
FF	Facility Operation Supplies	5,220 58%	9,000	9,000
GG	Energy/Space Rental	- 0%	-	-
HH	Professional Services	- 0%	-	-
JJ	Operational Services	- 0%	-	-
KK	Equipment Purchase	- 0%	40,000	40,000
LL	Equipment Lease, Maintenance, Repair	- 0%	30,000	30,000
NN	Construction/Maint./Improvements	- 0%		-
Total Uses		<u>\$ 5,220</u>	<u>\$ 113,000</u>	<u>\$ 113,000</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Parking Fines Trust Fund (439)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget	
	Q1 Spending				
EE	Administrative Supplies	18,817	51%	36,896	36,896
RR	Educational Assistance	0	0%	60,000	60,000
	Total Uses	<u>\$ 18,817</u>		<u>\$ 96,896</u>	<u>\$ 96,896</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Health Services Trust Fund (442)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
	Q1 Spending			
AA Regular Employees	\$ 17,101	22%	\$ 77,731	\$ 77,731
BB Employee Related Expenses	-	0%	3,500	3,500
CC Temporary Part-Time Employees	-	0%	12,750	12,750
DD Staff Benefit Expenses	6,201	21%	29,530	29,530
EE Administrative Expenses	250	10%	2,500	2,500
FF Facility Operation Supplies	1,620	9%	18,000	18,000
HH Professional Services	8,000	2%	400,000	400,000
LL Equipment Lease, Maintenance, Repair	328	41%	800	800
RR Client Medical Services	-	0%	950	950
UU Technology Expenses	-	0%	4,000	4,000
Total Uses	<u>\$ 17,101</u>		<u>\$ 549,761</u>	<u>\$ 549,761</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Resident Hall Trust Fund (445)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
	Q1 Spending			
AA Regular Employees	\$ 238,902	18%	\$ 1,327,233	\$ 1,327,233
BB Employee Related Expenses	50	1%	5,000	35,000
CC Temporary Part-Time Employees	64,250	25%	257,000	257,000
DD Staff Benefit Expenses	85,717	17%	504,216	504,216
EE Administrative Expenses	22,860	18%	127,000	127,000
FF Facility Operation Supplies	45,475	17%	267,500	267,500
GG Energy/Space Rental	4,061,470	48%	8,461,395	8,461,395
HH Professional Services	4,030	13%	31,000	31,000
JJ Operational Services	1,050	7%	15,000	15,000
KK Equipment Purchase	-	0%	-	25,000
LL Equipment Lease, Maintenance, Repair	67,260	57%	118,000	118,000
NN Infrastructure & Building Improvements	292,898	38%	770,784	770,784
RR Educational Assistance	50,381	8%	629,764	629,764
UU Technology Related Expenses	7,140	21%	34,000	34,000
Total Uses	<u>\$ 4,591,064</u>		<u>\$ 11,113,344</u>	<u>\$ 12,602,892</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Student Activities Trust Fund (446)

		Q1 Spending	Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
BB	Employee Related Expenses	\$ -	0%	\$ 1,000	\$ 8,000
CC	Temporary Part-Time Employees	3,000	10%	30,000	30,000
DD	Staff Benefit Expenses	-	0%		-
EE	Administrative Expenses	-	0%	15,000	30,000
FF	Facility Operation Supplies	16,800	14%	120,000	230,500
GG	Energy/Space Rental	-	0%		-
HH	Professional Services	-	0%	35,000	70,000
JJ	Operational Services	510	17%	3,000	6,000
KK	Equipment Purchase	-	0%	-	5,000
LL	Equipment Lease, Maintenance, Repair	12,250	49%	25,000	50,000
NN	Construction/Maintenance/Improvements	-	0%	-	500
	Total Uses	<u>\$ 32,560</u>		<u>\$ 229,000</u>	<u>\$ 430,000</u>

Worcester State University
FY 2021 Budget
1st Quarter Spending Plan: 7/01/2020 - 9/30/2020
Residence Hall Technology and Equipment Trust Fund (448)

		Q1 Spending Plan %	FY2021 Budget Released 7/01/2020	FY2021 Requested Budget
	Q1 Spending			
AA Regular Employees	\$ -	0%	\$ -	\$ -
DD Staff Benefits Expense	-	0%	-	-
EE Administrative Expenses	-	0%	-	-
GG Energy/Space Rental	72,105	24%	300438	300,438
LL Equipment Lease, Maint., Repair	-	0%	-	-
UU Technology Expenses	-		-	-
Total Uses	<u>\$ 72,105</u>		<u>\$ 300,438</u>	<u>\$ 300,438</u>

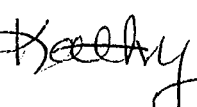
Appendix

A. Budget Fee Package from January
Meeting

Memorandum

DATE: December 17, 2019

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance 

RE: RATE SETTING PROPOSAL FOR FY 2021

As in the prior year, WSU is looking to set its rate structure for the coming 2020/2021 academic year as early as possible. WSU's ability to freeze rates in 2019 resulted in the institution having the least costly mandatory fees of all the state universities. Other institutions raised their student fees from 3% - 6% with comparable mandatory annual fees being anywhere from \$342 to \$1,182 a year greater than the rates at WSU.

Higher education in New England and the Northeast in general is predicted to experience a decline in the numbers of public and private high school graduates. Ruffalo Noel Levitz, a provider of higher education enrollment management services, has predicted a 3.5% decline in students in Massachusetts from academic year 2018-19 through 2023-24. A multi-year operating budget forecast has been prepared incorporating slight declines in enrollment that translate in to revenue deficiencies impacting the bottom line. A forecast worksheet beginning with current year actual and projecting through FY2024 is attached. Following the lead of Ruffalo Noel Levitz, a 3.5% cumulative reduction in undergraduate day students has been spread across FY 2021 through FY 2024. In addition, the FY 2021 revenue forecast for certain non-credit program offerings have been decreased to reflect the actual results of the business like activities in FY 2019. While WSU is venturing into the online graduate degree market in spring of 2020 we have held revenue expectations flat. The initial offerings through the graduate online programs are not expected to immediately return a profit and will be monitored closely in a set aside account. We will begin to incorporate the activity in to future forecasts after we have accomplished a term or two in a particular program. There are other opportunities for revenue growth that we continue to explore including collaborations with Worcester Center for Crafts, other private institutions, early college offerings and continued maximization of conferencing opportunities.

While the information presented in this package generally addresses revenue forecasts, the expenditure side of the equation with regard to cost containment and re-allocation of resources continues to be examined. As part of the FY 2019 budget process the administration closely examined all departmental lines and concluded that other than some high impact categories such as payroll, benefits, deferred maintenance and other various fixed operating costs, there are very small allocations of funds across almost 200 departments that serve to educate or support our students or the operations of the institution. There is very little if anything to reduce in the departmental lines without impacting services and operations. We continue to gather data on various categories of payroll cost which is the largest cost category in the budget. We have begun documenting existing practices, some of which have evolved over time, with the intent of evaluating the practices for effectiveness and efficiencies and opportunities for cost savings. Consideration will include alternative ways of accomplishing university goals while maximizing the use of limited resources.

The operating budget forecast for revenue for FY 2021 reflects a 2% decline that creates a budget deficiency of \$1,046,058. Other institutional trust funds were evaluated to assess the impact of the predicted change in student demographics on revenue projections in FY 2021. The Health Services Trust Fund and Student Activities Trust Fund may be slightly impacted in FY 2021, however each fund has sufficient reserves to draw on in the coming year without increasing the respective student fee. The Capital Improvement Trust Fund may experience a \$91,062 revenue gap in the coming year if undergraduate enrollment declines by 2%. This gap will reduce the cumulative net savings on an annual basis that accrues in the fund. The accrued net savings are part of the unrestricted reserves growth strategy that the university follows as part of its capital investment plan. The capital investment plan is being updated in response to the university's and Worcester State Foundation's desires to develop the May Street property. Student enrollment trends will be reflected in the update which is expected to be complete in the next few months. A draft of the Resident Hall Trust Fund budget for FY 2021 has been submitted to the MSCBA as they are the rate setting authority. The administration worked with MSCBA staff to develop the budget, and as in most recent years, revenue figures are based on full occupancy while expenditures are contained to provide a buffer in the event actual occupancy is less than 100%. In addition to reduced expenditures, double room rates have increased in the range of \$100 - \$200 a year with a more significant increase in single room rates. The rate increases proposed are less than the increases recommended by the MSCBA and are necessary to cover obligations to the MSCBA for long term lease and pooled reserve commitments. With regard to state operating appropriations, we may receive a 1% increase related to the performance incentive funds as we have in the past. We will not budget for any increase in state appropriations in FY 2021 as it has been our past experience that the funds may not be available until late in the year or may not make their way through the entire budget process.

As detailed on the Budget Forecast 2021 through 2024, a 2% decline in enrollment and adjustments to other revenue lines, creates a revenue gap that we propose be closed with a \$257 annual increase to the General Fee. Following the trend going forward, without adjustments to the model for successful net new revenue initiatives that are actively being pursued, further declines in enrollment would be mitigated with additional future General Fee increases of approximately \$200 in FY 2022 and \$100 in FY 2023. While these projected fee increases are not definitive, they are our best estimate at this time in response to the predicted demographic decline in college age students in Massachusetts. The projected increases do not provide any additional resources to address the enormous demand for new resources. While we continue to vigorously examine existing business practices in an effort to shift resources to areas of need it is not possible to quantify the results for FY 2021.

The WSU community is currently developing initiatives to position the institution to mitigate declines in enrollment, successfully compete with other institutions for future students, retain our student and increase their opportunities for success at WSU and the world beyond. At the same time we are planning for additional investment in campus infrastructure while continuing to maintain the financial stability of the institution. We are unable to rely on increased funding from the Commonwealth to provide resources to achieve university goals as we continually demand the cost of labor contracts negotiated by the Commonwealth to be adequately funded. While we are aware of the increasing costs to students it is important to invest in the plans that are underway. In addition to the \$257 increase in the General Fee previously discussed, we propose a \$168 annual increase to provide new resources to

be invested in critical needs of the institution. The cumulative increase in the General Fee for the year would be \$425, a 5% increase over the prior year.

Included in this package for reference is an Annual Tuition and Fee Analysis that identifies the proposed cost of attendance, depending on student type, as proposed for FY 2021 and forecast for FY 2022 through FY 2024. There is a draft Tuition and Fee schedule for AY 2020/2021 reflecting the proposed changes in rates. In addition a chart depicting the ten year trend of mandatory fees across all of Massachusetts Public Colleges and Universities is provided.

Worcester State University
Revenue Forecasts & Rate Setting
Operating Appropriations and Trust Funds

	FY 2020 Budget	FY 2021 % chg	FY 2021 Revenue Forecast	\$ change	rate change proposed
Annual State Maintenance Appropriation	\$ 29,682,709	1%	\$ 29,979,536	\$ 296,827	-
Institutional Sources					
General Fund	47,015,898	-2%	45,969,840	\$ (1,046,058)	Yes
Health Services Fund	445,573	-2%	436,662	\$ (8,911)	No
Residence Halls Fund	12,602,892	2%	12,854,950	\$ 252,058	Yes
Student Activities Fund	295,913	-2%	289,995	\$ (5,918)	No
Residence Hall Technology and Equip. Fund	327,580	0%	327,580	\$ -	No
Capital Improvement Fund	4,553,124	-2%	4,462,062	\$ (91,062)	No
Total	94,923,689		94,320,624	\$ (603,065)	

FY 2020 budgeted Transfers from Reserves (reserve balance 7/1/2019)

*Transfer from Health Services Fund Reserve	104,188
*Transfer from Student Activities Trust Fund Reserve	134,087
*Transfer from Capital Improvement Trust Fund	744,174

12/17/2019

Worcester State University
Operating Revenue
Budget Forecast 2021 through 2024

	FY2020 Approved Budget	FY 2021 2% Decrease in enrollment	FY 2022 2% Decrease in enrollment	FY 2023 1% Decrease in enrollment	FY 2024 Enrollment flat			
State Sources								
State Maintenance	41,339,070	41,339,070	41,339,070	41,339,070	41,339,070			
Total State Sources	41,339,070	41,339,070	41,339,070	41,339,070	41,339,070			
Institutional Sources								
General Trust Fund								
Tuition/ In state Undergraduate	4,370,808	4,283,392	4,195,976	4,152,268	4,152,268			
Tuition/ Graduate	1,764,882	1,708,605	1,708,605	1,708,605	1,708,605			
Tuition/ Out of State Undergraduate	1,314,670	1,288,377	1,262,083	1,248,937	1,248,937			
Total Tuition	7,450,360	7,280,373	7,166,664	7,109,809	7,109,809			
Waivers/Undergraduate	(177,008)	(173,468)	(169,928)	(168,158)	(168,158)			
Waivers/Graduate	(239,207)	(248,839)	(248,839)	(248,839)	(248,839)			
Total Tuition Waivers	(416,215)	(422,307)	(418,767)	(416,997)	(416,997)			
Net Tuition	7,034,145	6,858,067	6,747,897	6,692,813	6,692,813			
Undergraduate Day Division	34,036,000	33,355,280	32,674,560	32,334,200	32,334,200			
Undergraduate Eve/Summer Programs	2,608,738	2,556,563	2,504,388	2,478,301	2,478,301			
Graduate School	1,389,717	1,328,694	1,328,694	1,328,694	1,328,694			
Total Fees	38,034,455	37,240,537	36,507,642	36,141,195	36,141,195			
Undergraduate Day Division waivers	(955,813)	(936,697)	(917,580)	(908,022)	(908,022)			
Undergraduate Eve/Summer Programs/waivers	(69,014)	(67,634)	(66,253)	(65,563)	(65,563)			
Graduate Fee waiver	(144,688)	(160,753)	(160,753)	(160,753)	(160,753)			
Total Fees Waivers	(1,169,515)	(1,165,083)	(1,144,587)	(1,134,339)	(1,134,339)			
Net Fees	36,864,940	36,075,454	35,363,056	35,006,856	35,006,856			
Application Fees	119,700	119,700	119,700	119,700	119,700			
Special fees	332,708	332,708	332,708	332,708	332,708			
Commencement Fees	3,825	3,825	3,825	3,825	3,825			
Transcript Fees	53,250	53,250	53,250	53,250	53,250			
Orientation Fees	137,865	137,865	137,865	137,865	137,865			
Testing Fees	12,070	12,070	12,070	12,070	12,070			
Libr. fines/ copier inc.	835	835	835	835	835			
Activity income	50,310	50,310	50,310	50,310	50,310			
Commissions	302,568	302,568	302,568	302,568	302,568			
Non-Credit Courses incl Restricted	587,372	537,497	537,497	537,497	537,497			
Center for Effective Instruction	293,304	268,209	268,209	268,209	268,209			
Intensive English Institute	503,609	487,982	487,982	487,982	487,982			
Center for Business & Industry	50,000	60,104	60,104	60,104	60,104			
Facilities rentals	480,746	480,746	480,746	480,746	480,746			
Miscellaneous	188,651	188,651	188,651	188,651	188,651			
Other income	3,116,813	3,036,320	3,036,320	3,036,320	3,036,320			
Total General Trust Fund Source	47,015,898	45,969,840	45,147,273	44,735,989	44,735,989			
General Operating Budget Income	\$ 88,354,968	\$ 87,308,910	\$ 86,486,343	\$ 86,075,059	\$ 86,075,059			
Difference/GAP year to year	\$	1,046,058	\$	822,568	\$	411,284	\$	-
student billed FTE chg year to year		(125)		(98)		(49)		-
Fee Increase to cover the GAP	\$	257.33	\$	202.35	\$	101.18	\$	-
General Fee	4,065	4,003	3,905	3,856	3,856			
All mandatory Fees	8,373	8,630	8,833	8,934	8,934			
percent change per year GF	9,191	9,448	9,651	9,752	9,752			
percent change per year all fees		3%	2%	1%	0%			
		3%	2%	1%	0%			
** Additional fee for strategic priorities								
250,000	62	64	65	65				
350,000	87	90	91	91				
400,000	100	102	104	104				
500,000	125	128	130	130				
650,000	162	166	169	169				
700,000	175	179	182	182				
750,000	187	192	195	195				
800,000	200	205	207	207				
900,000	225	230	233	233				
1,000,000	250	256	259	259				
Proposed increase for operations	672,504	168						
Total GF % and \$ increase over PY	5%	425						

CHANGE FROM FY 2020				
Scenario #1 6% Decrease in Enrollment	Scenario #2 5.5% Decrease in Enrollment	Scenario #3 5% Decrease in Enrollment	Scenario #4 3.5% Decrease in Enrollment	Scenario #5 2.0% Decrease in Enrollment
41,339,070	41,339,070	41,339,070	41,339,070	41,339,070
41,339,070	41,339,070	41,339,070	41,339,070	41,339,070
4,108,560	4,130,414	4,152,268	4,217,830	4,283,392
1,708,605	1,708,605	1,708,605	1,708,605	1,708,605
1,235,790	1,242,363	1,248,937	1,268,657	1,288,377
7,052,954	7,081,382	7,109,809	7,195,091	7,280,373
(177,008)	(177,008)	(177,008)	(170,813)	(173,468)
(248,839)	(248,839)	(248,839)	(248,839)	(248,839)
(425,847)	(425,847)	(425,847)	(419,652)	(422,307)
6,627,107	6,655,535	6,683,962	6,775,440	6,858,067
31,993,840	32,164,020	32,334,200	32,844,740	33,355,280
2,452,214	2,465,257	2,478,301	2,517,432	2,556,388
1,328,694	1,328,694	1,328,694	1,328,694	1,328,694
35,774,748	35,957,971	36,141,195	36,690,866	37,240,537
(955,813)	(955,813)	(955,813)	(922,360)	(936,697)
(69,014)	(69,014)	(69,014)	(66,599)	(67,634)
(160,753)	(160,753)	(160,753)	(160,753)	(160,753)
(1,185,580)	(1,185,580)	(1,185,580)	(1,149,711)	(1,165,083)
34,589,168	34,772,391	34,955,615	35,541,155	36,075,454
119,700	119,700	119,700	119,700	119,700
332,708	332,708	332,708	332,708	332,708
3,825	3,825	3,825	3,825	3,825
53,250	53,250	53,250	53,250	53,250
137,865	137,865	137,865	137,865	137,865
12,070	12,070	12,070	12,070	12,070
835	835	835	835	835
50,310	50,310	50,310	50,310	50,310
302,568	302,568	302,568	302,568	302,568
537,497	537,497	537,497	537,497	537,497
268,209	268,209	268,209	268,209	268,209
487,982	487,982	487,982	487,982	487,982
60,104	60,104	60,104	60,104	60,104
480,746	480,746	480,746	480,746	480,746
188,651	188,651	188,651	188,651	188,651
3,036,320	3,036,320	3,036,320	3,036,320	3,036,320
44,252,595	44,464,246	44,675,897	45,352,915	45,969,840
\$ 85,591,665	\$ 85,803,316	\$ 86,014,967	\$ 86,691,985	\$ 87,308,910

\$ 2,763,303	\$ 2,551,652	\$ 2,340,001	\$ 1,662,983	\$ 1,046,058
679.78	627.71	575.65	409.10	257.33
8.12%	7.50%	6.88%	4.89%	3.07%
7.40%	6.83%	6.26%	4.45%	2.80%

* - graduate revenue pegged at FY 2019 actual throughout pro forma
** - carryover from FY 2020 S225K one time, S379K on going

Annual Tuition and Fee Analysis

FY 2021 - forecast reduction in select revenue categories totalling -3%

		In State Commuter	In State Resident Hall	Out of State Resident Hall	Out of State Commuter	Chg from PY
Tuition		970	970	7,050	7,050	
Fees						
General Fee	5%	8,798	8,798	8,798	8,798	425
Student Activity Fee		72	72	72	72	
Student Health Service Fee		110	110	110	110	
Capital Improvement Fee		636	636	636	636	
Total fees		9,616	9,616	9,616	9,616	
Average Double Room	2%	-	8,303	8,303	-	145
Board Plan	1%	-	3,800	3,800	-	50
Commuter Meal Plan		300	-	-	300	
Resident Activity Fee		-	50	50	-	
Technology and Equipment Fee		-	220	220	-	
Total Billed Charges		10,886	22,959	29,039	16,966	620

FY 2022 - additional forecast reduction in select revenue categories totalling -2% (compared to FY 2020)

		In State Commuter	In State Resident Hall	Out of State Resident Hall	Out of State Commuter	Chg from PY
Tuition		970	970	7,050	7,050	
Fees						
General Fee	2%	9,000	9,000	9,000	9,000	202
Student Activity Fee		72	72	72	72	
Student Health Service Fee		110	110	110	110	
Capital Improvement Fee		636	636	636	636	
Total fees		9,818	9,818	9,818	9,818	
Average Double Room	1%	-	8,403	8,403	-	100
Board Plan	1%	-	3,850	3,850	-	50
Commuter Meal Plan		300	-	-	300	
Resident Activity Fee		-	50	50	-	
Technology and Equipment Fee		-	220	220	-	
Total Billed Charges		11,088	23,311	29,391	17,168	352

FY 2023 - additional forecast reduction in select revenue categories totalling -1% (compared to FY 2020)

		In State Commuter	In State Resident Hall	Out of State Resident Hall	Out of State Commuter	Chg from PY
Tuition		970	970	7,050	7,050	
Fees						
General Fee	1%	9,101	9,101	9,101	9,101	101
Student Activity Fee		72	72	72	72	
Student Health Service Fee		110	110	110	110	
Capital Improvement Fee		636	636	636	636	
Total fees		9,919	9,919	9,919	9,919	
Average Double Room	2%	-	8,553	8,553	-	150
Board Plan	1%	-	3,900	3,900	-	50
Commuter Meal Plan		300	-	-	300	
Resident Activity Fee		-	50	50	-	
Technology and Equipment Fee		-	220	220	-	
Total Billed Charges		11,189	23,612	29,692	17,269	301

FY 2024 - forecast is flat revenue from FY 2023

		In State Commuter	In State Resident Hall	Out of State Resident Hall	Out of State Commuter	Chg from PY
Tuition		970	970	7,050	7,050	
Fees						
General Fee	0%	9,101	9,101	9,101	9,101	0
Student Activity Fee		72	72	72	72	
Student Health Service Fee		110	110	110	110	
Capital Improvement Fee		636	636	636	636	
Total fees		9,919	9,919	9,919	9,919	
Average Double Room		-	8,553	8,553	-	0
Board Plan		-	3,900	3,900	-	0
Commuter Meal Plan		300	-	-	300	
Resident Activity Fee		-	50	50	-	
Technology and Equipment Fee		-	220	220	-	
Total Billed Charges		11,189	23,612	29,692	17,269	0

Worcester State University
Tuition and Fees - Academic Year 2020/2021

		Annual	Increase from FY 2020
<u>Undergraduate Day Division</u>			
Cost for Full-Time In-State Student		10,586.00	-
Tuition:			
MA Resident		970.00	-
Non-Resident		7,050.00	-
NE Regional		1,455.00	-
Fees:			
* General Fee	5%	8,798.00	425.00
Student Activity Fee		72.00	-
Student Health Svc Fee		110.00	-
Capital Improvement Fee		636.00	-
Total Fees	4%	9,616.00	425.00

*Health Insurance	TBD	-
Orientation Fee (New Students)	75.00	-
Commuter Meal Plan - freshman, sophomore and junior	300.00	-

Residence Halls

Residence Hall rates			
* Chandler Village I	1%	8,178.00	100.00
* Dowden Hall	1%	7,878.00	100.00
* Wasylean Hall	2%	8,678.00	200.00
* Sheehan Hall	2%	8,478.00	180.00
* Single room varies (average additional charge)	33%	600.00	200.00
Residence Activity Fee		50.00	-
Technology and equipment fee		220.00	-
Resident Parking Fee-satellite lot		100.00	-
* Board	1%	3,800.00	50.00

Damage Deposit (1st Semester)	100.00	-
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Division of Graduate and Continuing Education

	Credit Hour	Increase
Tuition:		
Undergraduate	130.00	-
Graduate	169.00	-
Fees:		
Administrative Fee		
Undergraduate	125.00	
Graduate	126.50	
Capital Improvement Fee	26.50	-

Online Graduate Degree Programs;

* Master of Education - Moderate Disabilities	365.00	365.00
* Master of Education - Early Childhood Education	365.00	365.00
* Master of Education - Elementary Education	365.00	365.00

Other University fees:

All students

Application fee	per item	50.00	-
* Transcript fee	per item	10.00	5.00
Applied music fee	per course	260.00	-
Lab Instruction	per course	90.00	-

Undergraduate Day Division - only

Student Teaching	per course	75.00	-
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Continuing Education Division - only

Art Model Fee	per course	25.00	-
Student Teaching	per course	15.00	-
Field Work Supervision	per cr hr	15.00	-
Internship	per cr hr	15.00	-

* Change from prior year

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

Segment	Institution	FY- 2011	FY- 2012	FY- 2013	FY- 2014	FY- 2015	FY- 2016	FY- 2017	FY- 2018	FY- 2019	FY- 2020	1 Yr % Chg
University of Massachusetts	University of Massachusetts Amherst	\$10,020	\$10,900	\$11,518	\$11,546	\$11,546	\$12,460	\$382	\$382	\$482	\$598	24%
University of Massachusetts	University of Massachusetts Boston	\$8,900	\$9,696	\$10,254	\$10,254	\$10,254	\$10,970	\$326	\$326	\$326	\$466	43%
University of Massachusetts	University of Massachusetts Dartmouth	\$8,944	\$9,720	\$10,268	\$10,268	\$10,268	\$11,174	\$406	\$406	\$426	\$526	23%
University of Massachusetts	University of Massachusetts Lowell	\$9,052	\$9,744	\$10,394	\$10,644	\$10,994	\$11,974	\$376	\$450	\$470	\$570	21%
State Universities	Bridgewater State University	\$6,144	\$6,644	\$7,144	\$7,144	\$7,444	\$8,018	\$8,718	\$9,102	\$9,458	\$9,822	4%
State Universities	Fitchburg State University	\$6,830	\$7,330	\$7,740	\$8,016	\$8,290	\$8,964	\$9,164	\$9,184	\$9,384	\$9,534	2%
State Universities	Framingham State University	\$6,096	\$6,610	\$7,114	\$7,114	\$7,354	\$8,374	\$8,374	\$8,950	\$9,550	\$10,130	6%
State Universities	Massachusetts College of Art and Design	\$7,970	\$8,670	\$9,370	\$9,370	\$10,194	\$10,694	\$11,170	\$11,670	\$12,170	\$12,670	4%
State Universities	Massachusetts College of Liberal Arts	\$6,546	\$7,046	\$7,496	\$7,496	\$7,946	\$8,446	\$8,846	\$9,106	\$9,530	\$9,900	4%
State Universities	Massachusetts Maritime Academy	\$5,268	\$5,444	\$5,740	\$5,724	\$5,778	\$6,076	\$6,374	\$6,684	\$7,946	\$8,182	3%
State Universities	Salem State University	\$6,320	\$6,820	\$7,200	\$7,220	\$7,736	\$8,336	\$8,826	\$9,368	\$9,972	\$10,374	4%
State Universities	Westfield State University	\$6,462	\$6,918	\$7,328	\$7,328	\$7,712	\$8,346	\$8,306	\$8,746	\$9,460	\$9,880	4%
State Universities	Worcester State University	\$6,186	\$6,684	\$7,188	\$7,188	\$7,588	\$8,232	\$8,562	\$9,192	\$9,192	\$9,192	0%
Community Colleges	Berkshire Community College	\$4,410	\$4,820	\$5,030	\$5,030	\$5,030	\$5,240	\$5,420	\$5,670	\$5,970	\$5,970	0%
Community Colleges	Bristol Community College	\$3,734	\$4,334	\$4,484	\$4,484	\$4,484	\$4,724	\$4,934	\$5,174	\$5,324	\$5,534	4%
Community Colleges	Bunker Hill Community College	\$3,210	\$3,510	\$3,510	\$3,510	\$3,510	\$3,750	\$4,140	\$4,560	\$4,900	\$5,160	5%
Community Colleges	Cape Cod Community College	\$3,810	\$4,190	\$4,370	\$4,370	\$4,546	\$4,546	\$4,682	\$4,952	\$5,610	\$5,970	6%
Community Colleges	Greenfield Community College	\$4,578	\$4,938	\$5,238	\$5,238	\$5,388	\$5,702	\$5,852	\$6,002	\$6,152	\$6,152	0%
Community Colleges	Holyoke Community College	\$3,330	\$3,570	\$3,700	\$3,700	\$4,030	\$4,430	\$4,850	\$5,040	\$5,340	\$5,600	5%
Community Colleges	Mass Bay Community College	\$3,890	\$4,580	\$4,580	\$4,580	\$4,580	\$4,880	\$5,270	\$5,640	\$5,640	\$5,820	3%
Community Colleges	Massasoit Community College	\$3,930	\$3,930	\$4,350	\$4,350	\$4,650	\$4,890	\$5,130	\$5,130	\$5,310	\$5,520	4%
Community Colleges	Middlesex Community College	\$4,130	\$4,430	\$4,610	\$4,610	\$4,760	\$4,910	\$5,180	\$5,270	\$6,680	\$6,840	2%
Community Colleges	Mt. Wachusett Community College	\$4,690	\$5,140	\$5,290	\$5,290	\$5,500	\$5,650	\$5,800	\$5,950	\$6,100	\$6,250	2%
Community Colleges	North Shore Community College	\$3,900	\$4,110	\$4,320	\$4,320	\$4,920	\$4,920	\$5,410	\$5,530	\$5,800	\$6,100	5%
Community Colleges	Northern Essex Community College	\$3,480	\$3,660	\$3,960	\$4,110	\$4,970	\$5,110	\$5,380	\$5,650	\$5,810	\$5,990	3%
Community Colleges	Quinsigamond Community College	\$4,460	\$5,060	\$5,420	\$5,420	\$5,420	\$5,680	\$5,820	\$6,000	\$6,060	\$6,150	1%
Community Colleges	Roxbury Community College	\$3,530	\$4,122	\$4,130	\$4,130	\$4,130	\$4,690	\$4,690	\$4,700	\$5,710	\$5,710	0%
Community Colleges	Springfield Technical Community College	\$3,636	\$4,026	\$4,356	\$4,356	\$4,356	\$4,686	\$4,986	\$5,316	\$5,556	\$5,856	5%
Weighted Average	University of Massachusetts*	\$9,447	\$10,265	\$10,867	\$10,926	\$10,999	\$11,882	\$372	\$389	\$441	\$556	26%
Weighted Average	State Universities*	\$6,373	\$6,866	\$7,313	\$7,336	\$7,710	\$8,153	\$8,634	\$9,023	\$9,572	\$9,901	3%
Weighted Average	State Universities excludes MCAD and MMA**	\$6,328	\$6,820	\$7,266	\$7,296	\$7,660	\$8,118	\$8,621	\$9,016	\$9,524	\$9,849	3%
Weighted Average	Community Colleges	\$3,843	\$4,204	\$4,397	\$4,399	\$4,584	\$4,802	\$5,079	\$5,294	\$5,644	\$5,846	4%

\$630
\$342
\$938

\$1,182
\$688

Page created 10/31/2019

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.

B. Capital Adaptation & Renewal Spending Plan

Worcester State University
Capital Adaptation and Renewal
FY 2021

Critical Repair Projects	2,217,211
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Local Deferred Maintenance Projects	1,782,789
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	<hr/>
\$	4,000,000
	<hr/>

C. FY 2021 Tuition and Fee Schedule

Worcester State University
Tuition and Fees - Academic Year 2020/2021

		Annual	Increase from FY 2020
<u>Undergraduate Day Division</u>			
<i>Cost for Full-Time In-State Student</i>		10,586.00	-
Tuition:			
MA Resident		970.00	-
Non-Resident		7,050.00	-
NE Regional		1,455.00	-
Fees:			
* General Fee	5%	8,798.00	425.00
Student Activity Fee		72.00	-
Student Health Svc Fee		110.00	-
Capital Improvement Fee		636.00	-
Total Fees	4%	9,616.00	425.00
*Health Insurance	-4%	3,307.00	(137.00)
Orientation Fee (New Students)		75.00	-
Commuter Meal Plan - freshman, sophomore and junior		300.00	-
<u>Residence Halls</u>			
Residence Hall rates			
* Chandler Village I	1%	8,178.00	100.00
* Dowden Hall	1%	7,878.00	100.00
* Wasylean Hall	2%	8,678.00	200.00
* Sheehan Hall	2%	8,478.00	180.00
* Single room varies (average additional charge)	33%	600.00	200.00
Residence Activity Fee		50.00	-
Technology and equipment fee		220.00	-
Resident Parking Fee-satellite lot		100.00	-
* Board	1%	3,800.00	50.00
Damage Deposit (1st Semester)		100.00	-
<u>Division of Graduate and Continuing Education</u>		Credit Hour	Increase
Tuition:			
Undergraduate		130.00	-
Graduate		169.00	-
Fees:			
Administrative Fee			
Undergraduate		125.00	
Graduate		126.50	
Capital Improvement Fee		26.50	-
<u>Online Graduate Degree Programs;</u>			
* Master of Education - Moderate Disabilities		365.00	365.00
* Master of Education - Early Childhood Education		365.00	365.00
* Master of Education - Elementary Education		365.00	365.00
<u>Other University fees:</u>			
<u>All students</u>			
Application fee	per item	50.00	-
* Transcript fee	per item	10.00	5.00
Applied music fee	per course	260.00	-
Lab Instruction	per course	90.00	-
<u>Undergraduate Day Division - only</u>			
Student Teaching	per course	75.00	-
<u>Continuing Education Division - only</u>			
Art Model Fee	per course	25.00	-
Student Teaching	per course	15.00	-
Field Work Supervision	per cr hr	15.00	-
Internship	per cr hr	15.00	-

* Change from prior year

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Nominating Committee Meeting

Monday, April 27, 2020

3:00 PM

REMOTE PARTICIPATION

Join Zoom Meeting

<https://worchester.zoom.us/j/504514442>

Meeting ID: 504 514 442

Meeting Called By: Aleta Fazzone (Chair)

Minutes: Nikki Kapurch

Board Members: Craig Blais; Aleta Fazzone; Marina Taylor

WSU Staff: Nikki Kapurch; Patrick Hare

All documents considered to be **drafts** until discussed and/or approved by the Board

AGENDA		
ITEM	RESPONSIBLE	ACTION
1. <i>Administrative Business</i> a. Call to Order	Aleta Fazzone	
2. <i>Nominating Committee Report</i> a. <i>PRESENT SLATE OF OFFICERS - 2019-2020*</i> b. <i>PRESENT TRUSTEES- Expiration of Terms*</i>	Aleta Fazzone	Recommendation to the Full Board - 1 Vote Required a. Informational b. Informational
4. <i>Adjournment</i>	Aleta Fazzone	4. Vote Required

*Attachments

WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES
2019-2020 OFFICERS
Elected 6/5/19

Chair	Trustee Craig Blais
Vice-Chair (2)	Trustee Maryanne Hammond Trustees Stephen Madaus
Secretary	President Barry Maloney
Assistant Secretary	Ms. Nikki Kapurch
Foundation Board (2)	Trustee Maryanne Hammond Trustee Dina Nichols
Executive Committee Alternate	Trustee Aleta Fazzone Trustee Marina Taylor
MA State Colleges Residents/Trustees Association Alternate (2)	Trustee Craig Blais Trustee Maryanne Hammond Trustee Stephen Madaus

WSU BOARD OF TRUSTEES

List of WSU Board of Trustees members and the dates appointed (when membership started) and their terms of office.

BOT Members	Appointment Date	Expiration of Term	Eligible for Reappointment
Blais, Craig	<u>First Term</u> September 2, 2010 <u>Second Term</u> November 13, 2015	<u>First Term</u> March 1, 2015 <u>Second Term</u> March 1, 2020	Not Eligible
Colombo, Lisa	<u>First Term</u> August 31, 2017	<u>First Term</u> March 1, 2022	Eligible
Fazzone, Aleta	<u>First Term</u> October 9, 2014 <u>Second Term</u> July 29, 2019	<u>First Term</u> March 1, 2019 <u>Second Term</u> March 1, 2024	Not Eligible
Hammond, Maryanne	<u>First Term (Alumni Elected)</u> October 22, 2012 <u>Second Term (Alumni Elected)</u> April 14, 2017	<u>First Term</u> March 14, 2017 <u>Second Term</u> March 14, 2022	Not Eligible
LaFond, Karen	<u>First Term</u> November 15, 2015	<u>First Term</u> March 1, 2020	Eligible
Madaus, Stephen	<u>First Term</u> September 6, 2013 <u>Second Term</u> October 27, 2017	<u>First Term</u> July 31, 2017 <u>Second Term</u> July 31, 2022	Not Eligible
Mosley, William	<u>First Term</u> October 9, 2019	<u>First Term</u> March 1, 2024	Eligible
Nichols, Dina	<u>First Term</u> December 29, 2015	<u>First Term</u> March 1, 2020	Eligible
Reyes-Ponce, Manuel	<u>First Term (Student Elected)</u> July 1, 2019	<u>First Term</u> June 30, 2020	Anticipated year of graduation
Taylor, Marina	<u>First Term</u> November 15, 2015	<u>First Term</u> March 1, 2020	Eligible
Tuttle, David	<u>First Term</u> June 30, 2016	<u>First Term</u> March 1, 2021	Eligible

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
2020-2021 PROPOSED OFFICERS**

Chair	Trustee Stephen Madaus
Vice-Chair (2)	Trustee Maryanne Hammond Trustee Marina Taylor
Secretary	President Barry Maloney
Assistant Secretary	Ms. Nikki Kapurch
Foundation Board (2)	Trustee Maryanne Hammond Trustee Dina Nichols
Executive Committee Alternate	Trustee Aleta Fazzone Trustee Dina Nichols
MA State Colleges Residents/Trustees Association Alternate (2)	Trustee Stephen Madaus Trustee Maryanne Hammond Trustee Marina Taylor

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES**

Meeting Schedule

FY 2020-2021

2020-2021

FULL BOARD

Tuesday, September 08, 2020

Tuesday, October 20, 2020

Tuesday, November 17, 2020

Tuesday, January 19, 2021

Tuesday, March 16, 2021

Tuesday, April 13, 2021

Tuesday, June 15, 2021

President's Update

June 2020

President's Message



Our June Board of Trustees meeting typically is when we finalize the university's budget for the coming fiscal year and report on year-end activities. While this structure remains largely the same, we are completing an academic year like no other in Worcester State's 146-year history.

In this issue of the Update, we assess the two goals we have not yet reported on from the [2015-2020 Strategic Plan](#) and indicate the substantial progress we've made this year on the Roadmap for Advancing Student Excellence (RASE) plan. Fortunately, much of that work was nearing completion as we confronted the need to finish the academic year with almost no faculty, staff, or students physically on campus. On the heels of our rapid transition to off-site operations, we began a planning initiative – now well under way and being led by the Safe Return Team – that will enable us to welcome all those constituencies back to campus in some fashion, as soon as possible.

I view the next academic year as a bridge to what we presume will be more “normal” academic years in the future. For the next 15 months or so, we undoubtedly will operate very differently than we used to. A broad cross-section of employees, including many faculty members, are envisioning what that bridge year could look like for Worcester State University, taking into account the plans other public universities have announced and incorporating guidance we expect from the Baker Administration on or around May 18 (the date this Update is finalized).

As an institution of higher education, where life-long learning is in our DNA, we are eager to incorporate what we've learned over the past two months. We also are absorbing reports from other universities and organizations that have identified some initial best practices. As we move toward a socially-distant, rather than remote, campus, we are eager to innovate in order to provide the best learning environment possible for our students.



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COVID-19	2
2020-2025 Strategic Plan ...	3
RASE Plan	4
Strategic Plan Goal #1	5
Strategic Plan Goal #5	8

PRESIDENT'S OFFICE

Worcester State University
486 Chandler Street
Worcester, MA 01602
508-929-8000
www.worcester.edu

COVID-19

- The university's COVID-19 Response Team was reorganized in mid-April and expanded as the **WSU Safe Return Team**, which is comprised of 10 subgroups that involve more than 140 staff and faculty.
- The Safe Return Team's 10 subgroups are:
 - Budget
 - Communications
 - External Relations
 - Fiscal Stimulus
 - Academic Contingency Plan Development
 - Recruitment
 - Retention
 - Facilities Use
 - Mental Health & Wellness
 - Wrap-Around Services
- Safe Return Team subgroups are planning efforts intended to ensure the safe opening of the Fall 2020 semester that guarantee high-quality academic programming and anticipate the special considerations the pandemic has forced upon the institution.
- The Safe Return Team's stipulations for opening any in-person instruction include:
 - Convening class instruction and opening residence halls, while meeting appropriate social distancing guidance;
 - Provisioning sufficient personal protection equipment (PPEs) for students and employees;
 - Undertaking regular, systematic, and comprehensive COVID-19 testing of all segments of the on-campus population;
 - Defining appropriate isolation strategies for those who test positive or are exposed to someone who is positive.
- Worcester State University expects to have a preliminary fall opening framework drafted by mid-June, with a targeted commitment for the fall semester announced by the beginning of July. These dates are provisional and are informed by the new undergraduate deposit deadline of June 1, action on the university's budget planning set by the Trustees, and early information about the state budget process (which normally is completed by June 30).

2020-2025 Strategic Plan

- Eight working groups (125 Worcester State community members participated) submitted reports with proposed strategies and initiatives, leading to the consolidation of eight draft goals into six final goals.
- Based on campus surveys, forums, and feedback from key groups on campus, strategies and initiatives were created for each goal and Key Performance Indicators (KPIs) were developed.
- The draft goals, strategies, and initiatives were reviewed by the working groups, the Campus Climate Committee, the Affirmative Action Committee, the President's Executive Cabinet, and the President's Cabinet.
- Key Performance Indicators were reviewed by the President's Executive Cabinet and the Data Quality Committee.
- The Strategic Planning Steering Committee developed priorities for implementation which were shared with the Executive Cabinet, All University Committee, and Academic Department Chairs. In addition, faculty and staff were invited to an open forum Zoom meeting that polled participants on their support of the priorities.
- A draft of the strategic plan was reviewed by the President's Executive Cabinet and the broader campus community. The strategic plan final draft will be presented to the Board of Trustees and then submitted to the Board of Higher Education in June for the Department of Higher Education's Touchpoint 2, at which time the Strategic Planning Committee will provide feedback to Worcester State University for Touchpoint 3 in October.

RASE Plan

- During Summer 2019, the university convened five working groups of faculty and staff that represented a broad cross-section of the university community. These working groups focused on the following areas within the context of the Art and Science's positioning study:
 - revamping requirements for majors and minors to ensure academic rigor;
 - ensuring that student life and residence life programming contribute to a positive undergraduate college experience;
 - cataloging the wide range of academic and other advising services necessary to support undergraduate students who are pursuing multiple degree options;
 - exploring possible revisions of LASC (the university's undergraduate general education curriculum);
 - and studying policy models that enable students to pursue double-majors or a major and minor to better prepare them for academic and/or future professional success.Together, the groups generated more than 40 specific recommendations to realize the RASE plan, along with the goals needed to attain them.
- Based on the work of the summer RASE groups, specific proposals for submission to the academic governance process and/or through the non-academic RASE proposal process were developed to implement the RASE plan recommendations. During the Fall 2019 and Spring 2020 semesters, faculty and staff convened teams to develop governance proposals that:
 - ensure the academic rigor of minors;
 - establish a university requirement that all entering students declare a double-major or a major and minor;
 - recommend revisions of LASC to make it more flexible for students to pursue multiple undergraduate credentials;
 - recommend that Diversity is established as a new content area in LASC to support the university's ongoing efforts to promote greater campus representation and inclusion;
 - and revise the First-Year Seminar to ensure that students receive an appropriate balance of academic content and transition-to-college knowledge and support.
- As the 2019 - 2020 academic year concludes, the minor requirements proposal and the Major+ proposal have passed through academic governance; the next step is the President's Office. The LASC and Diversity proposals were passed by the Curriculum Committee and will be reviewed by the Academic Policies Committee and the All University Committee during the Fall 2020 semester. The First-Year Seminar proposal was passed unanimously by the Curriculum Committee but not by the All University Committee. As such, the proposal has gone forward to the President with both votes indicated.
- Because the minor requirements and Major+ proposals have moved through governance, the university can develop the necessary marketing materials in advance of the upcoming fall's

recruiting season. The requirement that all entering students pursue a double-major or a major and a minor will go into effect for the Fall 2021 semester. The LASC and Diversity proposals support the Major+ requirement and have been vetted by multiple campus constituencies; these two remaining proposals are not necessary prerequisites to the initial implementation of Major+, however, and will go through the remaining governance process this fall semester.

- Non-academic proposals that have received vetting and approval include:
 - revising First-Year Experience (FYE) programming to create a more cohesive experience for entering students and developing a dedicated website for FYE information for students, parents, and other constituencies;
 - establishing informal advising opportunities that enable faculty to reach out to students in non-classroom settings;
 - implementing enhanced pre-registration advising for first-year students with professional support for Major+;
 - developing a university-wide definition of leadership to support future student engagement in leadership activities, along with establishing a leadership symposium for current students to enhance their leadership skills and knowledge, while learning from staff, faculty, and Worcester community leaders.

Strategic Plan Goal #1

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

Academic Affairs

- Worcester State University's first fully online Master's programs in Education were scheduled to start on May 20, 2020. These online programs, approved by New England Commission of Higher Education (NECHE) and the Board of Trustees, are a significant step for the university to expand its pool of students.
- The first new Master's programs in ten years, Masters in Public Administration and Masters in Public Policy, were launched in Fall 2020. Undergraduate degree programs in Visual and Performing Arts and Political Science have been approved by the Board of Trustees and the proposals are now with the Department of Higher Education. In early May, the All University Committee approved a Minor in Civic Engagement, which will be hosted in the Political Science Department.

- The Division of Graduate and Continuing Education (DGCE) is developing a life-work portfolio program, which would expand student opportunities to petition for credit for learning achieved outside of the traditional classroom. This contemporary approach to graduate education will address the needs of many non-traditional-age students, while expanding the university's marketability within that critical enrollment sector.

Administration and Finance

- The university established the financial billing framework for the Graduate Online Accelerated Degree programs. Additionally, in collaboration with the Enrollment Management Committee, Student Accounts has achieved an average reduction of 61% of student registrations that are cancelled due to unpaid outstanding balances for prior-semester charges
- Worcester State's Campus Climate Committee (CCC) provided the university with survey data that demonstrated the need to ensure that students experience diversity within their academic curriculum. This survey data informed the RASE Planning Committee, which recommended that Diversity Across the Curriculum (DAC) become its own content area in the university's undergraduate general education curriculum (LASC). The Diversity proposal was approved by the Curriculum Committee and will be considered by the Academic Policies Committee (APC) and the All University Committee (AUC) in the Fall 2020.
- The Office of Diversity and Inclusion supports academic programs through its national and international faculty recruitment efforts. These efforts include advertising in journals and national publications, as well as supporting faculty and staff to attend professional conferences in order to network with potential faculty candidates and to raise the university's overall profile. As a result, this year WSU secured 14 exceptional new tenure track-faculty, 29% of whom identify as racial minorities.

Enrollment Management

- The university has completed the adoption of its first governance and catalog management software. Now, all course and program governance proposals can be reviewed in the context of their overall impact on the university's curriculum and their effects on students.

- Enrollment Management has begun creating the university's first real-time data library for weekly enrollment persistence comparisons, which also provides a year-to-year comparison of major aspects of student retention. Additionally, the university has finished adoption of its course scheduling software, which provides greater efficiency and flexibility in determining offerings for students.

Student Affairs

- Worcester State received a Higher Education Innovation Fund Grant that focused on diversifying faculty. This project was awarded \$100,000 to build an Equity & Engagement Consortium of faculty leaders and administrators across the state university system to create campus cultures that support community-engaged scholarship. The initial project teams included Fitchburg State, Salem State, and Worcester State; their primary goal was to gather research and resources to highlight ongoing community-engaged scholarship and determine how it influences equity and diversity.
- Professional and interpersonal skills are the focus of the newly minted leadership programs developed by the Office of Student Involvement and Leadership Development (OSILD). This programming provides a comprehensive leadership experience for all students to prepare them for classroom and workplace success. The culminating event in the program series was Worcester State's first ever Leadership Symposium for its students. Held in March, this day-long event introduced students to organizational and personal leadership topics through conference sessions, keynote speakers, book and resource recommendations, and alumni connections.

University Advancement

- In 2011, the Worcester State Foundation began providing \$20,000 per year for Student Research Grants, a fund that was doubled in fiscal year 2018 to include faculty research grants (\$20,000 for student grants and \$20,000 for faculty grants). This program has provided students and faculty with support to conduct research, buy materials, and travel to conferences. Since the inception of the program, more than \$180,000 in support has been provided. Students who receive this funding present at the Annual Celebration of Scholarship & Creativity.
- Beginning in 2015, the Worcester State Foundation has provided \$10,000 per year in support for the Honors Program; as part of the \$3,000,000 bequest from Lt. Col. James F. Sheehan (USMC Ret., Class of 1955), funding of the Honors program has been a key priority and it was renamed for its benefactor (read more [here](#)). Starting in late 2018, the Foundation increased the annual support of the Lt. Col. James F. Sheehan '55 Honors Program to \$50,000 per year. These funds are used to support study away scholarships for Honors students, for special honors program lectures, and for special cultural events. Additionally, funds are provided for cash prizes for the

Sheehan Commonwealth Honors Competition and for participation in the Northeast Regional Honors Conference.

- In 2013, University Advancement began seeking individual and corporate support for entrepreneurial learning at Worcester State. These efforts were launched with a generous gift of \$25,000 from Robert K. O'Brien to establish the Robert K. O'Brien '58 Next Big Idea Competition, a "Shark Tank"-like pitch contest with cash prizes for the winners. This investment was leveraged with the financial support of Digital Federal Credit Union (DCU) and, most recently, through a \$30,000 grant from Santander Bank, N.A., to continue fund the Next Big Idea Competition and establish student scholarships through the Santander Venture Fund and Santander Scholars programs.

Inspired by these corporate leaders, John Esler, founder of Esler Companies, pledged \$100,000 to increase the capacity of the Entrepreneurial Studies program infrastructure. His multi-year pledge provides additional student scholarships, sponsorship of the Next Big Idea, and expands the Center for Entrepreneurship programming. In response to the growing financial challenges students are facing due to the COVID-19 crisis, Mr. Esler recently committed a \$25,000 challenge gift to support student retention scholarships for incoming and returning entrepreneurship students. The Center's Advisory Board is actively seeking additional donations to match this generous investment.

Strategic Plan 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.

Academic Affairs

- The university has established strategic partnership grants for retention initiatives and technologies to mitigate the impact of the pandemic on classroom and workplace operations. Additionally, the university has partnered with AdmitHub, which offers a text messaging application that enables the university to push key messages by text to students; this product also will be a useful tool for recruitment, admissions, and retention.

Administration and Finance

- Maintained a positive rating with Standard and Poor's rating agency. (See attached.)
- Worcester State has implemented comprehensive efforts to recruit and retain underrepresented students, ensuring recruitment and retention of key student populations. The university's Latino Education Institute (LEI) and various pre-collegiate programs draw students from Worcester and Springfield. The Office of Multicultural Affairs supports underrepresented student retention and nurtures their leadership development. Worcester State's investment in such strategies reflect the university's commitment to its largest growing student demographic and the Department of Higher Education's Equity Agenda.
- Worcester State has expanded the inclusivity of its major events and strategically has partnered with community organizations to offer underrepresented students more opportunity to connect with the university community. In the Fall 2019 semester, the Offices of Diversity and Inclusion (within A & F), University Advancement, and Multicultural Affairs (within Academic Affairs) launched an ALANA Alumni Homecoming event at President Maloney's home. This event supplements the Multicultural Experience Tent at Homecoming and promotes increased philanthropy within this alumni population. Additionally, Worcester State has partnered with the Black Clergy Alliance to offer a theatre production on the Harlem Renaissance. This event raised funds for scholarships and began discussions about an endowed Reverend Thurman Hargrove Scholarship at Worcester State.
- The university restructured the Facilities Department to realign the maintainer workforce to best serve university needs.
- Year one of the five-year critical repairs spending plan has been completed. This plan provides \$12.4 million of state resources for campus projects, with a \$9 million match by the university. \$7.9 million of projects have been completed, including refurbishment of Coughlin Field, an extensive campus paving project, Phase II of Ghosh rooftop unit replacement, refurbishment of bathrooms in the Ghosh Building, and various upgrades to campus mechanical equipment

Enrollment Management

- This fiscal year, Worcester State has been awarded \$484,000 in grants from Strategic Grant Partners (SGP), a philanthropic organization, to support student retention. These grants are funding the purchase of laptops for student use and paying down student bills to allow them to continue on to a future semester.

- The university has been working to secure funding to continue the dual/concurrent/early enrollment efforts that are considered vital to the university's continued promotion within high schools. Successful efforts have included:
 - The \$40,000 2019-2020 Commonwealth Dual Enrollment Program (CDEP) grant from the Massachusetts Department of Higher Education (DHE) for subsidizing of dual-enrollment courses for Worcester Public Schools (WPS) students,
 - The \$50,000 2019-2020 100 Males to College (100 MTC) grant from the DHE to support the 100 Males to College Worcester program;
 - The \$70,000 DESE 460 grant for continuation of the Early College Program and designation from the Department of Elementary and Secondary Education (DESE), in conjunction with Quinsigamond Community College (QCC) and the Worcester Public Schools.
- To better support the university's students, it is necessary to provide enhanced financial aid service. To this goal, current funds were repurposed to facilitate the rollout of the university's Financial Aid Self-Service online platform, which is now operational and serving students.

Student Affairs

- Worcester State's Board of Trustees approved the establishment of the Wellness Center Trust Fund for FY2019 after establishing a baseline for stable earnings from Wellness Center program revenue (rentals, memberships, etc.). In its second budget cycle, the net earnings in the trust has supported enhancements to Wellness center student programming, equipment, and operations. This trust fund may help offset expenses normally supported in the traditional budget cycle as a result of the COVID-19 crisis.
- After an initial dip in occupancy rates with the addition of Sheehan Hall, the residence halls have operated at full or close-to-full occupancy for the past three years. According to a report issued by the Massachusetts State College Building Authority in September 2019, only one other campus in the state university system can report similar numbers. Student room occupancy is the major factor in the long-term fiscal health of the residence hall trust fund.

University Advancement

- The Worcester State Foundation is a separate 501c3 non-profit corporation that was established to support Worcester State University and is managed by the Office of University Advancement. To strengthen and sustain efforts to inspire financial support from alumni, the Foundation has provided \$32.5 million in support to the university out of donations totaling more than \$40 million, while maintaining a healthy balance of over \$33 million in funds under management. This \$32.5 million investment supports diverse campus needs ranging from scholarship, faculty and student research grants, recent capital improvements such as the Wellness Center, small equipment and lab consumables needed for faculty and student research, academic training, and community-based programming, such as those led by Worcester State centers and institutes, like the Latino Education Institute (LEI).
- The Young Alumni President's Circle was established to engage the university's most recent graduates; this organization continues to grow, with a more than 60% increase in event attendees this fiscal year. This dynamic group of young alumni commit to sharing their time, talent, and financial resources with Worcester State University and its students. Current membership reflects Worcester State's current student body, with over 30% being from underrepresented populations.
- Every spring semester, the university's annual Academic Achievement Award Ceremony celebrates the best and brightest of Worcester State's graduating class with cash awards for their academic achievements. The dollar amount of awards given annually exceeds \$50,000.

Historically most of these awards were paid from the university's operating budget, with an offset of support from the Foundation, while some awards were funded entirely by donor-established endowments. Beginning in 2019, the Foundation assumed the financial obligation to support all of these awards and increased the number of donors providing endowed funds (from a \$10,000 gift) and, for those funds with no donor sponsor, paid the remaining awards out of unrestricted funds within the Foundation's holdings.

Additionally, the university has successfully engaged new donors who have generously endowed the creation of new individual awards in various disciplines. With a principal gift of \$10,000, the fund is then restricted in perpetuity and the interest (5% per year=\$500) is paid out of the fund for the award. In the current fiscal year, three new funds have been established.

- Every year, the university successfully raises funds to support academic, capital, and student-focused initiatives. As of April 30, 2020, more than \$3.6 million dollars were raised in private grants and major gifts to support academic programs and centers, scholarships, the Worcester Center for Crafts, and community-based programs aligned with the university's strategic goals. Specific examples include:
 - \$1.2 million in unrestricted funds from the late Phillip M. Wasylean (Class of 1963) as a result of a planned gift that made the Worcester State Foundation the sole beneficiary of three life insurance policies. Additional funds from his estate are forthcoming, which will support \$100,000 in new scholarships and provide additional funding to his existing endowed scholarship. Overall, Wasylean's total planned gift will result in approximately \$1.7 million in support to the university.
 - Over \$1.1 million in multiple private grants to support diverse programming, advocacy, and research.
 - \$100,000 pledge from John Esler and the Esler Family Foundation to support the activities of the Center for Entrepreneurship.
 - \$100,000 for the Aisiku STEM Center to support innovative faculty and student research, access to industry leaders, exposure to best-practices through an annual lecture series, and celebration of scholarly achievement through presentations and attendance at regional & national conferences.
 - \$60,000 from Digital Federal Credit Union to support campus- and community- based programs led by the Worcester State's Speech-Language-Hearing Center, the Urban Action Institute, the Latino Education Institute, and the Office of Student Accessibility Services.
 - \$50,000 from Gene and Julianne DeFeudis, half of which will support their endowed scholarship and the other half (\$25,000) of which provides a challenge match for all funds raised to support the Student Emergency Fund. The expected total to be raised for this initiative is \$85,000.

[Additional Information](#)

[Standard and Poors](#)

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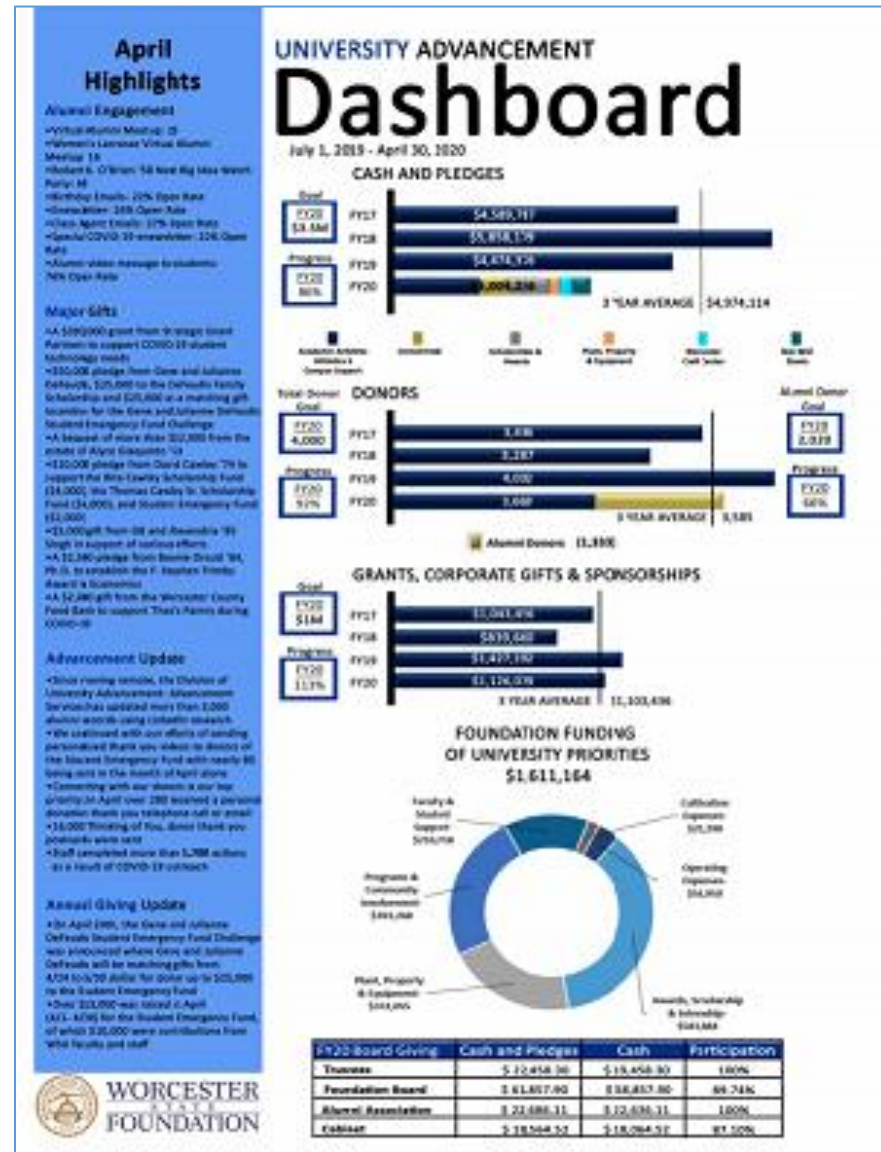
Rationale

Outlook

Enterprise Profile

Financial Profile

University Advancement's Dashboard



Diversity, Inclusion and Equal Opportunity 2019-2020

Diversity, Inclusion and Equal Opportunity 2019-2020 accomplishments:

Campus Climate Committee (CCC)

In February 2020, The WSU Campus Climate Committee (CCC), which includes the AVP for Institutional Research, designed and implemented a campus climate survey for staff. The CCC also endorsed definitions of Diversity, Equity and Inclusion for campus wide usage, which were adapted from the definitions used by the Independent Sector, a national membership organization that brings together the charitable community—a diverse set of nonprofits, foundations, and corporations—to advance the common good. These definitions were shared with the Strategic Planning Committee and workgroups in February 2020 and will go through the administrative policy review and Cabinet approval process. Once formally approved, these definitions will be included in the course catalogue as well as on the WSU webpage.

The CCC also recommended the implementation of a scaffolded (tiered) workshop series. These workshops could be taken individually or as part of a comprehensive certificate program. Course options may include the following:

- ✓ Diversity & Inclusion for a Welcoming Environment
- ✓ Power & Privilege in Higher Education
- ✓ The Impact of Bias
- ✓ Mindfulness as a Catalyst for Equity & Social Justice
- ✓ Inclusive Pedagogies (Faculty led)

Additionally, the Office of Diversity and inclusion is exploring a possible collaboration with Clark University, through which WSU faculty and staff would be eligible to participate in Clark University's Diversity and Inclusion Certificate Program.

Bias Incident Response Team (BIRT)

The Bias Incident Response Team (BIRT) was actively involved in responding to incidents of discriminatory graffiti on campus beginning in mid-December 2019. The response included a day-long session on Anti-Semitism led by the ADL, Jewish Federation of Central Massachusetts and promoting campus efforts such as the Rally for Unity: WSU Stands Against Hate, collaborated with students and faculty to begin a Chabad chapter on campus. BIRT also developed an updated brochure to promote BIRT's role around campus and led the re-launch of the Hate Has No Home Here campaign in early spring 2020, with the support of all Diversity & Inclusion committees and the distribution of 100 magnets, which were placed at the top left of each classroom whiteboard. The Office of Diversity and Inclusion, in collaboration with an informal group of student social justice advocates, began setting up information tables in high student traffic areas.

The LGBTQ+ Advisory Group