

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Tuesday, June 10, 2025
4:00 P.M.
Wellness Center, Room 204**

Meeting Called By: Dr. Lisa Colombo (Chair)

Minutes: Nikki Kapurch

Board Members: Dr. Lisa Colombo (Chair); Maureen Power (Vice-Chair); Dr. Lawrence Sasso (Vice-Chair); Kelly Brissette; Darnell Dunn; Karen Lafond; David Tuttle; Dina Nichols; Amy Peterson; Kyram Pou, Jr.; Marina Taylor

WSU Staff: Barry Maloney; Ashlynn Allain; Kathy Eichelroth; Carl Herrin; Nikki Kapurch; Tom McNamara; Edgar Moros; Lois Wims

All documents are 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. Approval of the Minutes: 1. Full Board - April 8, 2025* 2. Academic & Student Development - April 8, 2025* 3. Nominating Committee -April 23, 2025*	Dr. Lisa Colombo	1. vote required 2. vote required 3. vote required
2. <i>Inclusive Excellence and Belonging Presentation - 15 minutes /Q&A</i> A. New Inclusive Excellence and Belonging Committees*	Edgar Moros	A. Informational
3. <i>Finance & Facilities Committee Report</i> A. Finance & Facilities Committee Packet*	Dr. Lawrence Sasso	A. Informational and vote required
4. <i>Human Resources Committee Report</i> A. Human Resources Committee Meeting Packet*	Maureen Power	A. Informational and (2) votes required
5. <i>Nominating Committee Report</i> A. Nominating Committee Meeting Packet* B. Approve the 2025- 2026 Slate of Officers*	Marina Taylor	A. Informational B. vote required
6. <i>Administrative Updates</i> A. Report of the Chair I. 2025-2026 Meeting Schedule* B. Report of the Student Trustee C. Report of the President I. President's Update* II. WSU Strategic Plan Mid-Cycle Progress 2023-2024* III. University Advancement Dashboard*	Dr. Lisa Colombo Kyram Pou, Jr. Barry Maloney	I. vote required I. Informational II. Informational III. Informational
7. <i>Adjournment</i>	Dr. Lisa Colombo	7. vote required

*Attachment

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Meeting Minutes

CHAIR:	Dr. Lisa Colombo (Chair)	DATE:	April 8, 2025
LOCATION:	Wellness Center, Room 204	MINUTES BY:	Nikki Kapurch
TIME:	4:00 p.m.		
BOARD MEMBERS:	Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair, remotely); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle (remotely); Dina Nichols; Amy Peterson; Kyrar Pou, Jr.		
MEMBER ABSENT:	Dr. Lawrence Sasso (Vice Chair)		
WSU STAFF:	Barry Maloney; Ashlynn Allain; Kathy Eichelroth; Ryan Forsythe; Carl Herrin; Nikki Kapurch; Julie Kazarian; Sathi Mitra; Edgar Moros, Deborah Alvarez O'Neil; 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 8, 2025, in room 204, located in the Wellness Center. Chair Colombo called the meeting to order at 4:00 p.m. Chair Colombo reported that two trustees will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business

APPROVAL OF THE MINUTES - Full Board Meeting - January 14, 2025

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

VOTED: to approve the January 14, 2025, minutes of the Full Board Meeting as presented.

ROLL CALL VOTE: **9 approved.** Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyrar Pou, Jr.
1 abstained - Darnell Dunn

Trustee Colombo introduced and welcomed Darnell Dunn, a new trustee who has joined the board. Trustee Dunn introduced himself.

Inclusive Excellence and Belonging Presentation

Bias/Discrimination Dashboard Presentation

- President Maloney welcomed Edgar Moros, Executive Director of Inclusive Excellence and Belonging, who introduced Professor Nafisa Nipun Tanjeem and Jennifer Quinn, Associate Dean of Student Affairs/University Title IX Coordinator.
- They presented the PowerPoint presentation that was included in the packet.

April 8, 2025

- The Bias Incident Review Team (BIRT) is responsible for assessing the institutional response to incidents of bias that impact the University's mission, core values, civility policies, Policy of Nondiscrimination, and efforts toward improving campus climate.
- During the meeting, we reviewed the committee's charge.
- Dr. Moros presented the website's dashboard link and explained the details and information available on the site.
- We also discussed the governance process for received recommendations. Who is responsible for following up on these recommendations? The committee meets monthly to review reported incidents and implement specific actions.

Finance and Facilities Committee Report

- Trustee Taylor, vice chair of the Finance and Facilities Committee, reported that the group convened today at 3:00 p.m. and provided a summary of the meeting. Two main items discussed were the FY 2026 budget resources and the 535 Chandler Street Site Work Proposal. A detailed memo from Vice President Kathy Eichelroth is included in the packet.
- The Healey-Driscoll Administration announced in December that it would be awarding \$14 million from the fiscal year 2025 budget to support student success programming at state universities. WSU will receive a one-time SUCCESS Grant of \$1,620,191 for specific programs.
- Governor Healey released her spending plan for FY 2026, which incorporates all state funding from FY 2025 into a base funding line for FY 2026. However, the Governor has not proposed any resources for performance funding or the internship and endowment incentive programs for FY 2026.
- The committee discussed the appropriation of reserves, noting that the FY 2026 budget will likely include a planned draw on reserves.
- We are proposing a general fee increase of no more than \$500 per year for FY 2026. We will continue to work through the budget numbers, and if we can reduce the gap and lower the fee, we will present that to the board. Additionally, there will be a Student Activities Fee increase of \$59.
- Kathy and her team are also working on fringe benefits, taking our enrollment into consideration and looking for opportunities to increase revenue. Furthermore, discussions will include vacant positions.

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

VOTED: **to accept the recommendation of the Finance and Facilities Committee to authorize an increase in the General Fee for FY 2026 that would not exceed \$500 per year amount, with the final recommendation to be brought to the June board meeting as part of the presentation of the FY 2026 Comprehensive Annual Budget.**

ROLL CALL VOTE: **10 approved.** Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyrām Pou, Jr.

535 Chandler Street Site Work Proposal

- Included in the packet is a proposal for site improvements to the President's House at 535 Chandler Street and the Latino Education Institute at 537 Chandler Street.
- The Commonwealth of Massachusetts Trust Fund Guidelines issued by the DHE require board of

April 8, 2025

trustee approval for the university to expend these funds.

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

VOTED: to accept the recommendation of the Finance and Facilities Committee to authorize site improvements, as detailed in the memo and vendor proposal, to achieve necessary repairs to the driveway that provides access and parking to WSU occupied properties at 535 Chandler Street and 537 Chandler Street.

ROLL CALL VOTE: 10 approved. Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyrin Pou, Jr.

Trustee Taylor concluded her update by providing a summary of the OpEx presentation, highlighting the savings impact of \$5.2 million from the projects so far.

Academic and Student Development Committee Report

- Trustee Lafond, chair of the committee, reported that the group convened today at 2:00 p.m. and provided a summary of that meeting.
- Provost and Vice President for Academic Affairs Lois Wims provided the committee with an informative presentation regarding the process of awarding tenure and promotion.
- Provost Wims and the Committee went through the PowerPoint presentation that was included in the packet, which highlighted the process for both tenure and promotion and included a 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.
- The costs for proposed promotions will total \$79,966.00 annually and are based on the MSCA contractual rate effective September 2019.
- These rates are an increase in the base salary by academic rank, or whichever is the greater amount: 5% of the current salary or the rate listed and dictated by the contract.
- The administration plans for the annual cost to the best of its ability and budgets accordingly.
- Chair Colombo gave a big thank you to the faculty for all their hard work.

Upon a motion made by Trustee LaFond and seconded by Trustee Power, it was unanimously

VOTED: to accept the recommendation of the Academic and Student Development Committee and approve the awarding of tenure effective September 1, 2025, for the slate of faculty as presented.

Nafisa Nipun Tanjeem

Interdisciplinary Studies

ROLL CALL VOTE: 10 approved. Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson;

Kyram Pou, Jr.

Upon a motion made by Trustee LaFond and seconded by Trustee Colombo, it was unanimously

VOTED: to accept the recommendation of the Academic and Student Development Committee and approve the awarding of tenure with promotion to Associate Professor, effective September 1, 2025, for the slate of faculty as presented

Brittany Jeye	Psychology
Eric Nichols	Communication

ROLL CALL VOTE: 10 approved. Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyram Pou, Jr.

Upon a motion made by Trustee Colombo and seconded by Trustee Sasso, 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, 2025, for the slate of faculty as presented

Siri Colom	Sociology
Riley McGuire	English
Joshua Koenig	History & Political Science
Ian Stephens	Earth, Environment & Physics

ROLL CALL VOTE: 10 approved. Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyram Pou, Jr.

Upon a motion made by Trustee Nichols and seconded by Trustee Peterson, 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, 2025, for the slate of faculty as presented

Timothy Murphy	Urban Studies
Roger Greenwell	Biology
Pamela Hollander	Education
Nicole Rosa	Psychology
Kathleen Murphy	Chemistry
Jason Hardin	Mathematics
Benjamin Jee	Psychology

April 8, 2025

ROLL CALL VOTE: **10 approved.** Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyram Pou, Jr.

REPORT OF THE CHAIR

Nominating Committee - Chair Colombo

- Working on a meeting schedule for next year that will be brought to the board at the June meeting.
- Chair Colombo 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 Committee will have a recommendation and report for the June 10 meeting.
 - Chair Colombo appointed Trustee Taylor as chair, Trustee Nichols, and Trustee Lafond to the Nominating Committee and charged the group with bringing forth a slate of officers for election at the June 10, 2025, meeting.
- Next meeting: June 10, 2025.
- All trustees were sent an electronic email invitation to all the Spring events. Please RSVP to that email.

REPORT OF THE STUDENT TRUSTEE

- Trustee Pou reported that the SGA student body elections will take place this month, and the next trustee will be chosen tomorrow. He also reminded the trustees about the ongoing discussion regarding the Student Activities Fee with Administration and Finance.

REPORT OF THE PRESIDENT

President's Update

- The packet included the President's Update report. If any trustees have any questions, please let the President know.

University Advancement Update

- Felicia Riffelmacher, the Executive Director of University Advancement, provided several updates from the University's Advancement team, including important event dates happening on campus.
- Regarding the fundraising campaign, Trustee Taylor acts as the board's representative on the advisory board. The campaign is progressing and is currently focused on developing a budget.
- As of today, we have raised \$6.7 million for the year to date, which includes a generous \$1.2 million gift from Becker College to the Worcester State Nursing Department. For comparison, at this time last year, we raised \$2.5 million.

Enrollment Management Update

- Ryan Forsythe, Vice President for Enrollment Management provided an enrollment update.

Honorary Degree

- Approval of Honorary Degree
 - The President provided a memorandum in the packet seeking approval to award U.S. Senator Elizabeth Warren an honorary degree. Senator Warren will provide a graduation address at our

undergraduate Commencement.

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

VOTED: **to approve the awarding of the following honorary degree:**
U.S. Senator Elizabeth Warren, Doctor of Humane Letters, *Honoris Causa*, at
Undergraduate Commencement on May 17, 2025.

ROLL CALL VOTE: **10 approved.** Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyram Pou, Jr.

President Maloney provided an update on the concerns of the State Universities' Presidents regarding the State Universities Funding Formula, student financial aid, the State University SUCCESS Program, and funding for a Higher Education Bond Bill.

BRIGHT Act Information

- BRIGHT Act (Build Resilient Infrastructure to Generate Higher-Ed Transformation Act), a proposal of the Healey-Driscoll Administration to authorize new capital bond authority for public higher education in the Commonwealth. The overall proposed authorization is set at \$2.5 billion; it would be underwritten in part through dollars from the Fair Share tax provisions. First large-scale capital commitment to public higher education in over a decade, at a time of significant unmet capital needs across each higher education sector. Of the proposed allocation, state universities would be in line for approximately one-quarter (half would be reserved for UMass, and the other half would be split between the state universities and community colleges).

President Maloney discussed the DHE Axim grant, which is a three-year initiative that enables the Department of Higher Education (DHE) to establish an Innovation Hub. This hub will focus on identifying, piloting, and scaling innovative approaches to enhance college access and student success. Key areas of emphasis include automating financial aid, promoting co-op programs, developing advanced high-value non-degree credentials, and increasing innovation within DHE.

Additionally, the topic of the Sub 120 bachelor's degree was addressed for the second time during the Board of Higher Education (BHE) meeting. DHE plans to present a draft pilot policy proposal at the BHE meeting in May. Furthermore, Merrimack College has received approval for a proposal from the New England Commission of Higher Education (NECHE).

Provided a federal update.

- The New England Board of Higher Education (NEBHE) has shut down the North Star Collective program, which supported early-career diverse faculty. WSU was a member for three years.
- We are currently working with legal counsel and the Attorney General's Office on interpreting all recent federal changes.

WSU Board of Trustees

April 8, 2025

- We have hired our Executive Director of Emergency Management and Institutional Safety, Matthew Bosselait, who will start on April 14. Additionally, we will begin the search for the AVP of Marketing and Communication, and we will present a candidate's name for BOT approval at the June meeting.
- Congratulations Day was a success, with attendance numbers up compared to last year and on par with 2023.

Thanked all the board members for their support on promotion and tenure.


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

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

VOTED: **to adjourn the meeting at 5:33 p.m.**

ROLL CALL VOTE: **10 approved.** Dr. Lisa Colombo (Chair); Maureen Power (Vice Chair); Kelly Brissette; Darnell Dunn; Karen LaFond; Marina Taylor; David Tuttle; Dina Nichols; Amy Peterson; Kyrin Pou, Jr.

Respectfully submitted,



Barry M. Maloney

Secretary, Board of Trustees

WORCESTER STATE UNIVERSITY
ACADEMIC AND STUDENT DEVELOPMENT MEETING
Meeting Minutes

CHAIR:	Karen LaFond (Chair)	DATE:	April 8, 2025
LOCATION:	Wellness Center, Room 204	MINUTES BY:	Nikki Kapurch
TIME:	2:00 PM		
MEMBERS PRESENT:	Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette; Marina Taylor		
NON-MEMBER:	Kyrām Pou, Jr.		
WSU STAFF:	Barry Maloney; Lois Wims; Ashlynn Allain; Nikki Kapurch; Ryan Forsythe		

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 8, 2025, through a Zoom remote call. Chair LaFond called the meeting to order at 2:04 p.m. Trustee LaFond reported that one Trustee will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business:

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 informational 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 presenting his recommendations for promotion and tenure following the recommendation of Provost Wims.
- The MSCA contract governs the process for promotion and tenure.
- President Maloney and Provost Wims 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 total \$79,966.00 annually and are based on the MSCA contractual rate effective September 2019.
- These rates are an increase in the base salary by academic rank, or whichever is the greater amount: 5% of the current salary or the 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 Taylor and seconded by Trustee Brissette, it was unanimously

VOTED: **to recommend to the full board the approval of the awarding of tenure effective September 1, 2025, for the slate of faculty as presented**

Nafisa Nipun Tanjeem

Interdisciplinary Studies

ROLL CALL VOTE: **4 approved.** Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette; Marina Taylor

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

VOTED: **to recommend to the full board the approval of the awarding of tenure with promotion to Associate Professor, effective September 1, 2025, for the slate of faculty as presented**

Brittany Jeye	Psychology
Eric Nichols	Communication

ROLL CALL VOTE: **4 approved.** Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette; Marina Taylor

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

VOTED: **to recommend to the full board the approval of the following promotion to Associate Professor, effective September 1, 2025, for the slate of faculty as presented**

Siri Colom	Sociology
Riley McGuire	English
Joshua Koenig	History & Political Science
Ian Stephens	Earth, Environment & Physics

ROLL CALL VOTE: **4 approved.** Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette; Marina Taylor

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

VOTED: **to recommend to the full board the approval of the following promotion to Full Professor, effective September 1, 2025, for the slate of faculty as presented**

Timothy Murphy	Urban Studies
Roger Greenwell	Biology
Pamela Hollander	Education
Nicole Rosa	Psychology
Kathleen Murphy	Chemistry
Jason Hardin	Mathematics
Benjamin Jee	Psychology

ROLL CALL VOTE: **4 approved.** Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette; Marina Taylor

WSU Board of Trustees
April 8, 2025

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

VOTED: **to adjourn the meeting at 2:23 p.m.**

ROLL CALL VOTE: **4 approved.** Karen Lafond (Chair); Maureen Power (Vice-Chair); Kelly Brissette;
Marina Taylor

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Barry M. Maloney', with a long horizontal flourish extending to the right.

Barry M. Maloney
Secretary, Board of Trustees

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

CHAIR:	Marina Taylor	DATE:	April 23, 2025
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LOCATION:	Remote Participation	MINUTES BY:	Nikki Kapurch
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TIME:	2:30 PM
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COMMITTEE MEMBERS PRESENT: Marina Taylor; Karen LaFond; Dina Nichols

NON-COMMITTEE MEMBERS PRESENT: Lawrence Sasso

WSU STAFF: Nikki Kapurch

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 Wednesday, April 23, 2025, through a Zoom remote call. Chair Taylor called the meeting to order at 2:31 p.m. Trustee Taylor 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 Colombo at the April 8 meeting and was charged with bringing forth a slate of officers for election at the full Board meeting on June 10, 2025. Chair Colombo appointed Trustee Taylor, Trustee LaFond, and Trustee Nichols to serve.

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

- 2024-2025 Elected Officers of the Board
- List of Trustees with Expiration of Terms
- Current BOT Bylaws

Trustee Taylor also acknowledged that an email had been sent to all the trustees prior to the meeting, seeking any voluntary interest in any of the available positions. She received an expression of interest from Trustee Colombo to continue in the chairperson role and from Trustee Sasso to continue in the vice chair role.

The Board must formally elect a new Chair, as well as other officers. The following positions are available:

- Chair
- Vice Chair (2 positions)
- Foundation Board (2 positions)
- Executive Committee (1 position)
- Alternate to the Executive Committee (1 position)

After a thorough discussion, the trustees agreed to nominate Trustee Colombo for the chair position. Trustees Sasso and Power will continue to serve as vice chairs.

Further discussions addressed the remaining positions. Trustee Taylor, whose term is ending, has been serving as one of the Foundation Board representatives and will need to be replaced due to the expiration of her term. Trustee Nichols suggested that Trustee Dunn assume this role, given his background and experience, while recommending that Trustee Power remain in the second position as the other trustee on the Foundation Board. The committee also recommended Trustee Peterson serve on the Executive Committee and Trustee Brissette serve as the alternate.

After discussion among the trustees, it was agreed to present the following slate of officers to the full board at the June 10, 2025, meeting.

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

VOTED: **to recommend approval to the full Board the following slate of officers for 2025-2026:**

2025-2026 OFFICERS

Chair	Trustee Lisa Colombo
Vice-Chair (2)	Trustee Maureen Power Trustee Lawrence Sasso
Secretary	President Barry Maloney
Assistant Secretary	Nikki Kapurch
Foundation Board (2)	Trustee Maureen Power Trustee Darnell Dunn
Executive Committee Alternate	Trustee Amy Peterson Trustee Kelly Brissette
MA State Colleges Presidents/Trustees Association (Chair) Alternate (<i>Vice-Chairs as alternate</i>)	Trustee Lisa Colombo Trustee Maureen Power Trustee Lawrence Sasso

ROLL CALL VOTE: **3 approved. Marina Taylor; Dlna Nichols; Karen LaFond**

OTHER BUSINESS:

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

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

WSU Board of Trustees
April 23, 2025

VOTED: to adjourn the meeting at 2:41 p.m.

ROLL CALL VOTE: 3 approved. Marina Taylor, Karen LaFond, Dina Nichols

Respectfully submitted,

A handwritten signature in dark ink, reading "Nikki Kapurch". The signature is fluid and cursive, with the first name "Nikki" and last name "Kapurch" clearly legible.

Nikki Kapurch
Assistant Secretary, Board of Trustees



WORCESTER
STATE
UNIVERSITY

New IEB Committees

Dr. Edgar Moros

Executive Director for Inclusive Excellence and Belonging



IEB Strategic Plan

INCLUSIVE EXCELLENCE & BELONGING COMMITTEES

Campus Climate Committee (CCC)	
Advisory Committee for Equal Opportunity, Diversity & Affirmative Action	Bias Incident Response Team (BIRT)
LGBTQIA+ Advisory Committee	Antiracism Subcommittee
Accessibility Committee	Military & Veteran Affairs Committee
Adult Learner Committee (Proposed)	

New Committees

- **Antiracism Subcommittee**
- **Accessibility Committee**
- **Military & Veteran Affairs Committee**

Anti-Racism Subcommittee

- This committee serves as a bridge between students, faculty, and administration regarding student service and support with intentionality around transparency, visibility, training, communication, and giving voice to students' ideas and thoughts around cross-racial and cultural topics for programming and workshops, with an explicit focus on issues of race.

Anti-Racism Subcommittee (continued)

Composition:

- 4 faculty members,
- 4 staff,
- A minimum of 2 students,
- Executive Director of Inclusive Excellence and Belonging (ex officio).

Accessibility Committee

To keep informed as to federal and state laws and regulations as well as institutional policies impacting equal opportunity, diversity, as it relates to disabled individuals (students, faculty, staff, and librarians).

1. To recommend appropriate programs that are both preventative and responsive to incidents of bias, hate, or ableism.
2. To identify and provide educational resources and programs supporting and celebrating the disabled community.
3. To collaborate with Worcester State offices, programs, and groups that address the needs of the disabled community.
4. To make recommendations (annually) to the President about policies, programs, and services for disabled students, faculty, staff, and librarians at Worcester State.
5. To promote disability as an essential and important aspect of diversity.

Accessibility Committee (continued)

Composition:

- 4 faculty members
- 4 staff
- Students
- Assistant Dean and Director Student Accessibility Services or designee (ex officio)
- Executive Director of Inclusive Excellence and Belonging (ex officio)

Military & Veteran Affairs Committee

- The Worcester State University Military Affairs & Veteran Advisory Committee is dedicated to advocating for and developing policies and recommendations that establish the highest standards of military cultural competence and appreciation within both the academic and social aspects of the university community. Our goal is to cultivate a collaborative and inclusive environment that supports the success and well-being of military-connected students, faculty, and staff through transformative, holistic programs and services.
- The Military Affairs & Veteran Advisory Committee will provide strategic recommendations to the Worcester State University President and Board of Trustees regarding the administration of educational and training programs for Veterans, Service members, Reservists, National Guard personnel, ROTC students and the dependents of Veterans.

Military & Veteran Affairs Committee (continued)

- Furthermore, the Committee is dedicated to advising on initiatives that enhance the climate of inclusion and belonging within the WSU community. We will focus on ensuring that policies and practices promote equity and inclusivity for all students, faculty, and staff. The Committee will also address key access issues and facilitate the coordination of joint educational initiatives to further support military-connected individuals.

Composition:

- 4 faculty members,
- 4 staff (NUP, AFSCME, and APA)
- Director of Military Affairs and Veteran Services (ex officio)
- Executive Director for Inclusive Excellence and Belonging (ex officio)
- Students

Questions?

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
FINANCE & FACILITIES MEETING
Tuesday, June 10, 2025
3:00 P.M.
WELLNESS CENTER, ROOM 204

Meeting Called By: Dr. Lawrence Sasso (Chair)

Minutes: Nikki Kapurch

Board Members: Dr. Lawrence Sasso(Chair); Darnell Dunn; Dina Nichols; Amy Peterson; Marina Taylor
(Vice Chair)

WSU Staff: Barry Maloney; Ashlynn Allain; Kathy Eichelroth; Carl Herrin; Nikki Kapurch; Lois Wims

All documents are 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. Approval of the Minutes: 1. Finance & Facilities Committee - April 08, 2025*	Dr. Lawrence Sasso	1. vote required
2. <i>Finance & Facilities Committee Report</i> A. FY 2026 Comprehensive University Budget*	Dr. Lawrence Sasso Kathy Eichelroth	A. vote required
3. <i>Administrative Updates</i> A. Other Business	Dr. Lawrence Sasso	
4. <i>Adjournment</i>	Dr. Lawrence Sasso	4. vote required

*Attachments

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Finance & Facilities Committee Meeting Minutes

CHAIR:	Marina Taylor (Vice Chair)	DATE:	April 8, 2025
LOCATION:	Wellness Center, Rm 204	MINUTES BY:	Nikki Kapurch
TIME:	3:00 PM		
COMMITTEE MEMBERS PRESENT:	Marina Taylor (Vice Chair); Darnell Dunn; Dina Nichols; Amy Peterson		
COMMITTEE MEMBERS ABSENT:	Dr. Lawrence Sasso (Chair)		
BOARD MEMBERS PRESENT:	Dr. Lisa Colombo (Chair)		
WSU STAFF:	Ashlynn Allain; Kathy Eichelroth; Nikki Kapurch; Barry Maloney		

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Finance and Facilities Committee was held on Tuesday, April 8, 2025, in room 204, located in the Wellness Center. Vice Chair Taylor called the meeting to order at 3:00 p.m.

Administrative Business

APPROVAL OF THE MINUTES - January 14, 2025

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

VOTED: to approve the January 14, 2025, minutes of the Finance and Facilities Committee meeting as presented.

FINANCE & FACILITIES COMMITTEE REPORT

Trustee Taylor called upon Vice President Kathy Eichelroth to walk trustees through the *FY 2026 Budget Planning PowerPoint*.

FY 2026 Budget Resource Discussion

- VP Eichelroth started the FY2026 budget resource discussion by recapping the FY2025 budget. A detailed memo is included in the packet.
- The Healey-Driscoll Administration announced in December that it was awarding \$14 million from the fiscal year 2025 budget to support student success programming at the state universities. WSU is the recipient of a one time, \$1,620,191 SUCCESS Grant.
 - Many of the SUCCESS projects originated as university initiatives that had been proposed as a part of last spring's budget process but not funded in FY25 because of financial limitations. Through the prioritization process, we created a list of initiatives that were vetted and ready to execute should additional new resources be identified during the year. We now have the opportunity to fund some of the prioritized initiatives.
 - We continue to hold a list of relevant prioritized funding requests and have not solicited new or additional requests during the FY 2026 budget process.
- FY 2026 Baseline
 - Governor Healey released her spending plan for FY 2026, which incorporates all state funding from

FY 2025 into a base funding line for FY 2026. However, the Governor has not proposed any resources for formula funding or the internship and endowment incentive programs for FY 2026. The annualized base includes collective bargaining increases that were rolled out in FY 2025 and those that are awaiting ratification.

- We are in the process of firming up the estimates for campus generated revenue by evaluating the status of revenue generation compared to the budget for FY 2025.
- We will need to continue to address a continuing budget shortfall
- The extent to which we will need to rely on a budgeted reserve draw to fill a revenue gap is not known at this time.
- Discussed that the appropriation of reserves and the FY 2026 budget will likely include a budgeted draw on reserves.
- We are proposing a general fee increase not to exceed \$500 per year for fiscal year 2026. We will continue to analyze the budget numbers, and if we can reduce the gap and lower the fee, we will do so and present that to the board. The current General Fee is \$9,798 a year, and the total mandatory fees are \$10,816 a year as of today.
- Of the six non-specialty state universities, Fitchburg State currently has the lowest mandatory fees at \$10,374 a year, followed by Worcester State at the next highest and BSU at \$10,824. Framingham State is next at \$10,970, Westfield State is next at \$11,210, and Salem State is the highest, at \$11,428.
- At the June Board of Trustees meeting, the comprehensive budget packet for FY2026 will be discussed, and the amount of appropriated reserves will be identified.
- Additionally, there will be an increase of \$59 in the Student Activities Fee. Trustee Pou introduced this topic during the January meeting. Currently, the student activity fee is \$36 per semester or \$72 per year, and these funds are deposited into a student activity trust fund. The proposal for this fee increase will be included in the FY26 budget. As the third largest state school, we currently have the smallest activity fee, and we believe it is necessary to raise the fee to better meet our students' needs. Other state schools charge between \$45 and \$81 per semester, so we are proposing to increase our fee to \$59 per semester.
- Rents in residence halls will increase by \$400 per year. For a premium single rate, there is an additional \$2,000 charge. This refers to a room designed for two occupants but occupied by only one.
- What are your thoughts on the reduction of federal funds? Most of these funds are allocated for specific programs. We are currently monitoring the possible impact on Pell Grants and how we will structure student financial aid packages.
- What is the reasoning behind keeping certain positions frozen? We will continue to evaluate positions and determine whether each position is necessary before making any permanent eliminations.
- If we could secure formula funding to add to our base budget, we may not need to raise the general fee.
- At some point, we need to be cautious about continuing to increase fees, as this raises concerns about affordability.
- We are considering a \$500 fee increase and a \$59 mandatory student activity fee.

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

VOTED: to recommend that the full Board authorize an increase in the General Fee for FY 2026 that would not exceed a \$500 per year amount, with the final recommendation to be brought to the June board meeting as part of the presentation of the FY 2026 Comprehensive

Annual Budget.

535 Chandler Street Site Work Proposal

- Included in the packet is a proposal for site improvements to the President's House at 535 Chandler Street and the Latino Education Institute at 537 Chandler Street.
- We have a use agreement with the Worcester State University Foundation.
- The proposed improvements are for driveway work as the entire driveway, including the portion that provides parking for the Latino Education Institute, has fallen into disrepair and become a hazard.
- The work will be performed under the existing excavation and paving services contract that was awarded to Ricciardi Brothers, Inc. under a competitive procurement process.
- The Commonwealth of Massachusetts Trust Fund Guidelines issued by the DHE require the approval of the board of trustees for the university to expend these funds.

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

VOTED: to recommend that the full Board authorize site improvements, as detailed in the memo and vendor proposal, to achieve necessary repairs to the driveway that provides access and parking to WSU-occupied properties at 535 Chandler Street and 537 Chandler Street.

Operational Excellence Update

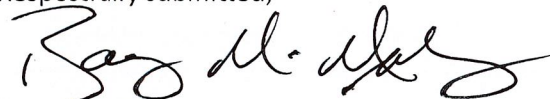
- Jonathan Walker, director, Operational Excellence, Financial Sustainability Task Force, provided an update on current projects and activities. He discussed the new benefits and time savings resulting from these initiatives.
- During this period, approximately \$5.2M of savings have been identified from operations through the work of the Financial Sustainability Task Force and Operational Excellence (OpEx).
- In FY 2025 and moving into FY 2026, OpEx continues to pursue efficiencies, mostly focusing on operational improvements by eliminating duplicative processes and those that add no value, and reworking processes to increase efficiencies and effectiveness. These efforts will continue to assist WSU in closing the operational budget gap.

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

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

VOTED: to adjourn the meeting at 4:00 p.m.

Respectfully submitted,



Barry M. Maloney

Secretary, Board of Trustees



WORCESTER
S T A T E
UNIVERSITY

FY 2026

**Comprehensive
University Budget**

**Worcester State University
FY 2026 Budget Package**

I Fiscal Year 2026 Budget Overview

II Fiscal Year 2026 Budget

- 1 Summary FY2026 Budget - Sources and Uses of Funds
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III Individual Fund Budgets compared with FY2026 Budget

- 8 General Operating Budget (111 & 400 Combined)
- 9 General Operating Budget - Expenditures by Division and Pie Chart
- 10 State Maintenance Appropriation (111)
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- 20 Residence Hall Technology and Equipment Trust Fund (448)

Appendix

- A Capital Adaptation and Renewal Spending Plan
- B FY 2026 Tuition and Fee Schedule
- C FY 2026 Budget Discussion April 23, 2025
- D OSILD Increase Request for Student Activities Trust Fund



Memorandum

DATE: May 28, 2025

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: **FY 2026 BUDGET PLAN – JUNE 2025**

At the April 8th Finance and Facilities sub-committee meeting we discussed the legislative landscape surrounding the development of the Commonwealth's budget for FY 2026. At that time Governor Healey had released her spending plan for FY 2026 that had annualized all FY 2025 state funding into a FY 2026 base funding line for each state university. The annualized base includes collective bargaining increases that were rolled out in FY 2025 and funding for FY 2026. The Governor had not proposed resources in FY 2026 for formula funding or the internship incentive and endowment incentive programs.

The House Ways & Means Committee released its budget on April 16th and the Senate Ways & Means Committee released its budget on May 6th. Proposed funding across all three budget submissions reflect various inconsistencies with the only constant being that all three constituencies have rolled forward our FY 2025 budget plus collective bargaining funds as the base level funding for FY 2026. At this time only the House W&M Committee proposal includes formula funding, the intern incentive program and additional campus operating funds. The Senate is currently debating the budget and it is expected to be sent to Conference Committee in June to reconcile differences between the House and Senate versions. In the event the final state resources allocated to the university differs from those we have carried in the attached budget package, a budget amendment reconciling the figures will be brought to the October board meeting for approval.

FY 2026 Comprehensive Budget Package

The FY 2026 university wide budget package represents a balanced budget with \$144,175,554 of sources and uses of funds. Available resources are represented by three distinct categories: State funding for operations and student financial aid of \$67,885,825 (47%); Federal student aid of \$10,245,463 (7%); and institutional sources of \$66,044,266 (46%) representing eight distinct trust funds. Campus based trust funds include General, Parking Fines, Health Services, Residence Halls, Student Activities, Residence Hall Technology & Equipment, Capital Improvement and Wellness Center trust funds.

General Operating Budget

Operating revenue

The General Operating (GO) budget funds the majority of the University's operating expenditures. The GO budget combines Commonwealth of Massachusetts State appropriations and fringe benefit funding with resources generated through the General Trust Fund. In FY 2026 total operating resources are budgeted at \$107,425,297, with 59% funded by State resources and 41% from General fund revenue, specifically student fees.

There is a net increase in resources for the GO budget in FY 2026 mainly attributed to collective bargaining increases funded by the Commonwealth. There have been modest fluctuations within campus generated revenue categories with a slight increase in graduate tuition offset by a decline in fee revenue from undergraduate day enrollment. Adjustments have been made to the revenue budget for FY 2026 to reflect these trends. The \$500 annual General Fee increase authorized by the board at the April meeting is reflected in the total operating resources identified above.

Operating Expenditures

The annual budget process includes a reconciliation of prior year spending and a projection of anticipated cost escalation. Changes in personnel costs since the budget was set in July 2024 have been evaluated and identified as one time or ongoing costs and then included in the baseline budget for the coming fiscal year. Collective bargaining commitments are added in and then fringe rates are applied to the updated base line of personnel costs. The details of the reconciliation for FY 2026 are shown below.

Expenditure Reconciliation

FY 2025 <u>General Operating Budget – Total Expenditures</u>		\$105,462,351
FY 2025 Add:		
FY 2025 Collective Bargaining Increases and other pay adjustments		<u>1,702,427</u>
Adjusted FY 2025 <u>Base Expenditures</u>		<u>\$107,164,778</u>
 FY 2026 Adds:		
FY 2026 increase in fringe/payroll tax rate and collective bargaining reserve	785,666	
 FY 2026 cost adjustments to existing commitments	634,322	
 FY 2026 investments in professional development, university safety and information technology	<u>1,055,000</u>	
 Subtotal - Add		\$2,474,988

FY 2026 Deduct:

Deferred vacancies

2,214,470**Subtotal – Subtract**\$2,214,470**FY 2026 General Operating Budget – Total Expenditures**\$107,425,296

The FY 2026 adds to the base budget include increases in direct labor costs that will be applied during the fiscal year, pricing and inflationary adjustments for ongoing obligations related to the procurement of goods and services, and investments towards several prioritized commitments.

Professional development was identified as a cross campus priority across all divisions during the FY 2025 budget process. Resources are being provided for plans that are in the developmental stage. The initiative includes funds to be managed by the Center for Teaching and Learning to enhance professional development opportunities for faculty. Employee Services will receive funds to roll out a professional development program available to all employees.

Resources have also been set aside for investments in university safety and security, including recommendations that came from the work of the university safety implementation committee. The investment provides resources for the Executive Director of Emergency Management and Institutional Safety to implement several high priority recommendations while a more comprehensive, multi-year plan is developed.

In the coming year information technology infrastructure will be assessed. Physical infrastructure related to telephone and Wi-Fi service will be evaluated for adequacy with a plan for upgrade or replacement to be developed. The current ERP software system will be evaluated for reliability and relevancy ensuring that university operations are utilizing the most current platforms in an effective and efficient manner. In addition, the multi-year classroom technology refresh plan that was drafted just prior to the disruption to university operations due to Covid -19 will be re-evaluated. These and other information technology initiatives will be evaluated and prioritized while seed money is provided to begin addressing a multi-year action plan.

The increase in expenditures in the reconciliation are being offset by a group of identified deferred vacancies. Most of the vacancies identified have been unfilled for several years now. In the coming year we will evaluate each position to determine if it remains relevant for continuity of university operations.

Gap Analysis

The budget gap analysis provided below identifies a \$2,965,983 budget shortfall between revenue and expenses in FY 2026. The budget plan as presented identifies the revenue generated from a \$500 year General Fee increase and a budgeted drawn on reserve of \$1,348,983 as the means to bridge this gap. While we have budgeted reserve draws over the past few fiscal years, we have not had to draw on them for real time spending. The General Fee increase will serve to partially fill the gap in a permanent way going forward. As we look towards FY 2027, projections indicate that available formula funding from the Commonwealth, cost reductions and operational efficiencies achieved through Operational Excellence, and increased revenue achieved through gains in new enrollment and student retention, will eliminate the need for a dependency on reserves to balance the budget going forward.

FY 2026 Budget GAP Analysis

FY 2026 General Operating Budget – Total <u>Expenditures</u>	\$107,425,289
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FY 2026 General Operating Budget – Baseline <u>Revenue</u>	<u>\$104,459,306</u>
<i>Revenue GAP</i>	<u>\$ 2,965,983</u>

Resources for Backfill

General Fee Increase	\$1,617,000
Reserve draw	<u>\$1,348,983</u>
Resources	<u>\$2,965,983</u>

Residence Life Trust Fund

The FY 2026 budget for the Residence Halls anticipates average room occupancy at 84% of capacity. The budgeted occupancy rate is closely aligned with actual capacity during fall of 2024 and spring of 2025 with a slight increase to reflect projected increased demand in response to the new premium singles room category. Room rental rates for FY 2026 are increasing between 4-5%, however the resources provided are not sufficient to fully fund operating costs. While the FY 2026 budget has been right sized to reflect reduced capacity there is a revenue gap of \$1,448,863 that will be filled with reserves. At June 30, 2024, the Residence Hall Trust Fund

reported an accumulated operating reserve of \$4,001,802 and accumulated net future lease payments of \$11,290,867 resulting in a net negative position of \$11,290,867.

Student Activities Trust Fund

The Office of Student Involvement & Leadership Development has presented a brief requesting an increase in the annual student activity fee. The proposal is included in Appendix D. An increase of \$58 a year has been presented in the FY 2026 budget bringing the total annual student activity fee to \$130 per year. Currently Worcester State University has the lowest student activity fee with the highest annual fee of \$300 being assessed by Massachusetts College of Liberal Arts (MCLA). The number of student organizations and their membership have experienced significant growth over the past several years and it has been a challenge to spread resources out to include expanded programming. The additional resources generated by the fee increase will ensure there is sufficient funding to address higher costs associated with program vendors, food and rental costs, in addition to supporting the club sports teams and providing resources to the Class Committee responsible for senior class programming and contributing to commencement events.

The FY2026 budget for the Student Activities Trust Fund is consistent with the prior year with regard to planned expenditures. Revenue is expected to increase by \$181,731 as a result of the planned fee increase. The total budget for the Student Activities Trust Fund in FY 2026 is \$455,583, consistent with prior years, without relying on a significant draw on the accumulated fund balance in the trust fund.

Other Trust Funds

The Wellness Center Trust Fund, Health Services Trust Fund, Capital Improvement Trust Fund, Parking Fines Trust Fund, Parking Garage Trust Fund and Resident Hall Equipment & Technology Trust Fund are fully funded with designated resource streams and reflect operating costs consistent with prior years.

The Strategic Plan Trust Fund was most recently funded by a \$562,582 transfer from operating reserves in FY 2020. FY 2025 reflects the final allocation of the funding that occurred five years ago. The final allocation in FY 2025 distributed \$335,000 to continue funding of previously approved innovation projects and the strategic priority that rose to the top of requested initiatives in FY2025, the Enroll 360 project, which is intended to boost undergraduate applications and new student enrollment. As we approach FY 2025 year end we will be rolling over the final \$20,000 in this trust fund to FY 2026 as continuation of previously approved projects.

The FY 2026 budget as presented for approval results in the annual cost of attendance for a full time in-state student who commutes to campus of \$12,344. The baseline cost for an in-state student who resides on campus per year is \$25,966. The baseline cost for an out-of-state student residing on campus per year is \$32,046.

Worcester State University
Summary of Sources and Uses of Funds
FY 2026 - All Sources and Trust Funds

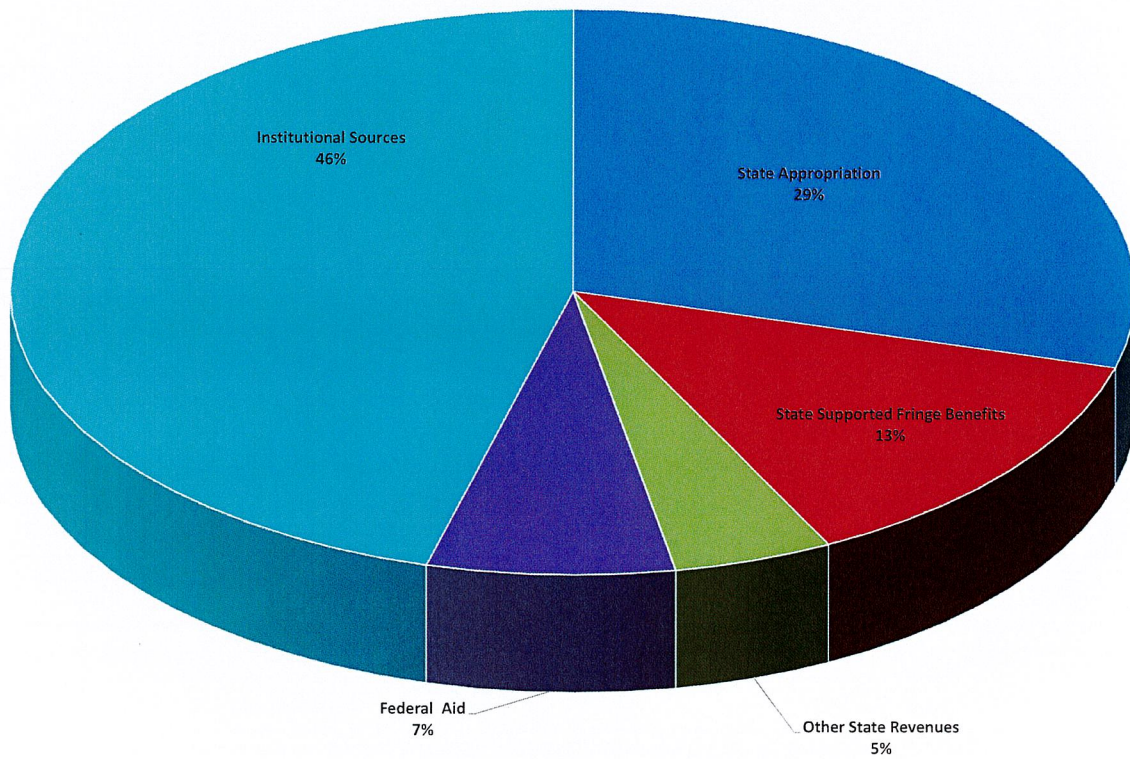
Sources of Funds:

State Appropriation	\$	42,276,179
State Supported Fringe Benefits		19,049,646
Other State Revenues		6,560,000
Federal Aid		10,245,463
Institutional Sources		66,044,266
Total Sources	\$	<u>144,175,554</u>

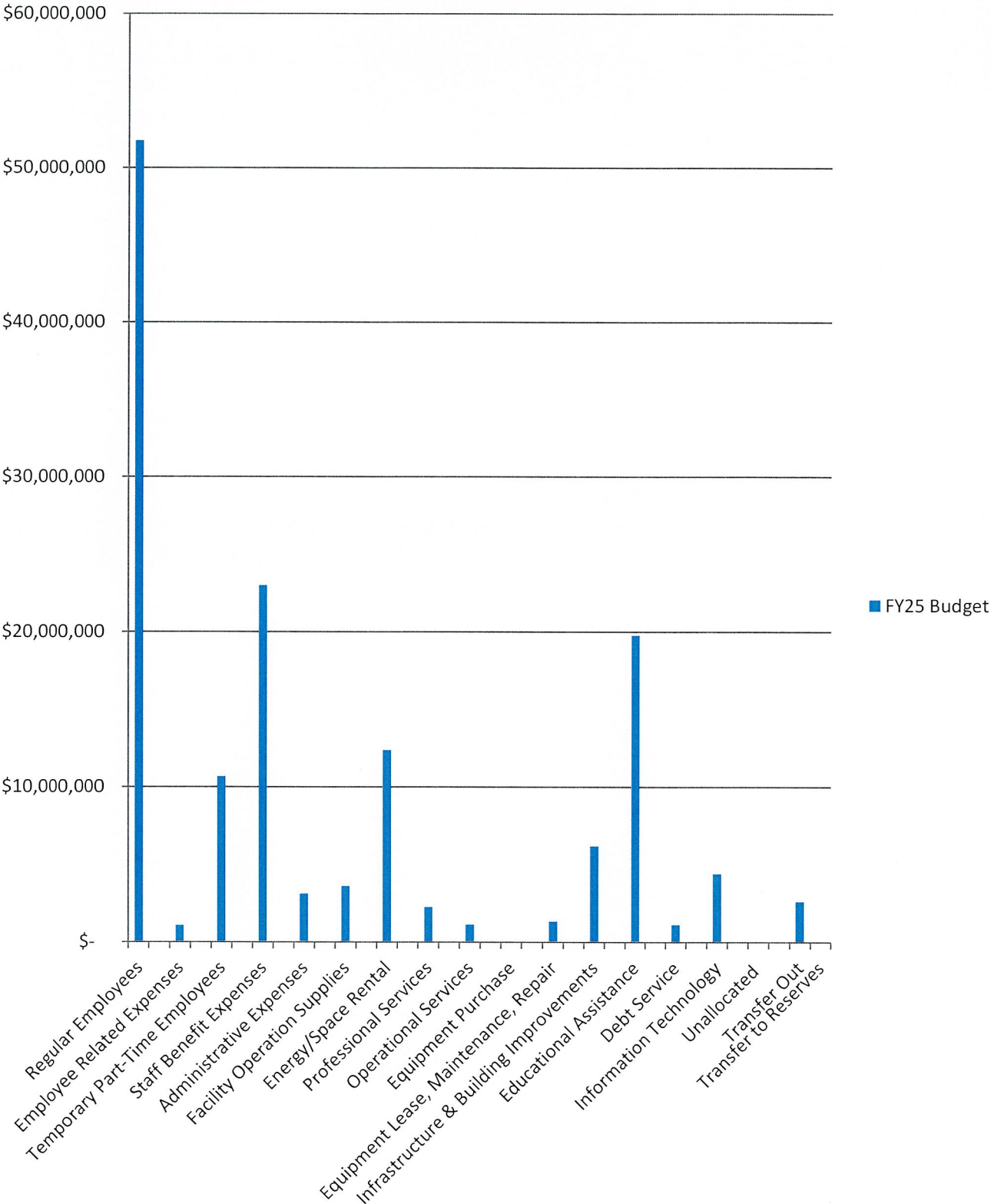
Uses of Funds:

AA	Regular Employees	\$	51,751,435
BB	Employee Related Expenses		1,066,503
CC	Temporary Part-Time Employees		10,652,199
DD	Staff Benefit Expenses		22,977,968
EE	Administrative Expenses		3,097,029
FF	Facility Operation Supplies		3,589,371
GG	Energy/Space Rental		12,355,116
HH	Professional Services		2,230,627
JJ	Operational Services		1,113,332
KK	Equipment Purchase		1,008
LL	Equipment Lease, Maintenance, Repair		1,313,177
NN	Infrastructure & Building Improvements		6,171,285
RR	Educational Assistance		19,751,477
SS	Debt Service		1,104,153
UU	Information Technology		4,389,176
XX	Unallocated		-
	Transfer Out		2,611,698
	Transfer to Reserves		
Total Uses		\$	<u>144,175,554</u>

**Worcester State University
Sources Of Funds
FY 2026 Budget**



Worcester State University
Uses of Funds
FY 2026 Budget



Worcester State University
Summary of Sources
FY 2026 - All Sources and Trust Funds

State Sources

Annual State Maintenance Appropriation		\$ 42,276,179
State Supported Fringe Benefits	19,049,646	
Student Aid Program Mass Cash Grants	6,560,000	
Total Other State Sources		25,609,646
Total State Sources		<u>67,885,825</u>

Federal Sources

SEOG Program	238,098	
College Work Study Program	186,693	
Pell Grants	9,748,091	
Local match (Transfer from General Trust Fund Reserve)	72,581	
Total Federal Sources		<u>10,245,463</u>

Institutional Sources

Revenue		
General Trust Fund	44,750,482	
Parking Fines Fund	112,315	
Health Services Trust Fund	986,463	
Residence Halls Trust Fund	12,563,592	
Student Activities Trust Fund	413,583	
Residence Hall Tech. and Equip. Trust Fund	278,740	
Capital Improvement Trust Fund	2,672,610	
Wellness Center Trust Fund	82,908	
Transfers In		
*Transfer from Resident Hall Trust Fund Reserve	1,448,863	
*Transfer from Student Activities Trust Fund Reserve	42,000	
*Transfer from Capital Improvement Trust Fund Reserve	1,211,206	
*Transfer from Wellness Center Trust Fund Reserve	112,514	
*Transfer from Strategic Plan Trust Fund Reserves	20,000	
*Transfer from Reserves	753,901	
Transfer from FY2025 APA Collective Bargaining	595,089	
*Transfer from Formula Funding-surplus	-	
Total Institutional Sources		<u>66,044,266</u>
Total Sources		<u>\$ 144,175,554</u>

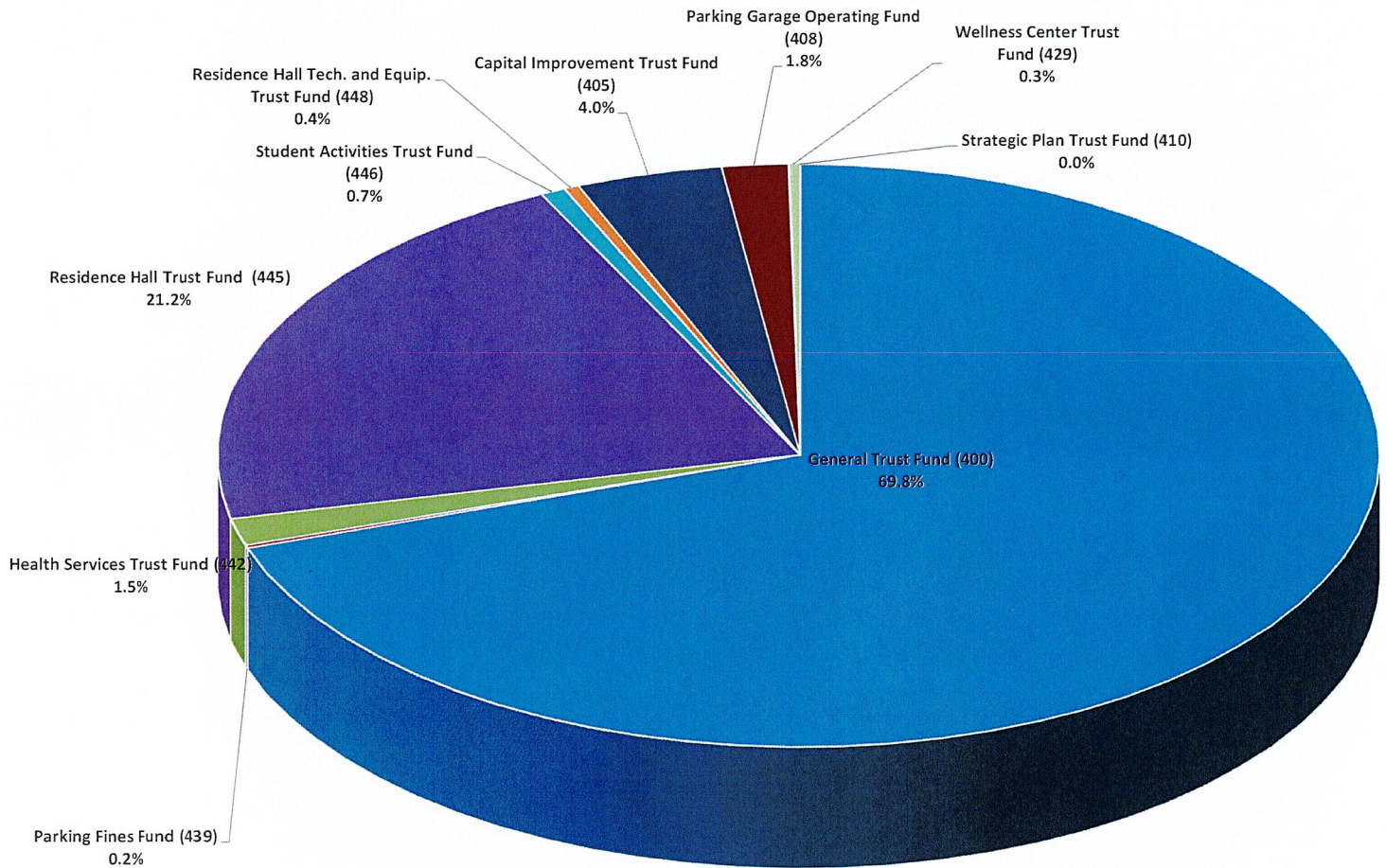
Worcester State University

Trust Fund Summary

FY 2026 Budget

	Budget FY 2025		
	Sources	Uses	
General Trust Fund (400)	\$46,099,472	\$ 46,099,472	69.8%
Parking Fines Fund (439)	112,315	112,315	0.2%
Health Services Trust Fund (442)	986,463	986,463	1.5%
Residence Hall Trust Fund (445)	14,012,455	14,012,455	21.2%
Student Activities Trust Fund (446)	455,583	455,583	0.7%
Residence Hall Tech. and Equip. Trust Fund (448)	278,740	278,740	0.4%
Capital Improvement Trust Fund (405)	2,672,610	2,672,610	4.0%
Parking Garage Operating Fund (408)	1,211,206	1,211,206	1.8%
Wellness Center Trust Fund (429)	195,422	195,422	0.3%
Strategic Plan Trust Fund (410)	20,000	20,000	0.0%
Total Trust Fund Budget	<u>\$66,044,266</u>	<u>\$ 66,044,266</u>	

Worcester State University Trust Fund Summary FY 2026 Budget



Worcester State University

Operating Revenue

FY 2026 Budget

	FY 2026 Proposed Budget	FY 2025 Approved Budget
State Sources		
State Maintenance	42,276,179	38,874,137
State Funded Fringe Benefits	19,049,646	17,108,306
Total State Sources	61,325,825	55,982,443
Institutional Sources		
General Trust Fund		
Tuition/ In state Undergraduate	4,153,067	4,153,067
Tuition/ Graduate	1,647,070	1,238,432
Tuition/ Out of State Undergraduate	1,397,261	1,397,759
Total Tuition	7,197,398	6,789,258
Waivers/Undergraduate	(120,704)	(110,804)
Waivers/Graduate	(163,766)	(188,112)
Total Tuition Waivers	(284,470)	(298,916)
Net Tuition	6,912,928	6,490,342
Undergraduate Day Division	33,273,354	32,056,744
Undergraduate Eve/Summer Programs	3,521,189	3,539,222
Graduate School	1,249,746	1,366,324
Total Fees	38,044,289	36,962,290
Undergraduate Day Division waivers	(1,095,941)	(849,858)
Undergraduate Eve/Summer Programs/waivers	(52,302)	(52,670)
Graduate Fee waiver	(143,922)	(131,351)
Total Fees Waivers	(1,292,165)	(1,033,879)
Net Fees	36,752,124	35,928,411
Application Fees	84,565	68,953
Special fees	241,541	282,829
Commencement Fees	5,340	3,885
Transcript Fees	49,608	39,378
Orientation Fees	104,415	36,840
Activity income	-	2,190
Commissions	128,343	120,000
Non-Credit Courses incl Restricted	113,025	211,027
Center for Effective Instruction	7,099	100,483
Facilities rentals	241,494	145,462
Miscellaneous	110,000	110,000
Other income	1,085,430	1,121,047
Total General Trust Fund Source	44,750,482	43,539,800
General Operating Budget Income	\$ 106,076,307	\$ 99,522,243

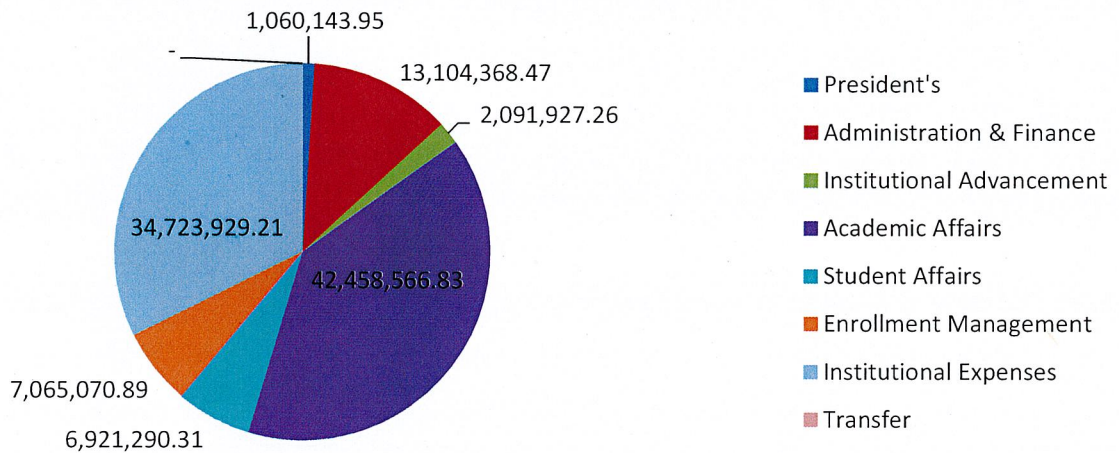
Worcester State University
General Operating Budget (111 & 400)
FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Institutional Revenue	\$ 44,750,482	\$ 43,539,800
State Appropriation	42,276,179	38,874,137
State Funded Fringe Benefits	19,049,646	17,108,306
Transfer in -Reserves	1,348,990	2,702,204
FY024 Formula Funds -surplus	-	1,115,792
Total Sources	<u>\$ 107,425,297</u>	<u>\$ 103,340,239</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 49,923,165	\$ 48,359,308
BB Employee Related Expenses	1,058,503	607,453
CC Temporary Part-Time Employees	10,348,199	9,979,580
DD Staff Benefit Expenses	22,161,988	21,695,448
EE Administrative Expenses	2,987,715	2,890,154
FF Facility Operation Supplies	2,917,621	2,615,975
GG Energy/Space Rental	2,140,200	2,140,200
HH Professional Services	1,567,927	894,652
JJ Operational Services	1,083,832	1,069,146
KK Equipment Purchase	1,008	-
LL Equipment Lease, Maintenance, Repair	1,175,177	1,100,177
NN Infrastructure & Building Improvements	4,727,536	5,228,226
RR Educational Assistance	2,416,964	2,416,964
SS Debt Service	567,536	567,536
UU Technology Expenses	4,347,926	3,775,420
Total Uses	<u>\$ 107,425,297</u>	<u>\$ 103,340,239</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

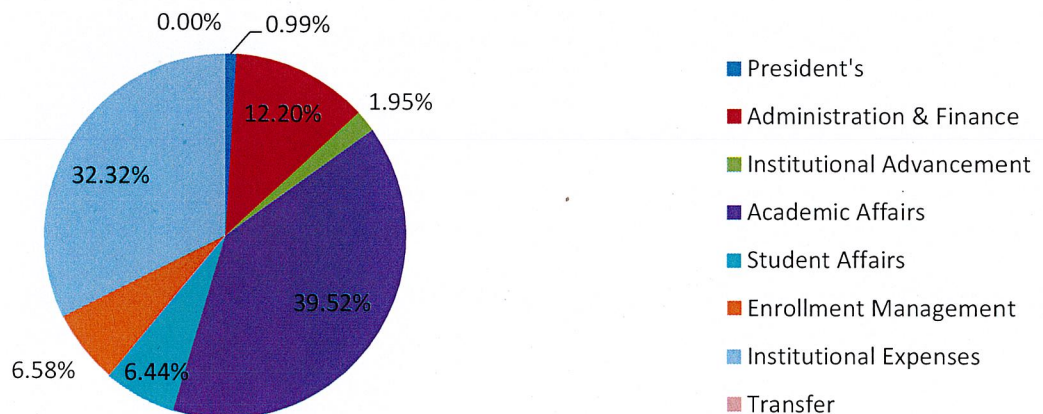
Worcester State University
400/111 Expenditures by Division
FY 2026 Budget

Class	Division	Budget FY25 Subtotals	Budget FY25 Exp %
2	President's	1,060,143.95	0.99%
3	Administration & Finance	13,104,368.47	12.20%
4	Institutional Advancement	2,091,927.26	1.95%
6	Academic Affairs	42,458,566.83	39.52%
7	Student Affairs	6,921,290.31	6.44%
8	Enrollment Management	7,065,070.89	6.58%
3	Institutional Expenses	34,723,929.21	32.32%
	Transfer	-	0.00%
		<u>\$ 107,425,296.92</u>	<u>100.00%</u>

**Budget FY2025
Subtotals by Division**



**Budget FY2025
Expense % by Division**



Worcester State University
State Maintenance Appropriation (111)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
Sources of Funds:			
	State Appropriation	\$ 42,276,179	\$38,874,137
	State Funded Fringe Benefits	\$ 19,049,646	\$17,108,306
	Total Sources	<u>\$ 61,325,825</u>	<u>\$55,982,443</u>
Uses of Funds:			
AA	Regular Employees	\$ 42,276,179	\$38,874,137
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	19,049,646	17,108,306
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	-
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
LL	Equipment Lease, Maintenance, Repair	-	-
NN	Infrastructure & Building Improvements	-	-
SS	Debt Service	-	-
UU	Technology Expenses	-	-
	Total Uses	<u>\$ 61,325,825</u>	<u>\$55,982,443</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University

General Trust Fund (400)

FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Institutional Revenue	44,750,482	43,539,800
Transfer in -Reserves	1,348,990	2,702,204
Transfer in-FY024 Formula Funds -surplus	-	1,115,792
Total Sources	<u>\$ 46,099,472</u>	<u>\$ 47,357,796</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 7,646,986	\$ 9,485,171
BB Employee Related Expenses	1,058,503	607,453
CC Temporary Part-Time Employees	10,348,199	9,979,580
DD Staff Benefit Expenses	3,112,342	4,587,142
EE Administrative Expenses	2,987,715	2,890,154
FF Facility Operation Supplies	2,917,621	2,615,975
GG Energy/Space Rental	2,140,200	2,140,200
HH Professional Services	1,567,927	894,652
JJ Operational Services	1,083,832	1,069,146
KK Equipment Purchase	1,008	-
LL Equipment Lease, Maintenance, Repair	1,175,177	1,100,177
NN Infrastructure & Building Improvements	4,727,536	5,228,226
RR Educational Assistance	2,416,964	2,416,964
SS Debt Service	567,536	567,536
UU Technology Expenses	4,347,926	3,775,420
Total Uses	<u>\$ 46,099,472</u>	<u>\$ 47,357,796</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Capital Improvement Trust Fund (405)
FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Capital Improvement Fee	\$ 2,672,610	\$ 2,689,788
Total Sources	<u>\$ 2,672,610</u>	<u>\$ 2,689,788</u>
<u>Uses of Funds:</u>		
GG - Energy/Space rental	\$ -	\$ -
SS - Debt Service	536,617	536,617
Transfer Out - Parking Garage Oper. Fund	1,211,206	721,206
Transfer Out - To Reserves	924,787	1,431,965
Total Uses	<u>\$ 2,672,610</u>	<u>\$ 2,689,788</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Parking Garage Operating Fund (408)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>			
	Transfer In - Capital Improvement T. F.	\$ 1,211,206	\$ 721,206
	Total Sources	<u>\$ 1,211,206</u>	<u>\$ 721,206</u>
<u>Uses of Funds:</u>			
FF	Facility operating supplies	\$ -	\$ -
GG	Energy and space rental	621,206	621,206
HH	Professional services	-	-
JJ	Operational services	-	-
LL	Equipment lease, maint and repair	-	-
NN	Construction/Maintenance/Improvements	590,000	100,000
UU	Technology Expenses	-	-
	Total Uses	<u>\$ 1,211,206</u>	<u>\$ 721,206</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Strategic Plan Trust Fund (410)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>			
	Transfer in - Reserves	\$ 20,000	\$ 335,000
	Total Sources	<u>\$ 20,000</u>	<u>\$ 335,000</u>
<u>Uses of Funds:</u>			
AA	Regular Employees	\$ 20,000	\$ -
BB	Employee Related Expenses	-	1,000
CC	Temporary Part-Time Employees	-	20,000
DD	Staff Benefit Expenses		
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	6,000
GG	Energy/Space Rental		
HH	Professional Services	-	300,000
JJ	Operational Services	-	-
KK	Equipment Purchase		
LL	Equipment Lease, Maintenance, Repair	-	2,000
RR	Educational Assistance	-	6,000
NN	Construction/Maintenance/Improvements		
XX	Unallocated		
	Total Uses	<u>\$ 20,000</u>	<u>\$ 335,000</u>
	Net Sources / (Uses)		

Worcester State University
Wellness Center Trust Fund (429)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>			
	Revenues	\$ 82,908	\$ 48,010
	Transfer in - Reserves	\$ 112,514	\$ 52,412
	Total Sources	<u>\$ 195,422</u>	<u>\$ 100,422</u>
<u>Uses of Funds:</u>			
BB	Employee Related Expenses	\$ -	\$ -
CC	Temporary Part-Time Employees	20,000	20,000
DD	Staff Benefit Expenses	422	422
EE	Administrative Expenses	12,500	20,000
FF	Facility Operation Supplies	113,500	31,000
GG	Energy/Space Rental	-	-
HH	Professional Services	20,000	-
JJ	Operational Services	2,000	2,000
KK	Equipment Purchase	-	-
LL	Equipment Lease, Maintenance, Repair	12,000	12,000
NN	Construction/Maintenance/Improvements	-	-
UU	Technology Expenses	15,000	15,000
	Transfer Out - To Reserves	-	-
	Total Uses	<u>\$ 195,422</u>	<u>\$ 100,422</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University

Parking Fines Fund (439)

FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Fines and Other Income	\$ 112,315	\$ 96,849
Transfer in - Reserves	-	-
Total Sources	<u>\$ 112,315</u>	<u>\$ 96,849</u>
<u>Uses of Funds:</u>		
EE Administrative Supplies	\$ 30,000	\$ 30,000
RR Educational Assistance	60,000	60,000
Transfer Out - To Reserves	22,315	6,849
Total Uses	<u>\$ 112,315</u>	<u>\$ 96,849</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Health Services Trust Fund (442)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>			
	Fees and Other Income	\$ 986,463	\$ 998,306
	Total Sources	<u>\$ 986,463</u>	<u>\$ 998,306</u>
<u>Uses of Funds:</u>			
AA	Regular Employees	\$ -	\$ -
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	8,000	8,000
DD	Staff Benefit Expenses	169	169
EE	Administrative Expenses	100	450
FF	Facility Operation Supplies	10,000	10,000
HH	Professional Services	600,000	600,000
LL	Equipment Lease, Maintenance, Repair	500	600
RR	Client Medical Services	100	750
UU	Technology Expenses	-	-
	Transfer Out - Reserves	367,594	378,337
	Total Uses	<u>\$ 986,463</u>	<u>\$ 998,306</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University

Resident Hall Trust Fund (445)

FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 12,563,592	\$ 12,277,962
Transfer In - Reserves	\$ 1,448,863	\$ 1,312,687
Total Sources	<u>\$ 14,012,455</u>	<u>\$ 13,590,649</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 1,808,270	\$ 1,639,968
BB Employee Related Expenses	-	-
CC Temporary Part-Time Employees	235,000	225,000
DD Staff Benefit Expenses	814,806	751,270
EE Administrative Expenses	30,714	32,500
FF Facility Operation Supplies	285,000	275,000
GG Energy/Space Rental	9,400,766	9,400,766
HH Professional Services	10,700	10,200
LL Equipment Lease, Maintenance, Repair	78,500	37,500
NN Infrastructure & Building Improvements	853,749	697,084
RR Educational Assistance	468,950	468,950
UU Technology Related Expenses	26,000	52,411
Transfer Out - To Reserves	-	-
Total Uses	<u>\$ 14,012,455</u>	<u>\$ 13,590,649</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Student Activities Trust Fund (446)
FY 2026 Budget

		FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>			
	Fees	\$ 413,583	\$ 231,852
	Transfer In - Reserves	\$ 42,000	\$ 223,892
	Total Sources	<u>\$ 455,583</u>	<u>\$ 455,744</u>
<u>Uses of Funds:</u>			
BB	Employee Related Expenses	\$ 8,000	\$ 8,000
CC	Temporary Part-Time Employees	41,000	40,000
DD	Staff Benefit Expenses	583	744
EE	Administrative Expenses	36,000	35,250
FF	Facility Operation Supplies	263,250	251,500
GG	Energy/Space Rental	-	-
HH	Professional Services	32,000	42,000
JJ	Operational Services	27,500	24,000
KK	Equipment Purchase	-	-
LL	Equipment Lease, Maintenance, Repair	47,000	54,000
NN	Construction/Maintenance/Improvements	-	-
UU	Technology Expenses	250	250
	Total Uses	<u>\$ 455,583</u>	<u>\$ 455,744</u>
	Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
Residence Hall Technology and Equipment Trust Fund (448)
FY 2026 Budget

	FY2026 Requested Budget	FY2025 Approved Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 278,740	\$ 275,000
Total Sources	<u>\$ 278,740</u>	<u>\$ 275,000</u>

<u>Uses of Funds:</u>		
AA Regular Employees	\$ -	\$ -
DD Staff Benefits Expense	-	-
EE Administrative Expenses	-	-
GG Energy/Space Rental	192,944	192,944
LL Equipment Lease, Maintenance, Repair	-	-
UU Technology Expenses	-	-
Transfer Out - To Reserves	85,796	82,056
Total Uses	<u>\$ 278,740</u>	<u>\$ 275,000</u>

Worcester State University
Capital Adaptation and Renewal
FY 2026

A

Sullivan Building - RTU Replacements	\$	656,539.00
Sullivan Roof Replacement		658,235
Student Affairs renewal and adaptation		1,630,110
Wellness Center Lighting		150,000
Learning Resource Center VAV Replacement		150,000
Misc campus projects		755,116

Total of planned projects	\$	<u>4,000,000.00</u>
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Worcester State University
Tuition and Fees - Academic Year 2025/2026

B

	Annual	Increase from FY 2025
<u>Undergraduate Day Division</u>		
<i>Cost for Full-Time In-State Student</i>	12,344.00	
Tuition:		
MA Resident	970.00	
Non-Resident	7,050.00	
NE Regional	1,455.00	
Fees:		
General Fee	10,298.00	500.00
Student Activity Fee	130.00	58.00
Student Health Svc Fee	310.00	
Capital Improvement Fee	636.00	
Total Fees	11,374.00	558.00
Health Insurance	4,721.00	780.00
Orientation Fee (New Students)	75.00	
Commuter Meal Plan - freshman, sophomore and junior	300.00	
<u>Residence Halls</u>		
Residence Hall rates		
Chandler Village - Double		
Double	9,100.00	400
Single	10,100.00	
Premium Single	11,100.00	
Dowden Hall - Double		
Double	8,800.00	400
Single	9,800.00	
Premium Single	10,500.00	
Wasylean Hall - Double		
Double	9,600.00	400
Single	10,600.00	
Premium Single	11,600.00	
Sheehan Hall - Double		
Double	9,400.00	400
Single	10,400.00	
Premium Single	11,400.00	
Residence Activity Fee	50.00	
Technology and equipment fee	220.00	
Resident Parking Fee	175.00	
Board	4,552.00	132
Damage Deposit (1st Semester)	100.00	
<u>Division of Graduate and Continuing Education</u>	Credit Hour	
Tuition:		
Undergraduate	148.00	
Graduate	189.00	
Fees:		
Administrative Fee		
Undergraduate	161.00	
Graduate	163.00	
Capital Improvement Fee	26.50	
<u>Online Graduate Degree Programs;</u>		
Master of Education - Moderate Disabilities	409.00	
Master of Education - Early Childhood Education	409.00	
Master of Education - Elementary Education	409.00	
Master of Science in Nursing - Nurse Educator	504.00	
Master of Science in Nursing - Public and Population Health	504.00	
<u>Other University fees:</u>		
<u>All students</u>		
Application fee	per item	50.00
Transcript fee	per item	10.00
Applied music fee	per course	260.00
Lab Instruction	per course	90.00
International Student Fee - fall/spring	per term	250.00
International Student Fee - summer session	per term	125.00
<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 cr hr	15.00
Field Work Supervision	per cr hr	15.00
Internship	per cr hr	15.00



WORCESTER STATE UNIVERSITY

Vice President, Division of Administration and Finance

Phone: 508-929-8087

Fax: 508-929-8433

Memorandum

DATE: March 25, 2025

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: FY 2026 BUDGET RESOURCE DISCUSSION

Governor Healey released her spending plan for FY 2026 which has annualized all FY 2025 state funding into a FY 2026 base funding line. The annualized base includes collective bargaining increases that were rolled out in FY 2025 and those that are awaiting ratification. The Governor has not proposed resources in FY 2026 for performance funding or the internship incentive and endowment incentive programs.

We are in the process of firming up the estimates for campus generated revenue while evaluating the status of revenue generation compared to budget for FY 2025. We anticipate we will need to address a continuing budget shortfall, though the gap appears to have decreased slightly. The extent to which we will need to rely on a budgeted reserve draw to fill a revenue gap is not known at this time. We are quantifying savings that have been achieved during the current year and evaluating other opportunities to suspend or eliminate expenses in FY 2026.

While planning for operating expenses in FY 2025 we had returned to a deliberative process of soliciting funding requests. At the conclusion of the FY 2025 budget process we were able to fund the EAB Enrollment Marketing proposal as a top priority. Enroll 360 is an innovative approach to inquiry generation aimed at increasing undergraduate applications and new student enrollment. Participation in the program requires a three-year commitment that has demonstrated results at other institutions of increasing enrollment by 16%, in addition to contributing to increased retention rates and postgraduation giving. Year one of this initiative has been funded in the FY2025 budget with the majority of resources being provided from the Strategic Plan Trust Fund and a small re-allocation of resources in the operating budget. Through the prioritization process we created a list of initiatives that were vetted and ready to execute should additional new resources be identified during the year.

The Healey-Driscoll Administration announced in December that it was awarding \$14 million from the fiscal year 2025 budget to support student success programming at Massachusetts' nine state universities. These funds support services such as peer mentors, academic skills workshops, and academic, career and scholarship advising aimed at increasing graduation rates, particularly among historically underserved students.

The Governor extended SUCCESS funding to state universities for the first time, which has been available to community colleges in recent years. WSU is the recipient of a one time, \$1,620,191 SUCCESS Grant.

The grant funding will be directed to 28 projects in Academic Affairs, Enrollment Management, Student Affairs and Administration & Finance. The projects represent a wide range of initiatives, from student advising and tutoring, to orientation and career readiness enhancements. Many of our SUCCESS projects originated as university initiatives that had been proposed as a part of last spring's budget process but not funded in FY25 because of financial limitations. As we continue to hold a list of relevant prioritized funding requests, we have not solicited new or additional requests during the FY 2026 budget process.

In FY 2025 adjustments were made to cost categories to reflect inflationary increases in recent years. As a result, only minor changes are required to base budget categories in FY 2026. In addition, we continue to carry many vacant positions though applicant prospects for posted vacancies have experienced an uptick since the beginning of 2025. As we did last year, the operating budget deficit reconciliation will include filling the gap though a selective position freeze initiative.

As we reconcile the budget it is important to recognize that we will continue to program reserves into the funding equation. Operating reserve have been programmed to fill a structural budget deficit since FY 2023 with \$2.9M in that year, \$2.7M in FY 2024 and \$2.7M in FY 2025. Since FY 2022 WSU has closed every fiscal year with an increase in net position and positive increase in cash flow as reflected in the annual audited financial statements for each respective year. The University has not drawn on reserves during this time. During this period approximately \$5.2M of savings have been shed from operations through the work of the Financial Sustainability Task Force and Operational Excellence (OpEx). In addition, labor market conditions contributed to significant position turnover resulting in an unusual complement of unfilled positions. Positions have remained unfilled due to a reduction in available workers and competition in the marketplace. As mentioned earlier, we are seeing the labor market strengthen since January with search pools containing more qualified candidates.

In FY 2025 and moving in to FY 2026, OpEx continues to pursue efficiencies, most of which focus on operational improvements by eliminating duplicative processes and those that add no value and reworking processes to increase efficiencies and effectiveness. These efforts will continue to assist WSU in closing the operational budget gap.

Other efforts to fill the budget gap focus on increasing retention, specifically with the roll out of the Success Funds, and increases in targeted enrollment through the Enrollment 360 initiative with EAB. While it is too early in these efforts to measure the impact and assess results, the OpEx team and Institutional Research are prepared to collect the data and report out the results to the campus as they become quantifiable.

In addition to the approach described above, we are asking for consideration of an annual General Fee increase of up to \$500 in FY 2026. While this is the third consecutive annual fee increase, along with the operations initiatives described above, it is shoring up the campus generated revenue base at a time when student resources provided through Massachusetts state grants is increasing. Student financial aid awards through federal, state and local resources have been increasing over the past several years serving to offset the impact of student fee increases.

The General Fee, which is the largest institutional source of revenue provides the majority of local revenue to operate the university. The General Fee is one of several mandatory fees assessed to undergraduate students. Total mandatory fees proposed for FY 2026 include the General fee of \$10,298 a year, the Student Activity fee of \$130 a year, the Student Health Service fee (\$310 per year), and the Capital Improvement fee (\$636 per year), for the total cost of mandatory fees of \$11,374. Mandatory fees assessed by the state universities are reported annually to the Department of Higher Education. Mandatory fees at the state universities are comparable to tuition assessed by private institution's, where the funds are the primary source of revenue to operate the institution. The proposed increase in the General Fee and Student Activities fee will place WSU at the higher end of mandatory fees among the state university institutions if the other campuses do not increase their rates.

We believe the strategy described above is prudent and consistent with the approach to fill the budget gap that began in FY 2023. We are closing in on eliminating the gap and are optimistic that several more years of increased state appropriation through formula funding will provide the leverage needed to get university operations back into the black from a budgeting perspective.

Office of Student Involvement & Leadership Development

**Increase Request for
Student Activities Trust Fund**

Prepared by:

Kristie McNamara, Director, OSILD

Sarah Potrikus, Associate Director, OSILD

February 2025

Background

The student activities fee paid by all undergraduate matriculated students provides valuable funding for campus events throughout the year. This fee funds the Student Activities Trust Fund, which is then allocated annually to each active student organization to assist with programming and events. Since its inception in the 80s, this fee has not increased for student activities. Due to rising involvement numbers and higher program costs, the current fee must be reviewed and increased for Worcester State's student organizations to remain successful and continue to provide the campus community with valuable programs and social opportunities.

Fee Information

The current student activity fee at Worcester State University is \$36 per semester, equaling \$72 per academic year. This breaks down to students paying \$3 per credit hour.

Information was collected from all state institutions on their current student activity fees to see how Worcester State compares; this data can be viewed in the table below. **Worcester State currently has the lowest student activity fee.**

State institution student activity fees for 2024-2025

Institution	Semester Fee	Total Fee
Bridgewater State University	\$50	\$100
Fitchburg State University	\$45	\$90
Framingham State University	\$70	\$140
Salem State University	\$50.40	\$100.80
Westfield State University	\$81	\$162
MCLA	\$150	\$300
Mass Maritime	\$71	\$142
Worcester State University	\$36	\$72

The last time the student activities fee was adjusted was in the mid-2000s to account for the creation of the Student Emergency Fund. This was the most recent change and was allocated to the Student Emergency Fund; the increase was less than \$10 per year. The student activities fee has not been increased to benefit the SATF since it was first implemented.

Increase Justification

It has been determined that an increase is needed to the student activities fee for the following reasons:

- Continued growth in student organizations and their membership
- Higher costs for program vendors, food, and rentals

- Higher costs of supporting club sports teams
- Anticipated contributions from the Class Committee to Commencement and other activities

Increase in Student Organizations and Student Membership

Each year hundreds of students participate in student organizations to meet other students, build their leadership skills, and contribute to the campus community. Many of our student organizations are responsible for hosting social and educational events that provide opportunities for students to build a connection to campus and add to university retention efforts.

The chart below reflects involvement in student organizations and how many events were sponsored during those years. A sampling of years before the COVID-19 pandemic is presented to demonstrate pre-2020 averages. On average, there are 40-50 active student organizations each year, attributing to newly approved organizations and those that stop being active.

Note: membership numbers were not being tracked until fall 2022.

	2017-2018	2018-2019	2022-2023	2023-2024
Number of active student organizations	39	41	45	44
Number of student members	N/A	N/A	564	707
Number of student organization events	333	358	249	224

The amount allocated and distributed to each student organization for their annual budget is impacted by the number of active student organizations, which can vary each year. The past few years have seen funds cut from some student organizations with larger budgets and level funding for all student organizations to compensate for the increase in active groups.

Increase in Programming Costs

The last five years have seen an immense increase in the costs associated with planning events for student organizations. Vendors have begun to put spending minimums on interactive activities, including game shows and other immersive experiences. A \$3,000 minimum for an event can potentially use an entire event budget, reducing the amount of students who can participate. This has directly impacted the number of events student organizations have sponsored, as seen in the previous chart.

Food has become a staple at many campus events, as it is a great way to encourage students to stop by and participate. Student organizations are required to purchase food from Chartwells, and an increase in their menu item prices has caused organizations to request to order food from off-campus locations more frequently. This process is significantly more difficult than ordering from Chartwells, as it includes creating new vendors in our payment system and

coordinating the payment, which has led to some student organizations forgoing food at their events.

Transportation, both in paying for vendors to come to campus and reserving buses for off-campus trips, has increased as well. In 2018-2019, the Student Events Committee was able to sponsor five off-campus trips; these past few years they have only been able to sponsor two or three. Our event policies require that we provide transportation to off-site trips, but the cost of the buses alone has led to many student organizations straying away from planning trips.

As costs continue to rise, we can continue to see a decline in the number of student organization-sponsored events unless an increase is approved.

Increase in Club Sport Membership and Associated Costs

Four club sports are currently supported by the Office of Student Involvement and Leadership Development; Cheerleading Team, Dance Team, Equestrian, and Men's Lacrosse. These four teams include upwards of 60 students who represent Worcester State at various competitions and tournaments throughout the year. Club sports teams require additional support and funding that extends past that of a regular student organization, including off-campus space rentals, coaching fees, travel expenses, and league and competition fees. Club sport members are expected to pay some expenses out-of-pocket and participate in numerous fundraising opportunities to help off-set these costs.

The closing of the May Street Building in spring 2023 has required both the Cheer and Dance teams to seek out off-site practice spaces, including Wachusett Regional High School and Spirit Central Gym. The fees associated with renting these spaces can vary depending on team membership but are not expenses that were required only a few years ago. For example, members of the Cheer Team are now expected to pay approximately \$100 out of pocket just to help cover the cost of using the space at Spirit Central. Not only are students funding this themselves, but they are also spending money on transportation to get to off-site locations.

All club sport teams must have a coach to practice and compete. Coaching fees have been changed from a stipend to an hourly wage that comes directly from SATF, and three of the four teams have also hired an assistant coach. This change to the hourly wage has increased what our coaches were being paid in the past. Both the Dance and Cheer teams travel to Florida for competition each year and take both of their coaches, an increase in travel that did not exist only a few years ago.

Registration and participation fees for leagues and competitions continue to increase each year. This, along with renting off-campus facilities and paying for coaches, has impacted the amount of funding that is available for other student organizations and additional allocations during the year. An increase in the student activity fee will directly impact the amount that can be allocated to each club sport, therefore reducing some of the student's out-of-pocket expenses.

While the current home of club sports teams is within Student Involvement, the goal of the office is to transition these teams over to Athletics. As part of this transition, club sports teams will continue to be funded via the SATF for the first three to five years; the proposed fee increase will help to align the club sports budgets with the funding needed to run them.

Increase in Program Expectations from Class Committee

The Class Committee is responsible for programming for the senior class each year and assisting with Commencement activities as requested. Events include on-campus social opportunities, off-campus trips, and the annual Party on the Eve the night before Commencement. Similar to programs for other student organizations, increased programming and travel costs have impacted the number of events the Class Committee can sponsor for graduating seniors.

Party on the Eve has become a tradition for seniors to celebrate with their families the night before Commencement. This event is a co-sponsorship between the Class Committee and Alumni Relations and Engagement. Due to budget changes within their office, the Class Committee has been expected to contribute more to this event than in the past, reducing what they can spend on other events.

Over the past few years, there has been an increase in the amount the Class Committee is expected to contribute to the Commencement speaker.

Conclusion

The members of student organizations have met the challenges of rising costs with creativity and collaboration, increasing the amount of co-sponsored events they plan with campus departments and other organizations. Many groups have also taken to fundraising to help with programming, as seen in the figures below:

2022-2023 - \$38,319

2023-2024 - \$45,359

Funds raised by clubs for programming

To better support our student organizations and align our fees with our peer institutions, **we propose an increased student activities fee of \$65 per semester, equating to \$130 per year.** This increase of \$58 will directly benefit the student, helping to broaden campus programming and involvement opportunities while supporting our student organizations.

Student organizations are relied upon to help build community, contribute to campus culture, and assist with both the recruitment of new students and the retention of current ones. For student organizations to remain successful, they need robust budgets to support their missions. An increase in the student activity fee is necessary for student organization members to continue the work that they do and make valuable contributions to the campus community.

****Student Senate voted to support an increase to the Student Activities Fee of up to \$130 on February 28, 2025.**

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
HUMAN RESOURCES COMMITTEE MEETING
Tuesday, June 10, 2025
2:00 P.M.
Wellness Center, Room 204**

Meeting Called By: Maureen Power (Chair)

Minutes: Nikki Kapurch

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

WSU Staff: Barry Maloney; Ashlynn Allain; Nikki Kapurch; Sathi Mitra

All documents are 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	Maureen Power	
2. <i>Human Resources Committee Report</i> A. Appointment of the Assistant VP for Communications and Marketing* B. President Maloney's 2024–2025 Self-Evaluation* 1. Memo from Commissioner Ortega*	Maureen Power Barry Maloney	A. vote required B. vote required 1. informational
3. <i>Adjournment</i>	Maureen Power	3. vote required

*Attachments



WORCESTER
STATE
UNIVERSITY

President's Office
Phone: 508-929-8020
Fax: 508-929-8191
Email: bmaloney@worcester.edu

May 22, 2025

Deborah O'Neil



Dear Ms. O'Neil,


I am pleased to inform you that I intend to submit to the Board of Trustees of Worcester State University at their June 10, 2025 meeting, your appointment at the University as the Assistant Vice President of Communications and Marketing. Your appointment is subject to Board approval upon the terms described as follows;

1. The Assistant Vice President of Communications and Marketing is responsible for leading the university strategy for communications, marketing, public relations, media relations, crisis communications, advancement communications, and internal communications. The incumbent is responsible for developing and implementing integrated communications and marketing strategy and messaging across the institution that supports the university's strategic priorities and ensures university-wide brand consistency. You will report to the Vice President for Enrollment Management and will be held to the standards of the University, and the Board of Trustees and the Massachusetts Board of Education. You will serve in the position at the pleasure of the President and the Board of Trustees.
2. Your appointment will begin effective Monday, June 16, 2025.
3. Your annual salary will be in the amount of \$130,000. Furthermore, you will be accorded all the other benefits and entitlements due to you based on your employment status as a Non-Unit Professional.

Please indicate that you accept this offer of appointment by signing and dating the original letter and returning it to the Director of Employee Services Operations.

I congratulate you on your appointment and extend my best wishes for a challenging and rewarding work experience.

Sincerely,


Barry M. Maloney
President
BMM/jlc

I accept the position of Assistant Vice President of Communications and Marketing effective June 16, 2025.

DocuSigned by:



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Deborah O'Neil

5/22/2025

Date



WORCESTER
S T A T E
UNIVERSITY

NON-UNIT JOB DESCRIPTION

Position Number: 00106328

Reports to: 00195251

Incumbent: D. O'Neil

Department: 819

UPDATED - JAN 2025

OFFICIAL TITLE: Assistant Vice President of Communications and Marketing

SUPERVISION RECEIVED: Vice President for Enrollment Management

SUPERVISION EXERCISED: Office of Communications, Marketing, Design and Printing

GENERAL STATEMENT OF DUTIES:

The Assistant Vice President of Communications and Marketing (AVP) is a university leader serving as part of the President's Executive Cabinet who champions the university's brand, reputation, and the Worcester State story. Overseeing the Office of Communications, Marketing, Design and Printing, the AVP leads university strategy for communications, marketing, public relations, media relations, crisis communications, advancement communications, and internal communications. The AVP is responsible for developing and implementing integrated communications and marketing strategy and messaging across the institution that supports the university's strategic priorities and ensures university-wide brand consistency. The AVP must be able to work independently and constructively in an institutional setting that strongly values cross-division collaboration, and do so beyond normal business hours.

The AVP is the university's spokesperson and, as the Public Information Officer, is responsible for responding to media inquiries, conducting media outreach and fostering relationships with news reporters. During emergencies, the AVP is the university's Emergency Management PIO and is responsible for leading all crisis communications. As PIO, the AVP works cross-divisionally to support continual improvements to the university's emergency management plans and preparedness, to include appropriate training for the MARCOM team and key leadership members.

The AVP manages, creates, edits, and ensures timely, accurate, clear, and creative communications that promote positive internal, community, and constituent relations. As the champion of the university's brand, the AVP is a key position involved in promoting campus pride and enhancing Worcester State University's reputation.

RESPONSIBILITIES:

1. (E) Is a direct report to the Vice President for Enrollment Management, and also serves as a member of the President's Leadership Team. As a member of the University Cabinet, makes recommendations to the campus's senior leadership on



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a wide variety of campus matters and brings the perspective of a communications and marketing expert to the table.

2. (E) Develops and implements integrated communication and marketing strategies and messaging to support the strategic goals of the University, works with MARCOM departments to set marketing and communications strategies, and develop and track appropriate communications and marketing metrics to assess effectiveness of institutional and department-level strategies, uses metric to engage in continuous improvement;
3. (E) Oversees undergraduate, graduate and university marketing strategies for student enrollment in close collaboration with the Director of Marketing and VP of Enrollment;
4. (E) Oversees advancement communications strategy for fundraising and alumni engagement in collaboration with the MARCOM Communications Director and the Director of Advancement Communications in collaboration with the VP of University Advancement
5. (E) Serves as university's Emergency Management PIO, completes all training associated with the role, and ensures MARCOM staff is appropriately trained for emergency management duties. Acts as an essential employee during emergency and weather-related events, as the PIO on the Emergency Management team, to assure timely and accurate communication to campus constituencies.
6. (E) Oversees and makes continual improvement to university's communications practices, procedures and systems. Ensures that all university communication practitioners are adhering to university editorial standards, and writing and sharing content so that it is widely available for repurposing through various communication and social media vehicles, in an integrated way;
7. (E) Works to ensure the most efficient means of coordinating design, editing, photography, and videography functions in a way that best serves marketing and communication priorities;
8. (E) Oversees internal communications and collaborates with the Communications Director to develop and maintain effective internal communications practices that meet internal campus communication goals; provides communications leadership in support of diversity and inclusion efforts on campus.
9. (E) Works with the President's Office collaboratively and as needed providing communication and public relations support for efforts led by that office. Also provides communications support and advice to other university leaders, including the Vice President for Enrollment Management and the Vice President for Advancement, for key messages to the campus community.
10. (E) Works to meet the University's strategic goal of 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, including designing and communicating appropriate messages regarding the



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- university's diversity-related efforts and publicly highlighting the diversity of the university to the community at large.
11. (E) Raises the visibility and profile of the university by developing a comprehensive media relations strategy that brings positive earned media coverage to the university, to include building relationships with news reporters across media outlets, developing and pitching story ideas that generate positive media coverage, responding to media inquiries, working with faculty and university leaders to respond to media inquiries, developing a faculty expert database available to the media. Organizes and leads media invitations and statements as needed across the university, promotes faculty and staff experts to the media.
 12. (E) Develops a public relations strategy to foster a positive public image, to include regular communication with area PIOs in higher education and the university's partner organization to seek collaborative opportunities to promote shared work and the state universities
 13. (E) Works closely with the university's Records Access Officer on public records requests that are generated from media outlets or may attract the attention of the media.
 14. (E) Oversees the President's social media accounts, coordinating closely with Marketing staff responsible for the University social media accounts. Oversees the University's news site and ensures that resources are available to provide adequate written content, as well as photography and videography. Oversees employee(s), cross-divisional staff, freelancers, and intern(s) to ensure they are providing adequate and appropriate content, and creates content.
 15. (E) Ensures appropriate monitoring of the University's online reputation and presence in traditional media outlets, and responds as needed.
 16. (E) Works collaboratively across divisions and between offices to ensure the communications goals of the senior leadership and the University are coordinated.
 17. (E) Serves as a liaison with other colleges, the Department of Higher Education, the Council of Presidents, and other organizations as necessary and appropriate for University public relations efforts and serves as a member of appropriate campus committees as determined by the VP for Enrollment Management.
 18. (E) Oversees the fiscal budgets for marketing, public relations, communications, and other supervised areas, as well as personnel, team professional development and workplace practices
 19. (E) Responsible for contributing to the WSU Strategic Plan.
 20. (E) Responsible for contributing to the Equal Opportunity/Affirmative Action objectives.
 21. (E) Performs similar and related duties as assigned.

REQUIRED QUALIFICATIONS:



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1. Knowledge of the U.S. higher education community, its principles, practices and procedures.
2. Familiarity with communications, marketing and branding, media relations, and design in a higher education environment.
3. A minimum of five (5) years' experience in public relations, marketing, communication, media/news, and/or a related field.
4. Impeccable writing and editing skills, and strong effective interpersonal and verbal communication skills working in an environment that is deadline-oriented, with a premium on transparency.
5. Experience working within an organization, with professional strengths including self-direction, credibility, project management, flexibility, respect for confidentiality, and affinity for teamwork.
6. Ability to exercise judgment and discretion as a member of the Executive Cabinet and in applying and interpreting University policies and procedures.
7. Ability to work effectively with faculty, administrators, and students in an environment with sensitive time constraints and an ability to anticipate and meet deadlines.
8. Current experience and ability to work with standard office and online communication tools and is comfortable working with social media.
9. Commitment to campus efforts to promote diversity and inclusion.

PREFERRED QUALIFICATIONS:

1. Master's Degree or appropriate equivalent professional experience.
2. Familiarity with media relations, communications, design, and marketing demands in a public higher education environment.
3. Experience with and contacts in public relations, marketing, communication, media/news in Central Massachusetts media outlets preferred.

By signing below, I acknowledge that I have received a copy of this job description. I understand that I must be able to perform the essential functions of my position with or without reasonable accommodation. Questions relating to my responsibilities or need for accommodation, now or in the future, will be directed to my supervisor and/or Human Resources.

DocuSigned by:

Deborah O'Neil

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AVP of Comm and Marketing

5/22/2025

Date

DocuSigned by:

Jennifer Collins

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Employee Services

5/22/2025

Date

CONTACT



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Worcester, MA

EDUCATION

Master of Arts

Latin American and Caribbean
Studies, Concentration:
Religious Studies
Florida International University

Bachelor of Arts

Mass Communication
University of South Florida

MILITARY SERVICE

U.S. Army Reserves

Hanscom Air Force Base
and Fort Devens, MA
1990–1994

TEACHING

Adjunct journalism instructor

English Department
Worcester State
Fall 2023

Adjunct journalism professor

FIU School of Journalism
and Mass Communication
2004–2005

Upward Bound

High school English
co-teacher, grades 10–12
1999

ACADEMIC PUBLISHING

“The Saint and the Siren: Liberation Hagiography in a Haitian Village,”

Deborah O’Neil and Terry Rey,
Studies in Religion,
Vol. 41, No. 2
June 2012

DEBORAH ALVAREZ O’NEIL

PROFESSIONAL PROFILE

- Communications and marketing leader with 25 years experience building and managing cross-functional teams in higher education, nonprofits and philanthropy.
- Proven expertise in public relations, thought leadership, and crisis communications, with a demonstrated skill in managing sensitive situations and safeguarding organizational reputation.
- Extensive experience in successful communications and marketing strategy, brand development, and creative campaign leadership.
- Passionate about advancing the mission of public higher education through a commitment to access, academic excellence, and community engagement.

PROFESSIONAL

Interim Assistant Vice President of Communications and Marketing, Worcester State University October 2024–Present

- Oversee 12-member team in Communications, Marketing and Printing & Publications Departments during a time of transition
- Serve on President’s Executive Cabinet; charged with advise the president on policy change as part of a 3-person team
- Manage internal communications and public relations for critical issues and successfully safeguard the university’s reputation.
- Advise and collaborate with University Advancement to develop university’s next fundraising campaign



WORCESTER
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Director of Editorial Communications, Worcester State University January 2022–October 2024

As the head of the Communications in the Office of Communications and Marketing, oversaw university news, supported media relations and led University Advancement communications and marketing efforts.

- Oversaw university’s news platforms
- Edited Worcester State University Magazine, weekly campus newsletter and monthly alumni newsletter
- Supervised and mentored student interns
- Wrote stories, announcements, press releases, remarks
- Hired and coordinated photographers for publications
- Responsible for all alumni social media channels
- Worked closely with University Advancement on outreach and communications efforts, marketing campaigns and affinity building activities

RECOGNITION

Five FIU Presidential Excellence Awards 2005–2012

News, web, and branding,
Highest award given to FIU's
8,000 employees

Council for the Advancement and Support of Education (CASE) Awards 2016

University Magazine Excellence in Online Writing for

Teacher and poet, rebel and traveler, David Menasche showed us how to live

2013

University Magazine General Excellence Grand Prize Award

University Magazine Illustration Design Grand Prize Award

University Magazine Cover Design Excellence Award

News & Research Videos Circle of Excellence Silver Award

2011

General Excellence in Feature Writing for "Bragging Rights & Basic Truths"

JOURNALISM AWARDS

Pulitzer Prize nominee
for investigative reporting and explanatory reporting,
"The CEO and His Church,"
St. Petersburg Times
2003

Gerald Loeb Award
winner
2003

Vintage Books 2003 Best Business Stories of the Year,
story selected for inclusion

Courageous Journalist Award
by the Society of Professional Journalist's—Tampa Bay
1996

Director of Communications, Patrick J. McGovern Foundation, Boston 2019–January 2022

The Patrick J. McGovern Foundation is a global \$1.5 billion philanthropy advancing data science and AI. Served as the first communications director building all communications infrastructure and overseeing storytelling and messaging, brand development, social media, website, special events, public relations, and thought leadership.

- Led a rebranding to include new logo, branding guidelines, collateral
- Launched new website with complete redesign and new messaging
- Lead writer for Foundation communications including announcements, remarks, website content, messaging, keynotes, talking points, remarks and op-eds
- Pitched stories to reporters, respond to media inquiries

Director of Communications, Ariadne Labs at Harvard School of Public Health 2015–2019

Founded by Dr. Atul Gawande, Ariadne Labs is a non-profit, global public health innovation center at the Harvard School of Public Health and Brigham and Women's Hospital in Boston. Served as the first communications director, leading organizational storytelling, messaging, brand elevation, marketing, social media, website development, media relations and special events.

- Served as communications thought partner to Dr. Atul Gawande, founder and chairman, Dr. Asaf Bitton, executive director, and Dr. Evan Benjamin, CMO
- Led strategic communications and marketing for a portfolio of more than 20 public health projects around the world to drive support and adoption of programs and interventions
- Developed integrated public health communication programs in close collaboration with leading health organizations
- Built and managed a six-member, communications department
- Managed contractors for design, videography, web services, marketing
- Coached Ariadne Labs scientists and physicians for media interviews, presentations, program messaging and personal brand development

Associate Director of News and Communications, Florida International University Division of External Relations 2003–2015

FIU in Miami is the fourth largest public research university in the U.S., and the country's largest Hispanic serving institution

- Served as speechwriter to FIU President Modesto A. Maidique
- Helped plan and execute university communication strategy
- Assigned, wrote and edited content for university news channels
- Produced videos for university news channels
- Traveled with researchers, students and alumni to create stories/videos about research/project initiatives around the world
- Supervised multi-disciplinary creative staff of writers, videographers and designers
- Co-led FIU's first national branding campaign, Worlds Ahead
- Co-created TEDxFIU
- Served as lead writer for brand communications and editor, FIU Magazine for 12 years, circulation 120,000

St. Petersburg Times, Staff Writer 1997–2002

- Covered police, civil and criminal courts, local and state politics
- Handled newspaper's most sensitive beat, the Church of Scientology, culminating in Loeb Award winning story and two Pulitzer Prize nominations



BRANDING: TEDxFIU

Branding Objective: At the time, FIU sat in the shadow of a private university and rival. And although FIU was among the largest R1 public universities in the country, its academic reputation did not reflect the quality of its educational excellence, and its national profile was virtually nonexistent. People would jokingly ask, FI-Who? The charge given to the two leaders of marketing and communications was to elevate the university's brand and national visibility.

Project: We proposed a big, ambitious idea: a fully licensed TED talk event that featured students, alumni and faculty - TEDxFIU. University leaders provided a small budget for us to launch this experimental idea.

My Role: As co-director of TEDxFIU, I helped lead all aspects of this project, from event conceptualization to speaker applications and event promotion. Once we selected speakers, my role shifted to working directly with speakers to develop their talks and run rehearsals.

Target Audience: A national audience. We also aimed to foster pride and affinity among students and alumni.

Strategy: While we recognized the one-night event would generate buzz locally, we knew an event would not result in a shift in public awareness and visibility. Our strategy was to produce high-quality TEDxFIU videos of each talk that would reach much larger audiences online in perpetuity – potentially millions of viewers on the official TEDx YouTube channel. Along with executing a flawless event, a great deal of effort went into filming and producing videos for each talk.

Results: Promotional efforts led to so much excitement that tickets to the first TEDxFIU event sold out in minutes. The following year, we moved to a bigger venue and university leaders invited donors and other VIPs. It became a signature event in Miami. Starting the second year, we implemented a ticket fee (for everyone except students) and were able to recoup some of our expenses. Today, TEDxFIU videos have garnered millions of views on YouTube, showcasing FIU's incredible students, alumni and faculty, including one with over one million views featuring [Worcester State alumnus John Dufresne](#). This project successfully played a pivotal role in helping to establish FIU's national visibility.





MEDIA: *THE ECONOMIST*

Media Objective: Generate public visibility and positive coverage of the Ariadne Labs Serious Illness Care Program.

Project: I received a routine media inquiry from a reporter at *The Economist* who was looking for a physician to comment on end-of-life care. I turned this inquiry into a month- long project to earn media coverage of the Ariadne Labs Serious Illness Care program.


My Role: I was the media spokesperson for the organization.

Target Audience: International readership of *The Economist*

Strategy: I provided the reporter, who was based in London, with an expert, and went on to tell the reporter about the Serious Illness Care program, which offers a different approach to end-of-life care. I lined up an opportunity for the reporter to have an informational interview with the program's manager to learn more. To give the reporter a closer understanding of the program, I reached out to a partner hospital that had implemented the program and coordinated interviews between the reporter and partner physicians. Then, I arranged for my organization's founder, Dr. Atul Gawande, to be interviewed about the program on Economist Radio while he was traveling in England.


Results: The Serious Illness Care program was featured in the April 29, 2017 cover story of *The Economist*. The coverage included a news feature, an editorial praising the program, and [Economist Radio's interview](#) with Dr. Gawande. [View the entire package here.](#)






Return on Objectives


Ariadne Labs offers a better path to patient care.




Our full systems-change package costs \$50,000 total and includes:




An 18-month implementation plan and timeline for your Serious Illness Care Program.




In-person trainings for the implementation and communication skills teams offered in partnership with VitalTalk and CAPC.



Small group training for clinicians of diverse specialties and backgrounds.



Access to Aria, an exclusive online 24-7 platform with evidence-based resources, tools, data exchange, reporting capabilities, and cross-system collaboration.



Technical assistance and coaching support, including webinars, individual coaching, and learning groups.

A patient who does not get the care they want can cost a health system up to a \$1 million in unwanted care that causes suffering for patients and families and moral distress for clinicians.

MARKETING: SERIOUS ILLNESS CARE PROGRAM

Marketing Objective: To enroll 19 hospitals/health care organizations from around the United States in the Serious Illness Care Program training.

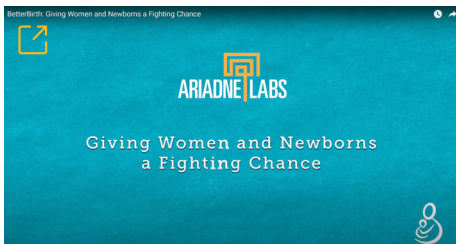
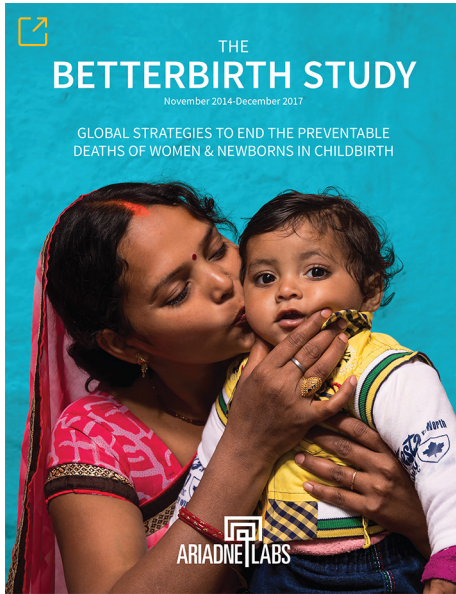
Project: The Ariadne Labs' Serious Illness Conversation and Care Program is a pioneering hospital-level intervention to train doctors and nurses to have more effective conversations with seriously ill patients. Ariadne Labs introduced scaled-up cohort training for hospital systems to implement Serious Illness Care and needed a marketing campaign to fill the training. The cost to participate was \$50,000 and required hospitals to designate a program coordinator and make significant improvements to patient care processes and records.

My Role: My role was to lead this marketing campaign; and I brought on a trusted marketing firm, Stinghouse, to partner in the project. I took them on site visits to three New England hospitals that had implemented the program so we could do extensive informational interviews to inform the marketing strategy.

Target Audience: The first audience for this campaign included physicians within the prospective hospitals who would implement the program in their practice. Their enthusiasm for the patient benefits of the program was critical. The next and equally important audience members were C-suite hospital/health system administrators whose buy-in was necessary to secure the institutional commitment and investment.

Strategy: Leverage Ariadne Labs physicians, all highly respected Mass General, Brigham and Dana Farber doctors, to recruit their peers from around the country. To do so, we needed to equip the doctors with appropriate marketing tools and to distill their enthusiasm for the program into a marketable campaign. We built the marketing campaign around several touch points in the recruitment process. First, we developed a flexible script for physicians to follow when making initial calls to their peers. Second, we developed a [brief video](#) that we would send to the prospects in the follow-up to establish an in-person visit. For the C-suite visit, we developed a presentation, a [brochure](#) and [Return on Objectives](#) leave-behind sheet.

Results: We successfully filled the first cohort of the training program and had a wait list for the second cohort.



INTEGRATED COMMUNICATIONS AND MARKETING: THE BETTERBIRTH STUDY

Communications and Marketing Objective: Disseminate the findings and recommendations of the Ariadne Labs BetterBirth study. Our goal ultimately was to drive adoption of the BetterBirth program, which was designed to end the preventable deaths of women and newborns in childbirth.

Project: The BetterBirth study was a \$26 million Gates Foundation funded, six-year randomized control trial led by Ariadne Labs in India and one of the largest trials ever conducted in maternal and newborn health. The study investigated the effectiveness of the Ariadne Labs Safe Childbirth Checklist and coaching program in ending morbidity and mortality in childbirth. When the study was concluded, the results were published in *The New England Journal of Medicine*. Next, Ariadne Labs needed an integrated communications and marketing strategy for organizing its massive volume of findings and data into actionable recommendations for policy makers and maternal health organizations around the world.

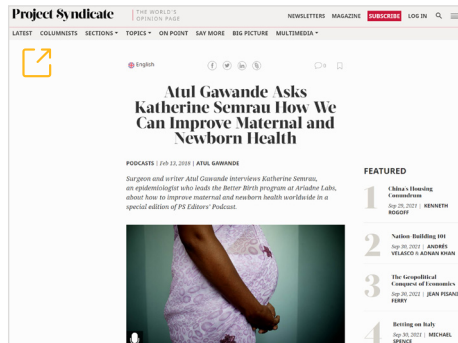
My Role: I developed and implemented the integrated communications and marketing strategy that spanned more than one year and involved the completion of a public report, media outreach, videos, development of a microsite, and an international launch event. I served as a co-author of the [BetterBirth report](#), producer and writer for the [BetterBirth video](#), lead writer for all messaging, and thought leadership partner to the study's lead researchers Drs. Katherine Semrau and Atul Gawande.

Target Audience: Global public health policy makers, maternal health program designers and implementers, and national/regional health system leaders.

Strategy: The global maternal health community is scattered around the world and includes national policy makers, regional/ local maternal health program designers and the international implementation organizations that run maternal health programs in low- and middle-income countries. We needed a multi-pronged strategy that would provide these national, regional and local leaders with our program's practical, feasible, and actionable recommendations, strategies and tools to improve their maternal health care.

We also wanted to reach fellow maternal health researchers to build awareness of the BetterBirth findings and recommendations. To start, we secured a [plenary address](#) at the 2017 Royal College of Obstetricians and Gynecologists World Congress in Cape Town, South Africa before a global audience of 2,500 ob/gyns to announce the findings of the study. My team designed a BetterBirth booth at the event that I staffed with a maternal health nurse. We spoke with hundreds of attendees about the BetterBirth program and provided the program tools as takeaways.

The next step of our strategy was to synthesize the scientific data from the trial into a clearly written, highly engaging, beautifully designed, readable and actionable report for policy makers and maternal health NGOs.



INTEGRATED COMMUNICATIONS AND MARKETING: THE BETTERBIRTH STUDY CONT.

In tandem, we developed a [microsite](#), videos, and a report launch event at [Women Deliver in Vancouver](#). Along with a targeted invitation-only launch event, we hosted an [open panel session](#) for all attendees. My team designed a BetterBirth booth at Women Deliver, which I staffed with the BetterBirth lead researcher to hand out the report, promote the recommendations, share the Safe Childbirth Checklist, and engage directly with the 60,000 attendees, many of them members of the global maternal health community.

In addition, I established a partnership with Project Syndicate to develop an [op-ed](#), [video](#) and [podcast](#) about the BetterBirth recommendations.

Results: Our objectives were not only reached, but surpassed based on the high level of engagement, inquiry and enthusiasm surrounding the reports findings. We captured hundreds of names and contacts in the Women Deliver booth and were able to do personalized followup. In the months following the launch of the report, we saw a significant increase in the BetterBirth Community of Practice, made up organizations interested in or already implementing the program. After Women Deliver, the BetterBirth team traveled to numerous countries to lead trainings and provide support for program implementation.



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UNIVERSITY

Division of Enrollment Management

Phone: 508-929-8497

Fax: 508-929-8194

May 19, 2025

Mr. Barry M. Maloney
Worcester State University
President's Office
486 Chandler Street
Worcester, MA 01602

Dear President Maloney,

Please accept this letter as my recommendation of the candidate to fill the position of Assistant Vice President for Communications and Marketing at Worcester State University. After a lengthy and thorough search, including a national position posting, the review of a great number of applicants, and a comprehensive interview and credential review process, I recommend Deborah Alvarez-O'Neil to fill the position.

Ms. Alvarez-O'Neil brings to WSU a wide variety and applicable set of professional experiences in campus-level higher education communications and marketing. In her tenure at Worcester State University, Deborah has been an effective leader, strategist, and communicator. Deborah has enhanced the university's preparedness for emergency communications and demonstrated her commitment to the WSU mission and strategic plan.

Deborah impressed me and others with her ability to communicate with broad audiences, organize efforts to lead to institutional change in marketing and communication, and support the enrollment, student, academic, and advancement efforts of the university. As a strategist and advisor to campus leaders, Deborah has a great deal of experience, which will surely serve Worcester State University well.

As this appointment must be confirmed by the Board of Trustees, I ask for your support of Deborah Alvarez-O'Neil. If you have any questions or need additional information, please let me know.

Sincerely,

Ryan G. Forsythe, Ed.D.
Vice President for Enrollment Management



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Self-Evaluation, July 2024 - June 2025

President Barry M. Maloney

Barry M. Maloney

Self-Evaluation

Evaluation period July 2024 - June 2025

Overview

In submitting this 2024–2025 Self-Evaluation, I begin with an “Overview” section, followed by responses to the specific areas identified by the Department of Higher Education. My intention is that this structure will provide clear context for the responses that follow.

New this year, the Department has requested that each Chair of the local Board of Trustees submit 3 to 5 examples of how their president has helped advance the Commonwealth’s priorities—specifically in making our institution more learner-ready and equity-minded. These examples should be supported by relevant quantitative or qualitative evidence in the areas of:

- **Affordability:** Addressing college costs and implementing financial aid initiatives
- **Access:** Expanding admissions opportunities, early college programs, or similar pathways
- **Student Success:** Enhancing support systems, including wraparound services

In response, this self-evaluation references and includes data that reflect significant progress in these domains. Highlights include:

1. ValuePlus – a major initiative improving affordability and access
2. Operational Excellence and Financial Stability Task Force (FSTF) – efforts to narrow the budget gap through administrative efficiencies
3. Enhanced Financial Aid Packaging – leading to improved student retention
4. Targeted Allocation of SUCCESS Fund Resources – supporting equity and student achievement

The “Beyond 150 Mid-Cycle Progress Report,” which captures progress through the end of last year on our 2020-2027 strategic plan and provides the data illustrating that progress, is also included as supporting documentation.

As always, I deeply value the guidance and support of the Board. Your partnership has been instrumental in helping both me and Worcester State navigate challenges while continuing to reach—and in some cases surpass—the goals we set at the year’s outset.

Finally, as I engage in this process of reflection, I do so with a mix of pride and humility. Serving as president of Worcester State University remains a profound privilege and responsibility. This self-assessment is intended to provide a candid account of my leadership over the past year—highlighting achievements, acknowledging challenges, and identifying opportunities for growth—all in service to our shared mission and enduring commitment to student success, equity, and institutional excellence.

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

- Appendix A: Beyond 150 Mid-Cycle Progress Report
- Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”
- Appendix C: WSU Strategic Enrollment Management plan
- Appendix D: Culture of Respect Report – WSU results

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)

As for total enrollment, in Spring 2025 (as of May 6), we had 5,664 undergraduate and graduate students. This represents a 1.6% increase over Spring 2024's total enrollment of 5,575 (point-in-time comparison), which was a 4.9% increase over Spring 2023. **Our Spring 2025 persistence rate (Fall 2024 to Spring 2025, as of May 6) is the same as our Fall 2023 to Spring 2024 persistence rate of ~87%, after increasing from 85.63% in Spring 2023.** I am encouraged that the initiatives we've implemented to boost 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 admissions, 2024-2025 was a difficult year. After experiencing our largest new student class in university history in Fall 2023, we were optimistic to repeat in Fall 2024. Then came the complications of the "simplified" FAFSA rollout and violent incidents on and around our campus. Despite Fall 2024 applications being the highest in university history (even more than Fall 2023), in Fall 2024, the university enrolled our smallest new incoming class in over a decade. On the university's survey of admitted students last fall, 26% indicated that the violent incidents had a significant effect on their decision and 44% indicated that the timing of their financial aid package (delayed by the FAFSA rollout) was a significant factor in their decision.

To help the university return to enrolling robust new student classes, **we employed the services of EAB and their Enroll360 suite of services.** This work began last summer, in anticipation of the increasing effects of demographic changes and changes of opinion about higher education in New England and across the country. Enroll360 aims to increase undergraduate admission applications and new student enrollment through more robust prospective student cultivation. This has grown our number of prospective students, enhanced our communications with prospects, and endeavors to convert more prospective students to applicants and yield 6-16% more new enrollees. For Fall 2025, this work appears to be on track to meet that goal, with 9.3% more deposits from new first-year students (798, as of May 14), as compared to the average of 730 from the last five falls (point-in-time comparison).

Highlights:

- We continue to implement the 2022-2027 Strategic Enrollment Management plan (Appendix C), a comprehensive initiative designed to enhance our undergraduate and graduate student body over the next five years. The plan's aim is to grow undergraduate enrollment by 6%.
- The Math Center offers many sessions throughout the day during both fall and spring semesters to support success in math learning across the campus. This summer, the Math Center also will offer virtual sessions for students who are taking math courses. In addition, the Math Department is offering a free course, MA 099, for students who need the support to continue in their major.

- WSU is attracting traditional-aged students and transfer students and actively seeking to expand enrollment of adult learners, other non-traditional students, and graduate students. We also are engaging faculty in enrollment efforts and developing a parent/family association and a targeted communication plan.
- We are reaching other specific student populations, as well, via various initiatives such as dual enrollment with Worcester Public Schools, in order to address the effects of demographic shifts and the pandemic.
- We continue as a Common Application institution, which has broadened our access.
- The MajorPlus academic framework is fully operational, which redesigned the undergraduate curriculum to enable students to graduate with two majors or a major and a minor within four years. MajorPlus was cited by 73% of new students who responded to a survey as somewhat important, important, or very important in considering WSU and was one of the reasons some out-of-state students chose Worcester State (an increase of 8% from Fall 2023).
- Student success following graduation remains extremely strong. The most recent post-graduation survey showed that 98% have jobs or are furthering their education, or are doing both, within six months of graduation.
- Incoming Fall '24 Class Profile, Degree-Seeking First-Time First-Years:
 - GPA 3.4
 - Female 62%
 - Male 38%
 - ALANA (African, Latine, Asian, Native American)/BIPOC (Black, Indigenous, People of Color) 44%
 - In-state 93%; Out-of-State or International 7%
 - First Generation 52%

Challenges/Opportunities:

- Despite our overall progress, we continue to see equity gaps in student outcomes. Compared to the 86% of white first-year students retained, the retention rate was 82% for African American students and 79% for Latine students. For graduation rates, 67% of white students graduated in six years, compared to 55% of Black students and 42% of Latine students.
- We are beginning to see an impact of Free Community College on WSU undergraduate Day and DGCE enrollments.
- 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.

Academic Excellence Highlights:

- The online Master of Science in Nursing (MSN) program was ranked [second best in the state](#) for 2025 by RegisteredNursing.org, based on factors including program quality, affordability, and graduate success rates. The California-based nursing advocacy organization has also ranked WSU's undergraduate nursing program as the number one program in the state for the past three years.
- WSU recently received a \$1.24 million gift from the former Becker College that will have a profound, lasting impact on the university's nationally ranked Dr. Lillian R. Goodman Department of Nursing. The gift will establish the Becker Legacy Endowed Scholarship for Nursing Leadership, which will provide financial support to Worcester State nursing students in perpetuity.
- In fall of 2024, the National Endowment for the Humanities awarded a grant establishing a Spotlight Fellows program whereby WSU's Department of Interdisciplinary Studies, the John J. Bliniana Center, and the Center for Teaching and Learning, are forging new academic-community partnerships that support student learning outcomes in the humanities.

Academic Management:

- As part of the nine state universities' efforts, Worcester State successfully reached collective bargaining agreements with two units, the AFSCME and APA units.
- A presidential-appointed team of faculty have been engaged in a deep review and recommendation process to overhaul the general education program, which is expected to come before governance committees in the next academic year.
- Senior Academic Affairs Division leaders have commenced a review of the Information Technology area that will position the university to meet changing technological needs as we enter the second quarter of the 21st century.

Expanding Academic Offerings and Academic Innovation:

- The School of Humanities and Social Sciences (SHSS) pursued initiatives to expand access for undergraduate students to pursue graduate-level and professional legal education. These initiatives were undertaken with an eye on enrollment in the university's Pre-Law minor curriculum, which has more than tripled since fall 2019, and an expanded interest by new students in the accelerated "3+3" program offered between the university and its in-state partners, the University of Massachusetts School of Law and Western New England University School of Law. SHSS expanded on-campus visits and events by admissions teams, ensuring that those teams established a regular, once-per-semester schedule, visiting a variety of classes, in order to describe accelerated and regular admissions processes and options for emphasis in study for the institutions' Juris Doctor programs. Additionally, with the university's international partner Ulster University, through Ulster's School of Law, SHSS established a pathway that

allows graduates from undergraduate majors in English, History, Political Science, Sociology, and Urban Studies to gain entrance seamlessly to Ulster University's Master of Laws (LLM) programs in Access to Justice, Gender and Human Rights, and Human Rights Law and Transitional Justice, and to Ulster University's Master of Science program in Peace and Conflict Studies.

Experiential Learning and International Experiences:

- The [Aisiku STEM Center](#) has focused on providing academic support using the Supplemental Instruction Model (which WSU calls Peer Assisted Learning, or PAL) for introductory and 200-level courses that are crucial for success in the STEM disciplines. Over the past two years, we have expanded the PAL program to offer support to basic science courses required for Nursing and other clinical disciplines including Occupational Therapy, Communication Sciences and Disorders, and Public Health. The support has included Medical Microbiology (BI206; 8 sections 119 students), Anatomy and Physiology 1 (BI161 - 9 sections, 178 students), Anatomy and Physiology 2 (BI162; 8 sections, 157 students), and Survey of Chemistry (CH112; 8 sections, 117 students).

Early College (tied to Access, Success, Equity, and Affordability):

Spring 2025 Enrollments

- 56 dual enrollment/Early College classes
- 22 high schools (13 districts)
- 892 enrollments
- 763 individual students

Fall 2024 Enrollments

- 57 dual enrollment/Early College classes
- 19 high schools (10 districts)
- 1,011 enrollments
- 872 individual students

Success rates for Fall 2024 (success defined as earning a grade of C- or better; D/F/Ws are considered unsuccessful):

- Worcester Public Schools Fall '24 success rate is 78.3%
- Springfield Empowerment Zone Schools Fall '24 success rate is 63.8%
- All other schools' Fall '24 success rate is 78.6% or better

Challenges/Opportunities:

- Changes in leadership in the Center for Teaching and Learning (CTL) are ahead.
- WSU's new Gen Education platform is targeted for implementation in Fall 2026.

3. Assessment

(Numeric Rating 4)

At the midpoint of our 2020-2027 strategic plan, Beyond 150: Lead, Succeed, Engage, we have made considerable progress across all six goals and two overarching areas. As we enter the second half of the strategic plan and celebrate our 150th anniversary, we are well-positioned to build upon the achievements of the first four years and fulfill the promise of our strategic plan: To lead, succeed, and engage beyond 150 years.

Highlights (also see Appendix A, which visually represents much of this data):

- A comprehensive General Education/Liberal Arts and Sciences Curriculum (LASC) assessment/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 MajorPlus academic framework and the commitment to inclusive excellence and belonging through the general education core offerings.
- Strategic Plan progress to date:
 - 91% of metrics are at least halfway toward their targets.
 - 52% of metric targets have been met or exceeded.
 - 80% of initiatives have been fully implemented.
 - 37% of initiatives are now well established via ongoing practices.
 - 86% of IE&B (Inclusive Excellence & Belonging) initiatives have been fully implemented.
 - 81% of Continuous Improvement initiatives have been fully implemented.
- 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 response to our comprehensive self-study, which was a university-wide review of our institution. The NECHE process is conducted every ten years and the last review resulted in a full 10-year reaccreditation for WSU.
- A successful program review for the WSU Occupational Therapy program was completed.

Challenges/Opportunities:

- We will continue to implement the 2020 -2027 WSU Strategic Plan, “Beyond 150.”
- We seek to complete, in a timely fashion, the review of the Liberal Arts and Sciences Curriculum (LASC)/General Education common core. Anticipated rollout of the new general education platform is Fall of 2026.
- We will continue to pursue recommendations coming out of the NECHE Self Study – assessment, budget oversight, and enrollment management, in particular.
- We aim to strengthen campus involvement in the Strategic Plan Review process.

4. Infrastructure

(Numeric Rating 4)

Campus Infrastructure, Planning, and Partnerships

The University has made steady progress on capital projects and infrastructure upgrades that support both student learning and operational efficiency. Over \$10 million in capital investment has supported renovations and modernization efforts, including upgrades to HVAC systems, classroom technologies, and critical building infrastructure. Recent projects included the Wellness Center Phase 2 renovation, fire panel replacements, Learning Resource Center upgrades, and improvements to the Wasylean Hall roof and residence hall bathrooms. Each project has been guided by student needs, safety, and long-term facilities planning.

Worcester State continues to work closely with the Division of Capital Asset Management and Maintenance (DCAMM) and the Massachusetts State College Building Authority (MSCBA) to align local priorities with state capital planning and funding streams. As part of the FY25 capital planning cycle, the university submitted funding proposals totaling \$5.8 million for critical deferred maintenance and energy projects. At the same time, internal space planning efforts have been refreshed to ensure that academic and student spaces are aligned with current and projected usage. This integrated planning framework helps ensure that future projects are both strategic and sustainable.

Decarbonization and Student-Centered Improvements

Meeting the Commonwealth's decarbonization goals under Executive Order 594S continues to guide many of Worcester State's facilities decisions, with multiple energy efficiency initiatives underway. The university dedicated \$1.9 million to HVAC improvements, including system upgrades and energy-efficient retrofits in academic and residential buildings. Additional funding supported LED lighting replacements and building automation enhancements.

During FY24 and FY25, a new electrical distribution system to all buildings was installed in order to replace the existing aging and failing infrastructure. This project was advocated for with DCAMM over many years and, through these efforts, attained 100% state funding. An entirely new system was installed which included new manholes & ducts, cabling and transformers to greatly improve the reliability and operability of the campus' electrical system for many decades. The value of this work totaled \$10.7M. These improvements are expected to yield annual savings in energy costs and support progress toward state climate and decarbonization goals.

At the same time, Worcester State remained focused on improving the student experience through targeted facility investments. Over \$750,000 was allocated for student-centered improvements, including upgrades to dining facilities, ADA accessibility enhancements, and residence hall repairs. These investments are informed by student feedback and designed to create a welcoming, accessible, and supportive living and learning environment. Together, these efforts reflect the university's commitment to aligning physical infrastructure with the values of inclusion, sustainability, and student well-being.

Highlights:

In addition, the following projects were undertaken in 2024-25:

- Campus paving projects, \$716,915.
- Sullivan RTU replacement project underway, \$3,619,339
- Replaced data center cooling units, \$740,049
- Completed various landscape and hardscape projects, \$616,000
- Student Center: Relocated food pantry; created Veteran's lounge; created LGBTQ+ Community Center, \$146,963
- With the assistance of DCAMM, and in compliance with state law, completed the WSU Decarbonization Plan 2025 to 2050.

Challenges/Opportunities:

- In anticipation of the passage of Governor Healey's BRIGHT Act - a bond bill in support of public higher education – we aim to launch, implement, and complete a new Master Plan for Worcester State
- We will continue to coordinate and modify the City of Worcester's plans to redesign Chandler Street.
- Meeting the new state energy decarbonization plan's targets may be a challenge.
- We aim to finalize development of funding strategies to implement May Street renovations and campus classroom technology work.

5. Fiscal Management and Budgeting

(Numeric Rating 4)

Strategic Financial Management

The fiscal challenges Worcester State has faced since the height of the COVID 19 pandemic have been met with prudent fiscal planning and a campus-wide shift toward operational excellence. Those initiatives have resulted in \$5.2 million in efficiencies, which has helped us avoid drawing down reserves to balance this year's budget and has narrowed the deficit that arose during the pandemic.

Worcester State continues to demonstrate disciplined financial leadership through responsible budgeting, targeted investments, and careful long-range planning. Throughout the academic year, Finance and Facilities committee reports emphasized the university's commitment to maintaining a balanced budget while clearly tracking expenditures and preparing for FY26 planning. The current FY25 general fund budget totals approximately \$104 million, reflecting a modest increase from FY24. Federal funding, including allocations from the American Rescue Plan Act (ARPA) and Higher Education Emergency Relief Funds (HEERF), has played a crucial role in supporting deferred maintenance and one-time capital needs. Worcester State leveraged approximately \$2.7 million in remaining federal funds during FY24, focusing on high-priority infrastructure and instructional needs.

In tandem, the University has maintained a proactive approach to managing debt and aligning capital investments with enrollment and institutional priorities. Long-term planning ensuring the sustainability of future capital investments. Scenario modeling, forecasting, and revenue and expense reconciliation are underway for FY26, with careful attention to compensation increases, enrollment shifts, and fixed cost pressures. These efforts underscore the university's strong fiscal foundation, as well as its ability to strategically navigate complex financial challenges.

Highlights

- Operational Excellence (OpEx) is producing results. To date, \$5.2 million in efficiencies have been gained from both the FSTF and OpEx processes.
- On a tight time frame, WSU solicited, reviewed and awarded 28 projects to improve student outcomes, in order to expend, within about six months, the state's FY25 mid-year appropriation of \$1.6 million in SUCCESS funding. The projects are well underway and most are on track to meet their milestones. We anticipate a need to reallocate only about 4% of the funds. The DHE has selected us to partner with the National Institute for Student Success (NISS) in developing our FY26 SUCCESS plan.

Challenges/Opportunities

- We seek development of a cost/benefit grid to assess the true cost of all academic programs.
- We seek development of a financing plan for the demolition and re-use of the May Street site.
- The institutional transition to an organization that operates within the Operational Excellence paradigm must progress, 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 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 FY25, 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 the cost savings plans.**

In recent months, the federal government has proposed or implemented numerous initiatives that have (or may) impact not only our finances, but also certain groups of students. Therefore, in February we began holding more frequent "Campus Conversations" over Zoom, open to all faculty, staff and students. In these 45-minute sessions, I provide updates on federal, state, and campus actions and answer any questions they have for me or for the senior leadership team. The marketing office also created a Web page for federal actions that affect higher education.

Highlights:

- Held an Academic Year Kickoff Meeting for all employees in September, with keynote speaker Massachusetts Department of Higher Education Commissioner, Dr. Noe Ortega.
- Substantially increased social media engagement again this year, with our Instagram account up nearly 30% and tripling our TikTok video views.
- The university received substantial positive traditional media coverage, across the state and across the Atlantic. Highlights include:
 - Masslive and Worcester Telegram stories about ValuePlus, the tuition-free announcement;
 - Central Mass. coverage of our \$1.2M gift from Becker College for the nursing program;
 - Worcester Business Journal coverage, as well as an event celebrating, my receiving the Large Business Leader of the Year award from them;
 - Stories in Worcester and Ireland outlets about honorary degrees WSU bestowed upon the Mayor of Derry City and Strabane and Cathaoirleach of the Donegal County Council; and
 - Commencement coverage that included a full-page story with photos in the Boston Globe and a WCVB profile of an 81-year-old graduating graduate student.
- WSU launched a 150th campaign logo, theme, video, and Web landing page.
- The Communications and Marketing area published a special, commemorative 150th magazine and completed a new Crisis Communication Plan, with associated training provided for campus leadership.
- A 29.2% increase in Instagram engagement was realized, including 106,083 total interactions (likes, saves, comments, shares, and Direct Messages).

- A 191.26% increase in TikTok video views was realized, with 115,622 total views, alongside significant engagement growth across interactions, including +286.7% in likes (3,927 total likes), 378.95% increase in comments (91 total comments), 288.39% increase in shares (435 total shares).

Challenges/Opportunities:

- Filling the Assistant Vice President for Marketing and Communication position due to the departure of Maureen Stokes is a priority.
- Developing and executing a communication plan focused on the implementation phase of the Financial Sustainability work, including our WSU Rapid Improvement Events (RIE), will be needed.
- We seek more exposure in all forms of media – social, web, print, news outlets, etc.
- Continuing with the 150th anniversary Communications and Marketing plan will elevate our visibility.
- Assisting the Advancement area with the development and messaging for a comprehensive fundraising campaign is on the docket.

7. Administrative Management and Leadership

(Numeric Rating 4)

Administrative challenges included 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) and to move the university toward Rapid Improvement Event process efficiencies and full campus-wide adoption of Operational Excellence.

Highlights:

- Completed an after-action review process related to the October 2023 shooting incident, with the help of Healy +, and a nationally recognized security group, to improve campus safety (policy, physical campus, and response preparedness training).
- Based on the recommendations, I have:
 - Hired an Executive Director of Campus Safety and Security
 - Reorganized Environmental Health and Safety and University Police under the Administration and Finance Division, and have both areas report to the new Executive Director.
- Initiated Year Two of WSU's Operational Excellence (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, responding to federal changes, governance, AI, and Board engagement.

Challenges/Opportunities:

- Ongoing engagement and cultivation of the Board of Trustees is necessary, especially after successfully onboarding two new trustees (Brissette and Dunn).
- I must spend time recruiting new BOT members to present to the Governor for consideration, as several current members' terms will expire between 2026 and 2027.
- Orienting new Board of Trustees members will be a priority, and we have planned to hold an orientation scheduled for January 2026.
- I will be continuing to cultivate "rising stars" for the administrative team, beyond the Executive Cabinet level – those who are supportive of each other and the mission of the institution – and continue to develop a strong 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 analyses, 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 fourteen 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, from which our Operational Excellence program has emerged, 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:

- Implementing recommendations from the Healey + report concerning the October 2023 shooting incident.
- 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 \$2 million in FY24 due to changes in personnel spending – hiring freeze, and efficiencies realized to date now total \$5.2M.
- 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:

- Continuing to implement recommendations from the Healey + report concerning the October 28 2023 shooting incident is a priority.
- Carrying forward lessons we have learned about making timely, grounded decisions and involving more staff members in making and carrying out those decisions, continues to need attention. 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.

9. Fundraising

(Numeric Rating 5)

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 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.**

Alumni Engagement Highlights:

The Office of Alumni Relations successfully coordinated 30 events, attracting a total of 1,468 attendees, including the following.

- The 50th Anniversaries of the Nursing and the Urban Studies departments, engaging and soliciting over 100 alumni at each event.
- The Florida events on the east and west coasts, connecting with approximately 100 alumni and friends.
- Sea Change screening, featuring renowned photojournalist and alumnus Brian Skerry, served as both a donor stewardship event and an educational experience for the broader university community. The program highlighted critical ocean conservation issues, engaging alumni, students, and faculty, while reinforcing the university's commitment to global environmental awareness and sustainability.
- Partnering with Office of Student Involvement and Leadership Development and Career Development Center to plan Future Forum for young alumni and students, replacing the Backpack Briefcase event.
- Partnering with Athletics to support six alumni games and receptions for alumni and two events honoring alumni athletes: the first teams of each athletic program and the Athletic Hall of Fame.

Grant Highlights/Awards

- \$760,000 - Anonymous Foundation: Funding will provide support for projects related to Enrollment Management and Career Services, including the implementation of EAB's Enroll360, Financial Aid and yield expansion models to increase the overall enrollment numbers of first-year students, which will positively impact the university's future financial stability.
- Quinncia, an advanced career preparation platform designed to transition students from academics into the workplace will also be implemented. Student support provided by a Career Explorations Counselor will help to provide holistic services to enhance career outcomes for students and improve their engagement, retention and satisfaction with WSU.
- \$153,978 - Project SERVE - U.S. Department of Education: Grant funding provided reimbursement for safety, security, and counseling services that were needed as a result of a shooting on WSU's campus in October of 2023. Funding supported costs associated with additional police presence, security camera installation, counseling services for students and staff, as well as RAVE training.

- \$101,146 - National Science Foundation CAREER: Building a more expansive understanding adaptation in marine phytoplankton across the ocean. Year 1 award: \$16,655. Lead agency is Clark University. This project's educational objective is to increase literacy in research and support the science pipeline by broadening participation in AREs among both local elementary school students at Columbus Park Preparatory Elementary School, pre-Kindergarten through Grade 6 school part of the Worcester Public Schools school district and undergraduate students at Clark University.
- \$24,927 - National Endowment for the Humanities: Mapping our future. Through this project, WSU will embark on a curriculum mapping project within its Asian Studies, Ethnic Studies, Global Studies, and Women, Gender and Sexuality Studies programs to align the academic structures within these minors with intentional, engaged experiences to create pathways for students that are meaningful, supported, and relevant.
- \$25,000 - Santander Bank: Grant funds will be used to support student scholarships for fall and spring semester, summer and short-term study abroad travel. Semester awards of a maximum of \$1,000 and short-term and summer program awards of \$500-\$750 will be awarded to needy students with a focus on underrepresented populations.
- \$109,505 - Massachusetts Inclusive Concurrent Enrollment Initiative (MAICEI): MAICEI funds support college and high school partnerships that provide opportunities for public high school students with intellectual disabilities (ages 18-22) to enroll in college courses. The WSU MAICEI program is designed to: 1. Enable students with severe disabilities to be placed in credit courses with their non-disabled peers; 2. provide a college experience that includes academic and extracurricular opportunities that are person-centered and designed to meet established transitional goals; and 3. provide opportunities for the university community to have substantive conversations pertaining to student equity and accommodations.
- \$45,000 - STEM Connections – Cornerstone Bank: \$15,000/year for a three-year period. With multi-year funding through Cornerstone Bank, WSU will provide a week-long STEM Connections summer workshop for high school students. Students from Worcester public high schools.
- \$270,725 - Behavioral and Mental Health - Massachusetts Department of Higher Education: to support programming for students mental and behavioral health including Resilient U; activities for mental health awareness and building supported and safe environments for all students.
- \$94,757 - Early College – Massachusetts Department of Higher Education: in support of Early College initiatives including Dual Enrollment.
- \$15,718 - 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.

Continuing Support from Multi-Year Grants

- \$715,950 - United States Department of Education (FIPSE) - Early College Central Massachusetts.
- \$371,001 - Nursing Pathways Expansion - Massachusetts Workforce Skills Cabinet: funds support equipment purchases that will lead to increases in the numbers of nursing students and also provide support for Nursing adjuncts.
- \$174,458 - National Oceanic and Atmospheric Association, Year III extension: to support efforts to increase diversity, equity, and inclusion in sciences by providing a pathway to STEM education.
- \$27,445 - National Science Foundation - Computing Collaborative (Year 5): A project to increase success rates in computing education and create a more diverse workforce through incorporating Humanitarian Free and Open-Source Software (HFOSS) into computing education.

- \$46,203 - National Science Foundation EDU (Year II): Collaborative Research Leveraging Simple Card Games to Promote Children's.
- \$52,274 - MassTEACH - National Science Foundation Noyce award to the MA Department of Higher Education (final year).

Latino Education Institute (LEI) Awards

- \$100,000 - Barr Foundation: Support for the Youth Civics Union and FLAMA.
- \$25,000 - Hanover Foundation: ISLA (Innovative Services for Latino Achievers) program support.
- \$80,000 - Balfour Foundation: LIDER (Latinos Involved in Discovering Educational Resources).
- \$50,000 - Ellsworth Foundation: Club E (Adult ESL program for language proficiency).
- \$108,360 - 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.
- \$75,000 - The Fred Harris Daniels Foundation for support of the One Circle program.
- \$15,000 - Massachusetts BioTech Initiative: to increase diversity in STEM among youth.
- \$29,500 - Greater Worcester Community Foundation: operational support for LEI and support of LIDER program.
- \$97,500 - UMASS Determination of Need, Strengthening Community Wellness (through 2027).
- Promotoras de Salud – Health Ambassadors for a training program that builds on LEI's successful REACH Initiative work. Total award is \$195,000.

Major Submissions – Pending Award

- \$498,443 Spencer Foundation (resubmission) – Large Research Grant: School Segregation in Massachusetts & #39; Gateway Cities: A Transdisciplinary Approach to Exploring Education and its Effects in Small- to Mid-Sized Cities – three-year research project.
- \$175,000 National Endowment for the Humanities K- 12 Institutes (resubmission): This request will support a K-12 Professional Development Institute titled, Linguistic Assimilation in US Immigration: Education, Law, Politics and Society. This proposed two-week, (10-day) summer institute to be held in June 2026 for middle and high school teachers of Grades 7 through 12, will be designed to provide a venue for middle and high school teachers to explore the role and impacts of English language education in the assimilation process for immigrant students.
- \$178,945 – National Science Foundation: Designing Materials to Revolutionize and Engineer our Future. Working in collaboration with researchers at Kent State University, WSU's Dr. Maxim Lavrentovich will be responsible for all theoretical and computational work. This project aims to engineer materials with a predesigned response to spatial confinement and dynamic excitation by temperature gradient and electric fields through experimental characterization, theoretical modeling, and numerical simulations of long-range electrostatic interactions and their influence on the structures of these materials.
- \$51,726 - Space Telescope Science Institute - This collaboration with Virginia Military Institute will assist with development of new open source theoretical/computational tools which incorporate recent advances in modeling the chemical evolution of ice under astrophysical conditions. Project takes a tripartite approach to this problem, focusing on: how reactions occur within solids at low temperatures, the physics of UV photon and cosmic ray ice bombardment, and the underlying chemical reactions driven by energetic ice processing.

- \$105,000 - The Health Foundation of Central MA Activation Fund: A proposal to support WSU's Speech-Language-Hearing Center for expanded outreach and hearing screenings through the acquisition of new equipment and strengthened community partnerships.
- \$837,457 MA Broadband Institute: A proposal to provide digital literacy training to underserved residents in greater Worcester.
- \$272,364 - TRIO Student Support Services - U.S. Department of Education: To provide academic and other support services to increase retention and graduation rates of low-income, first generation, and students with disabilities.

Direct Support

The Worcester State Foundation has provided \$1.8 million in support of university priorities so far, this fiscal year.

- \$15,640 has been raised this fiscal year for the Student Emergency Fund. So far, this fiscal year, over \$8,000 has been given to 30 students to assist with the purchase of books, laptops, food and bills.
- The scholarship award and internship support are on track to exceed \$800,000 for the sixth year in a row.
- Departments have utilized approximately \$350,000 of foundation funds to use as part of their budgets in FY25. Many of the expenses were to offset budget cuts. It allowed for items such as the purchase of audiology equipment, continued coverage of MTEL costs, hiring of additional student staff, speakers for class lectures, classroom materials, laboratory supplies, software licenses, items for student events, and student/faculty travel.
- The President's Office and Provost were given an additional \$80,000 during FY25 for specific initiatives. Some of these initiatives include Greater Worcester Land Trust agreement to serve DEEP, class trips to WAM and Worcester Historical Museum, sponsoring student conference presentations and allowing faculty the ability to attend needed conferences, covering travel from federal grants which were terminated.
- In FY25, the Worcester State Foundation has so far granted over \$600,000 in scholarships and awards to 397 recipients. Generous donations of over \$10,000 were received to sponsor an endowed fund that will provide an annual stipend to Thea's Pantry, our on-campus student food pantry.

Challenges/Opportunities:

- Completing campaign readiness is necessary prior to launch.
- Successfully onboarding a new hire, the Alumni Coordinator, is a priority.
- We will learn from best practices on remote alumni and donor engagement.
- Revamping alumni/donor trips to strategically align with priorities is necessary.
- Finishing Phase One of the May Street property renovation – razing of current structure – and resolving the associated cell tower easement is a need.

10. Campus Climate

(Numeric Rating 4)

The 2024–2025 academic year—particularly the spring semester—has brought with it a range of challenges that have impacted both performance and wellbeing across Worcester State University. Compared to previous years, these challenges have emerged with greater urgency and intensity. Anecdotally, the cumulative effect has been disruptive, affecting our collective capacity to operate at our fullest potential. Many of these pressures stem from external forces beyond the university’s immediate control, yet they nonetheless shape the context in which we teach, learn, and serve.

Strategic Goals

1. Recruitment and retention of students and employees from historically marginalized identities.
2. Development of an inclusive belonging and anti-racist climate.
3. Empowerment of employees and students from historically marginalized identities.
4. Enhancement of accountability and communication.

Highlights (also see Appendix D):

- The Bias Incident Response Team pursued updating the committee's charge which reads:
 - BIRT is responsible for assessing the institutional response to incidents of bias that impact the university's mission, core values, civility policies, Policy of Nondiscrimination, and efforts toward improving campus climate.
 - Approved new language on 5/23/25 after meeting with the campus steering committee.
- The LGBTQIA+ Advisory Group has continued work on the Campus Pride Index, which examines resources and policies relating to LGBTQIA+ concerns on college campuses.
- In part because a WSU climate survey showed that 30% of WSU’s students identify as part of the LGBTQIA+ community, we prioritized this area. WSU scored a 4.5 out of 5 stars in our efforts to improve the campus experience for our LGBTQIA+ members. Specific work included:
 - Creation of more academic courses with LGBTQIA+ subject matter.
 - Furthering the LGBTQIA+ housing initiative, via collaboration among the Inclusive Excellence & Belonging Office, the LGBTQIA+ Community Center, and Residence Life and Housing.
 - Providing accessible gender-inclusive restrooms in every campus building so that the WSU community and visitors can use restrooms that don’t have binary gender labels.
 - Continuing to ensure compliance with Title IX and university policies.
- **Unity Day** has been maintained and expanded and is being embedded as an all-university annual event. Participation is growing, becoming a must-attend event for students and the entire campus.
- The first year of [NASPA’s Culture of Respect Initiative](#), led by the Office of Title IX and the Counseling Center, has been completed. The effort is aimed at ending campus sexual violence. This two-year program is supported by a Student Behavioral and Mental Health Grant award.

- **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** 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**
- Three additional Inclusive Excellence and Belonging (IEB) Committees have been created:
 - Accessibility Subcommittee
 - Military and Veterans Affairs (MAV) Advisory Committee
 - Anti-Racism Subcommittee

Challenges/Opportunities:

- We will strive to maintain and set metrics to measure employee morale during challenging times for higher education.
- Closing achievement gaps for ALANA/BIPOC students remains a high priority.
- Development of plans to become a Hispanic Serving Institution (HSI) is necessary, even if the federal designation is non-existent in the future. The institution has to be prepared to help members of one of the few growing demographic populations.
- We will 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 fourteenth 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:

- I was recognized as Worcester Business Journal's Large Business leader of the Year and, for the second straight year, listed as the publications Power 100 group of influential business leaders in Central MA.
- 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.
- WSU established a formal partnership agreement with the Worcester Guardian online newspaper. This partnership creates internship opportunities for students, coincides with a newly established Journalism minor and expands local news coverage for the community.
- I continue to serve on the boards of Saint Vincent Hospital, Worcester Regional Research Bureau, the Greater Worcester Community Foundation, and was recently selected to serve on the Worcester Art Museum board.
- I attended a Latino Education Institute legislative luncheon, participated in HECCMA (Higher Education Consortium of Central MA) 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 and Washington, DC.

Challenges/Opportunities include:

- Raising visibility of the university inside and outside of the Central Massachusetts market is of increasing importance.
- Balancing community needs against limited resources of the university poses challenges.

12. Affordability / Access

(Numeric Rating 4)

Worcester State University's instructional commitment is grounded in the principle that access to high-quality education must remain affordable for all students, especially those whose families are not high wage earners or who hail from historically underserved backgrounds. Throughout the evaluation period, and since I arrived in 2011, I, along with the Board, have prioritized academic excellence while implementing strategies that contain costs and enhance value. By investing in student-centered teaching, expanding high-impact practices, and leveraging innovative delivery models—including online and hybrid instruction—we have reinforced our mission as a public university dedicated to affordability, opportunity, and social mobility. This section outlines the key initiatives and outcomes that demonstrate our ongoing commitment to delivering exceptional instruction without placing undue financial burden on our students.

Highlights:

- To address prospective student and family concerns about the affordability of a higher education, in November 2024, WSU debuted **ValuePlus**, which brings together a range of financial resources that reduce or eliminate obstacles so that economically-disadvantaged student can attend Worcester State for free if they are Massachusetts residents, planning to commute, and Pell eligible (adjusted gross income of \$75,000 or less). Those who qualify have tuition and fees covered by a combination of federal, state, and institutional aid. In addition, Worcester State University continues to provide generous financial aid and robust merit scholarships for other students. (See my op ed promoting Value Plus [here](#).)
- **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.
- \$247,000 has been raised for the Student Emergency Fund, which has supported 363 students facing financial hardship. Additional external grant funding has helped address food insecurity on campus.
- In a December 2024 report from WSU's Urban Action Institute, data indicated that nearly 40% of students experienced some level of food insecurity. In January 2025, **Thea's Pantry** was relocated to a newly designed and expanded space on the first floor of the Student Center. This project was a collaboration between the Facilities Department and Student Affairs Division. The new central location is a key driver to increase awareness, access, and visibility for the campus community. The pantry provides students with food, personal care items, allergen-friendly offerings, and school supplies at no cost

2024-25 Statistics:

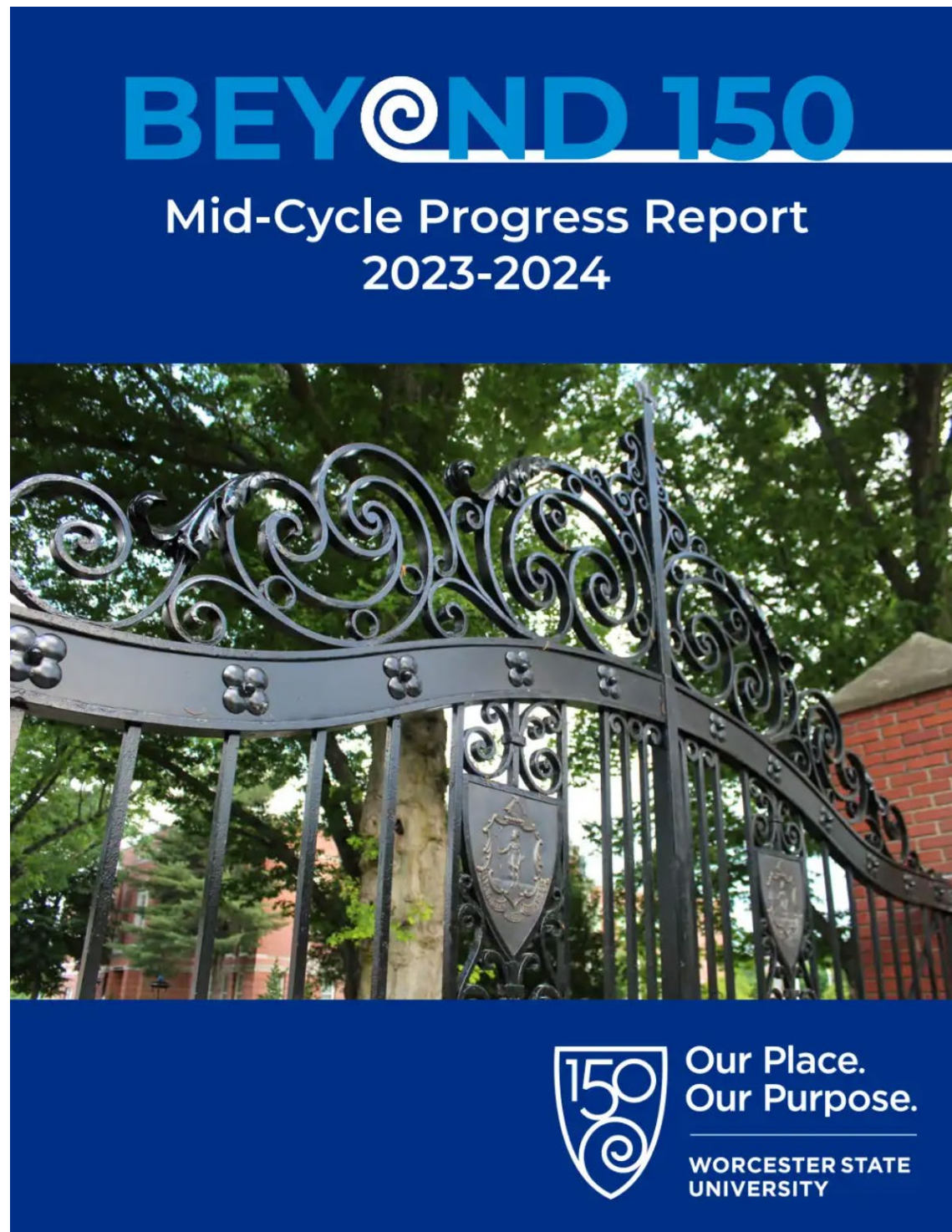
- 6,828 lbs. of food were contributed to the pantry through donations, sponsorship, the Worcester County Food Bank, and grant-funded purchases.
- There were 927 student visits to the pantry this year.
- 55% residents vs. 45% commuters utilized the pantry.

Challenges/Opportunities

- **Maintain Affordability!!!!**

Appendix A: Beyond 150 Mid-Cycle Progress Report

[Download Document](#)



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

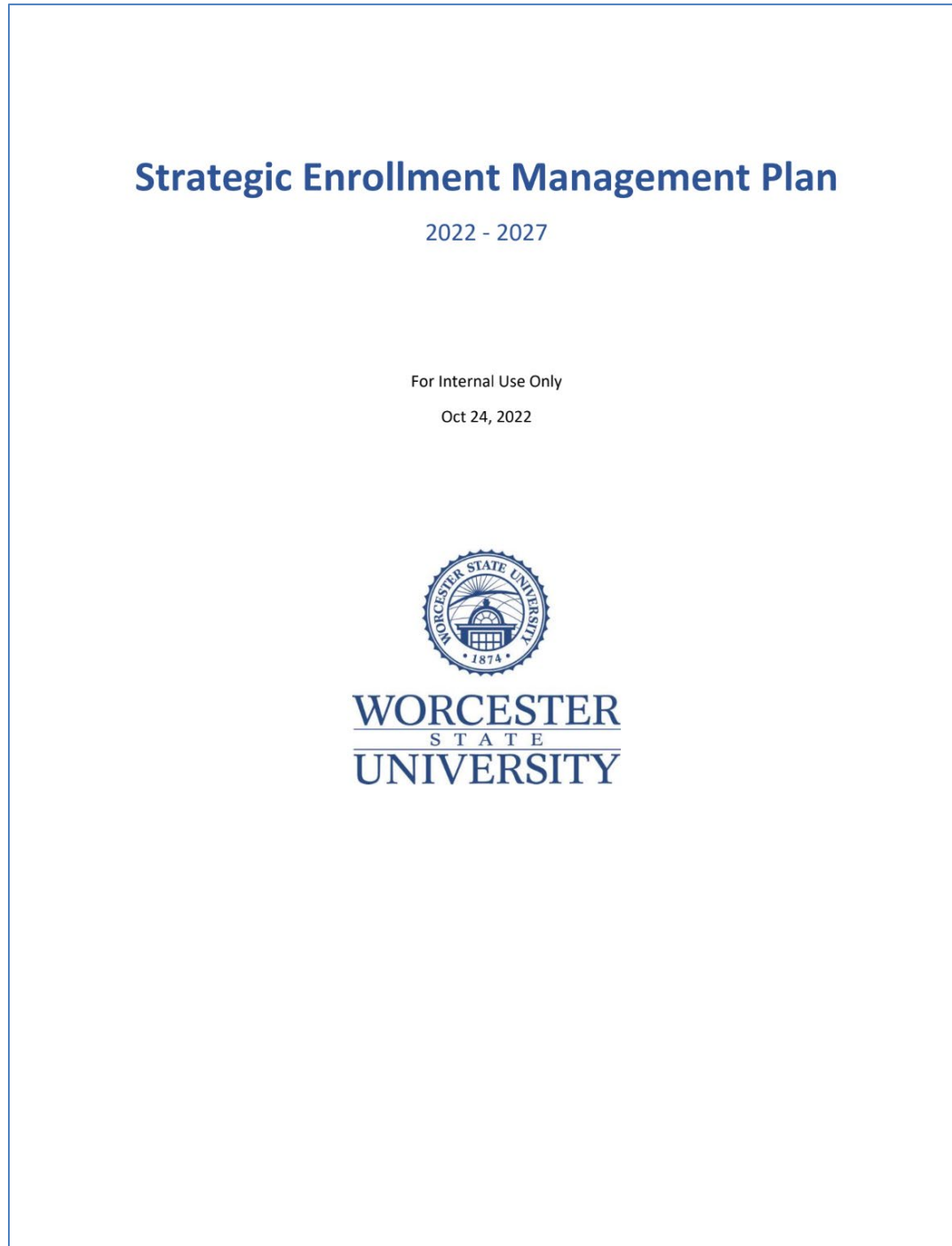
[Download Document](#)



Appendix C: WSU Strategic Enrollment Management Plan

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

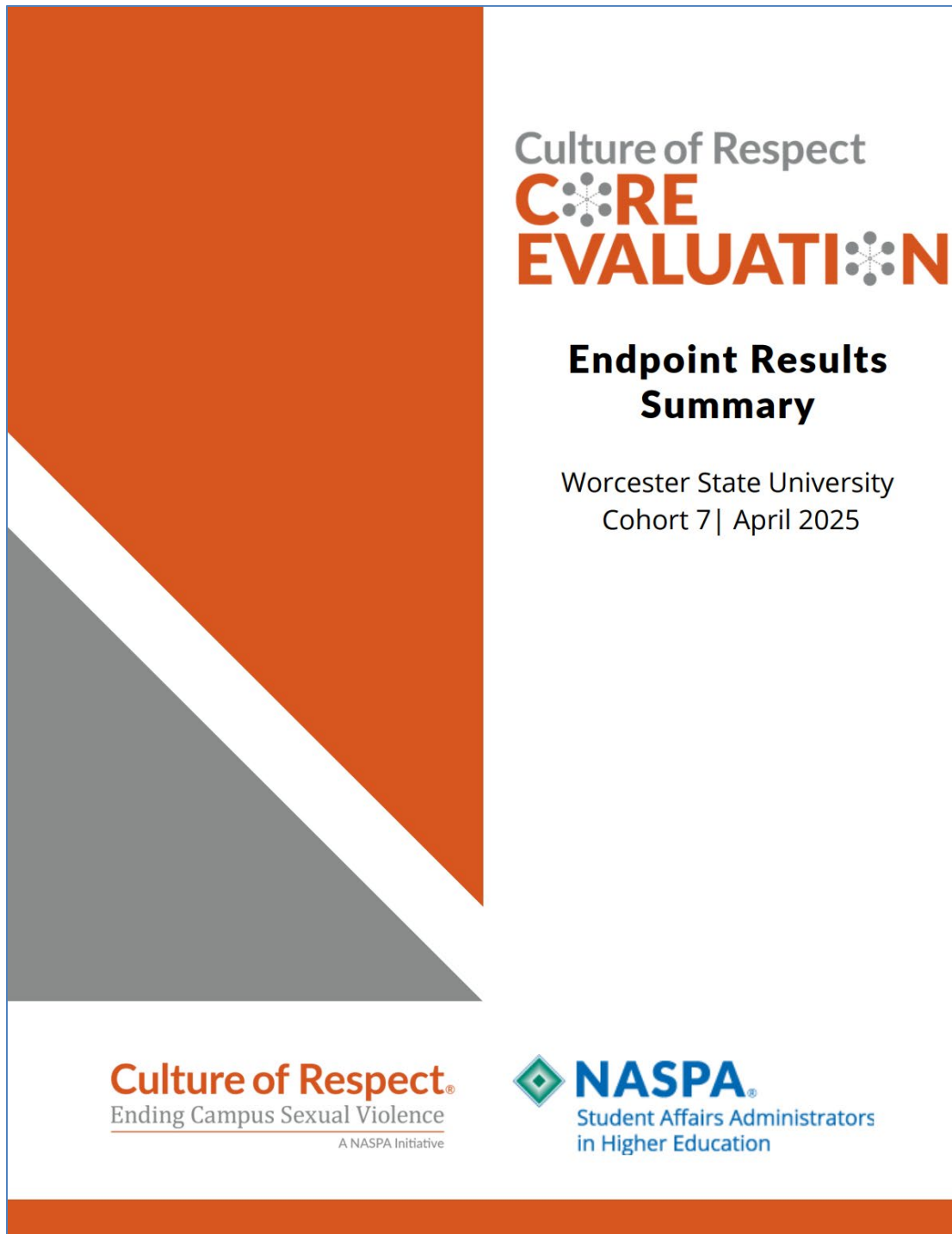
[Download Document](#)



Appendix D: 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](#)



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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: April 25, 2025

SUBJECT: **FY2025 and FY2026 Presidential Evaluations – Statewide Priorities and Procedures for Annual Reviews**

Dear Board Chairs,

As we enter the presidential evaluation cycle, I want to begin by expressing deep gratitude for your leadership and steadfast commitment to fostering safe, inclusive campus environments and advancing student success. I also want to extend my sincerest thanks to our presidents, whose steady guidance continues to be critical in the face of persistent uncertainty at the federal level. The evolving policy landscape and funding outlook demand not only strategic thinking, but also a great deal of responsiveness and resilience. As you continue to evaluate your respective institutional leaders, I want to encourage you to assess them through a broader lens—one that recognizes their extraordinary efforts to sustain institutional progress while managing uncertainty and immediate challenges.

As stewards of your institutions, you hold critical statutory and fiduciary responsibilities. These include overseeing and assessing the performance of your campus president. The purpose of this memo is to provide you with the following:

- An overview of the BHE's statewide (system-level) priorities for academic year 2024–2025 (FY2025);

- A timeline and procedural guidance for conducting presidential evaluations; and
- A preview of systemwide priorities for academic year 2025-2026 (FY2026).

For your convenience additional resources, including the [BHE Presidential Compensation and Evaluation Guidelines](#), can be accessed on the Department's [website](#).

Statewide Priorities for FY2025

As the Department continues to evolve its work, I would like to confirm that the FY2025 statewide system-level priorities remain unchanged from the previous academic year and focused on improving enrollment, attainment, and long-term success for equity populations. As such, the Department requests that each Chair of the local Board of Trustees submit **3 to 5 examples** of how your president has helped to advance the state's priorities and make your institution more **learner-ready and equity-minded**. Please support your examples with relevant quantitative or qualitative data, particularly in these areas:

- **Affordability:** Addressing college costs and implementing financial aid initiatives
- **Access:** Expanding admissions opportunities, early college programs, or similar efforts
- **Student Success:** Scaling access and support services, including wraparound supports

As you identify examples and continue to advance this important work, you may find the following resources helpful:

- [Post SFFA Overview and Guidance September 2024](#)
- [Updated SFFA Guidance February 2025](#)

These examples will help us better understand the strategies and successes taking place across our campuses and guide our statewide support efforts.

Looking Ahead: Statewide Priorities for FY2026

At its January 2025 retreat, the Board of Higher Education (BHE) adopted four strategic priorities to guide work across the public higher education system. The four priorities are stated as follows:

1. ***Student Success and Financial Aid-*** Supporting and advancing student access and success through well-designed, sufficiently funded, clear and consistent financial aid and success program funding
2. ***Economic Mobility-*** Increasing the Economic Mobility Benefits of Postsecondary Participation
3. ***Public Good-*** Improving Alignment Between Public Good Outcomes and Postsecondary Higher Education Opportunities

4. ***Innovation- Facilitating and Fostering High-Impact Innovation Throughout the Public Higher Education System***

These priorities support the BHE's overarching equity goal: to expand access, enrollment, attainment, and long-term outcomes for underrepresented students. A link to the BHE motion approving these goals is accessible here: [BHE 25-29 Approval of BHE Strategic Priorities and Endorsement of Innovation and Economic Mobility Strategic Priorities Framework Plans.pdf](#)

As these priorities evolve, the Department will continue to provide more guidance. However, in an effort to help you prepare for FY2026, we want to signal that next year's presidential evaluations will emphasize the following key areas:

- Promoting **affordability and access**;
- Advancing **student success**;
- Increasing **economic mobility**; and
- **Timeliness** in submission of **reporting data** requirements to the Department.

At this time, evaluation of the **Public Good** and **Innovation** priorities is optional, pending further development by the BHE. We expect to provide additional detail after the BHE's fall 2025 retreat.

In addition, we want to acknowledge the broader context in which our campus leaders are operating. Ongoing uncertainty at the federal level – including shifting policy directions and potential changes to funding – continues to demand significant attention and adaptability. In light of these challenges, it is important to recognize that our presidents are required to dedicate considerable time and energy to urgent response efforts that ensure institutional stability and student support. We ask that these circumstances be thoughtfully considered within the evaluation process, understanding that effective leadership in times of uncertainty often requires a strategic shift in priorities and an extraordinary level of responsiveness. With this in mind, we invite you, at your option, to share examples of how your respective presidents may have demonstrated leadership and resilience in managing change and uncertainty.

Procedural Guidance: Academic Year 2024-2025 Presidential Evaluation Submissions

Process for Submitting Evaluations

Please submit a **brief executive summary** of your president's evaluation. This should include:

- A description of your board's review process
- Data and evidence used in your assessment
- Any recommended compensation adjustments
- A summary of performance at both the institutional level and the statewide level

Attach the president's self-evaluation to your submission. Additional documents may be included only if directly relevant to your executive summary.

Performance Measurement and Data Tools

The BHE Presidential Compensation and Evaluation Guidelines, require that evaluations include institutional data aligned with statewide goals and metrics (see Section III.B). To support this, DHE launched the Performance Measurement Reporting System (PMRS), in 2019—a public-facing dashboard that tracks key performance indicators and disparities across student groups (i.e., race/ethnicity, gender, income). The Department's PMRS dashboards were refreshed in early April and each of your Institutional Research Directors also have access to year-round data via the Higher Education Information Resource System (HEIRS) through Tableau.

Timeline

Consistent with prior years, the **deadline** for completion and submission of presidential evaluations for FY2025 performance **is September 30, 2025**. 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. We invite you to contact Alex Demou, Director of Legislative and Trustee Relations, if you have any additional questions or requests, including whether you need an extension of time to prepare and submit the presidential evaluation in alignment with your board meeting schedule or otherwise.

Closing Thoughts

In the ensuing months we hope to convene the members of the Office of Trustee Relations (OTR) Advisory Committee to inform and strengthen our presidential evaluation processes. Your voice will be essential in shaping a system that supports collaboration and innovation across institutions.

Thank you for your leadership and continued partnership in strengthening our public higher education system.

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES**

Nominating Committee Meeting

Wednesday, April 23, 2025

2:30 PM

REMOTE PARTICIPATION

Join Zoom Meeting

<https://worcester.zoom.us/j/91538219707>

Meeting ID: 915 3821 9707

Meeting Called By: Marina Taylor (Chair)

Minutes: Nikki Kapurch

Board Members: Marina Taylor; Karen LaFond; Dina Nichols

WSU Staff: 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	Marina Taylor	
2. <i>Nominating Committee Report</i> a. <i>Present Slate Of Officers - 2024-2025*</i> b. <i>Present Trustees- Expiration Of Terms*</i> c. <i>Current Bylaws*</i>	Marina Taylor	Recommendation to the Full Board - 1 vote required a. Informational b. Informational c. Informational
3. <i>Adjournment</i>	Marina Taylor	3. vote required

*Attachments

Board of Trustees - Slate of Officers

POSITION:	CURRENT 2023/2024 (Elected 6-11-2024)	NEW SLATE 2025/2026
CHAIR	Trustee Lisa Colombo	
(2) VICE-CHAIRS	Trustee Lawrence Sasso Trustee Maureen Power	
SECRETARY	President Barry Maloney	
ASSISTANT SECRETARY	Nikki Kapurch	
(2) FOUNDATION BOARD	Trustee Marina Taylor Trustee Maureen Power	
EXECUTIVE COMMITTEE: ALTERNATE	Trustee Karen LaFond Trustee Amy Peterson	
MA STATE COLLEGES PRESIDENTS/TRUSTEES ASSOCIATION (<i>CHAIR</i>) ALTERNATE (<i>VICE-CHAIRS AS ALTERNATE</i>)	Trustee Lisa Colombo Trustee Maureen Power Trustee Lawrence Sasso	

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
Colombo, Lisa (appointed alum)	<u>First Term</u> August 31, 2017 <u>Second Term</u>	<u>First Term</u> March 1, 2022 <u>Second Term</u> March 1, 2027	Not Eligible
Brissette, Kelly	<u>First Term (replaced Aleta)</u> Official: March 2024 Appointed: November 20, 2024	<u>Firm Term</u> March 1, 2029	Eligible
Dunn, Darnell	<u>First Term (replaced Mosley)</u> Official: March 2024 Appointed: March 6, 2025	<u>Firm Term</u> March 1, 2029	Eligible
LaFond, Karen	<u>First Term</u> November 15, 2015	<u>First Term</u> March 1, 2020 <u>Second Term</u> March 1, 2025	Not Eligible
Nichols, Dina	<u>First Term</u> December 29, 2015 <u>Second Term</u> July 24, 2020	<u>First Term</u> March 1, 2020 <u>Second Term</u> March 1, 2025	Not Eligible
Peterson, Amy (elected alum)	<u>First Term (Alumni Elected)</u> July 1, 2022	<u>First Term</u> June 30, 2027	Eligible
Power, Maureen	<u>First Term</u> Official: August 1, 2022 Appointed: January 3, 2023	<u>First Term</u> July 31, 2027	Eligible
Pou, Kyram	<u>First Term (Student Elected)</u> July 1, 2024	<u>First Term</u> June 30, 2025	Anticipated year of graduation
Taylor, Marina	<u>First Term</u> November 15, 2015	<u>First Term</u> March 1, 2020 <u>Second Term</u> March 1, 2025	Not Eligible
Tuttle, David	<u>First Term</u> June 30, 2016 <u>Second Term</u> March 26, 2021	<u>First Term</u> March 1, 2021 <u>Second Term</u> March 1, 2026	Not Eligible
Sasso, Lawrence	<u>First Term</u> January 22, 2021 <u>Second Term</u> March 1, 2025	<u>First Term</u> March 1, 2025 <u>Second Term</u> March 1, 2030	Not Eligible

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
BY-LAWS

Updated 1/19/2021

PREAMBLE: Worcester State University is a public university in the system of public institutions of higher education in Massachusetts. The University is governed by an eleven-member Board of Trustees. These By-Laws shall govern the proceedings and acts of the Board of Trustees of Worcester State University.

ARTICLE I. ORGANIZATION AND OFFICERS OF THE BOARD OF TRUSTEES

SECTION 1. COMPOSITION AND FUNCTIONS OF THE BOARD. The composition, functions, duties, powers, and responsibilities of the Board of Trustees, its committees, or subcommittees, shall be as provided and authorized by the laws General Laws of the Commonwealth as in effect, and by such rules, regulations, policies, or guidelines as the Board of Higher Education may, from time to time, adopt amend or repeal for the management, control, administration, or regulation of the system of public institutions of higher education, or any part thereof.

SECTION 2. OFFICERS OF THE BOARD. The officers shall consist of a Chair, two Vice-Chairs, a Secretary, and an Assistant Secretary, all of whom shall be elected at the annual meeting of the Board.

The Chair and Vice-Chairs of the Board shall be Trustees.

The Officers shall serve until their successors have been elected and sworn to the duties of their respective offices.

SECTION 3. THE CHAIR OF THE BOARD OF TRUSTEES. The Chair of the Board of Trustees shall have the following powers and duties:

- (a) To preside at all meetings of the Board of Trustees at which he/she is present.
- (b) To call special meetings of the Board of Trustees.
- (c) To serve ex officio, with voting power, as a member of all standing committees of the Board of Trustees.
- (d) To appoint standing committees, a nominating committee, and other special committees or task forces of the Board of Trustees and Chair thereof.
- (e) To appoint successor members and chairs of standing committees, other than the Executive Committee, in the event that for any reason a vacancy occurs in any such office. A successor so appointed shall serve until the next annual meeting of the Board of Trustees.

- (f) To appoint substitute members and chairs of standing committees, other than the Executive Committee, in the event that any such member or chair thereof declares an inability to serve for any period. A substitute so appointed shall serve during such inability.
- (g) To designate a minimum of two Trustees as members of standing committees, other than the Executive Committee. In the event of an increase in the number of Trustees appointed to the Board, the number of members of such committees shall be enlarged by such appointment. A member so appointed shall serve until the next annual meeting of the Board of Trustees.

SECTION 4. THE VICE CHAIRS OF THE BOARD OF TRUSTEES. The Vice-Chairs of the Board of Trustees shall have the following powers and duties:

- (a) To perform the duties of the Chair of the Board of Trustees at the Chair's request or in the case of absence or incapacity of the Chair. In the absence of the Chair and the Vice-Chair, the Board of Trustees shall elect a Chair Pro Tempore.

SECTION 5. THE SECRETARY. The secretary shall have the following duties:

- (a) To give written notice of all regular and special meetings of the Board of Trustees and of standing and special committees thereof. And to compile and distribute agendas therefor.
- (b) To record the proceedings and to prepare minutes of the meetings of the Board of Trustees, and of standing and special committees thereof.
- (c) To preserve all documents, papers, and records of the Board of Trustees determined by the Board to be a part of its official records or necessary to the performance of its duties.
- (d) To conduct correspondence as directed by the Board of Trustees and to certify official documents and proceedings.
- (e) To perform duties, not inconsistent with those prescribed by these Bylaws or by the Board of Trustees as prescribed from time to time by the Chair of the Board of Trustees.
- (f) To serve as Parliamentarian of the Board of Trustees.

SECTION 6. THE ASSISTANT SECRETARY. The Assistant Secretary shall perform the duties of the Secretary in the event of his absence or illness and assist in the preparation and conduct of general Trustee business under the direction of the Secretary.

ARTICLE II. ROLE OF THE BOARD. The Board shall be responsible to execute all of its duties and functions as mandated by Chapter 15A of the General Laws of the Commonwealth, any other provision of applicable law, and by its own bylaws. The key responsibilities of the Board shall include:

- (a) To appoint, support, and assess the performance of the President;
- (b) To provide guidance, direction, feedback, approve and assess the overall mission and strategic direction of the University in the long-range;

- (c) To provide guidance, direction, feedback to major initiatives of the University and to approve new academic programs;
- (d) To ensure adequate financial resources and financial management of the University;
- (e) To preserve the institutional autonomy, represent the University to the community and the community to the University;
- (f) To periodically review and provide guidance to the president on major issues facing the University.
- (g) To develop and submit to the Secretary and the Council a mission statement for the University. *(Secretary would be Commissioner and Council refers to the former Higher Education Coordinating Council which is now the Department of Higher Education.)*

The Board places responsibility on the President, as its Chief Executive Officer, to act with administrative authority on all matters pertaining to the conduct of the University business.

For the purpose of executing its fiduciary and statutory responsibilities, as mandated through its bylaws, BHE policies, and procedure guidelines, the full Board may delegate to the appropriate committee(s) the responsibility and authority to deliberate an action agenda as presented to it by the President. The appropriate Vice President shall serve as a resource person to Committee Chairs in providing detailed data and information on agenda items under consideration. Positive or negative recommendations of committees shall be forwarded to the full Board.

ARTICLE III. MEETINGS OF THE BOARD

SECTION 1. ANNUAL MEETING: Annual Meetings of the Board of Trustees shall be held at the last scheduled Board Meeting during which the Board will elect officers, adopt its organizational issues, establish standing committees and meeting schedules.

REGULAR MEETINGS: The Board shall conduct its regular meetings through bi-monthly sessions and meet at least five times a year or more as necessary.

SECTION 2. SPECIAL MEETINGS: Special Meetings of the Board of Trustees may be held at any time and place within the Commonwealth when called by the Chair of the Board of Trustees or the President of the University or by three Trustees in writing given to the Secretary specifying the purpose(s) of said meeting. The time and place of such meeting shall be fixed by the Chair of the Board of Trustees, except for those called by three or more Trustees, who shall have the right to fix the time and place of said meeting. Written notice of such meetings shall be sent to each Trustee by mail at least three days prior to the date fixed for said meeting, which notices shall state the time, place, and the purpose(s) for which it has been called; provided, that no notice need be given to any Trustee who waives the same by a written waiver executed before or after the meeting. Each such waiver shall be filed with the records of the meeting.

SECTION 3. NOTICE OF REGULAR MEETING; WAIVER. Written notice of each regular meeting of the Board of Trustees shall be sent to each trustee by mail at least seven days prior to the date fixed for said meeting, which notices shall state the time and place thereof; provided, that no notice need be given to any trustee who waives the same by a written waiver executed before or after the meeting. Each such waiver shall be filed with the records of the meeting.

SECTION 4. AGENDA OF REGULAR BOARD MEETINGS. A written agenda of matters to be considered at each regular meeting of the Board of Trustees shall be sent to each Trustee by mail at least five days prior to the date fixed for said meetings. Items to be included in the agenda for a regular meeting shall be submitted to the Secretary in writing by (a) recommendation of a standing or other committees of the Board of Trustees, (b) the Chair of the Board of Trustees, or (c) the President of the University, and any Trustee upon the majority vote of said Board shall be entitled to present matters to the Board of Trustees for its consideration without prior reference to a committee.

The focus of the Board should be on a format structured around issues and operating results rather than a series of individual reports. The structured areas to be considered on a regular basis include:

- Review and discussion of major policies or issues and formal adoption of such programs.
- Review and status of previously implemented policies and initiatives.
- An operational report concerning the current status of the programs and the finance of the University.
- Review of administrative matters requiring Board approval.
- Review and discuss the furtherance of diversity, equity, and inclusion.

At least one meeting a year would be devoted to a strategic review which can be used as the benchmark for discussions for the remainder of the year.

SECTION 5. QUORUM. The number of Trustees necessary to constitute a quorum for the transaction of business shall be a majority of members (Trustees) then in office, but a lesser number may adjourn any meeting from time to time, and such meetings may be held as adjourned without further notice. When a quorum is present at any meeting, a majority of the Trustees present may take action on behalf of the Trustees unless a larger number is required by other provisions of these Bylaws. By a vote of a majority of a quorum of Trustees present, any meeting may be recessed.

ARTICLE IV. COMMITTEES OF THE BOARD OF TRUSTEES

SECTION 1. STANDING COMMITTEES. There shall be five standing committees of the Board as follows: (a) Executive Committee; (B) Committee on Finance and Facilities; (c) Committee on Academic and Student Development; (d) Committee on Human Resources; (e) Committee on Planning and Development.

SECTION 2. NOMINATING AND SPECIAL COMMITTEES OR TASK FORCES.

Nominating and Special Committees or task forces for any purpose may be appointed by the Chair.

SECTION 3: MEMBERS OF STANDING COMMITTEES. The Chair of the Board of Trustees at the annual meeting shall fix the number and appoint the Chair and the members of each standing committee other than the Executive Committee provided that each standing shall have no fewer than two members. The Chair of the Board of Trustees, with voting power, and the President of the University, without voting power, shall be members ex officio of each standing committee.

SECTION 4. COMMITTEE MEETINGS. Committee meetings may be held at any time and place when called but the Chair of the committee, the Chair of the Board of Trustees, the President of the University, or a majority of members of the committee. The Secretary shall send a written notice of the time and place of the meeting by mail to each member and any special member of such committee at least five days prior to such meeting. Notice need not be given to any member or special member who waives such notice in writing before or after the meeting, or who attends the meeting. Should any matter be an appropriate subject for consideration by more than one committee, the Chair after consultation with the respective chairs of said committees shall determine to which committee or committees the matter shall be referred, and whether a joint committee meeting shall be held.

As a principle, the quorum for a meeting shall be determined by the presence of a majority of members on a standing committee. The chair of the committee may, from time to time, invite students, faculty, administrators, alumni, and others to participate in committee meetings in seeking their advice.

Any member of the Board other than those as bonafide members of the committee may attend and participate in committee discussions but without voting power.

SECTION 5. AGENDA OF COMMITTEES OF THE BOARD. A written agenda of matters to be considered at each meeting of a committee of the Board of Trustees shall be sent to each committee member as early as possible in advance of the meeting. Copies of committee agendas will be sent to all trustees for their information as will minutes of committee meetings. Items to be included on committee agendas shall be submitted to the Secretary in writing by:

- (a) The President of the University, or
- (b) Any Trustee.

SECTION 6. THE EXECUTIVE COMMITTEE. The Executive Committee shall be composed of the Chair and Vice-Chairs of the Board of Trustees, the President of the University, and one additional Board member elected to this committee by the Trustees at the annual meeting. The Trustees will also elect an alternate to serve in the event that the elected Board member is unable to serve or be present at a meeting of the committee. This Committee shall have the following powers and duties:

- (a) The Executive Committee of the Board will meet, upon due notification by the Chair and the President, to transact business between regular board meetings and to act with the full power and authority of the Board.
- (b) To consider and act upon proposals by the President for action which the Board may have generally or specifically authorized the President to take with the concurrence of the Executive Committee.
- (c) To recommend honorary degree candidates for approval by the Board of Trustees.
- (d) To assign to an officer of the University any matter for which a hearing by the Board of Trustees or any committee thereof is deemed necessary by the Executive Committee, or is required under the laws of the Commonwealth or the rules and regulations for said Board.
- (e) To consider, propose, and recommend to the Board of Trustees the adoption, amendment, or revisions of rules and regulations for the governance of the Board of Trustees and the University, its administration, faculty, staff, students, and activities.
- (f) To report to the Board of Trustees all actions taken or concurred in by said Committee at the next regular meeting of the Board of Trustees or as soon thereafter as possible.
- (g) To consider the furtherance of governance, legislative, and public relations policy interests of the Board of Trustees and of the University and to make recommendations to the Board of Trustees with respect thereto.
- (h) To consider recommendations regarding relationships between the university and its alumni bodies and other groups having or desiring a special relationship to the University, and to make recommendations to the Board of Trustees with respect thereto.
- (i) To consider recommendations of the President of the University with respect to programs concerning the various constituencies of the university and to make recommendations to the Board of Trustees with respect thereto.
- (j) To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

SECTION 7. THE COMMITTEE ON ACADEMIC AND STUDENT DEVELOPMENT.

The committee on Academic and Student Involvement shall have the following powers and duties:

- (a) To consider all matters related to academic affairs.
- (b) To consider policies regarding the quality, character, and extent of instruction and research at the university, including policies governing admission requirements, programs of instruction, curriculum, academic personnel, new degree programs and changes to existing degree programs, public service activities and research, and to make recommendations to the Board of Trustees with respect thereto.
- (c) To consider policies related to the educational purposes and responsibilities of the university and evaluate the same on a long-range basis, and to make recommendations to the Board of Trustees with respect thereto.
- (d) To consider all matters related to Student Development.

- (e) To consider policy matters pertaining to student life and activity, student government, and other recognized student organizations and groups, and to make recommendations to the Board of Trustees with respect thereto.
- (f) To consider policies relating to the health and well-being of the student body, including advisement and counseling, and to make recommendations to the Board of Trustees with respect thereto.
- (g) To advise the President on any matter within the scope of the committee's duties.
- (h) To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

SECTION 8. THE COMMITTEE ON FINANCE AND FACILITIES. The committee on Finance and Facilities shall have the following powers and duties:

- (a) To consider all matters related to administration and finance.
- (b) To consider and act upon operating budget requests and capital outlay budget requests submitted by the University and to make recommendations to the Board of Trustees with respect thereto.
- (c) To review proposals for the transfer of funds between subsidiary accounts, and to make recommendations to the Board of Trustees with respect thereto.
- (d) To consider policies and other matters pertaining to the investment of endowment funds and other funds of the University that may from time to time be invested and reinvested, and to make recommendations to the Board of Trustees with respect thereto.
- (e) To review the financial records and controls of the University; to review and develop policies respecting the receipt, management, and disbursement of funds of the University from whatever source received, the purchase of services, supplies and materials and internal controls over the same; to review proposals for fees, rents, and charges; to consider policies and other matters pertaining to the leasing of private property by the University, to review audits of financial activities of the University and to report thereon, and to make recommendations with respect thereto to the Board of Trustees.
- (f) To consider the fidelity and performance bonding of the University personnel and to report thereon, and to make recommendations to the Board of Trustees with respect thereto.
- (g) To consider policies and other matters pertaining to the physical properties of the University, including all buildings, land acquisition, and transfer, landscape plans, and developments and construction thereon, and to make recommendations to the Board of Trustees with respect thereto.
- (h) To consider plans and policies governing campus master planning and capital outlay budgets, and to make recommendations to the Board of Trustees with respect thereto.
- (i) To consider and make recommendations to the Board of Trustees with respect to design plans, bid taking, and other building project matters, contracts, and combinations for architects and engineers on all buildings, structures and facilities to be built on University property, prior to any final action thereon by the Board of Trustees.

- (j) To inspect University lands and buildings as required; to consider the acceptance of completed construction, and to make recommendations to the Board of Trustees with respect thereto.
- (k) To consider plans for lots, roads, streets, paths, and ways, and regulations for pedestrian and vehicular use thereof on the property of the University, and to make recommendations to the Board of Trustees with respect thereto.
- (l) To consider names for buildings, streets, ways, and other properties of the University and to make recommendations to the Board of Trustees with respect thereto.
- (m) To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

SECTION 9. THE COMMITTEE ON HUMAN RESOURCES. The committee on Human Resources shall have the following powers and duties:

- (a) To consider all matters related to personnel.
- (b) To consider general policies relating to the formulation of budgets and appropriate compensation policies for the University and to make recommendations to the Board of Trustees with respect thereto.
- (c) To consider policies on personnel staffing patterns and to make recommendations to the Board of Trustees with respect thereto.
- (d) To consider recommendations from the President on the appointment, change in status, or termination of University personnel and to make recommendations to the Board of Trustees with respect thereto.
- (e) To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

SECTION 10. THE COMMITTEE ON PLANNING AND DEVELOPMENT. The Committee shall consist of the following members: The two trustees elected by the Board to serve on the board of the Worcester State Foundation and one other trustee named by the Chair of the Board. The Committee on Planning and Development shall have the following powers and duties:

- (a) Consider matters relating to long-range development quality enhancement and growth of the University.
- (b) Consider strategic plans to achieve key mission initiatives including but not limited to:
 - (i) Academic programs
 - (ii) Student life development
 - (iii) Support services
 - (iv) Financial, human, physical, and capital resource development
 - (v) External community relations,
 - (vi) Alumni relations
 - (vii) Governmental relations

- (c) Consider such joint projects which may be appropriate with the Worcester State Foundation.
- (d) To review programs to raise private funds for the University through special gifts, endowment bequests, and other means, and to make recommendations to the Board of Trustees with respect thereto.
- (e) To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

ARTICLE 11 MISCELLANEOUS

SECTION 1. THE SEAL OF THE UNIVERSITY. The Common Seal of Worcester State University and of the Board of Trustees shall consist of a circle in which the latitudinal and longitudinal lines of the Earth are inscribed over which the outline of the Commonwealth of Massachusetts is superimposed. An open book and a twig with three leaves is within the outline. Two rings circle the representation of the earth. The words “Worcester State University 1874” are formed around the outer ring and another ring circles outside these words. The border of the seal is formed by a twelve pointed scallop that encloses it.

The Earth is used as a background to show the universality of education.

The Commonwealth of Massachusetts is superimposed on the Earth to show its relationships and contributions to the word of which it is a part.

The book, representing knowledge, is placed on the Commonwealth of Massachusetts where the City of Worcester would be located, and thereby indicates the placement of the University within the city and the state.

The leaves symbolize the living, growing nature of the university and the process of education of which it is a part.

SECTION 12. AMENDMENT, REVISION OR REPEAL OF BYLAWS. These Bylaws may be amended, revised, or repealed by vote of a two-thirds majority of the entire number of Trustees at any meeting of the Board of Trustees; provided, however, that the text of any amendment, revision, or repeal as originally proposed shall be sent to the Trustees at least thirty days before the meeting.

SECTION 13. PARLIAMENTARY PROCEDURE. Roberts Rules of Order shall be a guide in conducting the meeting of the Board of Trustees unless otherwise provided by the Board.

BOARD OF TRUSTEES
2025-2026 OFFICERS

Chair	Trustee Lisa Colombo
Vice-Chair (2)	Trustee Maureen Power Trustee Lawrence Sasso
Secretary	President Barry Maloney
Assistant Secretary	Nikki Kapurch
Foundation Board (2)	Trustee Maureen Power Trustee Darnell Dunn
Executive Committee Alternate	Trustee Amy Peterson Trustee Kelly Brissette
MA State Colleges Presidents/Trustees Association (Chair) Alternate (<i>Vice-Chairs as alternate</i>)	Trustee Lisa Colombo Trustee Maureen Power Trustee Lawrence Sasso

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Meeting Schedule
FY 2025-2026

FULL BOARD MEETING

Thursday, October 23, 2025
Thursday, November 20, 2025
Thursday, January 8, 2026
Thursday, April 09, 2026
Thursday, June 11, 2026

Subcommittee meetings will be scheduled as needed.

President's Update

June 2025



President's Message

It's been a good year to celebrate our 150th anniversary! The challenges we've faced since the height of the COVID 19 pandemic – enrollment ups and downs, especially – have been met with prudent fiscal planning and a campus-wide shift toward operational excellence. Those initiatives have resulted in \$5.2 million in efficiencies.

We have managed to balance this fiscal year's budget without drawing from reserves, to grow graduate enrollment, and to use financial aid and other state funds to improve students' persistence. As a result, we have substantially narrowed the budget gap that opened in Fall 2020, at the height of the pandemic.

Pursuing a fiscal recovery path was complemented by many achievements this past year, showcased in the pages that follow. Some I am most proud of:

- The launching of [ValuePlus](#), whereby students whose families earn \$75,000 or less can attend for free;
- The [\\$1.24 million gift from Becker College](#) that will have a profound, lasting impact on the university's nationally ranked Dr. Lillian R. Goodman Department of Nursing;
- The many wonderful student projects and achievements showcased at the [Celebration of Scholarship and Creativity](#) and the [Academic Achievement Awards Ceremony](#); and
- That we enrolled our largest-ever graduate class—for the second year in a row!

I recognize all who were involved in end-of-year ceremonies, from those on the academic ceremonies committee to the maintainers, events office staff, class advisors, and police officers. Each event was well run and well received. I have no doubt that our students and families will look back upon them with pride and fond memories!



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Student Support, Equity, and Campus Well-Being 4

Financial Stewardship, Infrastructure, and Assessment 6

Academic Excellence and Strategic Growth..... 8

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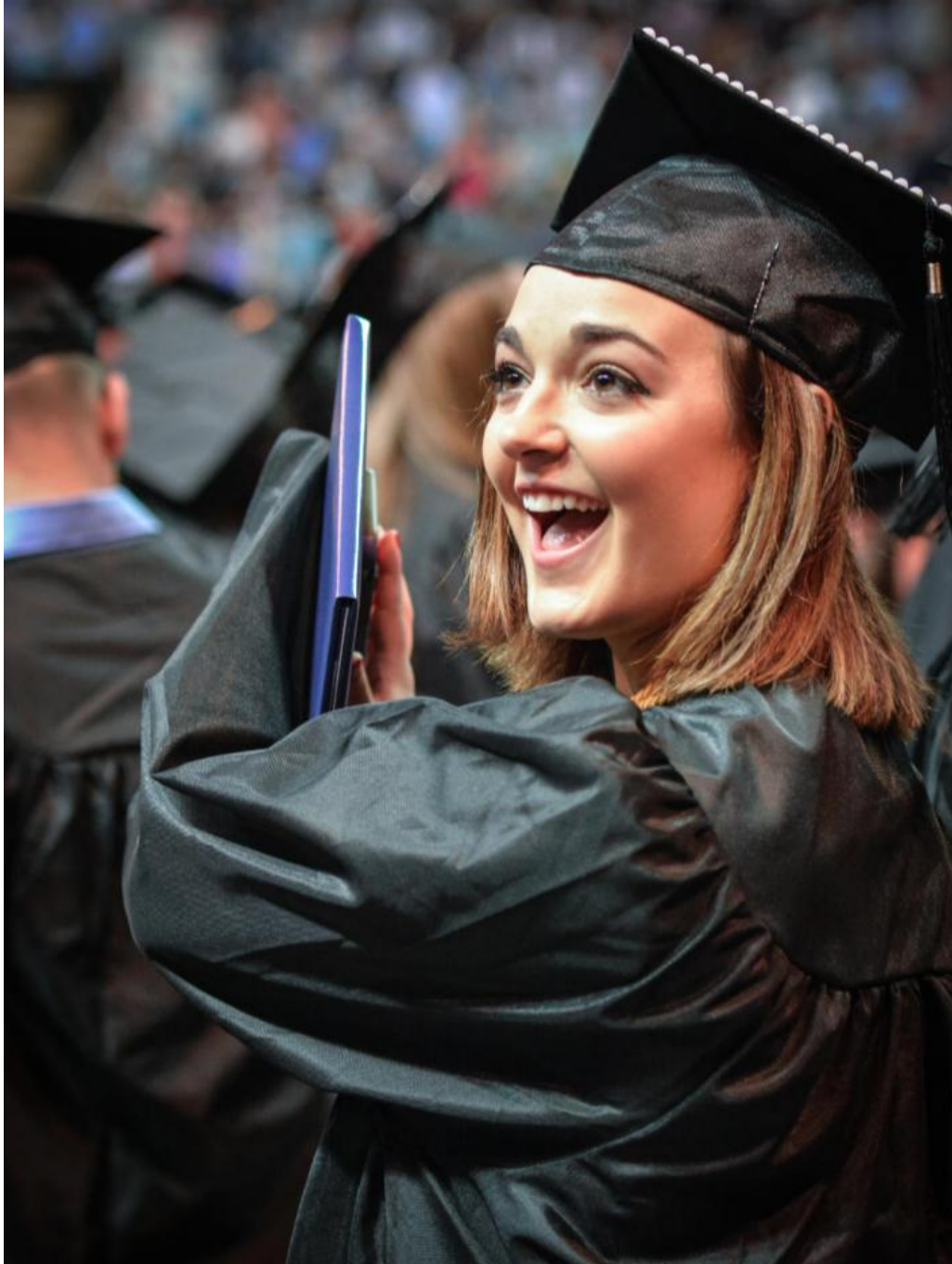
Appendix 12

PRESIDENT'S OFFICE

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



I also thank trustees for stewarding our fiscal enterprise and for sharing in our common purpose: putting students first. Once the FY26 state budget is finalized this summer and FY25 student success projects are completed, we will further invest in those projects that improve student outcomes. This fall, a revamped general education program will be before us – one that will prepare students well for the next quarter century – and we look forward to kicking off a fundraising effort that will not only support students but also set the stage for the University's next 150 years.



Affordability and Access

Worcester State continues to expand affordability initiatives that help students and families navigate the cost of higher education. In November 2024, the University announced the launch of ValuePlus, which offers full coverage of tuition and fees for Pell-eligible, commuting Massachusetts residents with a household income of \$75,000 or less. These students benefit from a combination of federal, state, and institutional aid. As of the May 1 national decision deadline, 381 admitted students had been offered ValuePlus support, underscoring growing demand for accessible pathways to bachelor's degrees.

Efforts to support enrollment growth also expanded this year through a grant-funded partnership with EAB, which focuses on yield enhancement, financial aid optimization, and prospective student engagement. The collaboration integrates advanced data modeling, real-time surveys, the ZeeMee student engagement platform, and new econometric tools for aid award strategy and monitoring. At the same time, Worcester State reaffirmed that its admissions policies remain compliant with the Supreme Court's SFFA (Students for Fair Admissions) decision, continuing to support diverse outreach without using race as a determining factor in admission.

The University's [Early College program](#) continues to expand its reach and impact, ensuring equitable access and meaningful academic experiences for hundreds of students across the Commonwealth. Fall 2024 saw 1,011 enrollments across 19 high schools, with an overall success rate of 78.6%, and Spring 2025 brought 892 enrollments from 22 high schools.



Student Support, Equity, and Campus Well-Being

The University continues to enhance holistic support systems that promote retention, equity, and well-being. In 2024–25, the [CARE Team](#) was restructured to address student concerns more proactively. The multidisciplinary group, which meets twice weekly, handled nearly 200 student support cases, a 500% increase over previous years. Simultaneously, new personnel were hired to support students affected by Title IX-related concerns and to serve as Confidential Resource Providers under Massachusetts law.

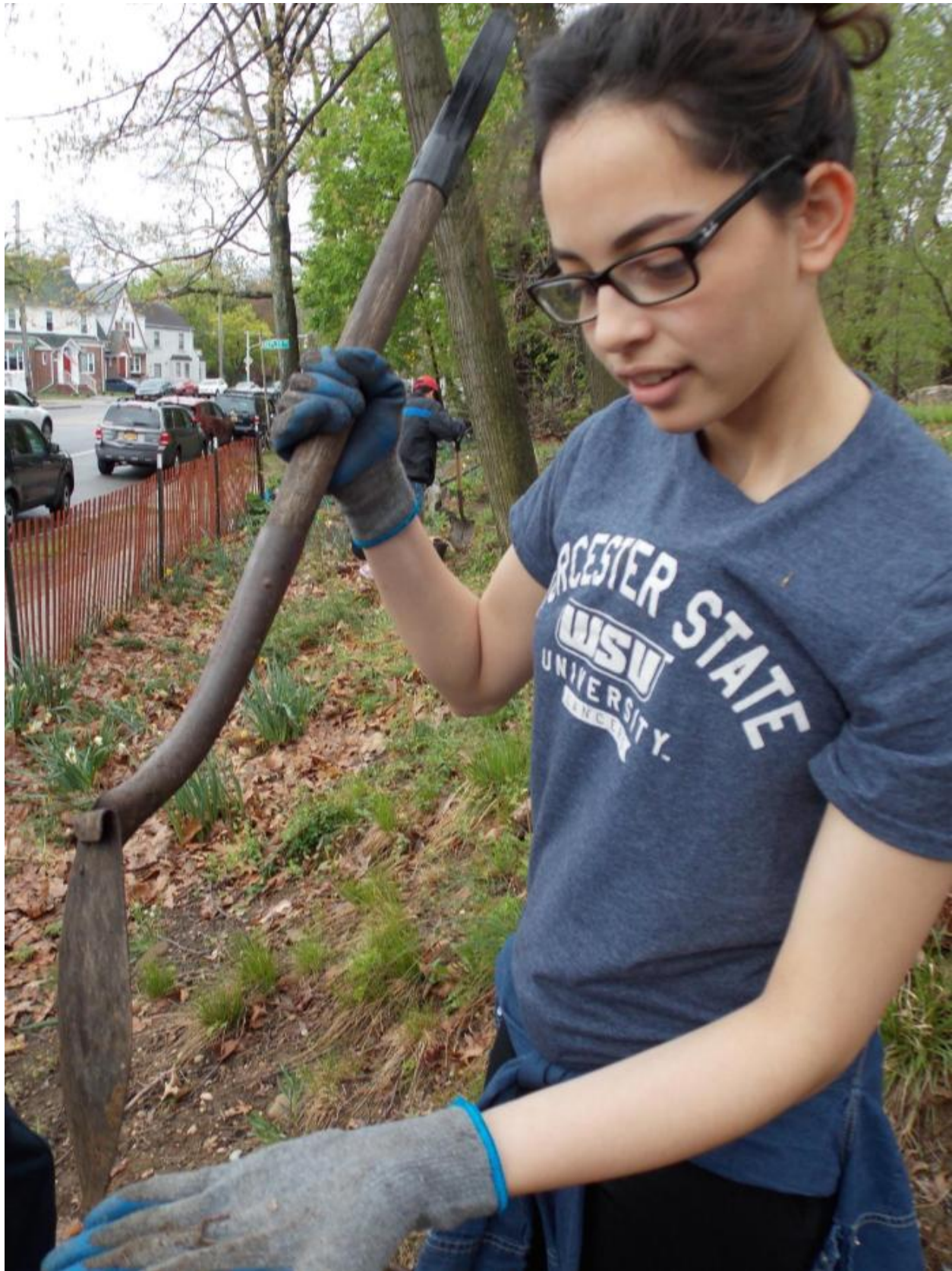
Several student-serving spaces were redesigned or expanded to meet emerging needs and enhance campus life. The [LGBTQIA+ Community Center](#) opened in Spring 2025, alongside a newly appointed outreach coordinator, both of which play key roles in fostering inclusive support. The Veterans Lounge also expanded to offer tailored advising, peer networks, and benefits navigation for military-connected students. [Thea's Pantry](#) relocated to a more central Student Center location, resulting in 927 visits this year, with nearly 7,000 pounds of food distributed. A December 2024 report by the Urban Action Institute showed that nearly 40% of WSU students experience food insecurity, affirming the pantry's critical role.

Academic support systems have grown as well. The [Aisiku STEM Center's Peer Assisted Learning](#) (PAL) program supported over 570 students across foundational science courses, including Anatomy and Physiology, Microbiology, and Chemistry. The Math Center extended services into the summer and launched MA 099, a no-cost foundational course to help students build skills and confidence in higher-level math, especially for those in STEM and Education programs.

Worcester State also completed its two-year participation in [NASPA's Culture of Respect Collective](#), an intensive program aimed at assessing and strengthening sexual violence prevention efforts. Through structured evaluation, planning, and implementation, the initiative helped the University deepen its commitment to a safe, respectful learning environment.

[Unity Day](#), launched in 2021, continues to serve as a vibrant celebration of Worcester State's commitment to diversity and inclusion. This year's event featured keynote speaker [José Luis Santos, Senior Deputy Commissioner at the Department of Higher Education](#), and brought together students, faculty, and staff for a day of programming focused on equity, identity, and community. It remains a signature event marking the beginning of the academic year.

To further institutionalize its equity efforts, President Maloney has approved the formation of three new [Inclusive Excellence and Belonging](#) (IEB) Committees in 2024–25: the Accessibility Subcommittee, Military and Veterans Affairs Advisory Committee, and Anti-Racism Subcommittee. These groups contribute to the broader IEB Strategic Plan and help ensure inclusive, forward-looking policies and practices. Additionally, three Worcester State employees—one faculty member and two staff—completed the [Diversity and Inclusion Certificate Program through Clark University](#), strengthening campus leadership capacity in equity and belonging.



Financial Stewardship, Infrastructure, and Assessment

The University continued its long-term investment in strategic planning, capital improvements, and infrastructure renewal. A comprehensive financial strategy that emphasizes budget transparency and operational excellence helped produce \$5.2 million in efficiencies, avoiding a drawdown from reserves. The University's FY25 budget of \$104 million supports both academic and student services, with federal ARPA and HEERF funds covering an additional \$2.7 million in one-time needs. Worcester State's \$6.3 million annual debt service remains aligned with future enrollment and capital planning models.

In FY25 alone, over \$10 million in capital improvements supported key renovations including HVAC systems, academic space upgrades, and residence hall improvements. A major infrastructure milestone was the completion of a new \$10.7 million electrical distribution system, funded entirely by the state. This upgrade replaces failing systems and secures with reliable, campus-wide service for decades to come. Sustainability/decarbonization efforts continued through \$1.9 million in energy efficiency improvements, and over \$750,000 was invested in student-centered upgrades, such as ADA compliance and dining enhancements—each informed by student feedback.

Worcester State continues to advance its data analysis and assessment capacity as part of a broader commitment to strategic infrastructure and institutional planning. The 2024–2025 academic year saw substantial progress in enhancing systems and services – as well as a customer service approach from the [Institutional Research Office](#) – in order to support data-informed decision-making across the University. These efforts ensure that departments and leadership teams have timely, accurate insights to guide planning, resource allocation, and student success initiatives.

- Data warehouse modules for Student Success and Finance, in use for a year, allowed for data-driven decision-making this year in the areas of Admissions, Retention, Enrollment Management, and Administration and Finance, while data quality improvement projects with the Honors Program and with the Office of Veteran's Affairs were completed.
- [Institutional Assessment and Planning \(IAP\)](#) is currently working to ensure better data reporting to the Department of Higher Education, and, in collaboration with academic deans and department chairs, is developing and refining new data sets for annual reports and program reviews.
- The IAP Office created Tableau Dashboards for department chairs, which will be used to provide information regarding enrollment, retention, graduation and more for each department/major.
- The IAP Office's strategic planning support included the production of the recently finalized Strategic Plan Mid-Cycle Progress Report – an assessment of the University's 2020-2027 strategic plan through the end of last academic year – and development of the Inclusive Excellence and Belonging Strategic Plan, in coordination with the IEB Office.



Academic Excellence and Strategic Growth

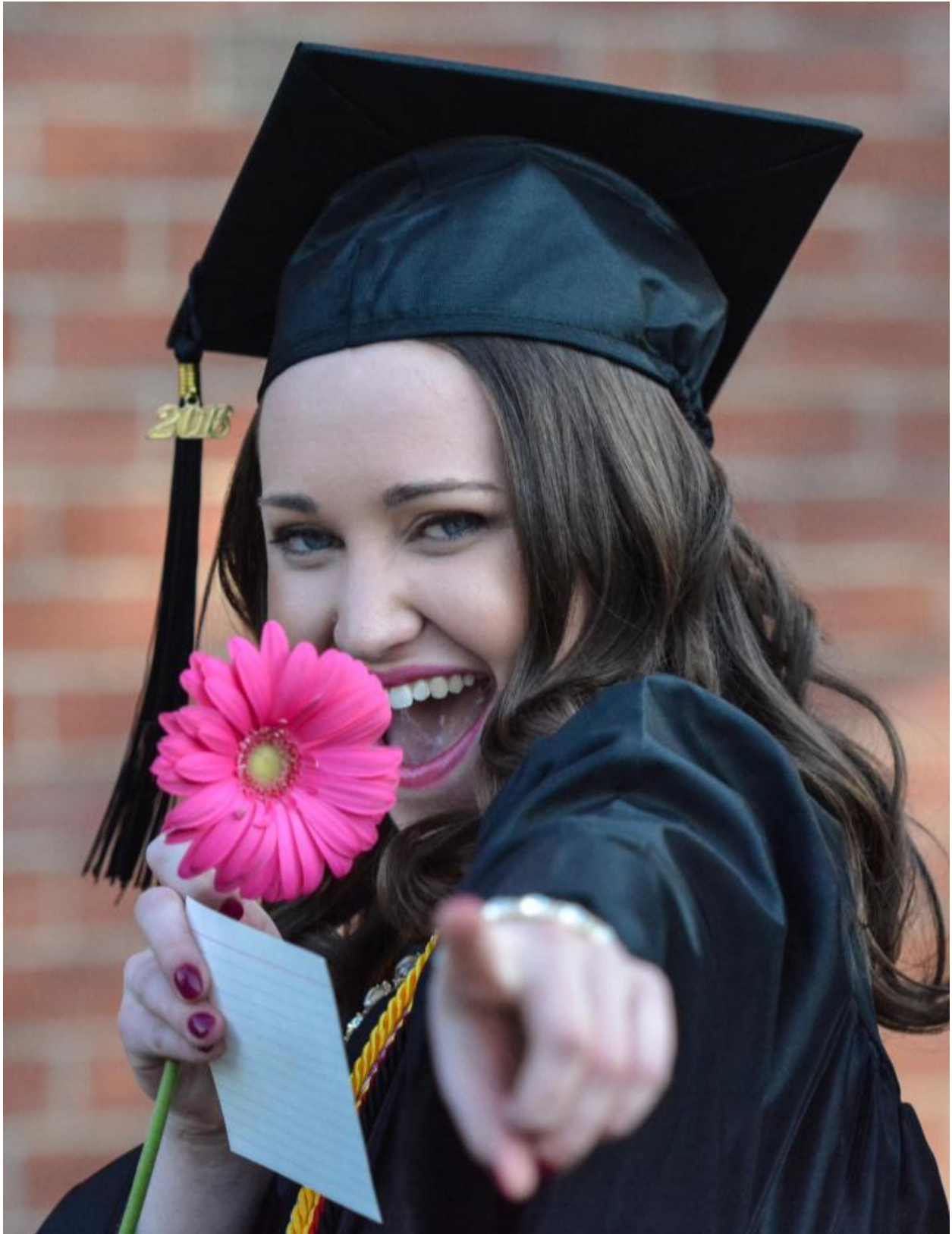
Our core academic function continues its path of, as the University's Strategic Plan puts it, "providing opportunities to excel in a close-knit learning environment characterized by distinguished faculty, excellent teaching, and creative linkages between classroom learning and real-world experiences."

The Aisiku STEM Center is an example of our "close-knit learning environment" in action. Academic support is available through the Center, using the Supplemental Instruction Model, which we call our Peer Assisted Learning (PAL) program, to certain introductory and 200-level courses that are crucial for success in the STEM disciplines. Over the past two years, the PAL program has expanded to offer support to basic science courses required for Nursing and other clinical disciplines including Occupational Therapy, Communication Sciences and Disorders, and Public Health.

Real-world experiences are increasingly central to a Worcester State education. The Strategic Plan's Mid-Cycle Progress Report indicates that, since 2020, the percentage of students who receive an internship, practicum or fieldwork experience has grown from 8 percent to 21%, while experiential learning sections in courses have jumped from 30 to 36 percent. One example of expansion: in fall of 2024, the National Endowment for the Humanities awarded a grant establishing a Spotlight Fellows program whereby WSU's Department of Interdisciplinary Studies, the John J. Blinenda Center, and the Center for Teaching and Learning are forging new academic-community partnerships that support student learning outcomes in the humanities.

The Graduate School has overseen substantial growth in online enrollment. For two years in a row, we reached an institutional record for the number of students earning advanced WSU degrees. The Mid-Cycle Strategic Plan Report shows that we have already reached our 2027 goal of 10 fully online graduate programs, and the online Master of Science in Nursing (MSN) program was ranked [second best in the state](#) for 2025 by RegisteredNursing.org, based on factors including program quality, affordability, and graduate success rates.

Growing enrollment in the Pre-law minor, which has tripled since Fall 2019, led to WSU establishing new access points for undergraduate students to pursue graduate-level and professional legal education. With the University's international partner Ulster University, through Ulster's School of Law, the WSU School of Humanities and Social Sciences has established a pathway that allows graduates from undergraduate majors in English, History, Political Science, Sociology, and Urban Studies to gain entrance seamlessly to Ulster University's Master of Laws (LLM) programs in Access to Justice, Gender and Human Rights, and Human Rights Law and Transitional Justice, and to Ulster University's Master of Science program in Peace and Conflict Studies.



Philanthropy, Grants, and Strategic Support

Worcester State University's advancement and grants efforts continued to deliver exceptional outcomes in FY25, strengthening both the University's financial foundation and its direct student support capacity. As of April 30, the Worcester State Foundation provided over \$1.8 million in funding, with more than \$600,000 awarded in scholarships and academic support to nearly 400 students. Additionally, over \$800,000 has been raised for scholarships and awards—marking the sixth consecutive year this milestone has been reached.

This year, University Advancement raised nearly \$7 million from 2,360 donors, including transformational gifts such as the \$1.24 million Becker College endowment transfer and major commitments supporting nursing, audiology, entrepreneurship, and international education. Several new funds were established, and donor engagement initiatives—including WooGives, VIP athletic events, and 50th anniversary celebrations for the Nursing and Urban Studies departments—helped deepen alumni and community connections. Notably, Advancement hosted 30 alumni events with nearly 1,500 attendees and deployed strategic multichannel campaigns for both fundraising and stewardship. University Advancement also reports a 248% growth in endowment value since 2011.

Grants activity also achieved record success, with over \$3.6 million awarded to support enrollment strategies, career readiness, STEM engagement, student mental health, Early College, and basic needs initiatives. Highlights include a \$760,000 anonymous foundation grant to support enrollment and career services innovations, a \$270,725 grant from the MA Department of Higher Education for mental health programming, and a \$153,978 [Project SERVE](#) award to enhance campus safety and wellness following the October 2023 shooting.

[The Latino Education Institute](#) (LEI) secured significant support for its civic engagement and educational access programs, with over \$580,000 in grants from organizations such as the Barr Foundation, Balfour Foundation, United Way of Central MA, and the Fred Harris Daniels Foundation. Multi-year grants continue to drive impact across STEM pathways, inclusive education, and student support initiatives, with sustained backing from the U.S. Department of Education, National Science Foundation, and private foundations.

University Advancement also launched new stewardship programs, including personalized student thank-you messages, holiday recognition mailings, and donor events such as the Loyal Lancers reception and Homecoming VIP tent, all of which helped support strong donor retention and engagement throughout the year. These efforts also cultivate long-term engagement aligned with institutional priorities.



Appendix

University Advancement's FY25 Highlights and Impact

DIVISION OF UNIVERSITY ADVANCEMENT FY25 Highlights and Impact

7/1/24- 4/30/25

ALUMNI ENGAGEMENT

The Office of Alumni Relations successfully coordinated 30 events, attracting a total of 1,468 attendees. Notable highlights include:

- The 50th Anniversaries of the Nursing and the Urban Studies departments, engaging and soliciting over 100 alumni at each event.
- The Florida events on the east and west coasts, connecting with approximately 100 alumni and friends.
- Sea Change screening featuring renowned photojournalist Brian Skerry served as both a donor stewardship event and an educational experience for the broader university community. The program highlighted critical ocean conservation issues, engaging alumni, students, and faculty while reinforcing the university's commitment to global environmental awareness and sustainability.
- Partnering with OSILD and CDC to plan Future Forum for young alumni and students, replacing the Backpack Briefcase event.
- Partnering with Athletics to support six alumni games and receptions for alumni and two events honoring alumni athletes: the "First Teams" of each athletic program and the Athletic Hall of Fame.

DONOR ENGAGEMENT

The University Advancement development team implemented a comprehensive strategy to strengthen the Annual Fund, utilizing a multichannel approach that included both mail and digital outreach. Targeted micro-appeals were also deployed to engage specific donor segments effectively.

In collaboration with the Office of Alumni Relations, the development team strategically aligned fundraising efforts with academic department milestone events, maximizing engagement and philanthropic support. Notably, the 50th Anniversary Open House for the Nursing Department and the Urban Studies 50th Anniversary celebration served as key opportunities to solicit contributions in support of these programs.

Another significant achievement was leveraging the University's 150th Anniversary Special Edition Magazine as a strategic fundraising outreach opportunity. This commemorative publication not only celebrated the institution's rich history but also served as a platform to engage alumni in a meaningful way. Fundraising collateral was included with the magazine, inviting recipients to reflect on the University's legacy and contribute to its continued success. This historic look back provided a compelling narrative for encouraging philanthropic support.

WooGives, which replaced Chandler's Challenge, was a success, raising over \$37,000 and with the participation of 644 donors.

BEYOND 150

Mid-Cycle Progress Report 2023-2024



Our Place.
Our Purpose.

WORCESTER STATE
UNIVERSITY

INTRODUCTION

As we reach the midpoint of our strategic plan: *Beyond 150: Lead, Succeed, and Engage* (2020-2027), we take this opportunity to reflect on the significant progress made in advancing our strategic priorities.

The first half of this planning cycle presented significant challenges, including a global pandemic, a nationwide decline in undergraduate enrollment, and financial constraints compounded by stagnant state funding. Despite these obstacles, we have made significant progress toward our goals.

Higher education continues to evolve rapidly, requiring institutions to be agile and forward-thinking. We have refined the strategic plan as necessary, while maintaining the foundational goals established through collaboration with the University community.

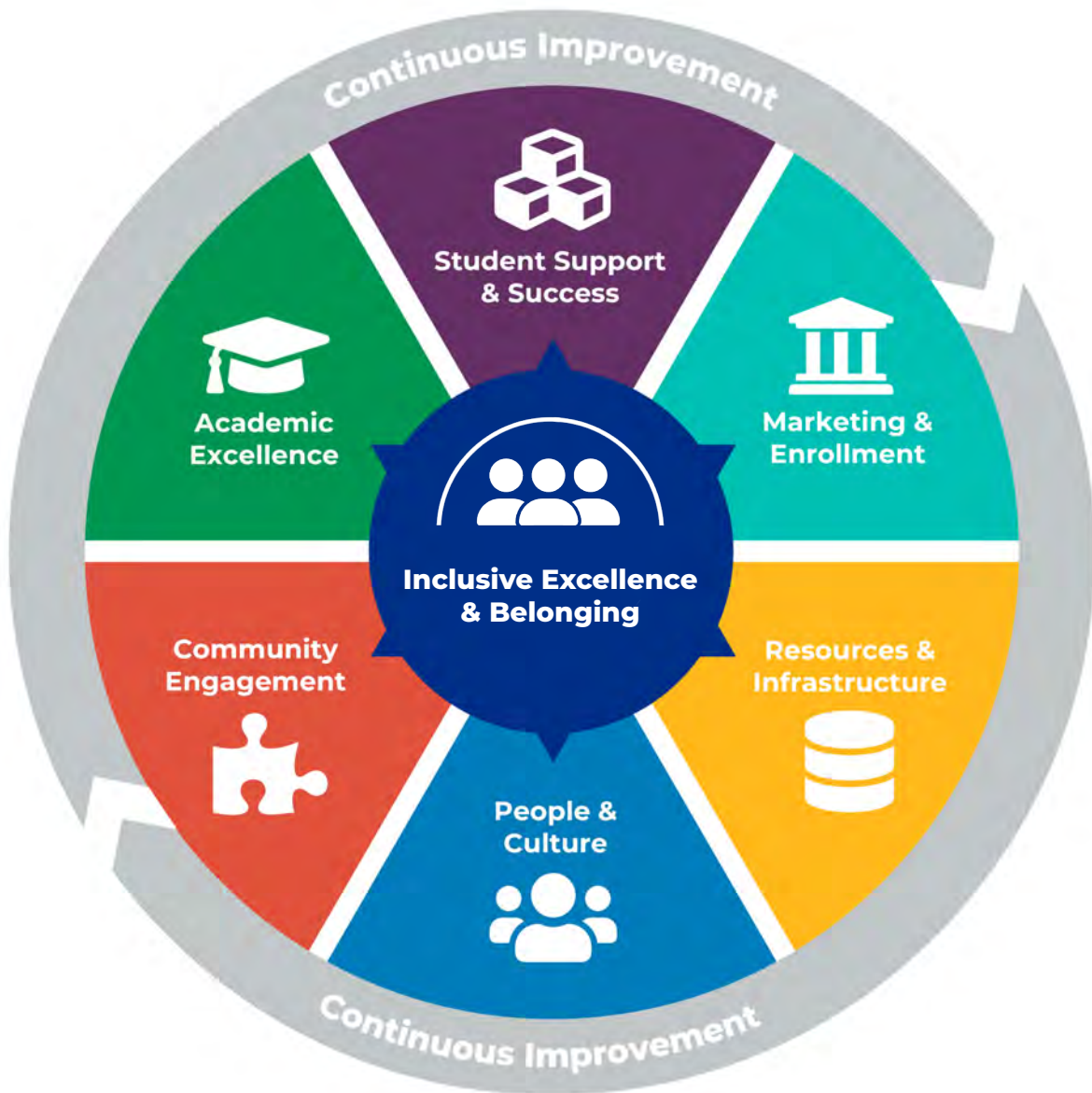
Through an enhanced emphasis on integrated planning and data-informed decision-making, we have strengthened our capacity to navigate change effectively. The establishment of the Operational Excellence Team has further reinforced our focus on continuous improvement across all areas of the University.

This report provides an overview of our achievements to date, including improvements in key metrics, progress on initiative implementation, and highlighting accomplishments from 2023-2024.

While not an exhaustive account of all of our efforts, this report reflects the substantial advancements made possible by the collective efforts of the entire Worcester State University community—faculty, staff, students, alumni, donors, and partners.

As we enter the second half of our planning cycle and celebrate Worcester State University's 150th anniversary, we reaffirm our commitment to providing a high-quality, accessible, and transformational education for the students who need it the most.

FRAMEWORK



PROGRESS OVERVIEW

52%

Metric targets met.

37%

Initiatives that are established practices.

91%

Metrics more than halfway to target.

80%

Initiatives that have been fully implemented

44%

IE&B metric targets met.

42%

IE&B initiatives that are established practices.

89%

IE&B metrics more than halfway to target.

86%

IE&B initiatives that have been fully implemented.

60%

CI metric targets met.

34%

CI initiatives that are established practices.

96%

CI metrics more than halfway to target.

81%

CI initiatives that have been fully implemented.

*IE&B: Inclusive Excellence & Belonging
CI: Continuous Improvement*

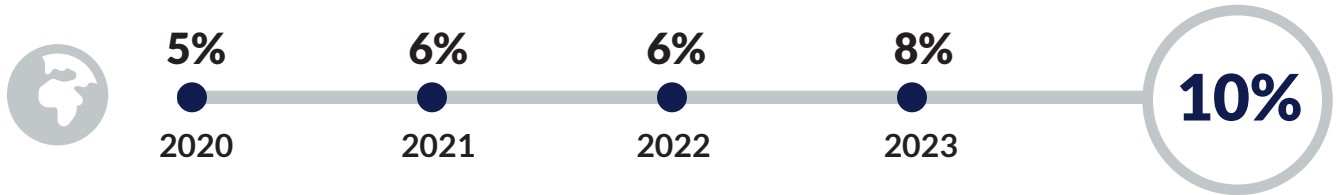


INCLUSIVE EXCELLENCE & BELONGING



PROGRESS INDICATORS

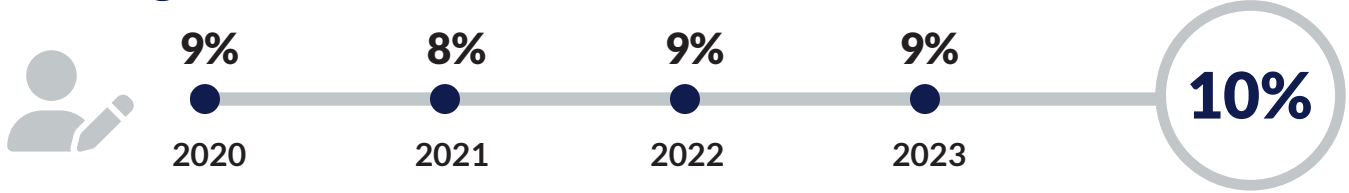
Diversity Course Sections



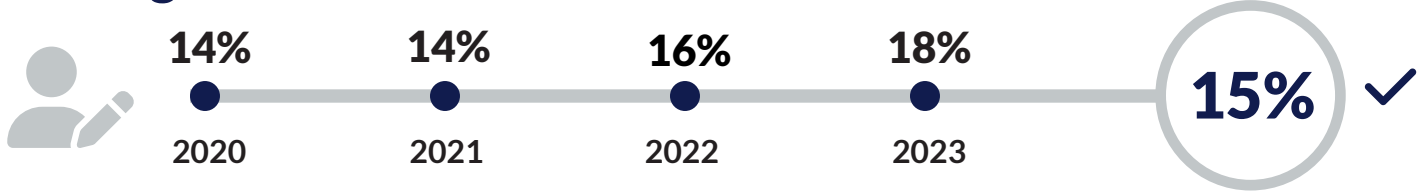
Inclusive Excellence & Belonging Events



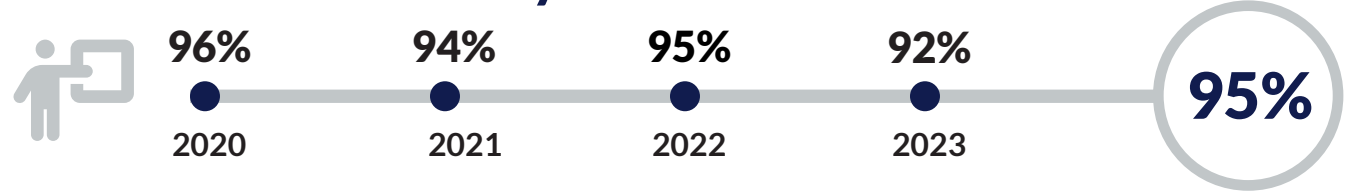
Undergraduate Enrollment: African American



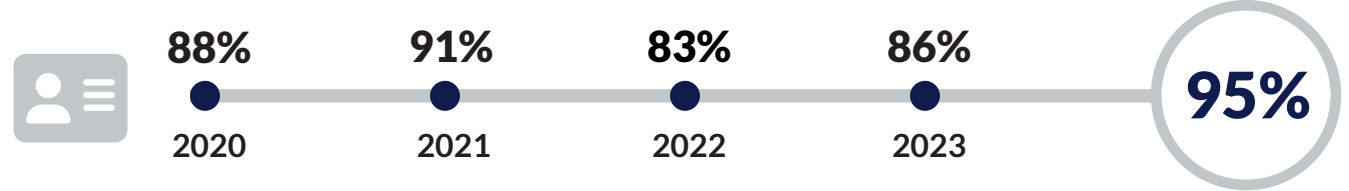
Undergraduate Enrollment: Latine



ALANA/BIPOC Faculty Retention



ALANA/BIPOC Staff Retention



INCLUSION & BELONGING



2nd Annual Lavender Graduation

Recognized graduating LGBTQIA+ students and honored their resilience and perseverance. Students were given lavender stoles to wear at Commencement.



Spanish-Language Sub-site Launch

The new site for prospective students and their families provides information on admissions, financial aid, and campus life, and includes a list of Spanish-speaking professors and admissions counselors.



Inaugural DEI Fellow

Ilyasah Shabazz, daughter of Malcolm X and Dr. Betty Shabazz and award-winning author served as the first DEI fellow at Worcester State.



Unity Day 2023

The 2nd Annual Unity Day featured panels, workshops, presentations, and a Unity Walk with a flag raising ceremony for the Hispanic Association of Colleges and Universities.



Calling In: Navigating Challenging Conversations

Dr. Loretta Ross, activist, author, and academic, discussed "Calling In" culture, based on her new book of the same name.



CONTINUOUS IMPROVEMENT



PROGRESS INDICATORS

Operational Excellence Projects	Financial Sustainability Recommendations
Reviewed 41	Reviewed 70
Initiated 31	Initiated 36
Completed 17	Completed 16

Processes and/or Practices Improved
249



Grant Budget Form

Created a grant budget form that automatically calculates and groups expenses and computes overhead costs.



VPA Liability Waiver

Developed a digital liability waiver using a QR code, allowing faculty instant access to check on waiver completion.



Procurement Process

Centralized procurement submissions through a shared mailbox, minimizing overlooked submissions.



CORI Verification

Created a digital process for CORI verification using a QR code, resulting in faster processing times and reduced administrative burden.



Event Planning RIE

Successfully executed a four day Rapid Improvement Event to analyze, identify challenges, and enhance workflows relating to event planning.



Directory Access

Restricted access to the "People" search function in the online directory for internal users only to enhance cybersecurity.

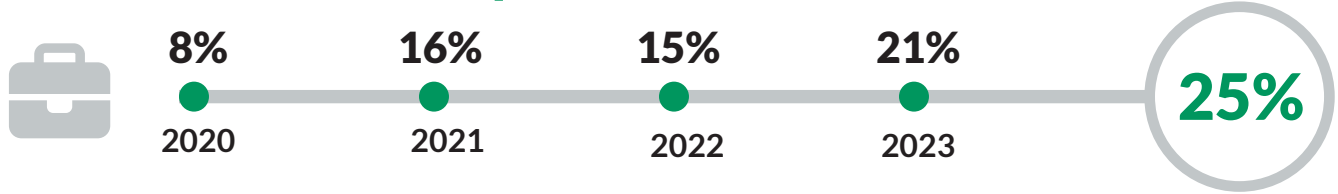


ACADEMIC EXCELLENCE AND DISTINCTION

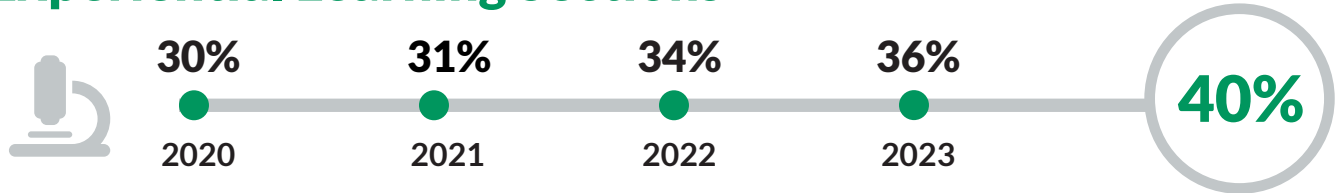


PROGRESS INDICATORS

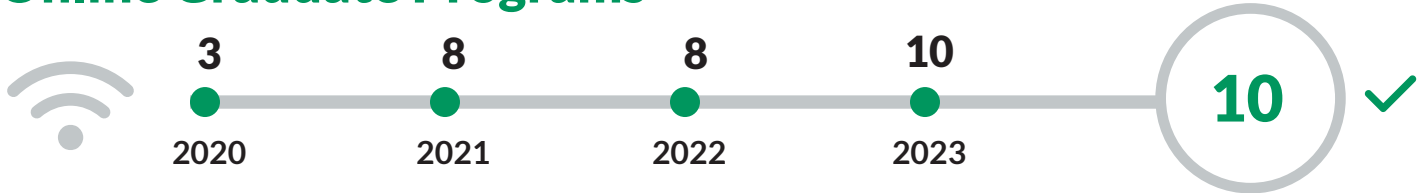
Students in Internship, Practica, or Fieldwork



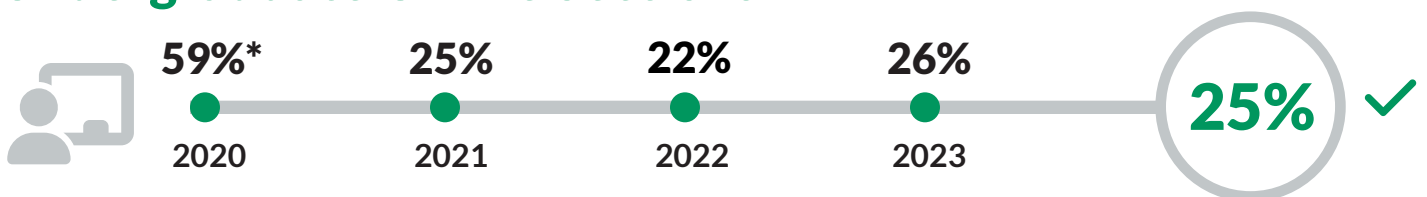
Experiential Learning Sections



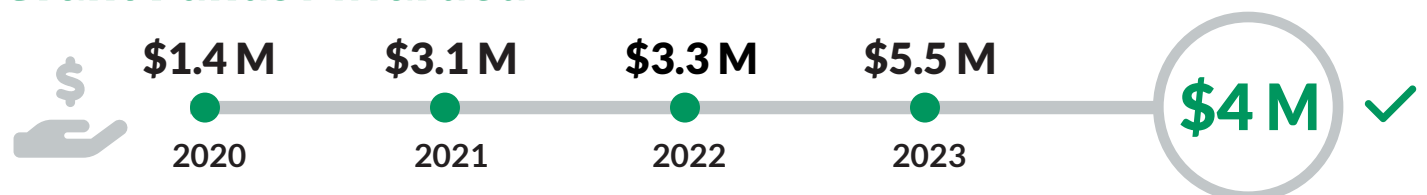
Online Graduate Programs



Undergraduate Online Sections



Grant Funds Awarded



*COVID-19 Year

RECOGNITION



Dr. Meghna Dilip

Chemistry

**American Chemical Society Award for
Incorporating Sustainability into Chemistry
Education**



Dr. Nabin Malakar

Earth, Environment & Physics

Fulbright Specialist Award



Dr. Margaret Kerr

Chemistry

Fulbright Specialist Award



Dr. Heather Treseler

English

May Sarton New Hampshire Poetry Prize



Joss Bracero

English Major

Elizabeth Bishop Manuscript Prize



EXTERNAL FUNDING



\$146,883

Dr. Benjamin Jee

Psychology

National Science Foundation

To develop card games that promote biological knowledge in young children.



\$256,600

Dr. Ian Stephens

Earth, Environment & Physics

Universities Space Research Association

For his ongoing research on star formation.



\$24,000

Dr. Elinor Fondell

Health Sciences

Barbro Osher Foundation and SWEA Boston

To support a faculty-led student trip to Sweden.



\$15,000

Dr. Heather Treseler

Presidential Fellow for the Arts

George F. and Sybil H. Fuller Foundation

To fund visits to the Worcester Art Museum for 800 students.

Artificial Intelligence's Impact on Academia

Faculty Learning Community

Year-long learning community exploring AI in higher education.

AI Open Studio

Faculty shared experiences and practical applications of AI in teaching and research.

Inclusive Learning

Change One Thing Workshops

Equitable teaching workshops

Student Course Equity Consultant

Infused student perspectives in course design for inclusive learning

Faculty Career and Leadership Institute

Early Career Teaching Fellows

Learning community for tenure-track faculty focusing on teaching effectiveness and innovation.

Mid-Career Faculty Leadership Fellows

Learning community for post-tenure faculty focusing on higher education leadership preparation.

Teaching and Learning Partnerships

"Use the Mic" Campaign

Collaboration with Student Accessibility Services.

Learning Management System (LMS) Project

Review and implementation project with Information Technology Services.

UNIQUE LEARNING OPTIONS



University Greenhouse

The renovated greenhouse provides a space for research and learning for both classes and individual student projects.



University Collaborative Child Care Center

Collaboration with the Guild of St. Agnes provides classroom experience for students and childcare to the community.



Remote Area Medical

The free health clinic experience offers hands-on experience for students while providing healthcare to community members.

THE WORCESTER GUARDIAN

FREE | NONPROFIT | NEWS

The Worcester Guardian

This partnership creates internship opportunities for students and expands local news coverage for the community.

SELECTED PUBLICATIONS

Dr. Mark Beaudry (Criminal Justice). “Cybercrimes and Cybercriminals.” *Kendall Hunt*.

Dr. Kristine Camacho, **Dr. Christina Kaniu** and graduate students **Christina Dwyer** and **Jill Petkewich** (Education). “University Policy Support for Threat Assessment: A Case Analysis of Public Higher Education Institutions in One U.S. State.” *Journal of Threat Assessment and Management*.

Dr. Meghna Dilip, **Dr. Jeremy Andreatta**, and students **Grace VanKirk**, **Ama Aninakwa**, and **Vivian Parker** (Chemistry). “Teaching green chemistry, sustainability ethics, and toxicity using nail polish removers.” *Green Chemistry Letters and Reviews*.

Dr. Yan Hu (Biology) and co-authors. “An efficient method for viable cryopreservation and recovery of hookworms and other gastrointestinal nematodes in the laboratory.” *International Journal for Parasitology*.

Dr. Maxim Lavrentovich (Earth, Environment & Physics) and co-authors. “Chiral Ground States of Ferroelectric Liquid Crystals.” *Science*.

Dr. Jacquelyn Raftery-Helmer, **Dr. Kathryn Frazier**, **Dr. Colleen Sullivan**, **Dr. Nicole Rosa** and students **Taylor Hapenny**, **Erica Hanlon**, and **Alyson Langhorst** (Psychology). “Protecting Student Motivation Following COVID-19: The Role of Need Satisfaction in a Period of Prolonged Remote Learning.” *Scholarship of Teaching and Learning in Psychology*.

Dr. Christina Santana (English) and **Dr. Aldo Garcia-Guevara** (History & Political Science) Editors. “Anti-Racist Community Engagement: Principles and Practices.” *Campus Compact*.

Dr. Ian Stephans (Earth, Environment & Physics) and co-authors. “Aligned Grains and Scattered Light Found in Gaps of Planet-Forming Disk.” *Nature*.

Dr. Karl Wurst (Computer Science) and co-authors. “Gitkit: Teaching git and github/gitlab workflow in an authentic context.” *Journal of Computing Sciences in Colleges*.

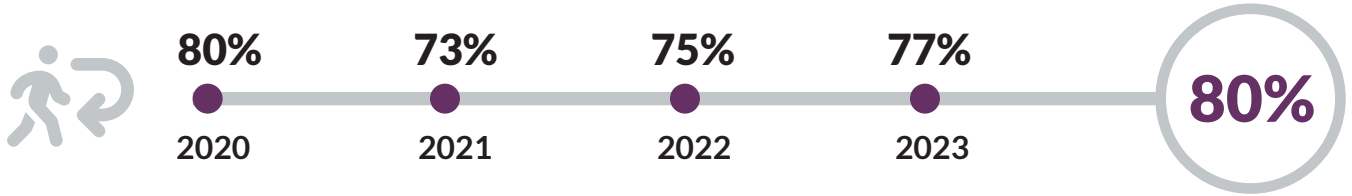


STUDENT SUPPORT AND SUCCESS

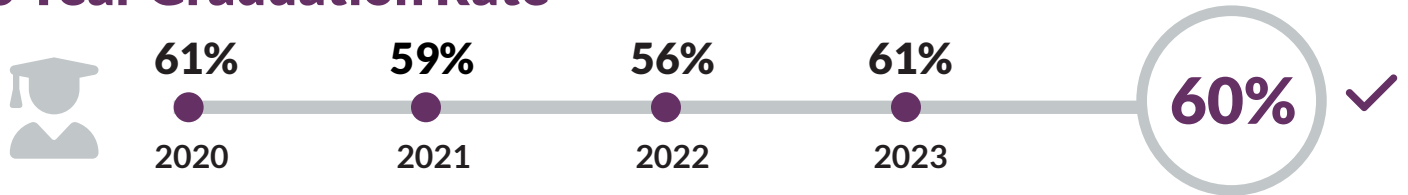


PROGRESS INDICATORS

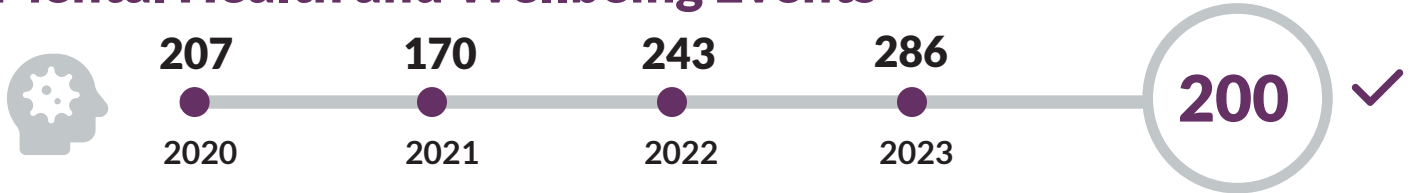
First-Year Retention Rate



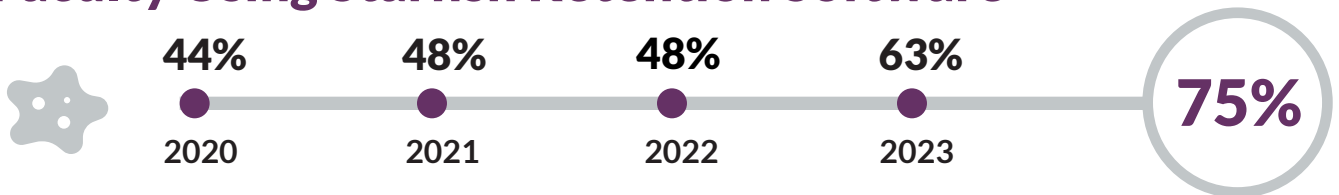
6 Year Graduation Rate



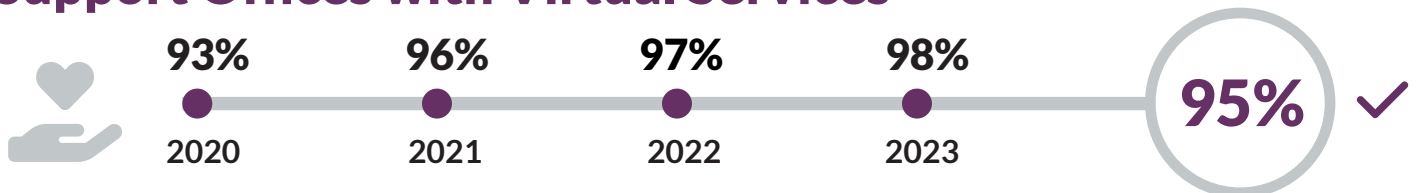
Mental Health and Wellbeing Events



Faculty Using Starfish Retention Software



Support Offices with Virtual Services



RECOGNITION



Dr. Stephanie Teixeira

Director of Military Services & Veteran Affairs

Outstanding Leadership Award

Education 2.0 Conference



Anabelle Santiago

Public Health & Business Administration Major

Meridith D. Wesby Young Leader Award

United Way of Central Massachusetts



Military Friendly School

Silver Award winners have earned the elite Military Friendly® designation and have programs that scored within 20% of the 10th-ranked institution within a given category.



Military Spouse Friendly School

Institutions that provide the best post-secondary education experiences for spouses of service members receive this prestigious designation.



EXTERNAL FUNDING



\$95,260

MA Department of Higher Education

To support students' mental and behavioral health programing including Resilient U.



\$37,000

MA Department of Higher Education

For the Hunger Initiative to address food insecurity efforts on campus.



\$153,978

U.S. Department of Education Project SERV

For training in emergency response and counseling.



\$10,000

Saint Vincent Hospital

To strengthen the local nursing pipeline by providing five \$2,000 scholarships for nursing students in their senior year.

HEALTH & WELLBEING



Wellness Expo

Over 60 exhibitors offering a variety of interactive and engaging experiences.



Fresh Check Day

More than 450 students attended the national mental health promotion initiative.

Culture of Respect®
Ending Campus Sexual Violence
A NASPA Initiative

Sexual Misconduct Survey

As part of the Culture of Respect Collective, a survey was deployed to measure student perceptions of safety on campus.

ResilientU
@WooState

ResilientU Relaunch

The streamlined platform provides students with free mental health and wellness support.

STUDENT SUPPORT



Iris Photo Booth

Provided high quality headshots for students regardless of financial situation. Sponsored by Rosen Cancer Awareness Fund & University Advancement.

FYS Peer Mentor Program

Peer mentors supported first-year students in First Year Seminar courses. The mentors received training in leadership and mentorship skills prior to the start of the term.



Backpack to Briefcase

The week-long program included networking with alumni, mock interviews with recruiters, resume review, headshots, and a Dinner with Strangers.

New Student Fall Welcome

A bridge between the traditional orientation and the beginning of classes. Included Academic Convocation with 1033 students attending, which is the largest convocation ceremony to date.



Student Activism Workshop

Interdisciplinary Studies and the First-Year Seminar initiative hosted a workshop on student activism led by Alison Frisella, doctoral student in Anthropology at UMASS Amherst.



MILITARY & VETERAN STUDENTS



Student Veteran Graduation & Awards Dinner

Honored graduating veteran students for their dedication, grit, and perseverance in the line of duty and in college. Veterans were presented with graduation regalia and state citations.



Student Connection

Military Connected Student Group
Student Veterans of America Chapter
Worcester Railers Military Appreciation Night
Worcester Veteran's Day Parade
Veteran Student Dodgeball



Military Commissioning

Honoree Lieutenant John Regan graduated in the summer and was leaving immediately for active-duty service, so he could not participate in the commencement celebrations.



R.E.D. Campaign (Remember Everyone Deployed)

Campaign to increase awareness and support for deployed service members.

Women's Ice Hockey

Won the ECHA Championship and was awarded the U.S. Marine Corps & American Volleyball Coaches Association Team Academic Award for academic excellence.



Women's Field Hockey and Men's Basketball Won the MASCAC Championship.



Dance Team

Won 7th place in the Open Hip Hop category at the Universal Dance Association's national competition.



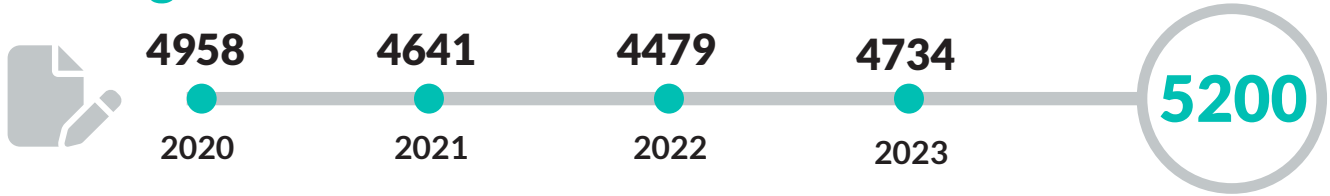


MARKETING AND ENROLLMENT

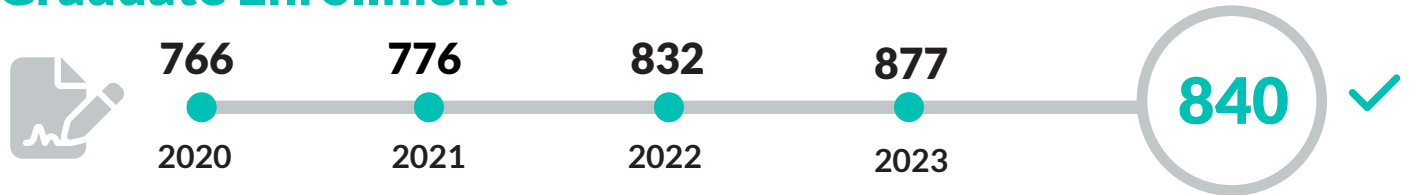


PROGRESS INDICATORS

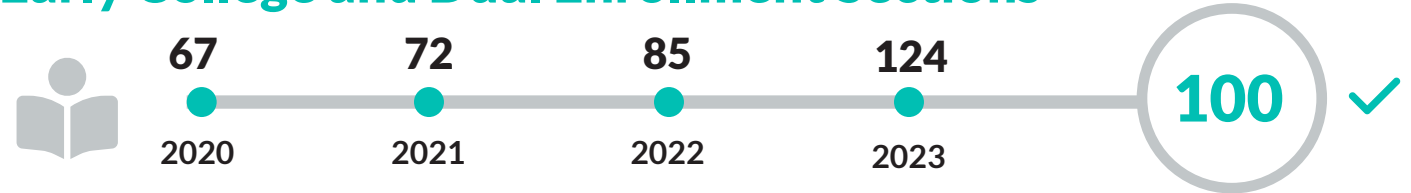
Undergraduate Enrollment



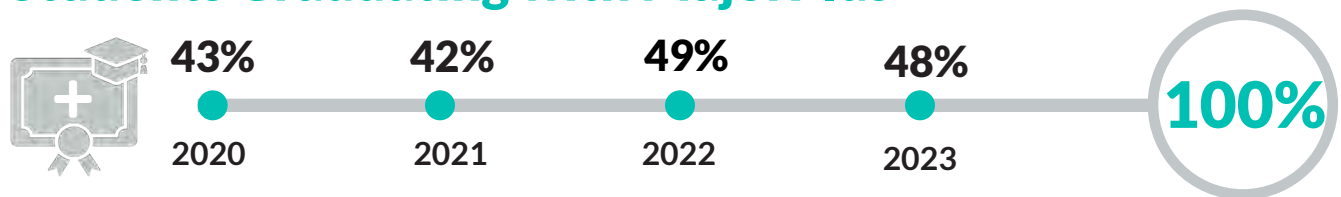
Graduate Enrollment



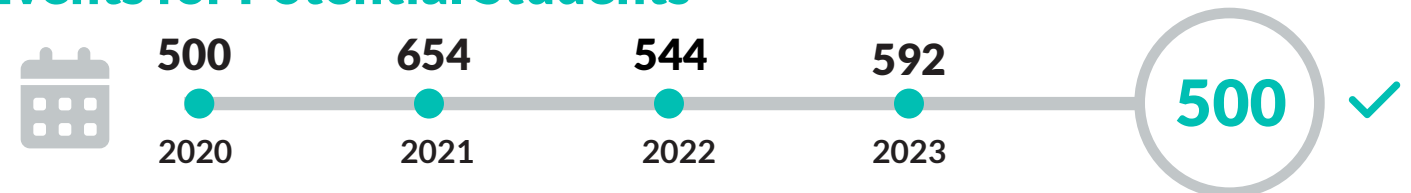
Early College and Dual Enrollment Sections



Students Graduating with MajorPlus



Events for Potential Students



RECOGNITION

**BEST
REGIONAL
UNIVERSITY
NORTH**

**U.S. NEWS &
WORLD REPORT**

**TOP PUBLIC
UNIVERSITY
NORTH**

**U.S. NEWS &
WORLD REPORT**

**TOP
PERFORMERS
ON SOCIAL
MOBILITY**

**U.S. NEWS &
WORLD REPORT**

**AMERICA'S
TOP
COLLEGES**

FORBES MAGAZINE

**BEST
VALUE
COLLEGES**

NICHE

**BEST
COLLEGES
FOR YOUR
MONEY**

MONEY MAGAZINE



EXTERNAL FUNDING



\$94,757

MA Department of Higher Education
In support of Early College Initiatives.



\$40,000

MA Department of Higher Education
To support Commonwealth Dual Enrollment efforts with two school districts.



\$72,614

MA Inclusive Concurrent Enrollment Initiative Planning Grant (MAICEI)
In support of students with special education needs attending classes at WSU.



\$218,018

Nursing Pathways Expansion Grant
MA Workforce Skills Cabinet
For continuing work in conjunction with Quinsigamond Community College and community partners.



COMMUNITY ENGAGEMENT AND PUBLIC GOOD



PROGRESS INDICATORS

Partnerships with Local Organizations



605

2020

651

2021

697

2022

701

2023

500



Faculty and Staff Engaged with the Community



123

2020

167

2021

172

2022

177

2023

150



Students in Civic Engagement Sections



2184

2020

3142

2021

3097

2022

3297

2023

3000



Student-Faculty Scholarly/Creative Pursuits



186

2020

160

2021

164

2022

283

2023

150



Alumni Events



48

2020

48

2021

44

2022

45

2023

50

RECOGNITION



Alex Lucier

Communication Major

Newman Civic Fellowship

Recognizing students for their leadership and commitment to creating positive change at Campus Compact institutions.



Carnegie Foundation Community Engagement Classification

National distinction recognizing institutions that make extraordinary commitments to community engagement.



Latino Education Institute

United Way of Central MA Aubrey Reid Award

In recognition for its years of excellent community service.



Carmen Rosado

LEI Family Engagement & Community Liaison

Commonwealth Heroines Class of 2024

MA Commission on the Status of Women and the MA House of Representatives.



EXTERNAL FUNDING



\$982,000

Dr. Jaime Vallejos (Health Sciences)

Dept. of Elementary and Secondary Education

To continue the Students of America Future Health Professionals Program



\$2,799,308

Youth Problem in Gambling initiative

MA Department of Public Health

10-year contract



\$862,000

Secured by

The Latino Education Institute

Including grants from:

United Way Community Investments - Women's Initiative

United Way of Central Massachusetts

Greater Worcester Community Foundation

Nellie Mae Education Foundation

UMass Memorial Determination of Need Funds

Fred Harris Daniels Foundation

Department of Elementary and Secondary Education

Massachusetts Biotechnology Initiative

COMMUNITY ENGAGEMENT



STEM Connections Camp

Local high school students were able to explore STEM skills through support from Cornerstone Bank.



Men's Hockey Fundraiser

The team visited Worcester Animal Rescue League and brought toys donated from their dog toy toss fundraiser.



Singing Program

Visual & Performing Arts and Speech-Language-Hearing Sciences students offered a weekly singing program for community members with Parkinson's disease.



Housing Justice Summit

The Urban Action Institute brought together community leaders to discuss the region's housing crisis.

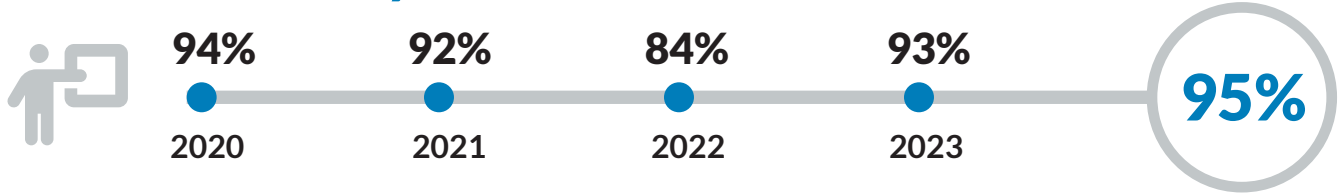


PEOPLE AND CULTURE

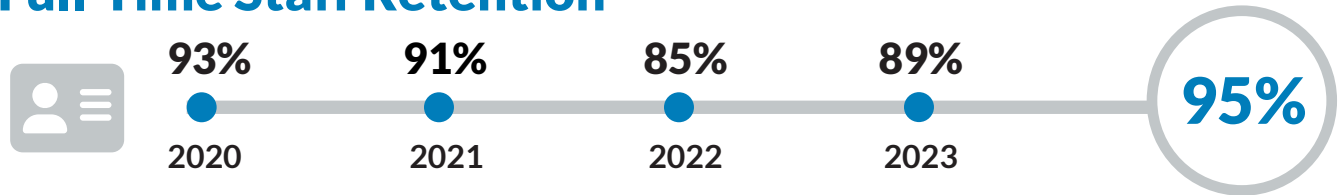


PROGRESS INDICATORS

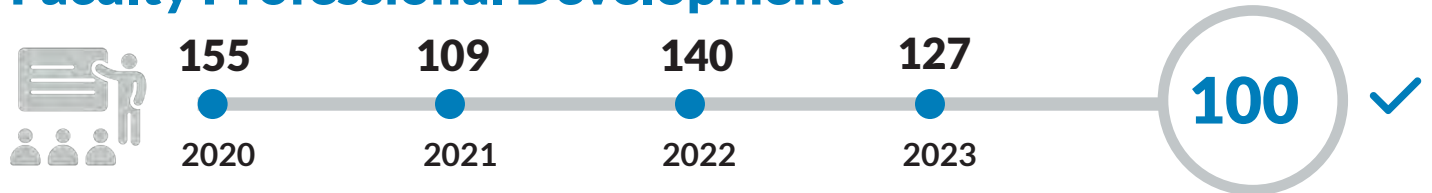
Full-Time Faculty Retention



Full-Time Staff Retention



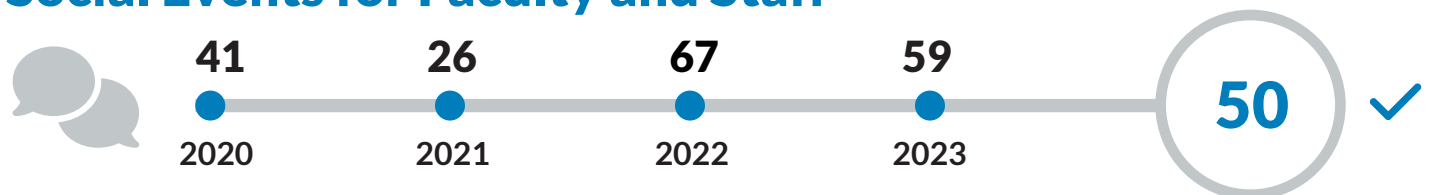
Faculty Professional Development



Staff Professional Development



Social Events for Faculty and Staff



© RECOGNITION & FUNDING



Emerging Hispanic Serving Institution Designation

Hispanic Association of Colleges & Universities and Excelencia in Education



2023 Community Choice Award: Best College/University

Worcester Telegram and Gazette



\$57,000

Welcoming, Inclusive & Supportive Environments Graduate Fellows Program

Dept. of Higher Education Higher Education Innovation Fund
Supports early career development for ALANA/BIPOC graduate students on the path to professorships.



UNITY, PRIDE & COMMUNICATION

Online Resource Center

The University created an internal online resource center to centralize official announcements, updates, and resources related to campus incidents and federal actions.

Capt. Ross A. Reynold Memorial Fountain

The University celebrated the life of U.S. Marine Corps. Captain Ross A. Reynolds '17 through the dedication of a memorial fountain in his name.

Employee Service Recognition & Retirement Celebration

Campus Collaboration Award

Jennifer Quinn (Student Affairs)

Diversity and Inclusion Award

Frances Manocchio (Student Accessibility Services)

Riley McGuire (English)

Edgar Moros (IELI)

Extraordinary Dedication Award

Sonela Demirazi (DGCE)

John Mejia (Facilities)

Sarah Potrikus (Student Engagement)

Sarah Strout (Assessment & Planning)

Donald Vescio (English)

Adam Zahler (Visual & Performing Arts)

Mark W. Cusson Award

Jason Grant (Sociology Clerk)

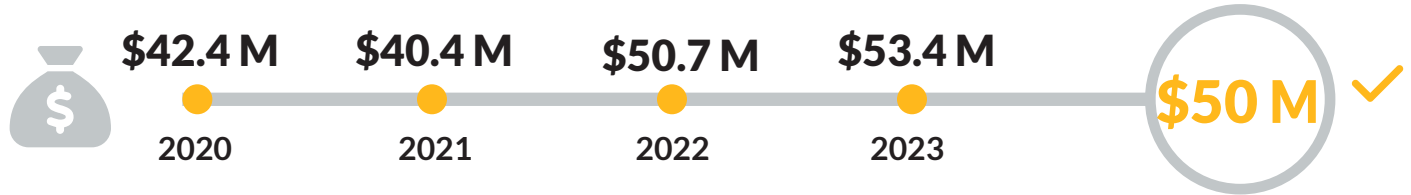


RESOURCES AND INFRASTRUCTURE

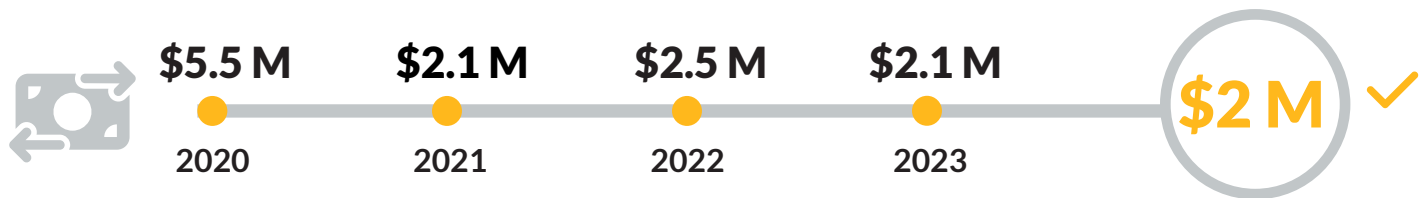


PROGRESS INDICATORS

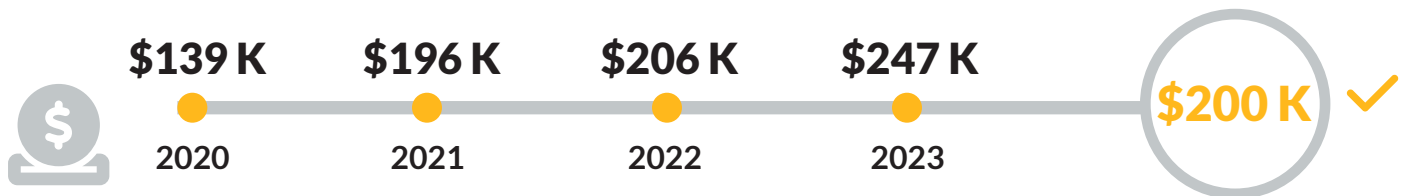
Overall Endowment



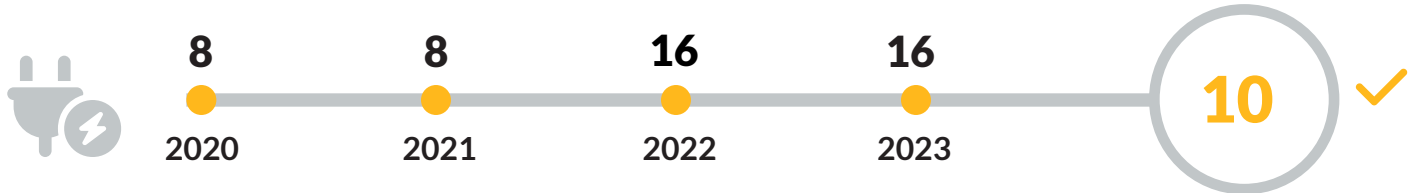
Endowment Funds Transferred to the University



Student Emergency Funds Raised to Date



Electric Vehicle Charging Stations



Est. Savings/Reduction from OpEx/FSTF Projects to Date



RECOGNITION & FUNDING



Princeton Review Green College

Institutions are selected for their exceptional programs, policies, and practices related to sustainability and the environment.



Worcester State Foundation

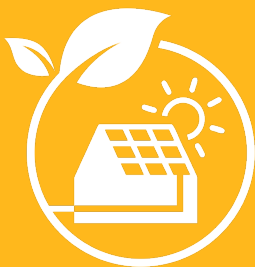
Ranks in top 3% compared to other 4 year public universities for its 23% increase in endowment market value. (National Association of College and University Budget Officers)



\$400,000

Nursing Pathways Expansion Grant

To purchase patient simulators and fully integrated mobile medication stations for the nursing program.



\$1.29 million

MA Executive Office of Education

To advance decarbonization efforts, address deferred maintenance and increase climate resilience.

PHILANTHROPIC SUPPORT

\$4.4 Million

Total amount raised from
2,502 donors.

\$115,000

Raised for scholarships at the
Worcester State Foundation
Board Golf Tournament.

\$1.07 million

Raised for scholarships and
awards

\$1.2 million

Transferred to the University
for direct student support

\$250,000

Gift to support the Robert E.
Mullin Scholarship Fund

\$250,000

Pledge for the John J.
Connolly '62, Ed. D. & Ingrid
Connolly Presidential Lecture
Series

TECHNOLOGY & FACILITIES



Sullivan Auditorium Renovation

Enhanced accessibility features (accessible entryway, accessible bathrooms including two gender-neutral facilities and assistive technology), upgraded lighting and sound systems, improved acoustics, a refurbished backstage, and a modernized foyer.



Eager Auditorium Renovation

Installation of surround sound systems and acoustic paneling, leveraging funding from the Massachusetts Higher Education Bond Bill for deferred maintenance projects and campus capital improvements.

FISCAL SUSTAINABILITY

\$3.2 million

Estimated savings or efficiencies from FSTF recommendations.

\$1.9 million

Estimated savings or efficiencies from Operational Excellence projects.

\$300,000+

Eliminated in credit card processing fees by implementing a third-party credit card process.

"A" bond rating

Maintained with Standard & Poors.

SUMMARY & ANALYSIS

At the midpoint of our strategic plan - *Beyond 150: Lead, Succeed, Engage*, we have made considerable progress across all six goals and two overarching areas. As we enter the second half of the strategic plan and celebrate our 150th anniversary, we are well-positioned to build upon the achievements of the first four years and fulfill the promise of our strategic plan: To lead, succeed, and engage beyond 150 years.

Progress to Date:

- 91% of metrics are at least halfway toward their targets.
- 52% of metric targets have been met or exceeded.
- 80% of initiatives have been fully implemented.
- 37% of initiatives are established ongoing practices.
- 86% of IE&B initiatives have been fully implemented.
- 81% of Continuous Improvement initiatives have been fully implemented.



SUMMARY & ANALYSIS

Academic Excellence & Distinction

- We have increased our academic offerings with over 25 new programs, majors, and minors, aligning with workforce and student demand.
- Experiential learning sections grew by 20% and student participation in internship, practicum, and fieldwork experiences increased from 8% to 21%.
- The Center for Teaching and Learning expanded its offerings to include peer mentorship, faculty leadership development, and workshops focused on current trends in teaching and learning, such as artificial intelligence.
- Our faculty have been recognized for their achievements, including Fulbright awards, publications in top-tier journals, and teaching awards.
- External grant funding increased by 138% from \$1.4 million to \$5.5 million, including competitive grants from prestigious agencies such as the National Science Foundation.

Looking Forward:

To appeal to non-traditional learners, we should focus on the initiatives relating to the flexibility of programs and courses, such as “Develop an accelerated degree completion program for non-traditional students.”, “Increase the number of degrees that can be attained completely online or during the evening.”, and “Create and offer an online track for core general education courses.”



SUMMARY & ANALYSIS

Student Support & Success

- First-year retention rates increased to 77%, approaching the 80% target, and the 6-year graduation rate reached 61%, surpassing our goal of 60%.
- Student support has been strengthened, with 63% of faculty utilizing Starfish for early alerts and student support offices enhancing their outreach to students.
- \$247,000 has been raised for the Student Emergency Fund, which has supported 363 students in times of financial hardship. Additional external grant funding has helped address food insecurity on campus.
- Campus life is thriving, with new student clubs and activities, many of which target under-served groups such as Military and Veterans, LGBTQ+ students, and ALANA/BIPOC students.

Looking Forward:

Despite our overall progress, we continue to see equity gaps in student outcomes. Compared to the 86% of white first-year students retained, the retention rate was 82% for African American students and 79% for Latine students. For graduation rates, 67% of white students graduated in six years, compared to 55% of African American students and 42% of Latine students. In the second half of the strategic plan, we should focus on initiatives relating to advising, academic support, and student retention.



SUMMARY & ANALYSIS

Marketing & Enrollment

- Our Strategic Enrollment Plan has produced positive results across undergraduate, graduate, and dual enrollment populations and our membership in the Common Application and targeted communications for transfer and adult learners further strengthened our enrollment funnel.
- While our undergraduate enrollment remains below pre-pandemic levels, we continue to see yearly improvements, with 4,734 students in 2023 (91% of target).
- Graduate enrollment has grown to 877 students, exceeding our goal. The accelerated online graduate programs in particular have experienced robust growth from 121 students in 2020 to 561 in 2023.
- Dual enrollment and early college opportunities have also expanded significantly, with annual course sections increasing to 124.
- Latine student enrollment reached 18%, resulting in our recognition as an Emerging Hispanic Serving Institution from the Hispanic Association of Colleges and University and Excelencia in Education.
- We have diversified our marketing, including multilingual recruitment materials, a Spanish-Language sub-site, and an increased social media presence.

Looking Forward:

As an Emerging Hispanic Serving Institution, we will need to examine our current policies and practices and enhance our support systems to ensure that our Latine student population is successful.



SUMMARY & ANALYSIS

Community Engagement & Public Good

- Student-faculty scholarly collaborations reached 283 (an 89% increase), and student research presentations and publications more than doubled.
- Our over 700 partnerships span local schools, nonprofit organizations, public health initiatives, and environmental stewardship projects. Faculty and staff community engagement increased, with 177 individuals involved in community-based activities in 2023.
- Our Carnegie Community Engagement Classification was renewed, recognizing our commitment to community engagement.

Looking Forward:

While most areas of the University are engaged with community, a centralized effort to identify and promote community engagement programs may help to improve the community's awareness of the role Worcester State plays in the local community.



SUMMARY & ANALYSIS

People & Culture

- The equity audit, strong Campus Pride Index score, and Inclusive Excellence and Belonging Strategic Plan, along with inclusion and belonging events such as Lavender Graduation, Unity Day, and “In Our Shoes” disabled student panel have helped create a more inclusive campus climate.
- We have improved internal communication through the continuation of Campus Conversations and the creation of an online internal resource center to centralize official announcements and resources.
- The launch of the data warehouse, improved data quality in our student information system, and the creation of the Operational Excellence team have helped to foster a culture of continuous improvement.

Looking Forward:

Faculty and staff continue to report confusion regarding the roles of various offices and individual staff. A comprehensive resource given at Academic Kick-Off each year, which outlines the role of each office and individual or role-based responsibilities may help to increase communication.



SUMMARY & ANALYSIS

Resources & Infrastructure

- The endowment has grown to \$53.4 million, surpassing our \$50 million goal.
- More than \$5 million in cost savings and operational efficiencies have been realized through Operational Excellence projects and Financial Sustainability recommendations.
- Capital improvements, such as renovations to Sullivan and Eager Auditoriums, have enhanced the campus experience and improved accessibility.

Looking Forward:

Staffing levels in Information Technology remain below the 36 FTE target and the organizational structure may no longer be suitable for the changes in the way in which IT interacts with the University. The initiative “Evaluate the organizational structure of IT and assess the need for additional resources and/or staffing” should be a focus in the coming years.

Environmental sustainability initiatives have stalled. Updating the Climate Action Plan, created in 2012, may lead to new initiatives and reinvigorate interest in sustainability.





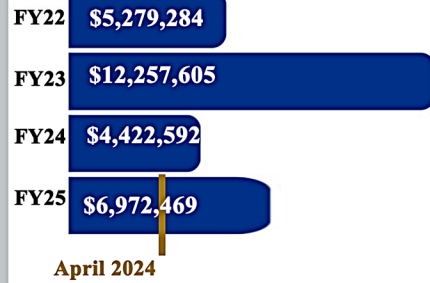
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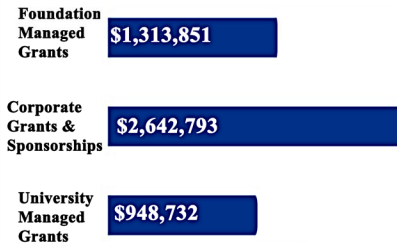
UNIVERSITY ADVANCEMENT Dashboard

July 1, 2024 - April 30, 2025

Total Dollars Raised



Grants and Corporate Sponsorships



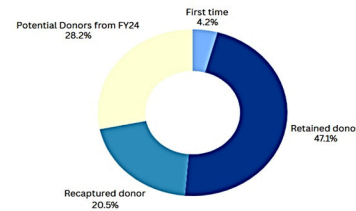
Total Donors



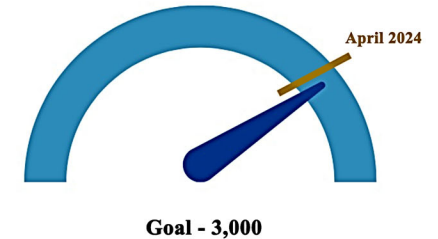
Alumni Donors



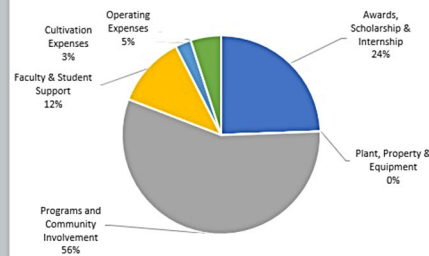
Alumni Donor Distribution



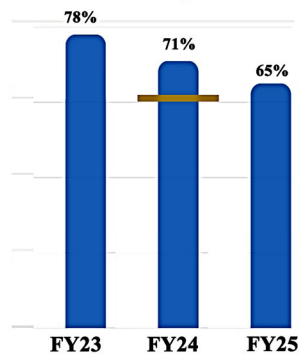
All Donors



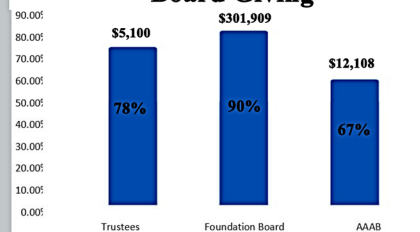
Expenses - University Priorities



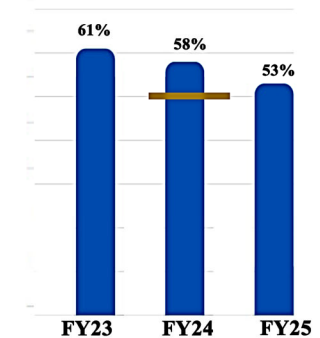
Loyal Lancers 1 yr. Retention



Board Giving



Alumni 1 yr. Retention



— represents the point at same time last fiscal year