

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
HUMAN RESOURCES COMMITTEE MEETING
Thursday, April 4, 2024
9:00 A.M.
REMOTE PARTICIPATION
Join Zoom Meeting
<https://worcester.zoom.us/j/95280058421>
Meeting ID: 952 8005 8421

Meeting Called By: Dina Nichols (Chair)

Minutes: Nikki Kapurch

Board Members: Dina A. Nichols (Chair), Maureen Power (Vice Chair), Amy Peterson, David Tuttle

WSU Staff: Barry Maloney; Ashlynn Allain; Nikki Kapurch

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	Dina Nichols	
2. <i>Human Resources Committee Report</i> A. 2023 - 2024 President Maloney's annual self-evaluation* B. Memo from Commissioner Ortega*	Dina Nichols	A. Informational and vote required
3. <i>Adjournment</i>	Dina Nichols	3. vote required

*Attachments



WORCESTER
STATE
UNIVERSITY

Self-Evaluation, July 2023 - June 2024

President Barry M. Maloney

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Barry M. Maloney

Self-Evaluation

Evaluation period July 2023 - June 2024

Overview

In submitting this 2023-2024 Self Evaluation, I offer an "Overview" followed by responses to the items I am charged with addressing by the Department of Higher Education. I hope you will find this layout to be helpful in providing context for those responses.

I sincerely appreciate the Board's guidance. It has helped me – and by extension, the University – meet challenges as well as reach, and sometimes exceed, the milestone markers we set for ourselves as the year began.

As I embark on the process of self-evaluation as the President of Worcester State University, I am compelled to reflect on the past year with a sense of both pride and humility. Serving at the helm of this esteemed institution has been a privilege and a profound responsibility, one that requires continuous introspection, adaptability, and a relentless commitment to our mission and values. In this self-assessment, I aim to provide a candid and comprehensive overview of my leadership, accomplishments, challenges, and areas for growth, with the ultimate goal of fostering transparency, accountability, and continuous improvement within our University community.

Additionally, to assist the Board with its review, you will find the following reports in the following appendices:

- Appendix A: WSU Financial Sustainability Report Phase 1 & 2
- Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”
- Appendix C: WSU Strategic Enrollment Management plan
- Appendix D: Social Media Engagement
- Appendix E: Culture of Respect Report – WSU results
- Appendix F: JED Campus/Healthy Minds

The reports are included to provide greater detail about the highlights below, in the key areas of financial sustainability; recruitment, retention, and strategic planning; equity work; and communications about all of these areas.

1. Retention and Student Success

(Numeric Rating 5)

Worcester State University welcomed its most diverse incoming new student class and saw a significant rebound in first-year student enrollment in Fall 2023 – a number that tied our previous record, set in 2017, for new first-years. When considering both first-years and new transfers, which were down

slightly from last year, we welcomed 1,219 new students (909 first-year students and 310 transfers) from 20 states and four countries. This represents a significant recovery from pandemic-period new student levels. Nearly 51% of newly enrolled students were the first generation in their families to attend college, and 41.8% identified as African, Latine, Asian, Native American and/or Black, Indigenous, People of Color (ALANA/BIPOC).

As for total enrollment, in Spring 2024 (as of March 12), we had 5,516 undergraduate and graduate students. This represents a 4.9% increase over Spring 2023 (point-in-time comparison). **Our persistence rate (retention) is also up, having improved from 85.63% last year to 87.16% for those persisting from Fall 2023 to Spring 2024.** I am encouraged that the initiatives we've implemented to boost applications and enrollment, and to help students stay in school and on track toward graduation, are paying off. Worcester State is making headway toward meeting our ambitious 2027 enrollment target of 6,500, as called for in the Strategic Enrollment Management plan.

As for our admissions processes, we continue to experience positive results from implementation of the Common App and initiatives such as fee-free-application days. Worcester State's overall undergraduate applications for Spring 2024 have continued to rise, with an 8.7% increase this year on top of the nearly 12% increase we experienced last year. Our undergraduate acceptance rate for Spring was 51.2%.

Highlights:

- Designed and launched the 2022-2027 Strategic Enrollment Management plan, a comprehensive initiative designed to enhance our undergraduate and graduate student body over the next five years. We aim to:
 - Attract traditional-aged students and transfer students, but also actively seek to expand the enrollment of adult learners, non-traditional students, and graduate students. We also will engage faculty in enrollment efforts, developing a parent/family association and communication plan.
 - Implement various other initiatives. We are targeting different student populations, including ALANA/BIPOC students and dual enrollment students, addressing the effects of demographic shifts and the pandemic.
- Have continued work on Common Application, and the MajorPlus program, which redesigned the undergraduate curriculum to help students graduate with two majors or a major and a minor within four years.
- MajorPlus was cited by 65% of new students who responded to a survey as somewhat important, important, or very important (14%) in considering WSU and was one of the reasons some out-of-state students chose Worcester State.
- Incoming Fall '23 Class Profile, Degree-Seeking First-Time First-Years:
 - GPA 3.4
 - Female 59%
 - Male 41%
 - ALANA/BIPOC 43%
 - In-state 92%; Out-of-State or International 8%
 - First Generation 53%

- We continue to make gains in the percentage of ALANA/BIPOC students, with 43% of the Fall 2023 incoming class identifying as such – critically important to us, knowing that the only growing Massachusetts high school population demographic is those who identify as Latine.
- The six fully online, accelerated graduate school programs have been an area of enrollment growth. This has provided us with an important new revenue stream and attracted students who, for a host of reasons, cannot attend classes in person.
- Following the FSTF Phase II recommendations, created a full-time position and hired a Head Coach and Coordinator of Operations, Men’s & Women’s Cross Country/Track & Field/Recruiting Coordinator-Hired September 2023. The position was deemed to be a critical step for increasing enrollment and retaining high-performing students who are connected to campus life and therefore likely to persist and succeed.
- Women’s Ice Hockey won their third consecutive ECHA Championship.
- Women’s Field Hockey won the MASCAC title.
- Men’s basketball returned to NCAA DIII Tournament, after capturing a second straight MASCAC title.
- Made changes to New Student Orientation.
- Added an additional session of New Student Fall Welcome, which was structured to act as a bridge between the traditional June program and the beginning of classes. The goal of this day-long experience was to aid students in establishing a connection to the Worcester State community and gain the knowledge and skills to set them up for having a successful first semester.
- The Academic Convocation ceremony, with 1033 students in attendance, was our largest Academic Convocation ceremony yet.
- Worcester State hosted a Commonwealth-wide gathering of all who serve student Veterans, to share best practices and support for this student population.
- Hired a full-time Director for Military Affairs and Veterans Services/Deputy Title IX Officer in August 2023.
- WSU has been awarded the following national designations:
 - 2024-2025 Military Friendly School Designation -Silver Status and
 - 2024-2025- Military Spouse Friendly School Designation -Silver Status.
- Student athletes excelled academically.
 - 115 Student Athletes made the Fall MASCAC All-Academic Team
 - 89 Student Athletes made the Winter MASCAC All-Academic Team
 - All 11 women's teams had GPA's above 3.0
 - 12 teams total had a GPA above 3.0
 - The total GPA for all student athletes was 3.16 (women 3.41, men 2.89)
 - 29 Student athletes had a GPA of 4.0 in Fall 2023 (20 women, 9 men)
- University compliance work included:
 - Compliance with Chapter 337 of the Acts of 2020, also known as the 2021 Campus Sexual Assault Law.
Two major sections:
 - 1.) The institution conducted a sexual misconduct climate survey (at least once every four years per M.G.L. c. 6, §168D).
 - 2.) WSU complied with specific policy, procedure, and reporting requirements on

institutions' efforts to identify, prevent, and respond to sexual misconduct (M.G.L. c. 6, §168E).

- WSU completed its first Sexual Misconduct Climate Survey in December 2023.
- Established a Sexual Misconduct Response Team (SMRT). This collaborative multi-disciplinary team focused on a comprehensive approach to evaluating and improving the campus response, policies, and protocols of sexual and gender-based misconduct and discrimination.
- The Sexual Assault Violence Education (SAVE) Task Force has completed over thirty in-classroom presentations or passive programming initiatives to raise awareness around sexual violence prevention and Title IX.

Challenges/Opportunities:

- Transfer student enrollment declined. The reasons for that are complex and largely dependent on the economy and community college enrollments. This and other enrollment challenges are addressed via the strategic enrollment management plan (see appendix).
- Adult learners represent a potential new market for us, and we have a plan for attracting and retaining them.

2. Academic Management and Leadership

(Numeric Rating 4)

One of the primary goals outlined in our 2020-2027 Strategic Plan: Beyond 150 is to achieve "Academic Excellence and Distinction." I am pleased to report that we have made significant progress towards this goal, thanks in large part to the exceptional leadership of our faculty.

Highlights:

Academic Excellence:

- The Lillian R. Goodman Nursing Department program once again came in first in Registered Nursing.org's ranking of 20 nursing schools in Massachusetts. The 2024 ranking analyzed the 2017-2021 pass rates on the National Council Licensure Examination (NCLEX) for registered nurses, the test all nurses must pass to be licensed. <https://news.worcester.edu/worcester-state-nursing-program-earns-no-1-ranking-in-massachusetts/>
- The Goodman Nursing Department was awarded \$1,000,000 in September 2023 for nursing education expansion. We have begun the purchase of roughly \$600,000 that is allotted for updated or new equipment for state-of-the-art student training.
- The WSU Elementary Reading program continues to receive accolades, after a Boston Globe story last June indicating that the way we teach Reading is based on the science. The story was based on a National Council on Teacher Quality report that ranked ours as one of the three best elementary reading programs in the state of Massachusetts and the 35th best in the country.

<https://news.worcester.edu/worcester-state-ranked-among-states-three-best-for-elementary-reading-education/>

Academic Management Successes:

- The Division of Graduate and Continuing Education (DGCE) was reorganized and it paused two of its areas: the Center for Business and Industry and the Intensive English Language Institute. DGCE will take on the Early College and Dual Enrollment programs for the University under its new structure, supporting the Commonwealth's expansion of college-level learning for high school students.
- The University concluded a collaborative effort with the faculty collective bargaining unit, the MSCA, having chosen a new evaluation instrument for all courses at the University that will be administered online.
- Have appointed a team of faculty who are engaged in a deep review and recommendation process to overhaul general education at Worcester State University.
- The Association for Advancing Quality of Educator Preparation (AAQEP) self-study has been completed and its accreditation team visited in March 2024, for national accreditation of Barbara (Hickey) O'Brien '57 Department of Education programs.
- Classes were able to resume smoothly on the Tuesday immediately following the Saturday October 28 campus shooting – a testament to the professionalism of our faculty and to the leadership of the Provost and her deans.

Expanding Academic Offerings and Academic Innovation:

- The Spanish Master's degree was approved for wholly online delivery.
- Multiple new minors, some interdisciplinary, were added to the array available so that students are able to meet the Major Plus requirement to either double major or complement their major course. Our undergraduate programs – majors and minors – now total more than 90.

Experiential Learning and International Experiences:

- Education majors are partnering with the Guild of St. Agnes, at a new early childhood center that is close to campus, to provide experiential learning for the students and quality child care for constituents. <https://news.worcester.edu/guild-of-st-agnes-and-worcester-state-open-doors-to-new-early-childhood-education-learning-lab/>
- A new grant with WPI and the Nursing department is aimed at increasing the student nurse's awareness of and experience with new technology associated with health care, including robotics.
- An Advanced Research Projects Agency grant, from the U.S. Department of Education, of \$70K was awarded to the Urban Action Institute and the Student Affairs Division to work collaboratively to address food insecurity through the Campus Grocery Project.
- After a COVID-era lull, faculty and students resumed study abroad in Portugal, Ireland, and the Dominican Republic in Spring 2024.
- WSU has established a WSUTPP Paraeducators pathway from an Associate's degree to a Bachelor's degree with an initial license. Pathway has been developed for Worcester Public Schools, and participation is being sought from other contiguous towns.

<https://news.worcester.edu/ws-u-and-worcester-public-schools-partner-to-offer-new-opportunities-for-instructional-aides/>

- The Binienda Center for Civic Engagement welcomed the new leadership of Dr. Amanda Wittman, who brings over twenty years of experience and education, and numerous new programs are underway. <https://news.worcester.edu/new-binienda-center-director-focused-on-community-engagement-for-students/>

Retention:

- The Alternatives for Individual Development (AID) program utilized \$600,000 of grant funding to triple the number of students served by the program – to 100 in the summer of 2023 and for the cohorts in the full 2023-2034 academic year.
- Students were hired as peer mentors for the First Year Experience courses, which research tells us is a key factor for retaining students. Students and faculty report a positive experience and learning enhancement, as well.

Early College:

- Increased the number of early college classes to 61 in Spring 2024 (a University high). Growth in this area is expected to continue in future years.
- Increased the number of early college partner high schools to 20 in Spring 2024 (also a University high). We are in conversations with numerous additional high schools/districts, which will likely result in additional high school partners in future years.
- Have experienced success in administering the Department of Education's \$1M Fund for the Improvement of Postsecondary Education (FIPSE) grant for the expansion of early college programming in central Massachusetts, as supported by Congressman Jim McGovern.
- Established significant relationships with school districts that desire early-college-like programming, often in advance of seeking DHE/DESE (state) early college designation, including, but not limited to, the Springfield Empowerment Zone Partnership (SEZP), South Shore Early College Consortium (SSECC), and multiple other individual school districts.

Challenges/Opportunities:

- Worcester State University recently held its first faculty meetings to discuss the implications of AI on higher education. The group, consisting of more than 25 faculty members from diverse disciplines, aims to explore how this emerging technology can be used ethically and responsibly to benefit students.

3. Assessment

(Numeric Rating 4)

We are moving forward to address focus areas identified at the end of the last academic year by the New England Commission of Higher Education (NECHE) as a result of our comprehensive self study, which was a university-wide review of our institution that is conducted every ten years and resulted

in a 10-year full re-accreditation. Worcester State University's self-study report was the result of an open, collaborative process involving the entire university community and facilitated by the provost and vice president for Academic Affairs. The Self Study focused on the description, assessment, and projection of our performance on each of NECHE's nine standards for accreditation. Nine subcommittees – one dedicated to each standard – were formed. Each subcommittee's co-chairs, the provost and vice president for Academic Affairs, the assistant vice president for Assessment and Planning, and two representatives of our Board of Trustees made up the Self Study Steering Committee, which was co-chaired by Dr. Noah Dion and Dr. Emily Soltano.

Highlights:

- A comprehensive General Education/Liberal Arts and Sciences Curriculum (LASC) review is underway, having launched in Spring 2024 with a team of 35 faculty led by Associate Vice President for Academic Affairs Henry Theriault. The General Education group has conducted surveys of faculty regarding the definition of a baccalaureate-educated person within the context of Worcester State's mission and values. The team will look to align the Major Plus academic framework and the commitment to diversity, equity, and inclusion through the general education core offerings.
- The Lillian R. Goodman Department of Nursing's program received a ten-year reaccreditation from the Commission on Collegiate Nursing Educations (CCNE) and from the American Association of Colleges of Nursing, without any areas of sanction.
<https://news.worcester.edu/nursing-program-receives-10-year-reaccreditation/>
- The installation of, training on, and use of the University's new data warehouse to support data-driven decision-making ramped up, in order to keep the University community better informed on matters of enrollment, among other topics, and to meet Massachusetts Department of Higher Education expectations for data submission and transparency. The Student Success modules will be completed this year and the Finance module is on deck.
- Deans and department chairs are working with Academic Affairs administration to develop new data sets for program review.
- Public Tableau Dashboards have been created and are in the final stages of revisions.
- The Strategic Plan has been updated to indicate strategies/initiatives related to Operational Excellence, and new metrics have been created to measure the success of Operational Excellence. (Specific data will be in the Strategic Plan Progress Report filed with the BOT in June 2024.)
- The Institutional Research Office has collaborated with multiple departments to assist in data collection, storage, and quality including: the Latino Education Institute, the Office of Multicultural Affairs, the Honor's Program, the Military and Veteran's Affairs Office, DGCE, and those working in the Early College/Dual Enrollment area.
- More academic departments are requesting and receiving data/assistance for decision-making. Notable examples:
 - For the History and Political Science and Psychology departments' examination of past enrollment patterns, in order to inform how they schedule courses;

- For the Biology department’s evaluation of the effect of the policy that was implemented in Fall 2019 that requires students to earn at least a grade of C- in core courses of the Biology/Biotech majors in order to move on to higher-level courses that require them as prerequisites, and the department’s assessment of summer course offerings by looking at past summer enrollment;
- For the Earth, Environment and Physics department’s investigation of enrollment in LASC courses for their majors;
- For the English department’s review of First Year Writing success by demographics, to inform changes to the First Year Writing courses; and
- For the Interdisciplinary Studies department, provided the the number of majors, minors, and concentrators in IDS programs as well as the number of graduated students, to inform the department’s decision making.

Challenges/Opportunities:

- Continued implementation of the 2020 -2027 WSU Strategic Plan, “Beyond 150.”
- Complete, in a timely fashion, the review of the LASC common core.
- Continue work on recommendations coming out of the NECHE Self Study – assessment, budget oversight, and enrollment management, in particular.
- Strengthen campus involvement in the Strategic Plan Review Committee process.

4. Infrastructure

(Numeric Rating 4)

While we explored demolition options for the May Street building, we continued to take advantage of the support from the Massachusetts Higher Education Bond bill to complete deferred maintenance projects, and we **were able to invest about \$5 million in campus capital improvements.**

Highlights:

We refurbished key campus spaces, as follows:

- Completed two-year project to replace all ceilings and lighting fixtures on the first floor of the Learning Resource Center
- Completed renovation of Eager Auditorium
- Completed Counseling suite renovation
- Completed replacement of all wet-lab fume hoods, as well as reconfiguring of mechanical infrastructure to the hoods to realize energy savings
- Completed Admissions Welcome Center
- Completed Math Department faculty office suite expansion
- Completed Sullivan Auditorium renovation
- Completed replacement of Learning Resource Center roof
- Completed repairs to Dowden Hall/Chandler Village heating loop

- Completed replacement of boiler plant for Sullivan Building/Administration Building
- Completed Phase I of planning the campus' decarbonization roadmap
- Completed refurbishment of the Ghosh Science and Technology Center greenhouse
- Completed programming and cost estimation of renovation of the Student Center

Challenges/Opportunities:

- Coordinate and modify the City of Worcester’s plans to redesign Chandler Street.
- Comply with the new State Energy Sustainability expectations.
- Finalize development of funding strategies to implement May Street renovations and campus classroom technology work.

5. Fiscal Management and Budgeting

(Numeric Rating 4)

To address the deficit that emerged in FY22, largely because of a sharp enrollment downturn due to the pandemic, I convened the Financial Sustainability Task Force (FSTF) in January 2022. The FSTF ultimately involved 70 members of our community serving on various work groups. By the end of 2022, they had offered 70 recommendations that they deemed likely to result in efficiencies/cost savings and/or revenue enhancement over the next few years. Some of those we were able to act upon immediately, for roughly \$3M in savings to our FY23 campus budget. The remainder we began to implement in the period covered by this evaluation. An outfall from the FSTF process is that not only senior administration, but dozens of our faculty and staff have come to recognize the need for adopting a culture of continuous improvement on campus. We are pursuing it, via the principles laid out by Prof. Bill Balzer in his book, *Lean Higher Education*, and in a manner that leads to Operational Excellence, an approach that builds upon the lean and “Six Sigma” approaches many organizations have used successfully. We began that transition this year by using OpEx principles as we pursue the FSTF’s remaining recommendations.

Highlights

- Established an Operational Excellence team, led by an existing employee, and supported by two new hires. The team is charged with aggressively pursuing the remaining recommendations of the FSTF process, while establishing new processes and business practices across campus that will help us achieve Operational Excellence.
- In Spring 2023, those conversant in Lean Higher Education principles and Operational Excellence led Rapid Improvement Events, whereby cross-divisional teams, over an intensive five-day period, tackled two inefficiencies identified through the FSTF process: the course scheduling process and the early alert software and associated processes.
 - For course scheduling, 13 action items were pursued over the summer and fall of 2023, so that by registration time this spring, students were able to develop a two-semester minimum planning schedule and several other objectives were able to be met. The goal is to ensure the correct number of sections and courses are offered each semester, supporting students’ academic progress by maximizing undergraduate course schedule

enrollment, which in turn should positively impact retention, graduation, and persistence rates.

- For the early alert/support software and processes RIE, held in June 2023, 53 action items were created and addressed during the summer, fall, and spring terms. As a result, WSU's early alert system, Starfish, will be utilized to a greater extent and have more positive effects on our students for retention purposes. Goals of this RIE include rebranding Starfish to students, staff, and faculty; redesigning the flow of early alert information to all stakeholders; improving functionality of the system for improved communication; soliciting feedback for continuous improvement; and improving student outcomes.

- Realized \$1.6M in savings/efficiencies for the FY24 budget from the FSTF recommendations. Below are the savings directly tied to the recommendations from the workgroup:

○ Center for Business and Industry positions	(141,597)
○ IELI position	(153,337)
○ Grad continuing ed positions	(161,687)
○ Fringe (on eliminated positions above)	(206,895)
○ Eliminate shuttle cost	(55,000)
○ Eliminate off parking cost	(211,557)
○ Bank fees	(300,000)
○ Adjunct Savings	(400,275)

- Despite a new challenge of covering the fringe costs and other on-campus expenses related to an 8% salary increase across collective bargaining units, we balanced the University's FY24 budget. We were able to do so, unlike many other universities, without resorting to across-the-board budget cuts, furloughs, and/or layoffs of permanent employees,
- Had another successful, clean audit for both the University and the Foundation.
- Maintained the University's A bond rating with Standard & Poor's.
- Hired a new Controller, who has been working tirelessly to eliminate inefficient and ineffective fiscal practices and to streamline processes. The Controller is working across areas with IT, Budget, Employee Services, and OpEx staff to maximize system automation with regard to payroll posting, project detail postings, time reporting, and position control and management.
- In coordination with the Director of Student Accounts, implemented a third-party credit card process eliminating more than \$300,000 in credit card processing fees, while expanding options for student bills to be paid.
- OpEx and the Director of Student Accounts created a test process for third-party billing and recording of AR and Revenue using our Colleague system, instead of decentralized spreadsheets. That process will be rolled out over the next few months.
- Significant time and effort has been spent on review and analysis of grant records in Colleague Projects, for the accounting and reconciling of grant funds and billings against grant award documents. A positive result is that the relationship between Fiscal Affairs and the Grants Office has been strengthened.
- University departments utilized approximately \$160,000 of Worcester State Foundation funds to use as part of their budgets in FY24. Many of the expenses covered by Foundation dollars offset what would have been university budget cuts. It allowed for items such as the purchase of

server licenses for clinical therapy and covering the Massachusetts teacher licensing (MTEL) exam costs for students; the hiring of a social media specialist for the Center for Teaching & Learning; obtaining speakers for class lectures; the purchasing of classroom materials, laboratory supplies, and software licenses; and expenditures on items for student events and for student travel.

Challenges/Opportunities

- Develop a cost/benefit grid to assess the true cost of all academic programs.
- Develop a financing plan for the demolition and re-use of the May Street site.
- Continue the institutional transition to an organization that operates within the Operational Excellence paradigm, as we work to close the remaining \$7+ million budget gap created by the enrollment decline that resulted from the COVID pandemic.
- Procurement/Accounts Payable staffing has turned over 100% since 2021. A high-priority effort is underway to train employees and stabilize operations while still experiencing a vacancy in the critical contracting role.

6. Communication

(Numeric Rating 4)

In my role as University president, I prioritize clear and transparent communication strategies to foster collaboration, engage stakeholders, and ensure alignment with the institution's vision and objectives.

Therefore, I have continued to focus on student's success as the most important goal in everything we do as an institution. **Continuing in FY24, I attempted to keep transparent lines of communication accessible to students and employees, even as we established Operational Excellence project working groups for course scheduling and first alert software. The emphasis on broad participation from all corners of the campus was as important as developing cost savings plans.** Additionally, we engaged with Matter Communications to assist our campus with the response to the October 28th shooting incident. The partnership proved to be an important piece of helping our campus stay aware of the situation and heal after the shooting.

Highlights:

- Held an Academic Year Kickoff Meeting for all employees in September, offering a "State of the University," which was heard also by our keynote speaker for the event, Massachusetts Secretary of Education Dr. Patrick Tutwiler.
- Thereafter, Campus Conversations (CC) open to all faculty, staff, and students were held monthly during the academic year, continuing with a format that worked well during the pandemic. Acting President Wims led the CC in October, a special one related to the shooting incident the day after it occurred, and the November CC, while I was on leave. I led the December session, as well as monthly sessions in the Spring semester.

- Tied opinion pieces to timely news topics to generate traditional and social media attention to WSU:
 - August 2023, Telegram guest column relaying that the Supreme Court decision striking down affirmative action in admissions processes would not affect Worcester State's admissions process, that we continue to enroll higher percentages of students of color.
 - February 2024, Telegram guest column followed by appearance on Hank Stolz's Talk of the Commonwealth, explaining why Worcester State will not be reinstating the requirement to submit SAT scores for admission.
- Two positive outcomes of our media relations efforts over the past several years:
 - VP for Enrollment Management Ryan Forsythe garnered earned media while I was on leave: a cover story in the Worcester Business Journal, and a follow up story, touting both the influx of financial aid via the MassGrant program as well as the rebound WSU experienced in enrollment of first-year students in Fall 2023. Subsequent to these stories, we met with the editor in chief and the publisher; since, WBJ has named me to this year's "Power 100" list (embargoed for external release until the end of April).
 - Garnered traditional and social media coverage of our hiring of the first Diversity Fellow, Malcom X's daughter Ilyassah Shabazz, notably from the Worcester Business Journal and Worcester Telegram. Her affiliation with us is gaining exposure beyond the region as well, due to college campus appearances around the country, including Springfield (WLLP TV and MassLive) and Chattanooga, TN, St. Louis, MO, and Kalamazoo, MI.
- In early April, I will kick off the day-long program for accepted students and their families, offering a message about the value of a WSU education.
- Held regular meetings with union leaders and with student leaders, and regularly attended campus events. I continued to maintain an open-door policy for meetings upon request.
- The OpEx website is launching (March), with a strategic communications plan to follow.
- Since hiring of a social media coordinator and alignment with WSU News, we've experienced a significant increase in social media engagement. See Appendix D.
- An Executive Cabinet Retreat Media Training was provided in August 2023, and one for second-in-command in the Divisions was held in September 2023.
- October 28 Communications Responses included:
 - A special Campus Conversation held October 29. About 200 WSU students, parents/guardians, faculty, and staff turned out on Zoom.
 - A crisis communications firm was immediately engaged to assist with messaging.
 - In addition to crisis alerts, messages were emailed out to the campus community beginning mid-morning on the 28th, on the 29th, the 30th, the 31st, Nov. 1st, Nov. 2nd, and Nov. 3rd (to alumni). Most of these are captured on a [special Web page](#).

Challenges/Opportunities:

- Develop and execute a communication plan focused on the implementation phase of the Financial Sustainability work, including our WSU Rapid Improvement Events (RIE).
- Seek more exposure in all forms of media – social, web, print, news outlets, etc.
- Launch and implement 150th anniversary Communications and Marketing plan.

7. Administrative Management and Leadership

(Numeric Rating 4)

Administrative challenges included empowering a second in command, with support from the Vice Presidents and all of Executive Cabinet, to lead the University while I was out on leave for nearly two months and continuing to address a structural, multi-million-dollar budget gap which resulted from the decline in enrollment precipitated by the pandemic. With the Board's continued support, and through the newly launched OpEx platform, we continued to aggressively implement recommendations of the 2022 Financial Sustainability Task Force (FSTF).

Highlights:

- Commend the WSU leadership team, most directly Provost Wims, for leading the institution during my medical leave and through the response to the incident that took place on October 28, 2023.
- Initiated an after-action review process related to the October 28th shooting incident, with the help of Healy +, and a nationally recognized security group, to help better improve campus safety (policy, physical campus and response preparedness training).
- Initiated Year One of WSU's Operational Excellence program (OpEx) process, which will play a significant role in setting direction for WSU's post-pandemic economic recovery strategy.
- Continued to enlist the help of EAB, a nationally recognized strategic thought partner, to assist University leadership with the strategic decision-making process post COVID. Topics included: orientation on state of the sector priorities for higher education fiscal planning, enrollment management, data usage and governance, and Board engagement.

Challenges/Opportunities:

- Ongoing engagement and cultivation of the Board of Trustees.
- Spend time recruiting new BOT members to present to the Governor for consideration, as several current members' terms will expire between 2024 and 2025.
- Continue to orientate new Board of Trustees members.
- Continue to cultivate "rising stars" for the administrative team – beyond the Executive Cabinet level - that is supportive of each other and the mission of the institution and to establish a bench for the university to pull talent from, when opportunities arise.

8. Decision Making and Problem Solving

(Numeric Rating 4)

As the University president, I am entrusted with the responsibility of leading our institution with integrity, vision, and a commitment to excellence. Central to my role is effective decision-making and problem-solving, which are essential skills in navigating the complex challenges facing higher education today. In evaluating my performance in these areas, I have consistently strived to approach decision-

making with careful consideration of diverse perspectives, data-driven analysis, and long-term implications. By fostering an environment of collaboration and open communication, I have sought to harness the collective wisdom of our faculty, staff, students, and stakeholders in making informed decisions that align with our institutional mission and values. Moreover, I have endeavored to cultivate a culture of adaptability and built a leadership team based on shared values and innovation, recognizing that the landscape of higher education is constantly evolving. In confronting challenges such as budget constraints, demographic shifts, and technological advancements, I have embraced a proactive approach to problem-solving, seeking creative solutions and opportunities for growth. Through ongoing reflection and feedback, I am committed to continuously refining my decision-making and problem-solving skills, ensuring that I am effectively serving the needs of the WSU community and advancing our shared goals of academic excellence, equity, and student success.

In the twelve-plus years I have served Worcester State, we have used broad-based, participatory processes to develop our campus's guiding documents. With the Board of Trustees' support, we have adapted those participatory models to the FSTF process, now known as Operational Excellence, so we can address the budget gap thoughtfully and strategically, rather than quickly and reflexively. In this manner, we surfaced the best recommendations for closing our budget deficit and have initiated the organizational change necessary for fostering a culture of assessment and continuous improvement – an approach that we must embrace in order to remain a financially healthy university, one ready and able to provide quality academic programs for the students of tomorrow.

Highlights:

- Promptly hired Healey + to perform an after-action review of the October 28th shooting incident.
- Revised the membership of the University's Cabinet group in order to formally include representatives from all three unions and the Student Government Association President.
- Successes from the participatory FSTF and Operational Excellence process are bearing fruit in terms of cost savings/revenue raising to address our budget deficit. We realized savings of \$3 million in FY23 due to changes at the Worcester Center for Crafts and closing out our lease of the Goddard Lot and an additional \$1.6 million in the current fiscal year.
- A highly qualified team is in place to transition the University to one that pursues Operational Excellence, building upon the success of the Rapid Improvement Events that demonstrated the value of the model.

Challenges/Opportunities:

- All three unions will soon begin the next collective bargaining process to finalize successor agreements for each collective bargaining unit, and we must appropriately deal with the byproducts of those discussions.
- Carry forward lessons we have learned about making timely, grounded decisions and involving more staff members in making and carrying out those decisions. We will need to apply these lessons moving forward with strategic planning goals, for example, and in furthering the adoption of the Operational Excellence business model across divisions and departments.
- Develop tools and strategies to keep morale high/avoid burnout from those who served as decision-makers, as well as implementers, on an all-hours basis over the past 38 months.

- Address the challenges of employee morale amidst a continued tight labor market, while ensuring we remain committed to a more diverse faculty and staff.
- Continue to hone a culture of continuous improvement.
- Evaluate, prioritize, and develop an implementation timetable for new safety recommendations connected to the Healy + review of WSU.

9. Fundraising

(Numeric Rating 4)

University Advancement continues to be an area where I have stayed closely connected with the division. The tight job market has been particularly challenging in the Advancement field, and the division has faced significant staffing challenges. Despite that, our fundraising efforts remained strong. 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 than non-scholarship peers. **Lastly, the WSU Office of Grants and Sponsored Research continues paying off, with over \$1 million dollars received.**

DONOR ENGAGEMENT

- University Advancement continues to engage with donors of all levels through personalized video messaging. During this fiscal year, 2,991 videos have been delivered to donors with a 66.8% open rate (industry average is 21.33%).
- In an effort to increase engagement and retention with first-time donors and include multiple touch-points, a special Valentine’s Day video was sent to 69 first-time donors. The open rate for this video message was 77.3%, significantly above the industry average.
- As we continue to build a culture of philanthropy across campus, we tripled our thank-a-thon locations this year during “Phil Day” – so-called in order to celebrate national philanthropy day, while honoring a WSU benefactor, the late Phil Wasylean ’63. We significantly increased the number of students who engaged, and approximately 1,500 postcards were hand-signed by students and mailed to donors in time for Thanksgiving – roughly 500 more than last year.
- In July 2023, 59 new Loyal Lancers were inducted into the Loyal Lancer Society, established in FY21 to recognize donors who consistently support the university, regardless of gift amount. This annual stewardship event at President Maloney’s home has been well-attended for the last two years. Approximately 500 donors are currently Loyal Lancers.
- In an effort to create meaningful, well-attended student/donor events, we initiated a new event in Fall 2023, an **Advancement Open House**, to encourage scholarship recipients to learn about the scholarship process and to dispel any anxiety regarding donor events. Twenty-five new scholarship recipients attended, met with staff, and had their questions answered, setting expectations for a successful event with their donors a few weeks later.

FUNDRAISING AND ENDOWMENT HIGHLIGHTS

FUNDRAISING:

- \$2,584,617 in support raised from 1,993 donors.
- So far in FY24, The Worcester State Foundation has supported the University with over \$1.2 million, including \$500,000 in direct student support.
- Created 14 new funds in FY24.
- Over \$600,000 was raised in scholarships and academic awards this fiscal year, and in the fall of FY24, The Worcester State Foundation awarded 380 scholarships
- The 2024 Chandler's Challenge successfully raised over \$37,179 from 863 donors. There was increased participation with 35 teams from across campus involved in this year's event.

ENDOWMENT:

- The Foundation's support for scholarships, awards, and internships is on track to again exceed the \$800,000 level. For five years in a row, WSU has sustained that level of support.
- Due to the strength of our fundraising efforts, the Foundation will be eligible to receive a Commonwealth endowment match of \$555,555 from the state this fiscal year.
- At the end of December 2023, the endowment/market value of funds under management reached a record high of \$45 million. This significant milestone is reflected in the Foundation Board treasurer's report.
- In National Association of College and University Budget Officer's (NACUBO) current report, when compared to the nationwide four-year public universities at the master's degree level, **Worcester State Foundation ranks in the top 3%** in change to the endowment market value.
- We have seen a healthy 23% increase in "endowment market value," according to the NACUBO-Communfund study on endowments. This represents the change in market value from one year to another. This change reflects the net impact of various factors, including the withdrawal of funds for institutional expenses/support, payment of endowment fees, additions from donor gifts, and investment gains or losses. It places us in a favorable position relative to the nearly 670 schools nationwide that contribute data to the annual analysis. It shows we are outperforming other colleges in Worcester and underscores our commitment to fiscal responsibility and institutional sustainability.

MAJOR GIFT HIGHLIGHTS

- \$250,000 from the Estate of Robert E. Mullin to support the Robert E. Mullin Scholarship Fund
- \$60,000 from Ruth Rubin '52 to establish The Allen & Ruth Rubin '52 Meal Plan Support Fund and continued support to The Ruth Rubin '52/The Allen and Ruth R. (Sadick) Rubin '52 Endowed Scholarship
- \$50,000 paid towards a \$250,000 pledge from John J. Connolly, Ed.D. '62 toward the John J. Connolly '62, Ed.D. & Ingrid Connolly Presidential Lecture Series
- \$50,000 gift from Gene and Julianne DeFeudis to the DeFeudis Wellness Center Naming Fund
- \$25,188 from Gregg '86 and Pam '87 Rosen in their continued support to the Rosen Cancer Awareness Support Fund
- \$25,000 gift from Santander Bank to establish the Santander First-Generation Scholarship
- \$24,500 from Diane M. Aramony '73 to support several funds, including The Aramony Family European Study Abroad Stipend, The Aramony Student Teacher Stipend Fund, The Dr. Jennie M. Celona Study Abroad Stipend Fund and The Kahlil Gibran Scholarship

- \$20,000 from Kevin '73 and Kathy '73 Campbell to support the Office of Military Affairs and The Worcester State Fund
- \$16,607 anonymous gift from an alumna to support the audiology department in purchasing new equipment and towards the Adopt-a-Scholar program
- \$10,000 from John and Kelley (Gallagher) Joseph '87 to the John and Kelley (Gallagher) Joseph '87 Endowed Scholarship for Elementary Education
- \$10,000 from Vivianne Holmes, Ph.D. '69 to the Florence Vivian "Tippie" Holmes Scholarship
- \$10,000 from Tom and Claudia '68 Corcoran to the International Programs Fund
- \$10,000 from Lionel Lamoureux to the Finish Line Fund
- \$10,000 pledge with \$2,500 paid to date from David Cawley '74 to The Thomas P. Cawley Sr. Memorial Scholarship and the Rita Cawley Memorial Scholarship

GRANT HIGHLIGHTS

Awarded:

- \$589,200 Massachusetts Department of Elementary and Secondary Education - Career Technical Service Organization – Health Occupations Students of America – Future Health Professionals – Department of Health Sciences
- \$172,156 National Science Foundation – Collaborative Research Leveraging Simple Card Games to Promoted Children’s – Department of Psychology
- \$95,260 Behavioral and Mental Health - Massachusetts Department of Higher Education to support programming for students’ mental and behavioral health including Resilient U and activities for mental health awareness and building supported and safe environments for all students - Counseling Services
- \$94,757 Early College – Massachusetts Department of Higher Education – in support of Early College initiatives including College Dual Enrollment - Enrollment Management
- \$37,000 Hunger Initiative - Massachusetts Department of Higher Education to support the Hunger Initiative: addressing food insecurity efforts on campus through provision of meals, food, and personal care items to students in need - Office of Student Affairs
- \$427,903 - Latino Education Institute (LEI)
- \$102,000 Nellie Mae Education Foundation in support of Youth Civics Union
- \$75,000 The Fred Harris Daniels Foundation for support of the One Circle program
- \$60,000 Massachusetts Department of Elementary & Secondary Education
- \$42,168 Massachusetts BioTech Initiative – to increase diversity in STEM

Other Major Submission Highlights – Pending as of March 2024

- \$494,299 Spencer Foundation – Large Research Grant: School Segregation in Massachusetts' Gateway Cities: A Transdisciplinary Approach to Exploring Education and its Effects in Small- to Mid-Sized Cities – three-year research project - Urban Studies Department
- \$175,000 National Endowment for the Humanities K- 12 Institutes, Making America: Humanizing Immigration 1945 to present – 15-month project - Education Department \$72,532
- NASA ROSES 2023: A Comprehensive Approach to Modeling Non-thermal Desorption: The Key to Linking Cosmic Ices with their Surroundings; a three-year project Earth Environment and Physics Department proposal

Continuing support from Multi-Year Grants

- \$900,000 U.S. Department of Education Early College Central Massachusetts Year II. The goals of the ECW program are to increase the percentage of students who are college ready, receive a high school diploma, enroll in college in the fall, and persist in college - Enrollment Management
- \$400,000 Nursing Pathways Expansion Massachusetts Workforce Skills Cabinet Year II. Purchases for equipment that will lead to increases in the numbers of nursing students. Included are: Patient simulators - Manikins and high-level fully-integrated, mobile medication stations with lockable drawers that replicate bedside point-of-care delivery - Nursing Department
- \$174,458 National Oceanic and Atmospheric Association Year II to support efforts to increase diversity, equity, and inclusion in sciences by providing a pathway to STEM education to a diverse population of students from Worcester and other Massachusetts communities - Earth Environment and Physics Department
- \$129,074 National Science Foundation AGEP Year II to support the creation of a national model to recruit and retain diverse STEM faculty with the goal of creating a systematic model for recruiting and advancing early-career AGEP-population (AP faculty are those who are African Americans, Hispanic Americans, American Indians, Alaska Natives, Native Hawaiians, and/or Native Pacific Islanders) in the STEM professoriate – School of Science, Technology and Health

DIRECT SUPPORT

- The Foundation has provided \$1.25 million to support University priorities so far this fiscal year.
- \$15,640 has been raised this fiscal year for the Student Emergency Fund. So far, over \$8,000 has been given to 30 students to assist with the purchase of books, laptops, food, and bills.
- Scholarship, award, and internship support is on track to exceed \$800,000 for the fifth consecutive year.
- The President's Office and Provost's Office were given an additional \$80,000 during FY24 for specific initiatives. Some of these initiatives include Greater Worcester Land Trust agreement to serve Department of Earth, Environment, and Physics; class trips to WAM and the Worcester Historical Museum; sponsoring student conference presentations; and support for faculty to attend professional conferences.
- In FY24, the Worcester State Foundation has so far granted over \$500,000 in scholarships and awards to 380 recipients.
- Generous donations of over \$6,400 were received to provide support for Thea's Pantry, our on-campus student food pantry.
- Two donors have generously funded a program to provide meal swipes in the cafeteria for students experiencing food insecurity.

Latino Education Institute, Highlights

- \$750,000 UMass Determination of Need: Promotoras de Salud – Health Ambassadors for three-year training program that builds on LEI's successful REACH Initiative work.
- \$2,799,308 Massachusetts Department of Public Health – Youth Leaders in Problem Gambling, initial 4-year contract with the Department of Health Sciences for the design/implementation of a four-year program that uses peer leaders to address the problem of youth gambling.
- \$40,000 Greater Worcester Community Foundation, including operational support for LEI and support of LEI's LIDER program

- \$108,735 the United Way of Central Massachusetts in support of several key programs including Club E - Club Educación; ISLA (Innovative Services for Latino Achievers); LASOS (Latina Achievers in Search of Success); and the Aspire Summer Academy.

ALUMNI ENGAGEMENT

- Alumni Relations and University Advancement organized 28 events, attracting a total of 419 unique attendees. Over 1,749 attendees (not unique) turned out for 28 events (virtual and in-person) through February 29, 2024.
- During our Backpacks to Briefcase series, organized in collaboration with Career Services, over 40 students participated in our LinkedIn headshot photograph night, thanks to the generous funding provided by Gregg '86 and Pam '87 Rosen. Three professional headshots suitable for LinkedIn profiles or other professional uses were provided to each. This initiative is designed to benefit all students by providing these, free of charge. By offering this resource, we empower every student with a valuable advantage as they transition into the professional world. Additionally, this service will be available to our alumni, further supporting their professional endeavors beyond graduation.

Challenges/Opportunities:

- Successfully onboard three new hires – Director of Major Gifts, Director of Grants and Sponsored Research, and Alumni Coordinator.
- Learn from best practices on remote alumni and donor engagement.
- Revamp alumni/donor trips to strategically align with priorities.
- Develop a strategic plan to prepare for a new campaign celebrating WSU's 150th anniversary.
- Finish Phase One of the May Street property renovation – razing of current structure – and resolve the associated cell tower easement.

10. Equity Work/Campus Climate

(Numeric Rating 4)

Since my arrival in 2011, I have approached the internal relationships portion of my job by, simply, talking with as many of my colleagues as possible. In order to move the institution forward, I needed to establish the following: ensure and demonstrate that the President's Office is actively engaged in the health and wellbeing of each department of campus, build levels of trust between the administration with faculty and students, and come up with an operational plan towards building a more inclusive campus, one that can engage with civility and respect. Additionally, starting in 2016, the University has made some strides towards the campus climate goals stated in the WSU Seven Points of Action. In the years since then, we have assessed – in many areas, annually – the feelings of belongingness of various groups who had been traditionally underrepresented, and acted upon what the assessments and surveys revealed.

The University's inclusion strategy, informed by the Commonwealth's Strategic Plan for Racial Equity, aims to eliminate disparities experienced by historically marginalized populations. It incorporates feedback from on-campus Committees dedicated to those concerns as well as responses from student and employee surveys.

The strategy consists of four strategic goals and twelve action priorities:

Strategic Goals

1. Recruitment and retention of students and employees from historically marginalized identities.
2. Development of inclusive, equity-minded, anti-racist, and culturally responsive curricula, assessments, and pedagogies.
3. Empowerment of employees and students from historically marginalized identities.
4. Enhancement of accountability & communication.

Action Priorities

1. Co-curricular: Establish a consistent calendar inclusive of all historically marginalized identities.
2. Communications and Marketing: Focus on student outreach.
3. Curriculum: Implement inclusive pedagogies and content.
4. DEIJ Committees: Increase spring appointments and student participation.
5. Departmental Self-Study: Include both academic and administrative aspects.
6. Hiring and Retention: Emphasize recommendations from all DEIJ committees, surveys, and a Town Hall.
7. Professional Development: Make it mandatory and tiered.
8. Resources: Ensure equitable distribution and expansion.
9. Student Leadership: Encourage development and provide compensation.
10. Student Recruitment & Retention: Analyze trends in student movement.
11. Vision/Mission: Update for University and departments.
12. Wrap-around Services: Expand and center on equity.

We have also been addressing issues related to affordability and the implementation of new financial aid programs and their potentially adverse impact on traditionally marginalized groups:

- Kept costs down, benefitting low-income populations and traditionally underrepresented groups.
- Touted the affordability and access that WSU provides via stories in WBJ, op eds in Telegram, and radio appearance advertising that WSU provides substantial financial aid, remains SAT-optional and boasts a diverse student body
- MassGrant – awarding of these funds is assisting lower-income, first-generation, and underrepresented populations.
- Increasing access, such as through new admissions practices, early college, or similar programs;
- **Early College** is strong and growing, and is benefitting highly diverse populations within Worcester, especially. We hosted a professional development day for Worcester Public Schools middle- and high-school counselors focused on Early College. <https://news.worcester.edu/early-college-worcester-program-receives-two-grants-from-the-mass-department-of-elementary-and-secondary-education/>
- **Unity Day: we have** maintained and expanded it, and are embedding it as an all-university annual event, growing in participation. It is becoming a “must-attend” event for students and the entire campus. <https://news.worcester.edu/campus-celebrates-unity-day-2023-with-artwork-pride-flag-raising-and-student-voices/>
- Full time staff people are now making a difference in both the LGBTQ+ Resource Office and Veteran’s Affairs Office, helping us to serve both populations of students.

Multicultural mental health outreach has been another area of emphasis, playing a crucial role in fostering students' mental well-being. Particularly in predominantly white institutions, racial and ethnic representation greatly impacts identity and development. By seeing themselves reflected in others, students receive validation that they belong and can succeed. This year, WSU's Counseling Services led a NASPA Student Affairs Administrator **Culture of Respect Cohort 7 Evaluation** (see Appendix E) in an effort to provide WSU with a baseline evaluation and develop a pathway forward helping the institution address sexual violence on campus. The work brought in outside evaluators to review WSU's policies and procedures associated with dealing with sexual violence. Additionally, WSU maintained its **JED campus status and mental health telehealth platform** (see Appendix F).

Highlights:

- WSU has achieved **emerging** Hispanic Serving Institution status, based upon at least 15% Hispanic/Latinx student enrollment.
- Hired Ilyasah Shabazz, inaugural DEI Fellow, who gave presentations at Unity Day and African American Read-In Day, and she is teaching within the history department.
- President has appointed DEIJ Committee members for two years, to promote continuity and their meetings kicked off in September.
- The Inaugural DEIJ Strategic Plan is currently under campus review and includes an increased emphasis on accessibility, veterans, religious inclusion, and older students.
- The Office of DEI curates and provides customized continuing education programs for academic and administrative departments, individual employees, and DEIJ Committees, as well regularly scheduled programs for new employees and search committees. The office is in the process of developing automated on-demand continuing education options.
- Partnered with the JED campus program to assess student mental health needs and develop a strategic plan that enhanced existing strengths, implementing strategies to improve student mental health. Completed the 4-year Jed Foundation campus program/assessment.
- Continued to leverage state-funded grant resources to support a comprehensive approach to student mental health services, including an extension of the Counseling Center, in an effort to increase accessibility,
- “Resilient U” is an all-encompassing wellness platform that consists of a 24/7/365 telehealth support line, telehealth appointments, and the “Headspace” app. This is the first full academic year with teletherapy resources.
- Continued to ensure compliance with Title IX and University policy compliance.
- Completed the first year of NASPA’s Culture of Respect Initiative, led by the Office of Title IX and the Counseling Center, aimed at ending campus sexual violence. This two-year program is supported by a Student Behavioral and Mental Health Grant award.
- Positioned WSU to be a local source of expertise on current events, including Food Insecurity (Adam Saltsman), Artificial Intelligence (Chatterjee), Supreme Court decision on Affirmative Action (Maloney), Historic Lesbians (Mookerjee), Sarah Ella Wilson, class of 1894 (Rebecca Cross), Not so Fast on Reinstating the SAT (Maloney); Police racial profiling (Fowler), etc.

Challenges/Opportunities:

- Continue to work on closing achievement gaps for ALANA & BIPOC students.
- Increase collaboration, membership, and education among the DEIJ committees.
- Develop new ways to address the 17% increase in students accessing mental health services compared to last year.
- Fully implement the Diversity Content Area (formerly Diversity Across the Curriculum) and ensure diversity courses meet new student learning outcomes and as well as pass governance.
- Explore incentives for hiring diverse faculty and whether there is a need to expand funding for DEIJ initiatives.
- Increase our emphasis on data and transparency, especially for student outcomes, by race, by major.

11. External Relationships/Leadership in the Community

(Numeric Rating 4)

During my thirteenth year on the job, I continue to prioritize developing external relationships. Over nights and weekends, during breakfasts, lunches, or dinners, I attended countless community events, meeting leaders, listening to stakeholders, and trumpeting Worcester State's stories. I am supported in this effort by my family. My wife Laura has agreed to serve on my behalf when asked to by groups, and my children happily engage with alumni, students, visitors, and other stakeholders to assist in our efforts at fostering good relationships. **I find it valuable to listen to stakeholders and community representatives and take advantage of these opportunities to tell Worcester State's stories to the external world.**

Highlights:

- Service learning and community engagement – including internships and research experiences, as well as volunteerism – remain mission-critical functions for the University. We were successfully reapproved by the Carnegie Foundation as a community-engaged campus, with 35-40 percent of students volunteering or otherwise engaged in service every year, and well more than a hundred students running more than 40 organizations. Leadership training is provided for them.
- A new director of the Binienda Center for Civic Engagement (<https://news.worcester.edu/new-binienda-center-director-focused-on-community-engagement-for-students/>) was brought on in Fall 2023. She has been introducing significant new programming, such as partnering with the Urban Studies Department to host the statewide Housing Justice Summit (<https://news.worcester.edu/worcester-state-university-announces-housing-justice-summit-open-to-the-community/>) on campus and partnering with the Office of Multicultural Affairs to initiate days of service inspired by MLK in conjunction with the annual MLK Breakfast.
- WSU's MLK Breakfast, which annually draws hundreds to campus and celebrates city youth, received an award from the City of Worcester at a council meeting (mentioned near end of this

article: <https://theworcesterguardian.org/f/wps%E2%80%99-alternative-education-program-praised-scrutinized>). The award is for 30 years of commitment to hosting the MLK breakfast.

- Continue to serve on the boards of Saint Vincent Hospital, the Wilbraham & Monson Academy, the Greater Worcester Community Foundation, and was recently selected to serve on the Worcester Art Museum board.
- Supported Mechanics Hall's portraits project, to include portraits of Frederic Douglass, Sojourner Truth, and William and Martha Brown, Black American leaders from the 19th Century, in the Great Hall.
- Featured the state's Secretary of Education Dr. Patrick Tutwiler at our September State of the University event.
- Attended LEI legislative luncheon, participated in HECCMA legislative meetings holding federal and state level conversations, to advocate for the Worcester community, and participated on several State University Council of Presidents delegation visits to Beacon Hill.

Challenges/Opportunities include:

- With the help of our newly hired director of the Binienda Center for Civic Engagement, strategically expand WSU efforts within Greater Worcester to benefit student learning.
- Raise visibility of the University inside and outside of the Central Massachusetts market.
- Develop and maintain the Latino Education Institute's presence in other markets in Massachusetts (currently in Springfield).
- Balance community needs against limited resources of the University.

Appendix A: WSU Financial Sustainability Report Phase 1 & 2

[Download Document](#)

Financial Sustainability Task Force

Phase One Report
May 30, 2022

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Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”

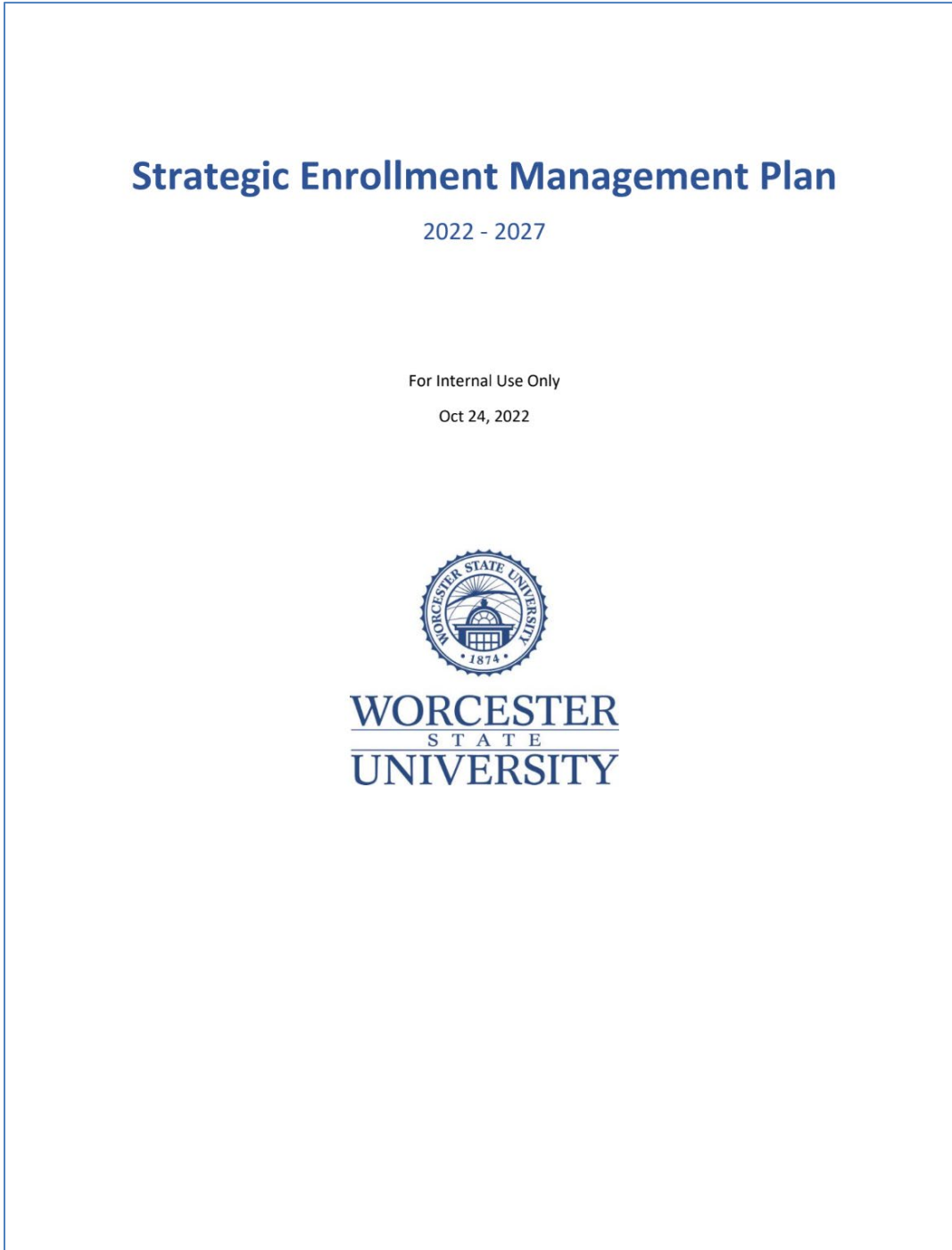
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Appendix C: New WSU Enrollment Management Plan

Access to the Enrollment Management Plan is restricted and requires login with WSU username and password.

[Download Document](#)



Appendix D: Social Media Engagement

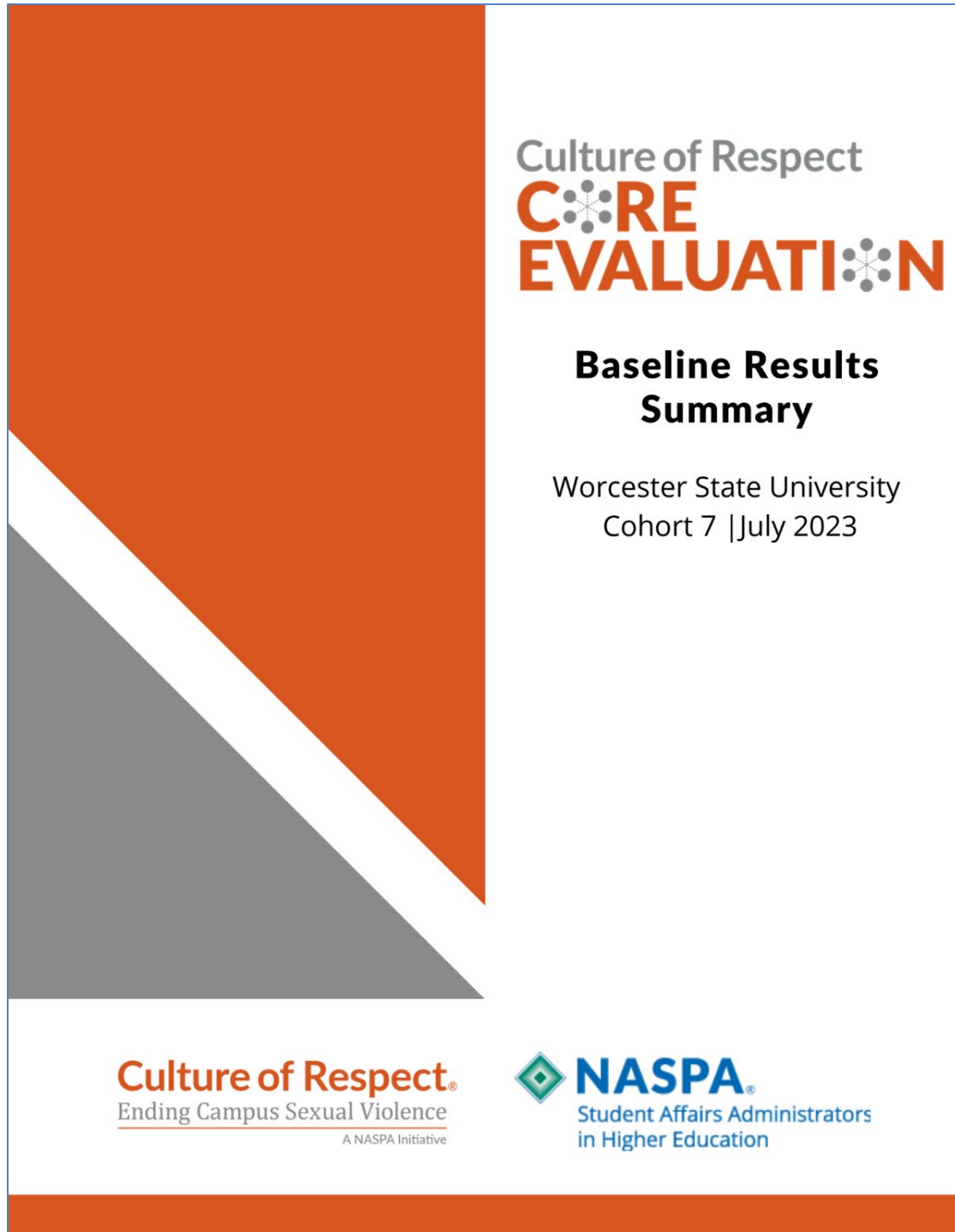
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Appendix E: Culture of Respect Report – WSU Results

Access to the Culture of Respect Report is restricted and requires login with WSU username and password.

[Download Document](#)



Appendix F: JED Campus/Healthy Minds

[Download Document](#)



WORCESTER
STATE
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JED Campus

Empowering schools to
enhance student mental
health, substance abuse
and suicide prevention
efforts

Massachusetts Department of Higher Education

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Noe Ortega
Commissioner
Chris Gabrieli
Board Chair

MEMORANDUM

TO: Community College Board Chairs
State University Board Chairs

FROM: Noe Ortega, Commissioner

CC: Community College Presidents
State University Presidents

DATE: January 22, 2024

SUBJECT: **FY2024 Presidential Evaluations – Statewide Priorities and Procedures for Annual Reviews**

As stewards of your individual institutions, you bear significant statutory and fiduciary obligations in guiding your institution, encompassing the oversight and assessment of the work advanced by your respective presidents. The purpose of this memo is to 1) describe the BHE's system-level priorities, or statewide priorities, for the academic year, and 2) provide the timeline for conducting annual presidential evaluations for FY2024 performance. Resources informing this process, including the [BHE Presidential Compensation and Evaluation Guidelines](#), can be accessed on the Department's [website](#).

In response to feedback we received from trustees and presidents, I asked my team to organize a webinar on the FY24 presidential evaluation procedures in early spring. Department staff will also review the three different types of Presidential compensation adjustments (e.g., annual, comprehensive, and equity) during the webinar to provide greater clarity around the criteria and process related to each.

Statewide Priorities.

For FY2024, the statewide priorities, also called system-level goals, will continue to build on the previous years' priorities. On behalf of the BHE and the Department, I ask that each local Board of Trustees continue to focus on our commitment to significantly raise the enrollment,

attainment, and long-term success outcomes of equity populations. For this year's evaluation, I ask that you continue to provide three to five examples of initiatives that highlight how your president has worked to make your institution more learner-ready and equity-minded with regards to:

- Addressing issues related to affordability and the implementation of new financial aid programs;
- Increasing access, such as through new admissions practices, early college, or similar programs; and
- Efforts to scale access and use of wraparound support services.

Please include relevant data, either quantitative or qualitative, on your institution's progress, highlighting in your narrative the leadership efforts of the President of your respective institutions. To that end, you may find the following material helpful as you frame your submission:

- [Post SFFA Overview and Guidance](#)
- [Strategic Plan for Racial Equity](#)
- [Support Services for Student Success Framework](#)

These examples will offer important insight to me and my team as we work to create the conditions of success for our institutions and their leaders.

Procedural Guidance.

Process.

As we prepare for the FY24 presidential evaluation process and given that we are restructuring the Office of Trustee Relations, I want to acknowledge that this process remains in transition.

Boards must submit brief executive summaries of the president's evaluation, and the executive summary should include the following:

- A description of the process your board used to conduct the review;
- Performance data used to support your board's conclusions and recommendations;
- Your board's recommendation regarding a proposed compensation adjustment; and
- A summary which addresses presidential responsibility at the institutional and state levels (e.g., one section for institutional goals and objectives, and a separate section on statewide priorities).

Please also attach the president's self-evaluation in this year's submission. Other supporting materials and documents should be submitted only to the extent that they relate to points addressed in the executive summary.

Performance Measurement Reports (Data Dashboards).

The BHE Presidential Evaluation Guidelines require that evaluations of presidential work consider and include institutional data linked to system-level goals and metrics. (See Section III.B). In May 2019, DHE launched [the Performance Measurement Reporting System \(PMRS\)](#), a public-facing data tool intended to prompt constructive conversations about performance and accountability between and among DHE, the institutions, boards of trustees, legislators, and others, and specifically to assist institutions in fulfilling this requirement of the Presidential Evaluation Guidelines.

The Reports summarize each institution's performance on a robust set of key indicators approved by the BHE in December 2018, including comparisons where appropriate to the institution's segmental peers in Massachusetts or a national peer group of similarly situated institutions. The Reports also support inquiry into an institution's performance related to disparities between different racial/ethnic, gender and income groups. The PMRS dashboards will be refreshed by the end March. In addition, through Tableau, your Institutional Research directors have access to extensive data through our Higher Education Information Resource System (HEIRS) for trend and benchmarking purposes, and these data are refreshed year-round as the various HEIRS collections are completed.

Timeline.

Our requested deadline for the completion and submission of presidential evaluations for FY2024 performance is June 30, 2024. We recognize, however, that the timing of your presidential evaluation committee meetings, local board schedules, and other competing priorities may make it challenging to complete this important work within this timeframe. Exceptions are permitted on a case-by-case basis and Assistant Commissioner Quiroz-Livanis is available to provide any support. Please note that while extensions of time are readily granted, our goal is to have all evaluations completed and submitted no later than December 1st.

If you have any questions, I invite you to contact me or Assistant Commissioner Elena Quiroz-Livanis.

I want to thank you for your patience and understanding as we undergo staffing transitions in the Office of Trustee Relations (OTR). I look forward to convening an OTR Advisory Committee this year that will help evaluate our current processes in this space. I believe the Committee will be a critical partner as we work to build cohesive structures that encourage collaboration and innovation. Each of you plays a vital role in shaping and maintaining the excellence of our public higher education system and I am grateful for your ongoing partnership.