

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Thursday, June 11, 2026
4:00 P.M.
Wellness Center, Room 204**

Meeting Called By: Dr. Lisa Colombo (Chair)

Minutes: Nikki Kapurch

Board Members: Dr. Lisa Colombo (Chair); Monica Aryitey, Esq; Kelly Brissette; Darnell Dunn; Mary Foley; Maureen Power; (Vice Chair); Kristen Garvey; Amy Peterson; Brandol Ogando Saladin; Jake Sanders; Dr. Lawrence Sasso (Vice Chair)

WSU Staff: Barry Maloney; Ashlynn Allain; Ryan Forsythe; 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. Administrative Business A. Call to Order B. Approval of the Minutes: <ol style="list-style-type: none"> 1. Full Board - April 9, 2026* 2. Academic & Student Development - April 9, 2026* 3. Nominating Committee - May 12, 2026* 	Dr. Lisa Colombo	1. vote required 2. vote required 3. vote required
2. Nominating Committee Report A. Nominating Committee Meeting Packet* B. Approve the 2026- 2027 Slate of Officers*	Amy Peterson	A. Informational B. vote required
3. Human Resources Committee Report A. Human Resources Committee Meeting Packet*	Maureen Power	A. Informational and (2) vote required
4. Finance & Facilities Committee Report A. Finance & Facilities Committee Packet*	Dr. Lawrence Sasso	A. Informational and (3) votes required
5. Planning & Development Committee Report A. Planning & Development Committee Packet*	Dr. Lawrence Sasso	A. Informational
6. Inclusive Excellence and Belonging Presentation - 15 minutes /Q&A A. BIRT Dashboard and Inclusive Excellence and Belonging Updates *	Edgar Moros	A. Informational
7. Administrative Updates A. Report of the Chair <ol style="list-style-type: none"> 1. 2026-2027 Meeting Schedule* B. Report of the Student Trustee C. Report of the President <ol style="list-style-type: none"> 1. President’s Update Message* 2. President Memo to Trustees re: Speaker & Awards* 3. Approval of Nominees for Speaker /Awards Pool 	Dr. Lisa Colombo Brandol Ogando Saladin Barry Maloney	1. vote required 1. informational 2. informational 3. vote required
8. Adjournment	Dr. Lisa Colombo	8. vote required

*Attachment

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

CHAIR: Dr. Lisa Colombo (Chair) DATE: April 9, 2026

LOCATION: Wellness Center, Room 204 MINUTES BY: Nikki Kapurch

TIME: 4:00 p.m.

BOARD MEMBERS: Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Maureen Power (Vice Chair); Kristen Garvey; Mary Foley; Brandol Ogando Saladin, Dr. Lawrence Sasso (Vice Chair), Jake Sanders

MEMBER ABSENT: Monica Aryitey, Esq; Amy Peterson

WSU STAFF: Barry Maloney; Ashlynn Allain; Kathy Eichelroth; Ryan Forsythe; Carl Herrin; Nikki Kapurch; Julie Kazarian; Josh Katz; 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 Thursday, April 9, 2026, in room 204 of the Wellness Center. Chair Colombo called the meeting to order at 4:00 p.m.

Administrative Business

APPROVAL OF THE MINUTES - Full Board Meeting - January 8, 2026

Upon a motion made by Trustee Sanders and seconded by Trustee Garvey, it was unanimously

VOTED: to approve the January 8, 2026, minutes of the Full Board Meeting as presented.

Chair Colombo welcomed two WSU championship sports teams to the meeting to congratulate them. The women's ice hockey team won its first MASSCAC championship. Men's basketball won its third MASSCAC title in five seasons, advancing to the NCAA tournament regional before losing to the eventual champion, University of Mary Washington. The team finished 15-13.

Chair Colombo recognizes and welcomes our newest trustee, Mary Foley. Mary has a tremendous amount of experience in both the state and federal governments. Trustee Foley introduced herself.

With Mary's appointment, Trustee David Tuttle's second term ends. Trustee Tuttle was an outstanding trustee for the last 10 years, serving on many committees and serving as chair of the board a few years ago. We will have a chance to recognize him at commencement, but I just wanted to acknowledge his service as well.

Academic and Student Development Committee Report

- Trustee Power, chair of the committee, reported that the group convened today at 3:00 p.m. and provided a summary of that meeting.
- We had a great presentation from the Provost, in which she introduced an additional candidate for sabbatical leave and announced the promotion and tenure of several Worcester State faculty members.

April 9, 2026

- Provost Wims provided the Committee with an informative presentation regarding the process of awarding tenure and promotion.
- 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 administration plans for the annual cost to the best of its ability and budgets accordingly.

Upon a motion made by Trustee Garvey and seconded by Trustee Sasso, it was unanimously

VOTED: to accept the recommendation of the Academic and Student Development Committee and approve the Fall 2026 sabbatical leave proposal for Riley McGuire as presented.

Recommendation for Promotions

Upon a motion made by Trustee Garvey 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, 2026, for the slate of faculty as presented:

Abir Bukhatwa	Business Administration and Economics
Carter Hardy	Philosophy
Maxim Lavrentovich	Earth, Environment, and Physics

Upon a motion made by Trustee Ogando Saladin and seconded by Trustee Garvey, 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, 2026, for the slate of faculty as presented:

Elizabeth Osborne	World Languages
Naida Saavedra	World Languages
Marc Wagoner	Psychology

Recommendation for Tenure with Promotion

Upon a motion made by Trustee Ogando Saladin and seconded by Trustee Garvey, 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, 2026, for the slate of faculty as presented:

Kyle Allaire	Mathematics
Kristine Camacho	Education
Sarah DiMeo	Occupational Therapy
Bo Fan	Business Administration and Economics
Laura Reynolds	Earth, Environment, and Physics
Luis Rosado	Biology
Heidi Wojcik	Education

Recommendation for Tenure

Upon a motion made by Trustee Ogando Saladin and seconded by Trustee Garvey, it was unanimously

VOTED: to accept the recommendation of the Academic and Student Development Committee and approve the awarding of tenure effective September 1, 2026, for the slate of faculty as presented:

Nada Alsallami	Computer Science
Mark Beaudry	Criminal Justice
Siri Colom	Sociology
William Deane	Nursing
Laura Kane	Philosophy
Riley McGuire	English
Ian Stephens	Earth, Environment, and Physics

Chair Colombo noted that in the Provost memo, one candidate on the tenure list was not recommended this year. **President Maloney** sent a memo to all board members on March 30, outlining the reasons for his recommendation not to award tenure. He asked the board members to let him know if they had any questions about his recommendation against awarding tenure to the professor.

With no questions or discussion, Chair Colombo stated that the board needs to take a vote on this and is seeking a motion to accept the President's recommendation not to award tenure to **Dr. Rita Mookerjee**.

Upon a motion made by Trustee Garvey and seconded by Trustee Ogando Saladin, it was unanimously

VOTED: to accept the President's recommendation not to award tenure to **Dr. Rita Mookerjee**.

Inclusive Excellence and Belonging Presentation

Update on LGBTQIA+ Community Center and Resources by Steven Edwards, Asst. Director, and Sarah Eagan, Asst. Professor

- President Maloney welcomed Edgar Moros, executive director of Inclusive Excellence and Belonging, who introduced Steven Edwards, assistant director, and Sarah Eagan, assistant professor.
- They presented the PowerPoint included in the packet.
- LGBTQIA+ Community Center completed its first year with nearly 1,500 visits and 63 programs.
- Renamed from Resource Center to Community Center and relocated to a larger, more prominent space in the student center.
- Despite a hostile national climate causing many universities to shut down similar centers, Worcester State expanded its LGBTQIA+ services—hiring Assistant Director Steven Edwards, adding a Title IX confidential resource provider, and securing a graduate assistant position.
- The fourth annual Lavender Graduate Celebration is taking place on Wednesday, May 6th. It opens at 2.30 pm in an eager auditorium, with refreshments to follow at the LGBTQIA+ community center.

Finance and Facilities Committee Report

- Trustee Sasso, vice chair of the Finance and Facilities Committee, reported that the group convened today at 2:00 p.m. and provided a summary of the meeting.
- Finance Committee reported a clean FY2025 federal fund supplemental audit with no findings;

Moody's and S&P ratings remain strong, though a structural deficit persists, and similar reserve/fee decisions are expected at the June board meeting.

- For the benefit of the new board members, the April meeting is when we get a first look at what's happening with the administration and their work on developing the budget for the next academic year. The June meeting is when we will be presented with their final thoughts on that and will vote on it.
- Chair Colombo asked the trustees to carefully review the board materials as we go into the board meeting in June, which will help us to make the right decisions.
- Congratulations, Kathy and team, and thank you for your stewardship of our financials.

REPORT OF THE CHAIR

Nominating Committee - Chair Colombo

- Chair Colombo notified the board that the bylaws require the chair to appoint a nominating committee to select next year's board officers and present a slate of officers at the June meeting.
- Trustee Peterson will chair that meeting, and will be staffed by Trustee Power and Trustee Brissette.
- The Committee will have a recommendation and report for the June 11 meeting.
- All trustees received an email invitation to all the Spring events. Please take a look at the dates on those, and if at all possible, try to attend.
- Next meeting: June 11, 2026.

REPORT OF THE STUDENT TRUSTEE

- Trustee Brandol Ogando Saladin provided a few updates.
- The SGA held Proud Lancers Day on April 8. Thanked the faculty and departments who showed up, helped us, and contributed to this event. It was amazing.
- SGA elections happen this week, and the newly elected student trustee, Kai Rahilly, is in the audience. Kai is a sophomore and serves on the SGA as a class of 2028 senator. She's a chemistry major with a minor in Spanish, a tour guide here at the University, and is very involved in clubs.
- SGA approved 12 clubs this year. It's been a busy year for the SGA.
- The master plan group met with many student groups on campus and received extensive feedback from students.
- Went on the DC Leadership Trip with 11 delegates to Washington, DC, to lobby on three issues. It was a wonderful experience.

REPORT OF THE PRESIDENT

President's Update

- The packet included the President's Update report. If any trustees have questions, please let the President know.
- VP Ryan Forsythe provided an enrollment update. Enrollment deposits stand at 430 — slightly below last year's 440 at this point — but Congratulations Day (Saturday, April 11) is expected to drive a rebound. 511 students registered for the event, with a Woo Sox partnership adding free game tickets and campus engagement.
- Worcester State is slated for Round 2 of the state's co-op pilot program (following Bridgewater State, Framingham State, and Mass College of Art in Round 1). Rollout will begin next fall across 3–4 departments and is designed to integrate with the existing Major Plus platform. President Maloney will bring an update on the co-op initiative, with more concrete details, to the board in the fall.
- President Maloney will bring a master plan update to the board at the June meeting. Campus master plan approval is now scheduled for October.
- The BRIGHT Act passed both the House and Senate without language changes and is now in

conference.

- President Maloney will invite new State Education Secretary Dr. Stephen Zrike Jr., former superintendent of Salem Public Schools, to replace outgoing Secretary Dr. Patrick Tutwiler, who stepped down in February.
- President Maloney introduced Felicia Riffelmacher, executive director of University Advancement, who provided an update on the Dashboard document that was included in the packet.
- Thanked all the board members for their support on promotion and tenure.

Honorary Degree

Approval of Honorary Degree

The President provided two memos in the packet seeking a couple of votes for some candidates to be considered for honorary degrees. The first vote seeks approval to confer an honorary doctorate on John Elder Robison. He is the selected commencement speaker for this year's commencement exercise. The President engages with the students of our senior class every year to determine who they want to bring in for the commencement exercise. In past meetings, we have brought names to our speakers and awards pool. Dr. Robison is one of those names.

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

**VOTED: to approve the awarding of the following honorary degree:
John Elder Robison, Doctor of Humane Letters, *Honoris Causa*, at
Undergraduate Commencement on May 16, 2026**

The second vote includes a list of additional names. There are many individuals in our community who are connected to the University in many ways. Some of the names on that list represent leaders, and others represent contributors and supporters of the institution in various ways. All of these names are eligible for approval of honorary doctorates and have been approved. We are using the opportunity throughout the year to award these different doctorates.

Looking for a motion to approve the awarding of degrees of Doctor of Humane Letters, *Honoris Causa*, to the following individuals, as presented.

Upon a motion made by Trustee Sanders and seconded by Trustee Garvey, it was unanimously

VOTED: to approve the awarding of the degrees of Doctor of Humane Letters, *Honoris Causa*, to the following individuals as presented:

**Michael Angelini
Thomas & Claudia Corcoran
Jerome Hewlett '87
Ruth Rubin '52
Dr. GB Singh and Lexi Singh
Megan Marshall**

Other Business

Chair Colombo informed the trustees that, at the end of the academic year, it's always the responsibility of the Human Resources Committee to evaluate the president, as was done last year. That evaluation, along with the recommendation for a salary adjustment for the president, was approved and then submitted to the Board of

WSU Board of Trustees

April 9, 2026

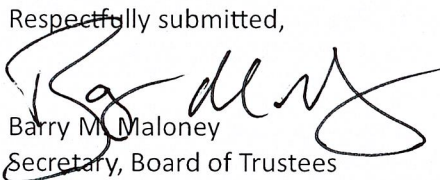
Higher Education, via Commissioner Ortega. Consistent with the guidelines for presidential compensation and evaluation, the commissioner had approved and authorized the salary adjustment that was recommended for the president. A similar process will take place this year. Chair Colombo thanked the president for his very good work in stewarding the university over the years.

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

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

VOTED: to adjourn the meeting at 5:16 p.m.

Respectfully submitted,


Barry M. Maloney
Secretary, Board of Trustees



Set weather ▾

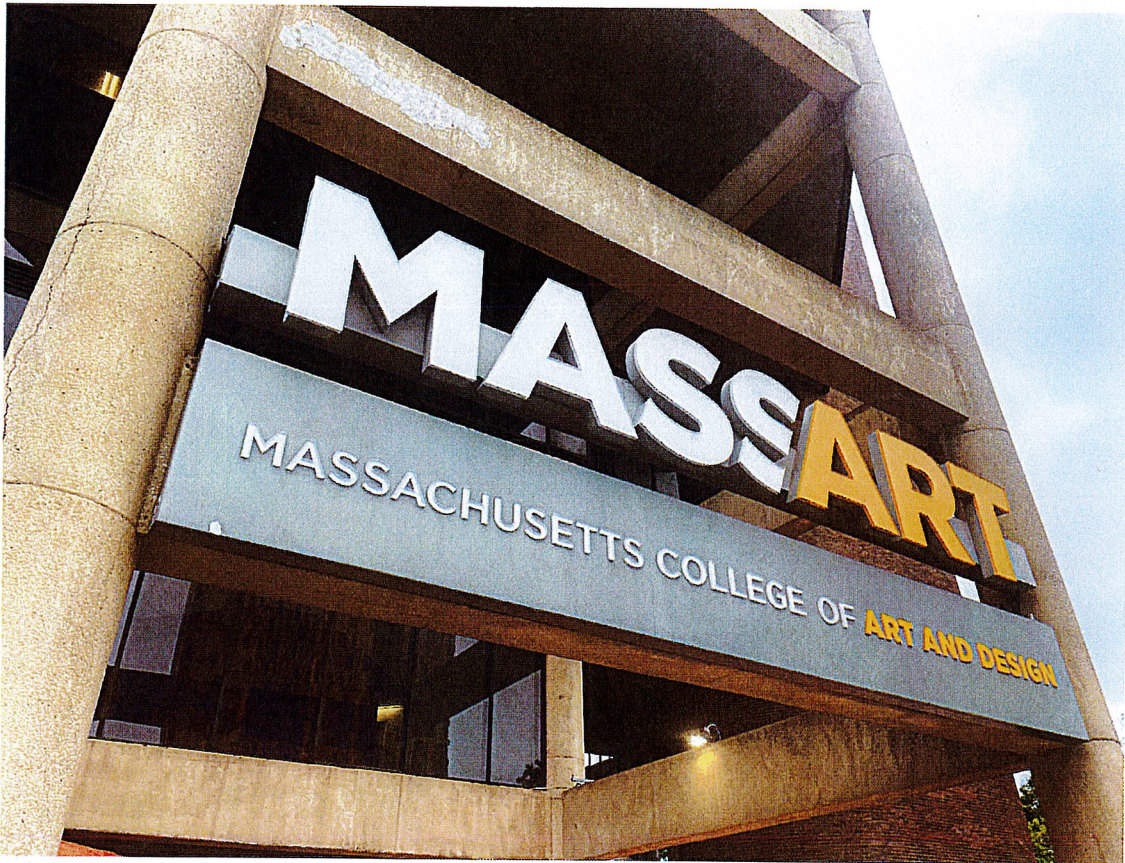


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EDUCATION

Co-op programs aren't just at Northeastern. They are expanding to Mass. public higher ed

Updated: Apr. 06, 2026, 12:57 p.m. | Published: Apr. 06, 2026, 12:07 p.m.



MassArt on June 22, 2024. Juliet Schulman-Hall



Three state universities will be launching cooperative education (co-op) programs for students this fall with funding from the Massachusetts Department of Higher Education.

Co-op programs allow undergraduates to alternate between full-time paid work experience for four to eight months and academic study. The programs offer a unique way for students to get ahead of their peers to develop their resumes and networks, leading to better employment, earnings and career satisfaction.

"In Massachusetts, a college degree should come with real experience and a direct path to a good-paying job," Gov. Maura Healey said in a statement. "That's why we've made historic investments in public education and set a goal of 100,000 apprenticeships over the next decade and now we're launching this initiative to expand co-ops and work-based learning so more students can build skills, earn a paycheck and graduate ready to succeed."

Northeastern University is most commonly known for its co-ops, which is part of why it has broken its application record for a seventh consecutive year.

Taking a page out of the University of Massachusetts Lowell's playbook for its co-op program, Bridgewater State University, Framingham State University and the Massachusetts College of Art and Design will each be given \$20,000 to launch and expand the programs.

At Framingham State, the funding will help expand its current pilot program with LabCentral, a nonprofit at Harvard University. The college has 12 students part of the program this semester, the college spokesperson said.

UMass Lowell, through a grant from Axim Collaborative, an education nonprofit between Harvard and the Massachusetts Institute of Technology, matched the Department of Higher Education's grants with an additional \$20,000 per institution to further support planning and design work.

UMass Lowell will provide technical advice, offering state institutions guidance on how to grow and create their co-op programs.

Students completing six-month co-ops earn an average of \$20,714 during their programs, which helps to make college more affordable and aid in networking, the university said.

"Cooperative education can be transformative for college students — providing invaluable work experience, creating connections that turn into good-paying jobs after graduation and making a college education more affordable," UMass Lowell Chancellor Julie Chen said in a statement.



The announcement comes amid a difficult job market for college graduates, especially as fears permeate about whether artificial intelligence will replace entry-level jobs.

Experiential learning and co-ops are growing rapidly at universities as a way to get ahead and learn more.

One university, the Greenway Institute in Montpelier, Vermont, is planning to offer students the ability to graduate in four years with no debt and two years of paid work experience.

Others, like Brandeis University, are embedding microcredentials into their curriculum and developing a competency-based, employer-valued secondary transcript.

The state's co-op initiative is its first pilot out of the Massachusetts Department of Higher Education's Innovation Hub.

The hub was announced in March 2025 following a \$2.1 million grant from Axim Collaborative.

The hub aims to pilot innovative approaches to college and student access, including the co-ops, strengthening pathways from high school to college and adding non-degree credentials such as industry-recognized certificates or licensure.

"Work-based learning is an essential focus of the Innovation Hub, which is designed to pilot promising approaches to college access and student success and explore whether they can be scaled throughout our public higher education system," Higher Education Commissioner Noe Ortega said in a statement.

MORE HIGHER ED

Boston University pauses flag, sign removal after backlash over free speech

From country clubs to college strategy: How some small colleges are using athletics to grow

BU took down pride flags over spring break and now its campus is fighting back

New report reveals the true danger of AI, and it's not what you think

115,000 cancer deaths in 8 years: What a new study suggests about

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Academic and Student Development Committee Meeting
Meeting Minutes

CHAIR: Maureen Power (Chair) DATE: April 9, 2026

LOCATION: Wellness Center, Room 204 MINUTES BY: Nikki Kapurch

TIME: 3:00 PM

MEMBERS PRESENT: Maureen Power (Chair), Kelly Brissette (Vice Chair), Kristen Garvey, Brandol Ogando Saladin

WSU STAFF: Ashlynn Allain; Nikki Kapurch; Josh Katz; Barry Maloney; Lois Wims

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Academic and Student Development Committee of the Board of Trustees was held on Thursday, April 9, 2026, in room 204 of the Wellness Center. Chair Power called the meeting to order at 3:03 p.m.

Administrative Business:

Academic & Student Development Committee Report

- Trustee Power, chair of the committee, introduced Provost and Vice President of Academic Affairs Lois Wims.
- Provost Wims mentioned that experienced trustees will notice this is out of sequence, and that we normally go through sabbatical applications in November. Through no fault of the applicant, an administrative error and a personnel change meant that his timely and appropriate sabbatical application was not submitted properly, and we did not see it in time for the November board meeting.
- Provost Wims is recommending to the board the sabbatical application for Dr. Riley McGuire for the Fall of 2026 for his sabbatical project, "How to be (In)Visible: Kate Bush and the Paradox of Cultural Endurance." Dr. McGuire's sabbatical application was submitted on time to his department chair, who recommended it in a timely manner. The documents were not uploaded to the electronic files for this purpose, and the error was not discovered until recently after the Board had approved the slate of sabbaticals for the 2026/2027 Academic Year.

Upon a motion made by Trustee Garvey and seconded by Trustee Ogando Saladin, it was unanimously approved

VOTED: To recommend to the full Board the approval of the Fall 2026 Sabbatical leave proposal for Riley McGuire as presented.

Tenure and Promotion Recommendations

- Provost Wims provided an informational presentation on the process for awarding tenure and promotion.
- The PowerPoint presentation included in the packet highlighted the tenure and promotion processes and provided 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 Provost Wims's recommendation.
- 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.
- Promotion differs from tenure in that rank changes do carry a base salary increase. The costs for the proposed promotions will total \$64,602 annually, based on the MSCA contractual rate.
- 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 Colombo and seconded by Trustee Garvey, it was unanimously

VOTED: to recommend to the full board the approval of the awarding of tenure, effective September 1, 2026, for the slate of faculty as presented

Nada Alsallami	Computer Science
Mark Beaudry	Criminal Justice
Siri Colom	Sociology
William Deane	Nursing
Laura Kane	Philosophy
Riley McGuire	English
Ian Stephens	Earth, Environment, and Physics

Upon a motion made by Trustee Garvey 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, 2026, for the slate of faculty as presented

Kyle Allaire	Mathematics
Kristine Camacho	Education
Sarah DiMeo	Occupational Therapy
Bo Fan	Business Administration and Economics
Laura Reynolds	Earth, Environment, and Physics
Luis Rosado	Biology
Heidi Wojcik	Education

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

VOTED: to recommend to the full board the approval of promotion to Full Professor, effective September 1, 2026, for the following slate of faculty as presented

Elizabeth Osborne	World Languages
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WSU Board of Trustees
April 9, 2026

Naida Saavedra	World Languages
Marc Wagoner	Psychology

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

VOTED: to recommend to the full board the approval of promotion to Associate Professor, effective September 1, 2026, for the following slate of faculty as presented

Abir Bukhatwa	Business Administration and Economics
Carter Hardy	Philosophy
Maxim Lavrentovich	Earth, Environment, and Physics

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

VOTED: to adjourn the meeting at 3:23 p.m.

Respectfully submitted,


Barry M. Maloney
Secretary, Board of Trustees

WSU Board of Trustees
May 12, 2026

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

VOTED: to recommend approval to the full Board, the following slate of officers for
2026-2027:

2026-2027 OFFICERS

Chair	Trustee Lisa Colombo
Vice-Chair (2)	Trustee Darnell Dunn Trustee Lawrence Sasso
Secretary	President Barry Maloney
Assistant Secretary	Nikki Kapurch
Foundation Board (2)	Trustee Jake Sanders Trustee Kristen Garvey
Executive Committee Alternate	Trustee Maureen Power Trustee Monica Aryitey
MA State Colleges Presidents/Trustees Association (Chair) Alternate (Vice-Chairs as alternate)	Trustee Lisa Colombo Trustee Darnell Dunn Trustee Lawrence Sasso

ROLL CALL VOTE: 3 approved. Amy Peterson; Kelly Brissette; Maureen Power

OTHER BUSINESS:

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

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

VOTED: to adjourn the meeting at 1:05 p.m.

ROLL CALL VOTE: 3 approved. Amy Peterson; Kelly Brissette; Maureen Power

Respectfully submitted,



Nikki Kapurch
Assistant Secretary, Board of Trustees

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Nominating Committee Meeting
 Tuesday, May 12, 2026
 1:00 PM
 REMOTE PARTICIPATION

Meeting Called By: Amy Peterson (Chair)

Minutes: Nikki Kapurch

Board Members: Amy Peterson; Kelly Brissette; Maureen Power

WSU Staff: Nikki Kapurch; Ashlynn Allain

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	Amy Peterson	
2. <i>Nominating Committee Report</i> a. <i>Present Slate Of Officers - 2025-2026*</i> b. <i>Present Trustees- Expiration Of Terms*</i> c. <i>Current Bylaws*</i>	Amy Peterson	Recommendation to the Full Board - 1 vote required a. Informational b. Informational c. Informational
3. <i>Adjournment</i>	Amy Peterson	vote required

*Attachments

Board of Trustees - Slate of Officers

POSITION:	CURRENT 2025/2026 (Elected 4-23-2025)	NEW SLATE 2026/2027
CHAIR	Trustee Lisa Colombo	
(2) VICE-CHAIRS	Trustee Maureen Power Trustee Lawrence Sasso	
SECRETARY	President Barry Maloney	
ASSISTANT SECRETARY	Nikki Kapurch	
(2) FOUNDATION BOARD	Trustee Maureen Power Trustee Darnell Dunn	
EXECUTIVE COMMITTEE: ALTERNATE	Trustee Amy Peterson Trustee Kelly Brissette	
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	

Updated: 04/16/2026

WSU BOARD OF TRUSTEES

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

SEAT #	BOT Members	Appointment Date	Expiration of Term	Eligible for Reappointment
1	Aryitey, Esq., Monica WSU ID# 0870574	<u>First Term (replaced Karen)</u> March 1, 2025 Appointed: June 2, 2026	<u>Expire Term</u> March 1, 2030	Eligible
2	Foley, Mary	<u>First Term</u> Official: March 1, 2026 Appointed: April 1, 2026	<u>Expire Term</u> March 1, 2031	Eligible
3	Power, Maureen	<u>First Term</u> Official: August 1, 2022 Appointed: January 3, 2023	<u>Expire Term</u> July 31, 2027	Eligible
4	Sanders, Jacob	<u>First Term</u> Official: March 1, 2025 Appointed: October 23, 2025	<u>Expire Term</u> March 1, 2030	Eligible
5	Sasso, Lawrence	<u>First Term</u> January 22, 2021 <u>Second Term</u> March 1, 2025	<u>Expire Term</u> March 1, 2025 <u>Second Term</u> March 1, 2030	Not Eligible
6	Garvey, Kristen	<u>First Term</u> Official: March 1, 2025 Appointed: June 2, 2025	<u>Expire Term</u> March 1, 2030	Eligible
7	Brissette, Kelly	<u>First Term (replaced Aleta)</u> Official: March 2024 Appointed: November 20, 2024	<u>Expire Term</u> March 1, 2029	Eligible
8	Dunn, Darnell	<u>First Term (replaced Mosley)</u> Official: March 1, 2024 Appointed: March 6, 2025	<u>Expire Term</u> March 1, 2029	Eligible
9 Appointed Alum	Colombo, Lisa (appointed alum)	<u>First Term</u> August 31, 2017 <u>Second Term</u>	<u>Expire Term</u> March 1, 2022 <u>Second Term</u> March 1, 2027	Not Eligible
10 Elected Alum	Peterson, Amy (elected alum)	<u>First Term (Alumni Elected)</u> July 1, 2022	<u>Expire Term</u> June 30, 2027	Eligible
11	Ogando Saladin, Brandol	<u>First Term (Student Elected)</u> July 1, 2025	<u>Expire Term</u> June 30, 2026	Anticipated year of graduation

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
BY-LAWS

Amended - 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
2026--2027 OFFICERS**

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

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
HUMAN RESOURCES COMMITTEE MEETING
Thursday, June 11, 2026
2:30 P.M.
Wellness Center, Room 204**

Meeting Called By: Maureen Power (Chair)

Minutes: Nikki Kapurch

Board Members: Maureen Power (Chair), Amy Peterson (Vice Chair), Monica Aryitey, Esq., Kristen Garvey

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. 2025 - 2026 President Maloney's annual self-evaluation* a. Memo from Commissioner Ortega* B. Mitra, Sathi - Promotion Letter 2026* a. Letter of Support* b. Proposed Associate Vice President Job Description* c. Resume*	Maureen Power Barry Maloney	A. vote required a. informational B. vote required a. informational b. informational c. informational
3. <i>Adjournment</i>	Maureen Power	3. vote required

*Attachments



WORCESTER
STATE
UNIVERSITY

Self-Evaluation, July 2025 - June 2026

President Barry M. Maloney

Barry M. Maloney

Self-Evaluation

Evaluation period July 2025 - June 2026

In submitting this 2025-2026 Self-Evaluation, I begin with an “Overview” section, followed by responses to the specific areas identified by the Department of Higher Education (DHE). My intention is that this structure will provide clear context for the responses that follow.

Overview and Three Examples

A January 8, 2026, memo from DHE Commissioner Ortega to Chairs of the campus Boards of Trustees outlines the framework for the presidential evaluation. Like last year, the Board may continue to evaluate presidents numerically across the categories used the previous year. Consistent with last year’s expansion to include three examples, as well, the Commissioner seeks three to five examples this year that demonstrate, in part via qualitative or quantitative data, how the president has helped advance the Commonwealth’s priorities of making their institutions more **learner-ready and equity-minded**. The focus of those examples has been tweaked slightly from what was put forward last year, emphasizing the following four considerations: “Promoting **affordability**; Advancing **student access and 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 continue to remain optional.” In response, this self-evaluation references and includes data that reflect significant progress in those domains, in the numerical categories as well as via appendices, and I have indicated which of the “four considerations” related to the Commonwealth’s priorities each category aligns with.

Regarding **timeliness of submission** of data to the DHE, Worcester State has consistently provided the Open Educational Resource Report, Early Enrollment Report, and Housing Scholarship Report on time. Where we are using less automated systems – currently being updated – we have occasionally requested two-week extensions. To address a submission that required extensions this past fall, we’ve engaged data warehouse consultants to streamline the process in time for this fall’s submissions.

The **following three examples** demonstrate that WSU is advancing the Commonwealth’s priorities, as outlined above, and bolded below.

1. An Anna Maria College transfer partnership, in place on the day the school announced its impending closure, is helping those students seamlessly transfer and stay on track toward graduation. Worcester State is therefore ensuring:

- **affordability and access for** that institution’s 42% Pell-grant-receiving student body and diverse population (36 to 50+ percent BIPOC, depending on the source);
- **equity and the opportunity for economic mobility** for low-income, racially diverse, and first-generation students, as they stay seamlessly in school and on track toward graduation.

2. WSU's signature [MajorPlus academic framework](#) ensures dual credentials can be earned within four years, advancing **affordability and economic mobility** for students.

- By completing two majors or a major and a minor within four years, students have an **affordable pathway** to two potential careers; top students cite MajorPlus as something that attracted them to WSU, and recent graduates credit it for post-graduate success, with 81% of our Class of 2025 graduates finding employment in their field, and 20% continuing their education (some graduates are doing both.)
- Our graduate outcomes are some of the best in the Commonwealth, especially notable because we enroll many lower-income, debt averse students (see Outcomes brochure appendix for data). Given our highly diverse and 49% first-generation enrollment, that these graduates are earning good salaries means we are advancing **equity** and providing a ladder for **social mobility**. The outcomes survey indicates those recent graduates' mean starting salary is \$65K, while the DHE earnings report shows that five years out, they are earning, on average, \$70,691.
- WSU is [the best value university](#) in Massachusetts, given the DHE's earnings report indicating our graduates' average earnings five years out is the eighth best of all public institutions in the Commonwealth. High earnings, plus our **affordability** and status as having the lowest debt burden for our graduates, equals an extremely high return on investment.

3. This year, **WSU has responded well to shifting market dynamics** to position the university for enrollment growth and students for success, via a teach-out and enrollment guarantees for a closing institution (**AMC**)-- a process that began last fall in discussion with the DHE; **expanded transfer agreements for accelerated graduate degrees**; **Early College** partnerships; and an **emergent CoOp** emphasis.

- New transfer pathways – both in and out – help our students, 49% of whom are first-generation-to-college, get ahead, and my service on the state's transfer pathways committee, appointed by the chair of the state's Board of Higher Education, helps me advocate for those students. Shorter time to advanced degree completion (agreement signed December 2025 with University of Limerick in Ireland, read [more](#); an emergent agreement for a 3+1 with WPI is underway) helps students earn advanced credentials **affordably**;
- Early College partnerships ensure **affordability**, as credits are earned for free while in high school, as well as **economic mobility and equity** advancement, given [Worcester Public Schools](#) is our major Early College partner.
- A comprehensive co-op program, around which we are fundraising, and for which our faculty have begun preparing, will address **equity for lower-income students**, so they don't have to decide between paid work and unpaid internships while in school.

Regarding data supplemental to what is included in this document, I point you to Appendix A, "Strategic Plan 5th Year Progress, 2024-2025", offering data illustrating measurable progress on our institutional priorities, which have substantial overlap with the Commonwealth's priorities. It also includes data related to all of the below categories.

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—our annual and strategic planning goals.

This annual reflective exercise always leaves me feeling a sense of accomplishment and pride, while also reminding me, with some humility, of my obligation to do the best I can to keep this 150-year-old institution going strong. Worcester State offers not only a great educational opportunity and a springboard for economic mobility, it also is an anchor for the regional economy. It is a privilege to lead our university.

This self-assessment is intended to provide a candid account of my leadership over this 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: Strategic Plan Fifth Year Progress, 2024-2025
- Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”
- Appendix C: Anna Maria College agreement + Program Alignment & Course Equivalencies
- Appendix D: Class of 2025 Outcomes Report

The reports are included to provide greater detail and data related to the categories below, in the key areas of financial sustainability; recruitment, retention, and strategic planning; equity work, learner-readiness, and economic mobility; and communications about all of these areas.

1. Retention and Student Success (student access and success, affordability, economic mobility)

(Numeric Rating 5)

With national data telling us that families and prospective students are looking - now more than ever - for a return on investment before committing to college, we are confident that **our ROI story is a compelling one**. Recent Lancer alumni are finding success in the marketplace and/or pursuing further education, and student persistence is very strong. Student success efforts are ongoing across the university and are ensuring extremely strong persistence rates; our admissions strategies have resulted in us climbing up the enrollment ranks among the nine state universities, even as we have begun to adjust financial aid packaging in order to attract new students. MajorPlus, implemented pursuant to the 2020 Roadmap for Advancing Student Excellence (RASE) Plan, is attracting students and contributing to their post-graduate success.

Student Success Highlights

- **Recent graduates out-earn most public university graduates** in the state:
 - Class of 2025 graduates' mean starting salary is \$65K (WSU Outcomes survey, Appendix D)
 - Five years out, they are earning, on average, \$70,691 (November 2025 [DHE earnings report](#))
- WSU graduates have the **lowest college debt** of the state's 28 undergraduate public IHEs ([DOE CollegeScorecard](#)).
- Career Development Center reports more than 758 student engagement interactions through career coaching, classroom presentations, and employer events.
- External funds are bolstering our **student academic success** efforts, including:
 - A [\\$1.3 million TRIO grant](#), awarded in October 2025
 - Work continued this year with the [National Institute for Student Success \(NISS\)](#) at Georgia State University, which we are undertaking with generous financial support from the DHE. We are identifying and resolving institutional barriers to college completion by increasing our capacity to implement proven and scalable student-success systems.
 - State SUCCESS funds are being used to hire [numerous grant-funded positions](#) that will begin in Summer 2026 and continue until at least September of 2027, which will help us reach more students overall and provide a cohesive case management approach for many of them.
- A Spring 2026 reorganization of the university's Academic Success Center, moving it from the Academic Affairs Division to the Enrollment Management Division, will strengthen the university's student-first commitment and advance enrollment, yield, academic advising, and student retention initiatives.

Retention and Enrollment Highlights

- Spring-to-Fall **persistence of continuing students was up again** for Fall 2025 (73.31% in Fall 2025, compared to 72.76% in Fall 2024).
- Fall 2025 degree-seeking undergraduate enrollment was roughly flat (down 1%) when compared with Fall 2024, despite the demographic decline among 18-22-year-olds in New England. Importantly, the academic quality of our incoming student enrollees remains strong.

- New efforts to reach lower into high school (“First Look” event with high school juniors, targeted outreach using texts and social media) to build a pipeline of new students were initiated this year; we expect to increase new student enrollment numbers in Fall 2026.
- **Percentage of students who identify as BIPOC/African, Latine, Asian, Native American (ALANA) continues to climb**, reaching 43% in Fall 2025, which is improving our accessibility to all.
- **Re-prioritizing how we package financial aid**, based on national research, is expected to improve our yield among strong learners with middle incomes, and addresses affordability.

Overall Highlights

- I was [appointed in October 2025 to serve](#) on the Healey-Driscoll Administration’s **Transfer Pathways Steering Committee**, which advises the DHE and BHE on strengthening MassTransfer.
- We marketed ourselves to, and established an **agreement with, Anna Maria College as a primary destination for students who were enrolled in or admitted to AMC**. As of May 27, we had received 254 AMC applicants, accepted 151, and 43 had made deposits. AMC’s priority deadline for applications was May 15, and we will continue to accept applications. We expect about 125 students to enroll, with between 30 and 50 of them from the nursing program. We had begun working with DHE and AMC last fall, and have been working over several months to line up their programs with ours so that the students have a smooth transition. (See AMC example above in the Overview section, for more information.)
- We offered a **new “First Look” event** with high school juniors, in order to begin wooing students sooner, pursuant to national data indicating it will widen our admissions funnel.
- **Key faculty are leading new admissions-oriented initiatives**. Dr. Laura Reynolds in Earth, Environment, and Physics worked with the STEM area dean at Quinsigamond Community College (QCC) to offer a STEM transfer day in tandem with the First-Look event, whereby potential QCC transfer students received specialized tours from WSU STEM faculty. Under a HOSA (Health Occupations Students of America) - Future Health Professionals multi-year grant awarded last year by the state’s Department of Elementary and Secondary Education, Dr. Jamie Vallejos (Health Sciences), has brought hundreds of high school students to WSU to learn about the various health and health related professions that WSU degrees can prepare them for.
- The MajorPlus academic framework is fully operational, which enables students to graduate with two majors or a major and a minor within four years. **MajorPlus was cited by 75% of new students who responded to a survey as somewhat important, important, or very important in considering WSU.**

- **Enrollment is nearing second highest among our sister state universities.** We were fifth when I arrived in 2011.
- Financial aid packaging as well as [ValuePlus](#), are ensuring affordability for many students.
- Our **Career Development Center (CDC) is prioritizing employer-student engagement**, by expanding employer engagement beyond traditional recruiting through Career Conversations, classroom participation, internship development discussions, and faculty collaboration initiatives, and has recorded 758 student engagement interactions, through career coaching, classroom presentations, and employer events.
- The CDC has also been strengthening experiential learning initiatives through expanded internship development, faculty partnerships, and employer outreach efforts, as we prepare for Co-op pilots in the near future.
- The **cross-division CARE Team** consists of staff from multiple divisions who come together to **speedily triage the needs of at-risk-of-withdrawal or otherwise needy students**, to ensure that they receive services that will help them succeed, and to advise students through the excused absence process, while leaving full discretion for an approval with the faculty member. 2025-2026 statistics:
 - 217 (as of 5/11/26) CARE referrals compared to 183 in 2024-2025, most common were mental health, academic, and financial concerns.
 - On average, referrals were reviewed, addressed, and closed within 5 business days.
- **Student Athletes (SAs) continue to be retained at higher percentages** than non-student athletes. Fall 2025 statistics on the academic success of our 533 varsity athletes:
 - 70% of SAs overall had a GPA of 3.2 or better (82% women; 58% men)
 - Overall SA GPA was a 3.29
 - Every woman's team had a GPA above 3.0
 - 59 SAs had a 4.0 GPA

Challenges/Opportunities:

- We are seeing an impact of Free Community College on WSU undergraduate day enrollments, as transfer student enrollment continues a steady decline. Some undergraduates who withdrew after paying a deposit in Fall 2025 reported that they left to attend community college for free.
- The number of international students declined significantly from Fall 2024 to Fall 2025, likely due to various changes made at the federal level.

- While last year's (2024) official graduation rate on the previous six-year cohort reflected an unprecedented 13 percentage point improvement in our reportable graduation rate over ten years – the 2025 rate slipped a bit. Our continuing improvement in retention, year over year, shows promise that we will bounce back.
- We now have a model pathway for making agreements with struggling institutions, based on the one we established with AMC. We are therefore poised to capture new transfers and admitted students should any other colleges close their doors.

2. Academic Management and Leadership (affordability, student success, economic mobility)

(Numeric Rating 4)

A primary goal outlined in our 2020-2027 Strategic Plan: Beyond 150 is to achieve "Academic Excellence and Distinction." The strategic plan progress report for this year (Appendix A) shows **we've already met 91% of the metrics established for this goal**, thanks to the efforts of our faculty and to the able administration provided by the Academic Affairs Division, as led by our Provost. Through our faculty's students-first approach, innovative academic programming, strategic partnerships, and expanded experiential learning opportunities, **we are becoming known as one of the best teaching universities in the state**, even as we more closely tie real-world experiences to the classroom. This year, we are laying the groundwork for future Co-op pilots, which will complement the dual program qualifications students acquire under our signature MajorPlus academic framework, setting future students up for continued post-graduate success, which was noted in Category 1, above, for the 2025 graduating class.

Academic Excellence Highlights

- Strategic Plan 2020-2027 Fifth-Year Progress Report shows that **we've met or exceeded 91% of the metrics established for the aspirational Academic Excellence goal, set in 2020, and that 100% of initiatives have been fully implemented – many of which are now established practices.**
- WSU received a **highly competitive two-year grant from the prestigious Davis Educational Foundation**, totaling \$192,984 to support the Center for Teaching and Learning's efforts to implement artificial intelligence across the curriculum and engage faculty and students in the process. This is the first Davis Foundation award received by the university in several years and represents an important investment in academic innovation and faculty development.
- Associate **Prof. Siri Colom (Sociology) won a Peabody Award** for her podcast series When We All Get to Heaven. The awards are considered the highest honor in electronic media, recognizing stories that enlighten, invigorate, and evoke empathy. By winning, Colom joins an elite circle of 2026 honorees that includes the HBO drama The Pitt, the breakout series Heated Rivalry, and comedy icon Amy Poehler.

- Professors Meghna Dilip (Chemistry) and Allison Dunn (Earth, Environment, and Physics), in partnership **with WPI, have developed an academic framework for a pre-engineering program** that will enable students to complete core coursework at WSU and seamlessly transfer to WPI to complete an engineering bachelor's degree. This program will serve as a strong recruitment tool by offering an affordable and accessible entry point into engineering education, while also helping to meet growing regional workforce needs.
- The **Lt. Col. Sheehan Honors Program** received reaccreditation as a Commonwealth Honors Program from the Board of Higher Education in May, following a rigorous self-study and review process. After a dip in 2021 (due to pandemic), enrollment has grown steadily and is at an all-time high of 376; those students graduate at a 91% rate. We received accolades for:
 - the program being named and funded;
 - broad support of faculty, deans and administration; and
 - the dedication and effectiveness of staff, including the director, Prof. Nicole Rosa.
- The American College Theatre Festival **recognized Worcester State Theatre's Spring '26 production of *house/less*, with several cast and crew members receiving nominations and awards.** Students based the production on oral histories of homeless individuals in Worcester, and audiences contributed to Thea's Pantry during the performance, supporting the Worcester community.

Academic Management Highlights (affordability, student success)

- Worcester State successfully negotiated **a new three-year collective bargaining agreement** with the MSCA faculty union, reinforcing the university's commitment to maintaining productive labor relations and supporting faculty excellence.
- A **new General Education curriculum** was formally adopted for students entering Fall 2026 following a multi-year collaborative effort led by faculty and staff. The redesigned curriculum is intended to prepare students with the knowledge, skills, and abilities necessary for success in their chosen professions and as engaged citizens in a democracy, emphasizing critical thinking, leadership, information literacy, and excellence in verbal and written communication. The program was also intentionally designed to integrate seamlessly with Worcester State's signature Major Plus initiative.
- Faculty and administrators in the School of Humanities and Social Sciences have completed the work necessary so that **articulation agreements could be signed with the University of Limerick in Ireland**, linking Worcester State undergraduate programs to graduate study opportunities there in Migration Studies and Translation.
- Working collaboratively with the Office of Grants and Sponsored Research, the Department of Communication secured **a Massachusetts Skills Capital grant totaling \$184,284 to upgrade**

equipment used by students in applied Communication courses in video, television, and film production. These state-funded upgrades will ensure that students continue to develop hands-on expertise using current industry-standard technology.

Expanding Academic Offerings and Academic Innovation Highlights (innovation)

- The **Graduate School relaunched the Master of Science in Biology** degree program, which is expected to serve as a valuable opportunity for secondary school teachers.
- The university approved **new degree names to better reflect program identity and student pathways**, including the Master of Education in Special Education, formerly the online AOP degree, and the Master of Education in Early Education and Care, formerly the on-ground Early Childhood Education program. My service on the Governor's [MassTransfer Steering Committee](#) is ensuring we align well with the state's nomenclature.

Experiential Learning and International Experiences Highlights (student success, economic mobility)

- **Co-op pilot areas have been identified** across the schools and divisions to prepare for a launch planned for the 2027-2028 academic year, advancing the university's commitment to experiential and career-connected learning opportunities for students. Efforts this year include the following:
 - Connections have been made for providing up to three municipal co-ops, each of which integrates the Urban Studies major with a different WSU department minor program, leveraging our signature MajorPlus framework to ensure students are fully prepared for co-op work with the City of Worcester.
 - In the School of Science, Technology, and Health, employer partnerships are being leveraged to establish paid student work experiences across multiple departments.
 - In the School of Education, Liberal, and Interdisciplinary Studies, through partnerships with the Nativity School and [the Guild of St. Agnes students](#) are being placed in paid positions.
- Worcester State **continued to expand study abroad/away and international learning opportunities** for students. Twenty-two students participated in summer and semester programs in South Korea, Australia, Italy, France, Greece, the United Kingdom, Spain, Hawaii, New Hampshire, and Florida.
- A total of 72 students participated in international and domestic experiential learning programs during the academic year. Fifty of them took part this spring via short-term faculty-led programs, including Field Biology in the Dominican Republic, Enchanted Scotland, Biodiversity and Sustainability in the Dominican Republic, and Geology in Ireland.

- The School of Humanities and Social Sciences organized a visit on March 5 by educational partners from the University of Limerick in Ireland to promote the articulation agreement noted above.

Early College Highlights (access, success, equity, and affordability, learner-ready, economic mobility)

- As of spring 2026, Worcester State University partnered with **20 high schools across 13 school districts** through its Early College and Dual Enrollment initiatives.
- **Early College Worcester remains the highest enrollment early college program** in the Commonwealth. Nearly 1,000 Worcester high school students are annually enrolled, via courses provided by WSU and Quinsigamond Community College.
- The university supported about 700 students enrolled in 46 classes during the spring 2026 semester.
- Gross revenue generated through the program during the term totaled \$387,860, with direct costs of \$237,798, resulting in net revenue of \$150,062.
- Worcester State applied for additional DESE/DHE designation approval for partnerships with the Hudson and Webster school districts, with announcements expected in May 2026.

Challenges/Opportunities:

- The successful implementation of the new General Education curriculum in Fall 2026 will require continued coordination, communication, and faculty leadership to ensure a smooth transition for students and academic departments.
- The development and implementation of co-op pilot programs across schools and divisions presents a significant opportunity to expand career-connected learning and strengthen partnerships with external employers and community organizations.
- The university’s growing focus on artificial intelligence integration across the curriculum, supported through the Davis Educational Foundation grant, presents an important opportunity to position Worcester State as a leader in innovative teaching and learning practices.

3. Assessment (affordability, student success)

(Numeric Rating 4)

Now in the penultimate year of our 2020-2027 strategic plan, Beyond 150: Lead, Succeed, Engage (Appendix B), I am gratified that we have made considerable progress across all six goals – achieving many metrics already. As the 5th-year progress report (Appendix A) states in the introduction: “In addition to achieving measurable progress towards our goals, we have also made strides in the

development of sustainable practices that will continue beyond the current plan. Many initiatives launched as part of the Strategic Plan have become embedded in the ongoing work of the University and continue to shape institutional culture, decision-making, and student experiences...As we enter the final year of the current Strategic Plan in 2026-2027 and begin preparing for our next plan, we are well-positioned to build upon this momentum.” When we launched that strategic plan in 2020, we made a commitment to measuring progress, and our Institutional Research office established metrics for every goal. I am pleased to see an assessment culture taking root across campus, as a result.

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

- We kicked off the **next step of Operational Excellence, full adoption of data-driven decision making**, via our campus budget process this year. In a February campus announcement, I said “the university will be prioritizing data-driven decisions to inform budget allocations. This represents a culture change that will be as important to our financial health as sustaining and growing enrollment in the years to come.”
- We have adopted a **new, data-driven approach to hiring**, announced in the same message to campus, as an example of the type of decision-making we seek all divisions to engage in. The new rubric for hiring considerations requires documentation of academic and service demands, operational necessity, strategic alignment, and financial viability. The new position approval process is co-chaired by Provost Lois Wims and Vice President Kathy Eichelroth to ensure that the university’s academic and financial priorities are balanced.
- **Assessing outcomes and tracking of data is a new focus for the Career Development Center (CDC):**
 - Achieved a 93% First Destination Survey response rate to determine the Class of 2025’s employment and educational achievements. This has significantly strengthened Worcester State’s graduate outcomes reporting and alignment with National Association of Colleges and Employers (NACE) standards.
 - New technology tools are ensuring that the CDC maintains excellent records related to university-employer and student-employer engagement. LancerEdge (12Twenty), a career management platform, will modernize career services, internship tracking, employer engagement, student appointments, and graduate outcomes reporting, and Salesforce is now the university’s centralized employer engagement and relationship management platform, strengthening data-informed employer partnership strategy and workforce alignment efforts.
- We have completed the **review of the Liberal Arts and Sciences Curriculum (LASC)/General Education common core**. As noted in challenges last year, I am pleased to report that we will be rolling out the new general education platform this fall.

- **Strategic Plan progress** highlights, to date:
 - 94% of all Strategic Plan metrics are at least $\frac{3}{4}$ of the way to their targets:
 - 100% of Academic Excellence, Community Engagement, and Marketing and Enrollment metrics have met that mark.
 - 90% of all Strategic Plan initiatives have been fully implemented, with many of them now established practices (up from 80% last year).
 - 93% of IE&B (Inclusive Excellence & Belonging) initiatives have been fully implemented, many of them now established practices (up from 81% last year)..
- **The Lt. Col. Sheehan Honors Program** was assessed (self-study) this academic year, and was reapproved as a Commonwealth Honors Program by the BHE.

Challenges/Opportunities:

- We will conclude the 2020 -2027 WSU Strategic Plan, “Beyond 150,” and will need to begin preparing for the next Strategic Plan.
- We will need to advance the cultural change across campus toward “data-driven decision making” – the next step as we embrace Operational Excellence campus-wide.

4. Infrastructure (student access and success, affordability)

(Numeric Rating 4)

The university has made steady progress on capital projects and infrastructure upgrades that support both student learning and operational efficiency – with an eye this year toward the Master Plan, currently under development, and, as always, with the goal of meeting the Commonwealth’s decarbonization goals. We have continued 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. **Over \$10 million in capital investment has supported renovations and modernization efforts**, as noted below.

2025-2026 Campus Projects Highlights

Project	Cost
Sullivan: RTU replacement project completed in accordance with EO 594 (energy reduction initiatives) Summer.	\$4.3M
Replacement of 23-year-old roof, underway, completion by September.	\$1.9M
Student Center: Renovate Student Affairs office suite and Career Development Center, including John J. Binienda Center for Civic Engagement (includes Community Standards and all Title IX offices), August completion date.	\$2.85M
Parking Garage: sealant refurbishment and various deferred maintenance.	\$ 350K
Sheehan: Campus Dining Hall carpet replacement.	\$ 130K
Wasylean Hall: New fire pump	\$ 210K
Accessible Walkway, Sullivan to SC	\$ 325K
Total	\$10.07M

Other Highlights

- **Strategic Investments in Student Spaces**
 - The Student Center renovations, and ADA accessible walkway leading to it, **build upon last year's investments in the building**, when we relocated Thea's Food Pantry, created a new Veteran's lounge, and created an LGBTQ+ Community Center.
 - **Various studies for whole-student-centered future work also have begun this year, including** for a varsity weight room, spiritual wellness facility, a residence hall landscaping master plan and for University Police programming.
- **Master Plan Development.** A major undertaking, managed by my office, is development of a new University Master Plan, which is the long-term roadmap for Worcester State's physical environment, including its buildings, grounds, and infrastructure. It guides the university in evaluating space and planning future investments that support academic programs and student success. The Plan will address the Commonwealth's priorities for effective use of space,

evaluation of office needs, renovation of existing assets, resilience to severe weather events, decarbonization, accessibility, and capital planning that responds to enrollment and student service needs. The university, in partnership with DCAMM and a team of consultants led by Jones Architecture, has been reviewing operations data from all Divisions of the campus, as well as actively engaging the campus community. Two online surveys captured comprehensive input, one distributed to faculty, staff, and administrators, and a separate survey tailored to students, to ensure perspectives across all campus user groups were represented. Town Hall meetings with faculty and staff provided an open forum for direct engagement with the master planning process. Student engagement was a highly meaningful component of the process.

- The next phase of work will translate these findings into design strategies and scenarios at multiple scales, testing how interventions can be implemented across the campus.
- We anticipate covering some costs for our Master Plan through the state’s BRIGHT Act, via an item titled “Master Plan Applied Learning Space Modernization”, whereby the State will fund up to \$500,000 in study costs and subsequently provide \$4,500,000 for construction.

BRIGHT Act

The state’s BRIGHT Act (Build Resilient Infrastructure to Generate Higher-ed Transformation) will authorize \$2.5B in higher education bond funding. I have engaged, along with the other eight members of the Council of Presidents, in advocating for the bill, which is, as I write, on the Governor’s desk for signing. That is expected to happen before the June Board of Trustees meeting.

Our funding priorities are the Student Center and LRC renovations. Pursuant to finalization of the Master Plan, we also anticipate funding through the BRIGHT ACT for the following:

- Through the Program for Applied Learning Space Modernization: renovation of instructional spaces to meet current and future needs for dynamic and effective learning, and to support workforce development and student outcomes while helping institutions sustain enrollment;
- Modernize/update four biology wet labs. The Central Massachusetts Regional Workforce Blueprint anticipates significant growth in the life sciences sector and has identified biotechnology as a regional workforce priority. WSU’s strong partnerships with regional biotech labs, which routinely host our interns and hire our graduates, ensures that this project will directly contribute to workforce readiness.
 - This project advances the Commonwealth’s sustainability goals under Executive Orders 594 and 569 by reducing the university’s energy consumption and enhancing operational resilience. More efficient use of gas and electrical loads in each redesigned lab will help to advance WSU’s decarbonization goals.

- Reconfigurable and modernized labs will allow faculty to integrate pedagogical strategies proven to increase STEM persistence such as active learning and collaboration. Upgrading these spaces will not only support student success but also improve WSU's ability to recruit and retain both faculty and students.

Challenges/Opportunities:

- Completion of Master Plan and adoption by WSU Board of Trustees and BHE/DCAMM.
- Due to the upcoming retirement of the longtime Assistant Vice President for Facilities Operations and Planning, we have a key position to fill.
- Successfully positioning ourselves for early appropriations pursuant to the BRIGHT Act.
- Continuing to coordinate and modify the City of Worcester's plans to redesign Chandler Street.
- Finalizing development of funding strategies to implement May Street renovations and campus classroom technology work.

5. Fiscal Management and Budgeting (affordability)

(Numeric Rating 4)

Strategic Financial Management

Our fiscal strength has been validated again this year with strong external audits, at a time when many other universities cannot make the same claim. S&P Global, for example, recently downgraded the outlook for dozens of universities, while Worcester State maintained an A bond rating and stable outlook. The fiscal challenges all have faced since the height of the COVID 19 pandemic have been met here at Worcester State with prudent fiscal planning and management and a campus-wide shift toward operational excellence, which has led to \$5.5 million in efficiencies, narrowing a deficit that had emerged at that time. We've managed to do this despite the headwinds of the demographic decline among 18-to-22-year-olds, lower college-going rates among high-school graduates, and free community college, which are impacting enrollments at regional public universities, and amid budgetary uncertainties stemming from substantial changes at the federal level.

Throughout the academic year, the Boards' Finance and Facilities committee reports emphasized the university's commitment to maintaining a balanced budget while clearly tracking expenditures and preparing for FY27 planning. The current FY26 general fund budget totals approximately \$107.4 million, reflecting a modest increase from FY25.

In tandem, the university has maintained a proactive approach to managing debt and aligning capital investments with enrollment and institutional priorities. Long-term planning ensures the sustainability of future capital investments, with a master plan process underway, as noted in the Infrastructure

section. Scenario modeling, forecasting, and revenue and expense reconciliation are underway for FY27, 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

- Our **cultural shift toward Operational Excellence (OpEx)** proceeds and continues to have a financial impact. Rapid Improvement Events, whereby a group intensively problem-solves a cumbersome, inefficient process over a few days, has resulted in numerous simplifications that are improving productivity. This year, faculty time exclusion reporting and work on rolling out Dynamic Forms will reduce employee frustration/inefficiency and cost.
- The OpEx/continuous improvement cultural shift has led us to **adopt a more data-driven budget process**. In a February message, we tasked departmental budget managers and the entire campus with adopting that approach – a message that was reinforced at A&F staff meetings with departments about their FY27 budget needs.
- With Employee Services, I established a **new hiring process** that reflects the data-driven approach we want to see at all levels of our organization. A hiring review committee, co-chaired by Provost Lois Wims and A&F VP Kathy Eichelroth, now reviews every request to hire, using a rubric that requires data related to the position's academic and service demands, operational necessity, strategic alignment, and financial viability. It is being used to determine whether positions should be filled, reconfigured, or left vacant, and whether new positions are necessary.
- Both Moody's and S&P Global **bond ratings remain very strong**, outperforming our peers.
- Following guidance from the State, we initiated an **Enterprise-Wide Risk assessment** process that will conclude in the fall of 2027, which is likely to tee up some cost-benefit analyses for future reductions/efficiencies.
- Our new bookstore partner, **eCampus.com**, **outperformed anticipated revenue** by 55%.

Challenges/Opportunities:

- We seek development of a comprehensive personnel and labor cost management system by activating the Human Resource module in Colleague. This update will link data sets that currently exist offline and provide valuable information necessary to make informed decisions in an easily accessible format.
- We seek the development of a re-use plan for the May Street site for which we can model various financing scenarios.

- Development of a classroom technology refresh plan is needed, for which we will model various financing scenarios.
- We aim to finalize a process for evaluating space needs in administrative areas across campus and develop procedures for requesting changes to the use of existing space, all with an eye towards greater efficiency. The Administration building is slated to be reviewed first.

6. Communication (student access)

(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 success as the most important goal in everything we do as an institution, through consistent messaging on the topic. Financial strength and the capstone 150th graduation were also themes this year, reinforcing the message that we are a stable institution worthy of families' and students' hard-earned dollars. The return on investment our graduates are seeing will be a continuing theme, as data accumulate showing their strong earnings, graduate school placements, and low college debt.

For the employee audience, we are continuing to drive the campus toward operational excellence in all that we do. As noted above in the assessment category (3), we have communicated broadly regarding the need to embrace data-driven decision making, given the challenges we face in enrollment and shifting attitudes toward the value of a college education. Approaching this topic transparently is essential.

I have continued to use all-campus meetings – especially our Academic Year Kick-Off – and monthly Campus Conversations during the academic year to supplement email communications to the Worcester State community. I have shifted the Campus Conversations, which draw mostly employees, from an alternating pattern of Zoom and in-person to solely Zoom, as data indicated we were attracting twice as many participants over Zoom.

While the Conversations are open to students, they rarely participate, so I engage students more directly by meeting regularly with the Student Government Association and other student groups, such as the Black Student Union, upon request. I also attend many student and student-athlete events through the year, and respond to those who reach out to me, whether by email or meeting with them.

I also communicate regularly with our Boards, offering Presidential-level updates at all Worcester State Foundation board meetings and include the President's Update document to supplement my verbal update at most Trustee meetings. I talk with Alumni Association's Advisory Board members at various alumni and donor events, nearly all of which I also attend, and, frequently, offer remarks.

Communications and Marketing Department-led Highlights

- **News stories** for our Website that gained traction/media hits include: LEI receiving state funding, Sociology Professor Siri Colom winning a Peabody Award, Communication Professor Julie Frechette's work to educate students on a changing media landscape, Worcester State's community MLK breakfast, a feature highlighting Jennie Cora Clough, the first Black woman to attend Worcester State, faculty expert Steve Oliver speaking on the history of dinosaurs in Central Mass, faculty expert Sebastien Velez speaking on bees, English Professor Heather Tresler winning the Mass Book Award, and Education Professor Megan Connerly's new children's book.
- **Brand consistency and brand visual identity were promoted** through the update of banners on campus interior roadways and pathways, and the Wellness Center.
- Expanded Worcester State's reach and engaged students through **phased ad campaigns on Google, YouTube, and Instagram**, which resulted in increased web traffic and conversions from primary and secondary markets to fill the top of the admissions funnel.
- Collaborated with key influencers on **JAMN 94.5 and WZRM to build awareness** and generate leads for undergraduate programs.
- Worked with Carnegie Dartlet and Risepoint to **promote graduate programs**.
- Made **continuous improvements to the WSU website** to boost user experience and increase discoverability, including search-engine optimization on several program pages and enhanced accessibility to meet the requirements of Title II, and the creation of a webpage dedicated to Anna Maria transfer students.
- Launched a **new social media ambassadors program**.

Messaging Highlights

- **Top Earners Report and Best Value University:** We widely communicated the message that "Worcester State is Massachusetts' best value for a 4-year degree" to all stakeholders, and the Communications and Marketing Department integrated the DHE earnings report data and College Scorecard data showing low college debt, into all marketing and communications collateral, as well as the Spring 2026 alumni magazine.
- **Successfully filled the Assistant Vice President for Communications and Marketing position** after an open search, by promoting our highly qualified director of editorial communications. This allowed for a smooth transition to fill the executive-cabinet-level AVP position, while we were able to backfill the editorial position with a highly qualified external hire.
- Launched a **new quarterly publication, Foundation Insider**, to target select donors
- Substantial traditional **media coverage of our agreement with Anna Maria College** to accept transfer and newly admitted students, including airing of an interview WCVB Channel 5 Boston

had with me, and coverage in the Worcester Business Journal, Boston Business Journal, and Worcester Telegram.

- In an initiative led by our Marketing Director, we will be **advertising in Spanish on Telemundo**, through sponsorship of TV and streaming video content and via ads before and during **World Cup** coverage. A 3-minute feature video aired on Telemundo *Aceso Total Inglaterra* on May 18, and 30-second spots will air during World Cup programming on Telemundo in June and July.
- Built brand awareness and affinity through a [Worcester State “wrapped” WRTA bus](#).

Overall Communication Highlights

- Orchestrated the **seamless onboarding and integration of the new Assistant Vice President of Communications and Marketing**.
- Partnered with the Executive Director of Campus Safety to **deliver high-stakes crisis communications and strategic support**.
- **Spearheaded a multi-year, cross-platform media campaign celebrating WSU’s 150th anniversary**, driving sustained engagement.

Challenges/Opportunities:

- Developing and executing a Rapid Improvement Event (RIE) exercise and implementation of outcomes recommended on paper usage on campus.
- Successful implementation of - including training of faculty and staff – new electronic signboards to be placed on campus summer 2026.
- We seek more exposure in all forms of media – social, web, print, news outlets, etc.’
- Assisting the Advancement area with the **development and messaging for a comprehensive fundraising campaign** is on the docket.

7. Administrative Management and Leadership (affordability, student success)

(Numeric Rating 4)

Strategic Success & Governance

Building on the **NISS recommendations** delivered in Summer 2026, we are successfully implementing the new **WSU Success Plan**. This initiative is central to redefining our approach to student support and enhancing long-term learning outcomes.

Ongoing engagement with the **Board of Trustees** remains a vital priority, particularly as we integrate three newer trustees (Foley, Garvey, and Aryitey). To ensure sustained alignment, we have institutionalized an **annual orientation** process, with the next session tentatively scheduled for January 2027.

Fiscal Sustainability & Operational Excellence

Addressing the **structural, multi-million-dollar budget gap**—precipitated by pandemic-era enrollment declines—remains a primary administrative focus. With the Board’s continued support and the launch of the **OpEx platform**, we are aggressively executing the recommendations of the 2022 **Financial Sustainability Task Force (FSTF)**. This transition is driving the university toward **Rapid Improvement Event (RIE)** efficiencies and achieving full, campus-wide adoption of **Operational Excellence** standards.

Labor Relations & Talent Development

Navigating a **tight labor market** and **evolving labor contract changes** has required a more agile approach to institutional stability. We are committed to fostering transparent, collaborative relationships with our labor partners while sharpening our recruitment strategies to attract high-caliber talent to WSU.

Internally, I am focused on cultivating **“rising stars”** beyond the Executive Cabinet level. By mentoring mission-driven leaders and fostering a culture of mutual support, we are building a **strong professional bench** to ensure the university is well-positioned to elevate internal talent as opportunities arise.

Highlights

- Completed a two-year process to develop a **new General Education common core**. In place for new students starting Fall 2026.
- Initiated **Year Three 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:

- Working with the NISS recommendations delivered in Summer 2026, I will successfully implement the new WSU Success Plan to redefine our approach to student support and learning outcomes.
- Ongoing engagement and support of the Board of Trustees remains a priority, particularly following the successful onboarding of three new trustees (Foley, Garvey, and Aryitey). Orienting new members will be a continuous focus, including an **annual orientation** tentatively scheduled for January 2027.
- I will continue to cultivate “rising stars” within the administrative team beyond the Executive Cabinet level. By fostering a collaborative, mission-driven culture, I aim to develop a strong internal bench to ensure the university has a ready pipeline of talent when opportunities arise.

8. Decision Making and Problem Solving (affordability, student success)

(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 fifteen 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 as we sought replacement of the WSU General Education core. A considerable amount of planning work was necessary and time and effort went into navigating the proposed new framework through the governance process. Additionally, I continue to work to close the

university's budget gap created after the COVID pandemic and stabilize the enrollment through strategies developed in the 2024 Strategic Enrollment Management plan.

Highlights

- With the assistance of EAB, conducted a **Board retreat** in January.
- Successfully **recruited five new members** to the WSU Board of Trustees.
- Developed a **teach-out plan with Anna Maria College** to bolster enrollment and support AMC students - many of whom hail from Central MA.
- **Developed and implemented WSU's Success** plan to assist students' learning outcomes.

Challenges/Opportunities:

- Launch the planning phase for the upcoming new University Strategic Plan.
- Facilitate the AI Steering Committee to drive institutional adoption and dialogue regarding emerging technologies.
- Strengthen workforce morale and diversity initiatives despite labor market pressures.
- Prioritize capital investments required for the 2026 WSU Master Plan.
- Execute the fundraising campaign and establish a robust administrative "deputy" plan with the Board Chair to manage daily decisions during travel.

9. Fundraising (affordability, student access & success, mobility)

(Numeric Rating 4)

University Advancement continues to be an area where I have stayed closely connected with the division. Our fundraising efforts outperform sister institutions in many areas. 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. The WSU Office of Grants and Sponsored Research is making a significant difference as it enters its third year of operation; our endowment continues to outperform peer institutions; and this year we've begun to lay the groundwork for a comprehensive capital campaign.

Comprehensive Campaign Preparedness

Over the past two years, Worcester State has undertaken a comprehensive planning and feasibility process for the proposed “Believe in Beyond” campaign. Through extensive stakeholder engagement, organizational restructuring, donor interviews, and campaign readiness assessments, the university has developed a proposed five-year, \$50-million comprehensive campaign focused on scholarships and access, STEM education and wet labs, and the library learning center, which we seek to have approved at the June Board meeting.

Over this year, donor feedback helped refine the campaign into a more outcomes-based and donor-centered initiative, emphasizing measurable student success, workforce development, and regional impact. In addition to fundraising goals, the campaign is intended to strengthen Worcester State’s long-term culture of philanthropy, expand donor engagement, and position the university as a leader in career-connected public higher education.

Campaign Readiness Highlights

- Momentum & Readiness: We are currently in the critical "**campaign readiness**" phase, focused on aligning internal resources and strategic priorities ahead of the public launch.
- Infrastructure Development: Significant progress has been made in **identifying key funding pillars and revitalizing donor stewardship programs** to ensure long-term sustainability.
- Strategic Alignment: Efforts are underway to **revamp alumni and donor travel programs and engagement opportunities** to directly support the campaign's core mission.

FY26 Fundraising Overall Highlights

- **\$6.26 million in support** from 1,808 donors through April 2026
- The Worcester State Foundation has provided the university with **\$2.56 million direct support so far this year** (up from the \$1.8 million total noted in last year’s self-evaluation) and is on track to be the largest amount distributed in its history, with \$1.6 million of that for scholarships and awards and over \$300,000 for unrestricted support. Through the generous support of two alumni donors, the Foundation provided 1,398 supplemental meal swipes to students in need over the past six months.
- This is the **third year in a row that the Foundation has provided over \$1 million** to scholarships and awards for Worcester State students.
- **29 new funds** created
- Our **endowment continues to outperform.**

- As of March 2026, the market value of funds under management reached \$52 million. Additionally, the Foundation's total net assets achieved a milestone of \$65 million, while the endowment continues to approach the \$60 million mark, reflecting sustained growth and strong investment performance.
- The NACUBO-Commonfund Study of Endowments shows that we ranked fourth among 54 New England institutions in total endowment market value growth, exceeding that of, among others, Boston College, Harvard University, Massachusetts Institute of Technology, Worcester Polytechnic Institute, College of the Holy Cross, and Clark University, among others.
- Thanks in large part to fundraising efforts this fiscal year, the Foundation remains on track to qualify for the Commonwealth's endowment match of \$555,555.
- The **Office of Grants and Sponsored Research** is now fully staffed and working collaboratively across university divisions, having **secured over \$4.2 million in new and continuing awards** to drive vital campus projects forward, as compared to the \$1 million noted in my self-evaluation last year.
- So far In FY26, the Worcester State Foundation has granted \$900,000 in scholarships and awards to over 500 student recipients.
- The Evan Armit '11 Hockey Benefit, held on February 7, raised more than \$20,000 in support of a newly established fund created in Evan's honor.
- The 2026 Chandler's Challenge successfully raised over \$32,824.70 from 412 donors.

Select Major Gifts *received 7/1/2025-4/30/2026*

- \$192,984 from Davis Educational Foundation
- \$161,000 from Gene J. DeFeudis and Julianne M. DeFeudis in support of various scholarships and initiatives across campus
- \$150,000 from Wellpoint for signage on the University track to support athletics, speech-language hearing center and other campus initiatives
- \$100,000 from an anonymous donor to support basic needs of students
- \$75,000 from Santander Bank to support internship and study away programs
- \$65,000 from Thomas J. Kirklauskas and Maryann C. Kirklauskas to support The Kirklauskas Endowment for Audiology and various initiatives across campus.
- \$62,500 from Diane M. Aramony to support multiple family scholarships

- \$50,000 from John J. Connolly, Ed.D to support The John J. Connolly '62, Ed.D. & Ingrid Connolly Presidential Lecture Series
- \$40,000 from Lionel Lamoureux to the Finish Line Fund and create a new family scholarship
- \$35,000 from Mary Cotter-Lemoine to support The Cotter-Lemoine Paraprofessional Stipend Award
- \$26,570 gift from Robert G. Doyle to support Track and Honors at Worcester State University
- \$26,000 from Robert Huffman to create a new scholarship in memory of his late mother, Jacquelin R. Huffman '86
- \$25,302 from Vincent and Rosanne Matulaitis to create a new family scholarship and other various other scholarships
- \$25,000 from the Janice Yee Family Trust to create the Janice Yee Academic Award in Economics
- \$25,000 from Dr. Kolar L. Kodandapani to create The Dr. Kolar Kodandapani Scholarship for First Generation Students
- \$25,000 from the Withstandley Family Charitable Foundation to support the Withstandley Family Fund

Select Grants *of those received or committed 7/1/2025-4/30/2026*

- Empowering Communities: The Latino Education Institute secured over \$545,000 in programmatic funding to expand its community outreach and strengthen its operations.
- Upgrading WSU Tech: A \$184,238 MA Skills Capital Grant paved the way for the Communication Department to purchase state-of-the-art equipment.
- Through collaboration with Education Dean Lewis, education students receive a scholarship of \$1,500 to help with tuition and MTEL fees.
- Healthy Hearing for All: Thanks to a \$105,000 grant from the Health Foundation of Central MA Activation Fund, WSU's Speech-Language-Hearing Center is launching new community partnerships and expanding hearing screenings for children and adults.
- Championing Student Success: WSU secured a five-year, \$1.3 million TRIO Student Support Services grant from the U.S. Department of Education. This critical program provides the academic coaching and resources needed to boost graduation rates for low-income, first-generation students, and students with disabilities.

FY 26 Alumni Engagement Highlights

- 26 alumni events attracted **1,572 attendees**, as compared to last year's total of 1,468 attendees.
- **Homecoming & Family Weekend:** 300+ guests, festivities included the Distinguished Alumni Awards event (five honorees) featuring honorary degree presentation to nationally renowned poet Martín Espada and a reading by him, **adding an academic connection to the event.**
- WooSox Baseball Series: **Two successful outings at Polar Park**—Family Day in August and a State University Alumni Night in September—engaging over 100 Lancers.
- **Inaugural Women's Leadership Group**, held at the Hanover Theatre, to bring together notable alumnae with significant career achievements to mentor current women Honors students.
- A Conversation Mo Rocca in Sullivan Auditorium in partnership with the Worcester Art Museum: Drew over 300 registrants, including a strong showing of 60 alumni.
- Red Sox in Florida: I hosted a spring training reception and game for alumni at JetBlue Stadium in Fort Myers.
- Metropolitan Museum of Art Event: A special engagement opportunity for Honors students, providing them with high-impact cultural and educational experiences in New York City.
- Athletic Partnerships: Coordinated alumni games and receptions for Volleyball, Softball, Lacrosse, Football and Soccer.

Donor Engagement/Stewardship Highlights

Worcester State's strategic stewardship efforts continue to generate strong appreciation from donors and serve as a primary driver of donor retention and engagement. Multi-channel stewardship initiatives include mailed thank-you notes, personalized student thank-you videos, holiday gift mailings, the annual calendar, customized donor stewardship reports, and special events designed to deepen engagement and demonstrate the meaningful impact of philanthropy.

- 2,225 personalized videos emailed from students (through April 30)
- 134 donor packets with a letter from VP McNamara/student thank you letters mailed before the scholarship brunch
- Hosted Class of 1969 luncheon on campus for 30 alumni with student scholarship recipients and tour of Thea's Pantry/Career Closet
- 89 donors attended the Scholarship Donor and Student Recipient brunch
- 1,000+ signed postcards from students for PHIL DAY - social media post and Thanksgiving message

- 75 attendees at VIP Athletics Donor tent for Homecoming
- 550 Loyal Lancers invited to upcoming event (scheduled for June 25)
- 45 new Loyal Lancers - inductee package sent - signed by stewardship committee members.
- 61 attendees at the inaugural mid-level donor event at the Hanover Theatre (Chicago)
- 82 attendees at Mechanics Hall President's Circle Holiday event
- Young Alumni President's Circle Event annual event: Stomp at Hanover Theatre
- Holiday stewardship: chocolates, flowers, a signed card from DUA mailed to President's Circle level donors and above
- 500+ Stewardship Calendars mailed to donors
- 42 Academic Achievement Awardees recorded video thank yous sent to donors
- New Founder's Society welcome package created
- 12 personalized stewardship reports
- 15 new Adopt a Scholar student bios and letter to donors

Direct Support

\$2.56 million direct support of the university, as of May, from the Foundation, including:

- \$28,898 for the **Student Emergency Fund, as compared to** \$15,640 reported by this time last year.
 - Over \$20,843 has been given to 46 students to assist with the purchase of books, food and bills. An additional \$22,741 was used to purchase 30 new loaner laptops for students in need.
 - Through special basic needs funding provided by an anonymous donor, the Foundation was able to award \$44,725 in additional support to 30 students facing challenges related to food insecurity, housing instability, and transportation needs.
- The scholarship, award, and internship support to the university has provided \$1.3 million so far, making it the seventh year in a row to exceed \$800,000.
- **University departments utilized >\$500,000 of Foundation funds** to supplant funds previously provided via other sources, helping the university to balance its budget. The funds were used, for example, for purchasing science equipment, classroom materials, and laboratory supplies; hiring additional student staff; securing guest lecturers; and for student/faculty travel.

- The **President’s and Provost’s Offices were given an additional \$80,000 for specific initiatives** such as student educational visits to the Worcester Art Museum and the Worcester Historical Museum, guest speakers on campus, sponsorship of student conference presentations, and providing academic and professional development opportunities for faculty.

Challenges/Opportunities:

- Launch of Believe in Beyond fundraising campaign, if supported by Board in June.
- Development and implementation of alumni/donor trips that align with the campaign, pending campaign approval by the Board.
- Meet aggressive fundraising targets associated with newly launched campaign

10. Campus Climate (student access and success, economic mobility)

(Numeric Rating 4)

The current academic year has seen a marked increase in external pressures that have disrupted the Worcester State community. These challenges have reached a new level of intensity this spring, affecting both academic performance and institutional morale. Despite these hurdles, we remain focused on fulfilling our mission while acknowledging the difficult context in which we currently 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

- Worked with the **MA Attorney General’s Office (AGO) to support the campus with Know Your Rights Programming.** Discussions were made available to all members of the WSU community, and a representative from the AGO’s office was our keynote speaker for our September 2025 Academic Year Kick Off event.
- Opened new spaces this year: **Veterans and Military Student Lounge-3rd floor Student Center and LGBTQIA+ Community Center-1st floor Student Center**
- Continued 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.

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.

11. External Relationships/Leadership in the Community (student access and success, public good)

(Numeric Rating 5)

During my **fifteenth year** on the job, I continue to prioritize developing external relationships. I view external engagement as more than just representation; it is a critical tool for building bridges between Worcester State and industry leaders. By fostering these partnerships, we develop essential leads on resources—ranging from philanthropic support to robust internship and career pipelines—that ensure our students' long-term success.

Highlights

- Was recognized as *Worcester Business Journal's* 2025 Large Business Leader of the Year and, **as I mark my 15th year as president**, was listed for the **third straight year** (in 2026) among the publication's **Power 100** group of influential business leaders in Central MA.
- **Developed a new, formal relationship with the Museum of Worcester** (formerly the Worcester Historical Museum), establishing a learning laboratory for our students and faculty.
- **Contributed to the Mechanics Hall mural project**, which depicts historically underserved yet impactful African Americans who visited and supported the Hall and the larger community. This project represents a significant step toward appropriately celebrating the historic diversity of our community.
- **Struck a new partner relationship between the Worcester Red Sox (WooSox) and WSU.** This agreement provides for the use of Polar Park for students, employees, and alumni.

- I engaged with city and state officials regarding the proposed **redesign of Chandler Street**. This multi-million-dollar renovation of the roadway directly in front of our campus carries significant potential impact for both Worcester State University and our ongoing **redevelopment of the May Street building**.
- Every fall and spring for several years, I have **met with the Teacher Educational Advisory Council (TEAC)**, which advises our Education Department and consists of curriculum leaders, superintendents, and human resource personnel from Worcester Public Schools and other nearby districts.
- 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.
- I continue to serve on the boards of **Ascentria Care Alliance (joined this year)**, Worcester Regional Research Bureau, and the Greater Worcester Community Foundation, and was recently selected to serve on the Worcester Art Museum board.
- **Chairing, for the third straight year, The First Wednesday Group business leaders' roundtable.**
- **Selected to serve on Governor Healey's Early Childhood Education and Transfer Pathways committees.**
- 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 in several state university Council of Presidents delegation visits to Beacon Hill and Washington, DC.

Challenges/Opportunities:

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

12. Affordability/Access (affordability and access, social mobility)

(Numeric Rating 5)

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 now in my 15th year since arriving 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. Notably, our efforts have resulted in the strongest pay outcomes for graduates five years post-graduation and the lowest debt burden among all 29 other public institutions in Massachusetts.** 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

- Worcester State is **the most affordable of the five other comprehensive Massachusetts state universities and the four undergraduate campuses of UMass**, according to [College Scorecard](#).
- Our **Pell-eligible students (lower income) are growing in amount per student and in percent eligible**: Total Pell for 25-26: \$10,124,465 awarded (yr-to-date), as compared to \$10,003,795 (final) in 24-25. The average Pell amount increased from \$5,595 to \$5,835.

Five-year Pell data show:

- A 21% increase in Pell-eligible students
- A 56% increase in the Pell grant amount

	2021	2022	2023	2024	2025	5 Year Change
Pell Eligible	43%	43%	48%	54%	52%	21%
Pell Amount	\$6,414,891	\$6,415,602	\$7,796,806	\$9,975,660	\$10,036,201	56%

- We continue to offer **ValuePlus**, which brings together a range of financial resources that reduce or eliminate obstacles so that economically disadvantaged students 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). WSU also continues to provide generous financial aid and robust merit scholarships for other students.

- Our **number of Latine students continues to grow** – from 755 to 793 between Fall 2024 and Fall 2025, which is up from 603 in Fall of 2021, as we approach the goal of attaining Hispanic Serving Institution (HSI) status; meanwhile our **BIPOC/African, Latine, Asian and Native American (ALANA) population reached 41% of our undergraduate degree-seeking students** in Fall 2025, a consistent and steady rise upward from 32% in Fall 2021.
- Our **Latino Education Institute continues to ensure learner-readiness among K-12 students** in Worcester and Springfield.
- Worcester State is ensuring that those who need accessibility services/accommodations are supported well via our **Student Accessibility Services Office**. 2025-26 statistics:
 - SAS census: 1027 students
 - Number of exams: 507 Fall '25, 300+ exams for Spring '26 pre-finals
 - Delta Alpha Pi Honors Society, recognizing high-achieving students with disabilities who are attending college: 46 students
- **Early College** is strong and we have established new partnerships this year, which is benefitting highly diverse populations within Worcester, especially.
- **Thea's Pantry helps to ensure none of our students are hungry**. We relocated it in early 2025 to the first floor of the Student Center, where it is more accessible, providing students with food, personal care items, allergen-friendly offerings, and school supplies at no cost, ensuring that low-income students are able to afford grocery items and thereby stay in school.

Thea's Pantry 2025-26 Statistics:

- 12,151 lbs. of food donated by students, employees, community members, and via, the Worcester County Food Bank and grant purchases – nearly double last year's 6,828 lbs.
- 1,650 guests, up from 927 last year, totaling 3,219 visits- a 78% increase.
- 1608 meal passes provided.

Challenges/Opportunities

- **Maintain affordability and high-quality outcomes for all students.**

Appendix A: Strategic Plan Fifth Year Progress, 2024-2025

[Download Document](#)



Appendix B: The 2020-2027 Strategic Plan

[Download Document](#)



Appendix C: Anna Maria College Agreement

[Download Document](#) (protected document)

Anna Maria College - Worcester State University
Transfer and Degree Completion Agreement and Memorandum of Understanding
ELIGIBLE ACADEMIC PROGRAMS CONTAINED HEREIN

1. Purpose

This Agreement and Memorandum of Understanding (hereinafter referred to as the "Agreement") is entered into by and between Anna Maria College (AMC), located in Paxton, Massachusetts, and Worcester State University (WSU), located in Worcester, Massachusetts. The purpose of this Agreement is to provide a seamless transfer and degree completion pathway for Anna Maria College students to continue their studies at Worcester State University, should their academic programs at AMC be discontinued or otherwise require transfer opportunities. This Agreement ensures eligible AMC students have the opportunity to complete their academic programs with minimal disruption and equitable treatment, consistent with institutional, state, and accreditation standards.

2. Effective Date

This Agreement shall become effective on the later of the two dates of execution below ("Effective Date").

3. Termination

This Agreement shall remain in effect until all eligible Anna Maria College students identified under this Agreement and accepted by WSU have completed their programs of study, stopped being continuously enrolled (e.g.: do not enroll for at least one fall or spring semester), or four (4) years from the Effective Date, whichever occurs first, unless terminated earlier by either party upon ninety (90) days' written notice.

4. Eligibility

An Anna Maria College student shall be defined as an individual who, as of the Effective Date of this Agreement:

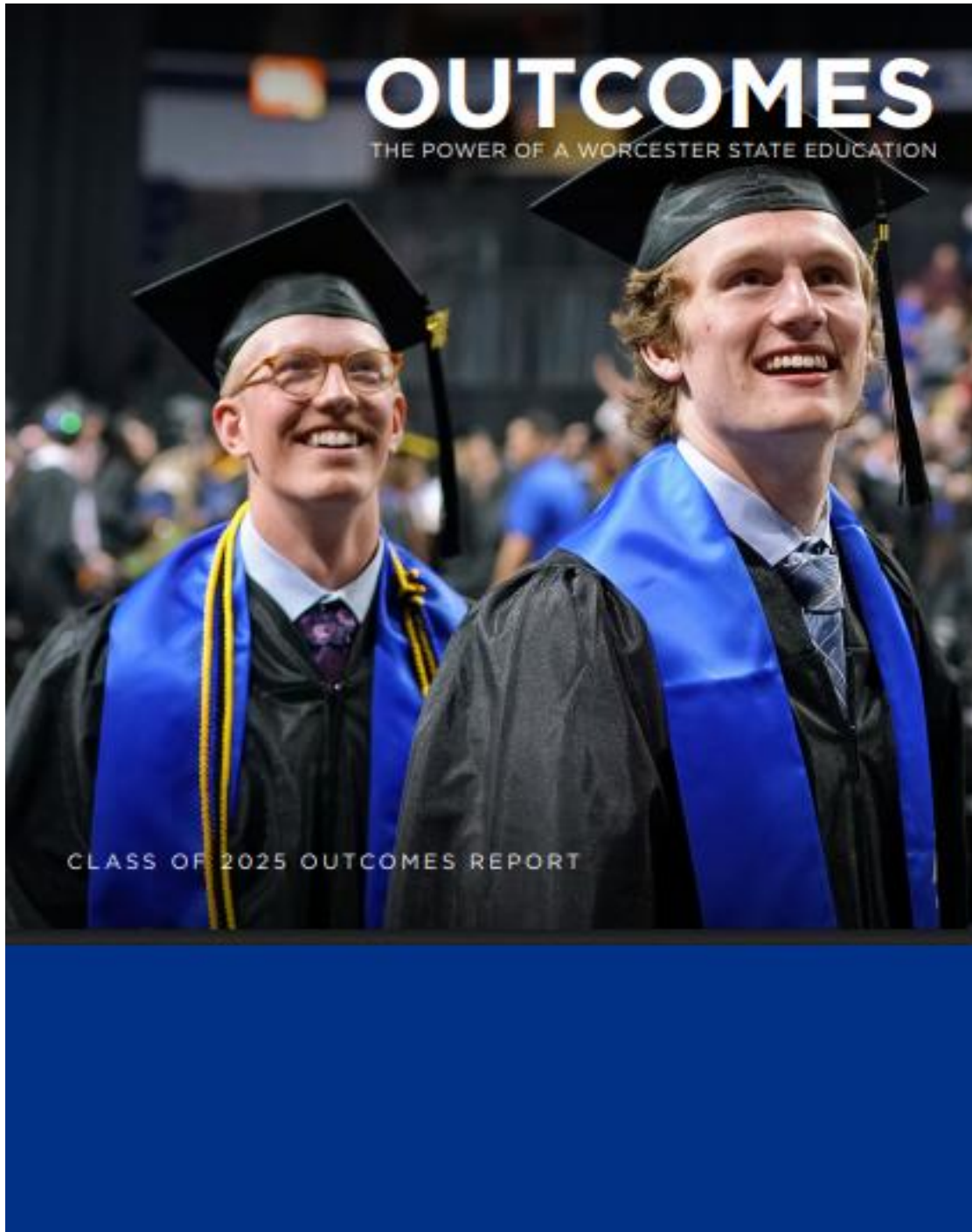
- a) Is enrolled in good academic and social standing in an Anna Maria College degree or certificate program; or
- b) Has been accepted for admission to Anna Maria College for an upcoming academic term.

Eligible students shall be permitted to transfer to Worcester State University to complete their degree requirements under the provisions of this Agreement. AMC students who

Appendix D: Class of 2025 Outcomes Report

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

[Download Document](#)



Massachusetts Department of Higher Education

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Noe Ortega
Commissioner
Chris Gabrieli
Board Chair

MEMORANDUM

TO: Community College Board Chairs
State University Board Chairs

FROM: Noe Ortega, Commissioner

CC: Community College Presidents
State University Presidents

DATE: January 8, 2026

SUBJECT: FY2026 and FY2027 Presidential Evaluations – Statewide Priorities and Procedures for Annual Reviews

Dear Board Chairs,

As we move into the presidential evaluation cycle, I want to begin on a personal note by thanking you for the unwavering leadership you bring to our system each day. Your commitment to building safe, inclusive campus communities, and strengthening student success continues to ground our collective work. I also want to express my sincere appreciation for our presidents, whose steady guidance remains essential amid ongoing uncertainty at the federal level.

Let me also reaffirm that the priorities outlined for FY26 remain exactly the same, as previously communicated to you via my memorandum of April 25, 2025, and these priorities will continue unchanged in FY27. The shifting policy environment and funding landscape require not only strategic foresight, but also remarkable adaptability and resilience. As you evaluate your respective institutional leaders, I encourage you to take a broad, holistic view—one that fully recognizes the significant efforts they undertake to maintain institutional momentum while navigating both immediate challenges and long-term uncertainties.

We recognize you hold critical statutory and fiduciary responsibilities. These include overseeing and assessing the performance of your campus president. In support of that important function, the purpose of this memo is to provide you with the following:

- Confirmation of the BHE's statewide (system-level) priorities for academic year 2025–2026 (FY2026);
- A timeline and procedural guidance for conducting presidential evaluations; and
- A preview of systemwide priorities for academic year 2026-2027 (FY2027).

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

Statewide Priorities for FY2026 and FY2027

In 2025, the Board of Higher Education (BHE) adopted four strategic priorities to guide work across the public higher education system. As the BHE and the Department continue to evolve its work, I would like to confirm that the FY2026 statewide system-level priorities remain unchanged from the previous academic year and are focused on expanding access, enrollment, attainment, career success, and other long-term outcomes for all students, including currently and historically underrepresented students.

The BHE four strategic 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 are in service to and support the BHE's overarching equity goal: to expand access, enrollment, attainment, career success, and other long-term outcomes for currently and historically 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](#) In addition, as

noted in my April 25, 2025 memorandum, we will continue to jointly monitor the timeliness in submission of reporting data requirements to the Department.

The Department requests that you submit **3 to 5 examples** of how your president has helped to advance each of the state's priorities and make your institution more **learner-ready and equity-minded**. Please support your examples with relevant quantitative or qualitative data, with particular focus on the following key areas:

- Promoting **affordability**;
- Advancing **student access and 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 continue to remain optional, pending further development by the BHE, but you are welcome to comment on those as well and share best practices. 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](#)
- [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.

The Department will continue to provide more guidance. However, to help you prepare for FY2027, we want to signal that next year's presidential evaluations will continue emphasize the key areas identified above.

Finally, 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. Considering 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: Fiscal Year 2026 Presidential Evaluation Submissions

Process for Submitting Evaluations

Please submit a **brief executive summary** of your president's evaluation. This must 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

Please 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 provides the Performance Measurement Reporting System (PMRS)—a public-facing set of dashboards that track key performance indicators in student success and other outcome areas, disparities in outcomes across student groups (i.e., race/ethnicity, gender, income), and progress toward student success targets set by the BHE. The Department's PMRS dashboards, available at www.mass.edu/pmrs, are refreshed in early April each year. Each of your Institutional Research Directors has access to other Massachusetts public higher education data from DHE's Higher Education Information Resource System (HEIRS) through DHE's Tableau site.

Timeline

Consistent with prior years, the **deadline** for completion and submission of presidential evaluations for FY2026 performance **is September 30, 2026**. 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 chairs of our local boards to share best practices, answer questions, 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
S T A T E
UNIVERSITY

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

TO: Members, WSU Board of Trustees

FROM: Barry M. Maloney, President 

RE: Proposal for Promotion from Assistant Vice President to Associate Vice President for Employee Services for Sathi Mitra

DATE: May 13, 2026

I am writing to propose the promotion of Sathi Mitra from Assistant Vice President for Employee Services to Associate Vice President for Employee Services at Worcester State University, a strategic move designed to enhance our administrative leadership and better align our resources with institutional goals. This recommendation comes after an analysis of our current organizational structure in Administration and Finance, the review of the responsibilities of the vacant General Counsel and Assistant to the President for Employment and Equal Opportunity position, and in order to have a designated backup for when the Vice President is unavailable.

Combining the duties of the Assistant Vice President for Employee Services with the majority of responsibilities of the General Counsel and Assistant to the President for Employment and Equal Opportunity will consolidate all employee-related matters under one executive leader. The Associate Vice President for Employee Services will report to the Vice President for Administration and Finance and hold an active seat on Executive Cabinet, in addition to providing support and counsel directly to the President, as needed. The new organizational structure maintains the existing indirect relationship between the President and the Executive Director for Inclusive Excellence and Belonging, while still remaining organizationally within Employee Services.

The promotion of Sathi Mitra is well deserved. In January 2025, she assumed a majority of the responsibilities when the staff that worked in the Employment and Equal Opportunity area became part of Employee Services. Since assuming those responsibilities, Sathi has proven she can handle them extremely well and has demonstrated, time after time, her commitment to this work. She has also now gained years of experience with a unionized environment and has proven she is ready to take on the new position, not only leading in the areas as outlined, but also that she is capable of assuming the Vice President duties, when called upon to do so. I recommend that the Board promote Sathi to the Associate Vice President position.

Elevating this position will signal to the WSU community our commitment to all facets of employee relations and the desire to offer a seamless approach of providing guidance and support services to all employees. Sathi's professionalism and demonstrated ability to work in a positive and collaborative manner across the university has garnered much respect. She is deserving of this well-earned promotion and has become a solid contributor and valued leader in our community. This promotion will include a compensation increase of 12% above her current salary, to reflect the expanded responsibilities and commitment to the ongoing success of the university.

Thank you for considering this strategic promotion.



WORCESTER
S T A T E
UNIVERSITY

Vice President, Division of Administration and Finance

Phone: 508-929-8087

Fax: 508-929-8433

To: Barry M. Maloney, President

From: Kathleen Eichelroth, Vice President for Administration and Finance/CFO

Date: April 15, 2026

RE: Position re-alignment: AVP for Employee Services, Chief Human Resources Officer

Sathi Mitra was hired as Assistant Vice President for Employee Services, CHRO, on March 3, 2023. At that time Stacey Luster served as General Counsel and Assistant to the President for Employment and Equal Opportunity. Stacey oversaw the work in the area of Affirmative Action, Equal Opportunity, Diversity and Inclusion, in addition to overseeing and coordinating legal matters related to those areas in addition to other employment and labor relation matters.

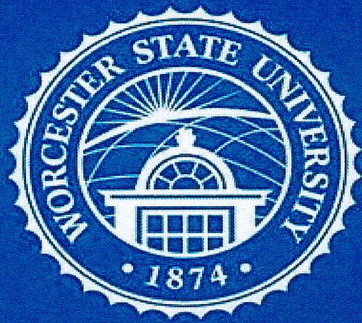
In January 2025 Stacey resigned from her position to leave for a new opportunity. Shortly after that the responsibilities of the General Counsel & Assistant to the President for Employment and Equal Opportunity were redistributed with the majority of them, except for general legal counsel duties, being re-assigned under Sathi's purview.

Attached is a presentation made to Executive Cabinet in January 2025 combining Employee Services with the AA/EEO/D&I responsibilities that were once with Stacey. At the time of the re-organization significant responsibilities for university wide oversight and compliance related to AA/EEO/D&I were assigned to Sathi without a change in title or compensation commensurate with her additional duties.

For more than a year Sathi has worked tirelessly to absorb these additional duties. She has re-aligned the workflow of the combined areas for greater efficiencies to ensure continuity of operations while her attention has been redirected by necessity to managing legal matters, including labor relations and other employment related issues. She has been actively managing and overseeing the investigative work of her staff, while encouraging and developing her staff's potential, and enhancing the focus on recruiting new talent and retaining existing employees by supporting their needs in a more effective and comprehensive manner.

During the three years that Sathi has been here she has proven to be a great asset to the university. She is a solid and reliable contributor towards improving university operations while coming to understand the unique challenges that exist in a public higher education setting. I place heavy reliance on her professionalism and ability to evaluate situations and problem solve from a broad university wide perspective. She has earned the respect and trust of many on campus and has demonstrated her ability to achieve results while working in a positive and collaborative manner.

It is my recommendation that Sathi be promoted to Associate Vice President for Employee Services. It is my hope you will consider Sathi's performance over the past 3 years, and more specifically since January 2025, and conclude that she is deserving of a promotion and salary adjustment.



WORCESTER
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UNIVERSITY

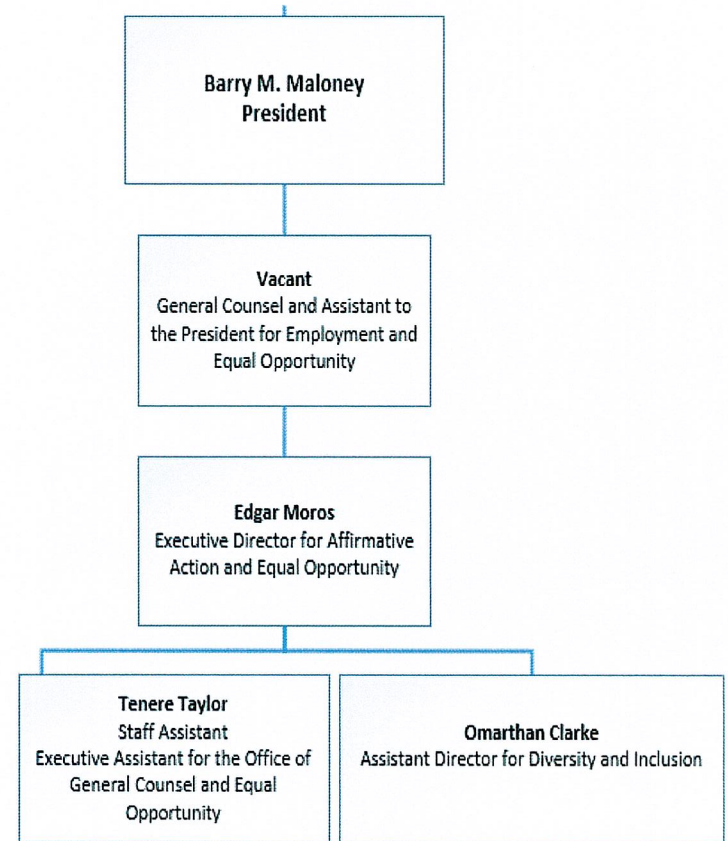
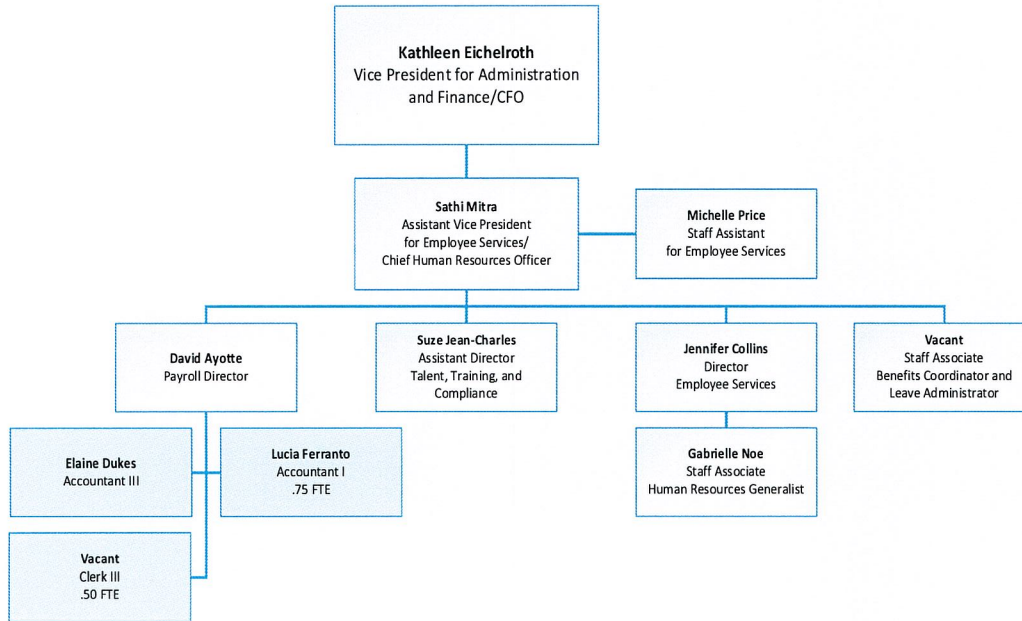
ES & DEI Re-Org

Jan 6th, 2025

ES & DEI Reorg

Worcester State University
Division of Administration and Finance
Employee Services

Current ES Org- 2024



- Non-Unit Professional
- APA
- Classified

**Worcester State University
 Division of Administration and Finance
 Employee Services / Inclusive Excellence
 and Belonging**

Barry M. Maloney
 President

Kathleen Eichelroth
 Vice President for
 Administration and Finance/
 CFO

Sathi Mitra
 Assistant Vice President
 for Employee Services/
 Chief Human Resources Officer

Michelle Price
 Staff Associate
 for Human Resources

Tenere Taylor
 Staff Associate
 HR Generalist

David Ayotte
 Director
 Payroll

Suze Jean-Charles
 Director
 Benefits & Training

Jennifer Collins
 Director
 Human Resources Operations

Omarthan Clarke
 Director
 Employee Relations

Edgar Moros
 Executive Director /
 Chief Diversity Officer

Elaine Dukes
 Staff Associate
 Payroll Manager

Scott Besser
 Staff Assistant
 Benefits Coordinator

Sean Goyette
 Staff Associate
 Human Resources Generalist

Barbara Guertin
 Staff Associate
 Recruiting Manager

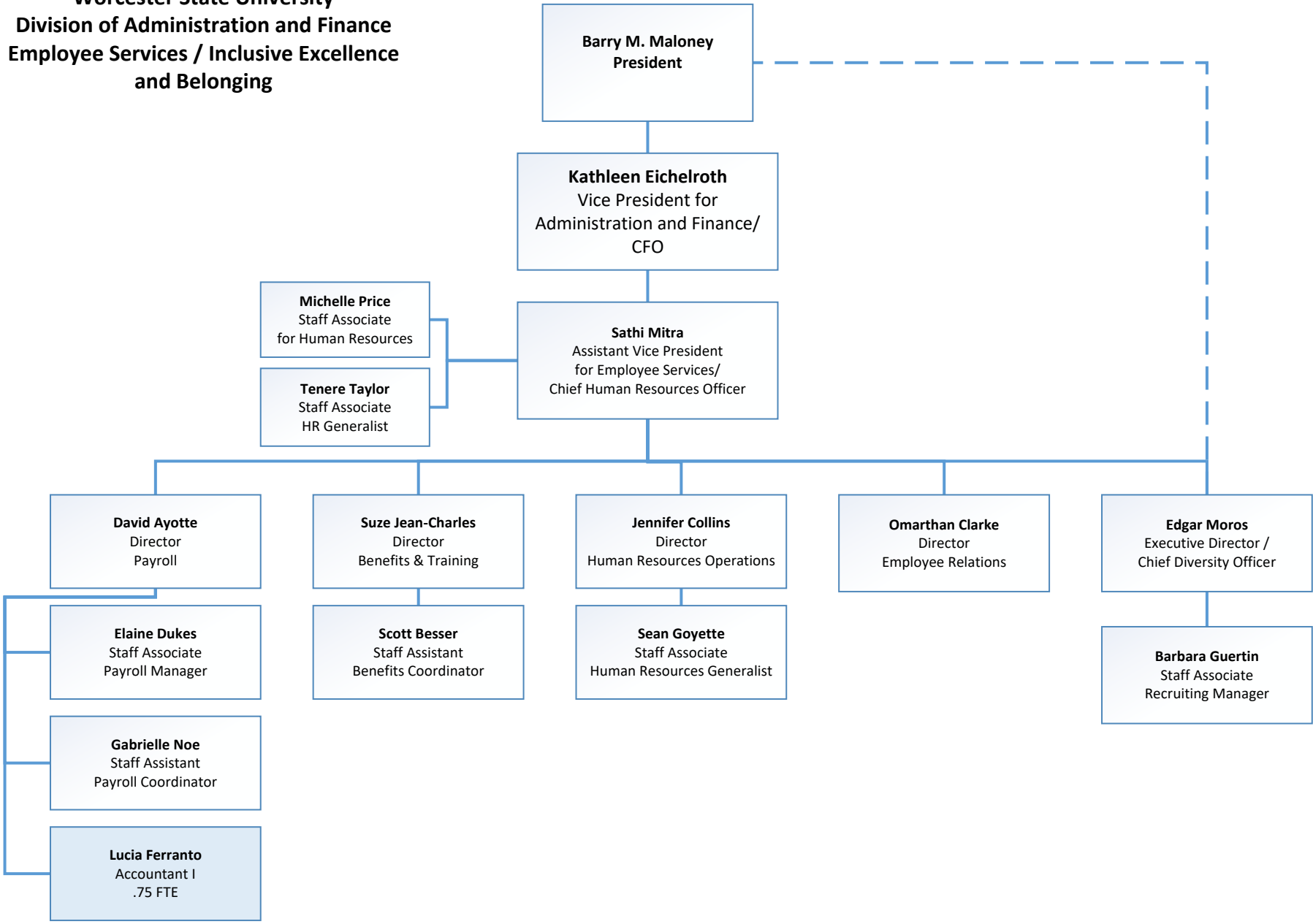
Gabrielle Noe
 Staff Assistant
 Payroll Coordinator

Lucia Ferranto
 Accountant I
 .75 FTE

Non-Unit Professional

APA

Classified



ES- Current Workload

Sathi Mitra - AVP & CHRO				
↓	↓	↓	↓	↓
Suze Jean Charles - Dir Training & Benefits	Jennifer Collins - Dir Human Resources			David Ayotte - Dir Payroll
↓	↓	↓	↓	↓
NEW - H.R. Generalist (benefits focus)	Gabrielle Noe - H.R. Generalist (employment life cycle focus)	NEW - PT Recruiter*	Michelle Price - E.S. Coordinator	Elaine Dukes, Lucia Ferranto, Mary Zona (retired) - payroll staff
Duties: Benefit Administration/Mgmt (all); includes GIC, FSA/DCAP, SMART, MSRB, ORP, 403b, Tuition, leave accruals, dental plans, etc. Leave Management, all types, including IE PAF completion for leaves Training & Professional Development, includes Orientation coordination Succession Planning Accommodations/ADA Unemployment Management Workers Comp Management	Duties: Employee & Labor Relations Job Audits/reclasses Recruitment/Selection process/Posting On-Boarding/CORIs/Forms I-9 Off-Boarding/Exit Interviews All Hiring in HRCMS (FT and all contracted) Interview Exchange Mgmt, including all non-LOA PAFs Master Roster Maintenance Surveys and Public Records Requests	Duties: Active sourcing of candidates Managing LinkedIn platform Managing Job Boards Resume Screening Conducting first round of interview Making Offers	Duties: Document Mgmt (PC, scanning, Payroll history cards) Evaluations Administration EE Recognition, awards and events Office Mgmt, supplies, etc. Website and Catalog updates Assist with other HR-related duties as needed (i.e., hiring, I-9s, etc.) HR special Projects Students Hiring	Duties: Payroll Administration - all functions Verifications of Employment (most) HRCMS SMEs - codes, processes Warehouse query assistance Timesheet training, Approver training Labor Allocations in MMARS Trust Fund/Appropriation Mgmt (with Finance) Systems Access (DSO role)
Access/Systems: HRCMS Warehouse MAGIC TASC, DFML, DUA Interview Exchange Perceptive Content	Access/Systems: HRCMS Warehouse Interview Exchange Perceptive Content	Access/Systems: HRCMS* Interview Exchange Perceptive Content *not allowed if an "03"	Access/Systems: HRCMS Warehouse Interview Exchange Perceptive Content	Access/Systems: HRCMS Warehouse Interview Exchange Perceptive Content MMARS DSO (Ayotte only)



OFFICIAL TITLE: Associate Vice President for Employee Services, Chief Human Resources Officer

SUPERVISION RECEIVED: Vice President for Administration and Finance

SUPERVISION EXERCISED: Subordinate employee services staff

General Statement of Duties: The Assistant Vice President for Employee Services, Chief Human Resources Officer is responsible for the leadership, direction, and administration of the human resources and payroll operations for a public university. The incumbent is responsible for providing strategic leadership to guide the University's efforts to appropriately staff its departments to achieve the mission and goals of the strategic plan. *Collaborates cross-divisionally to drive and expand equal opportunity, and inclusive excellence and belonging initiatives throughout the University and in the community.*

Responsibilities:

1. Recommends plans, programs, policies, and procedures, and provides leadership in all areas of responsibility. Educates and advises the executive team on strategic HR issues as a factor in decision-making.
2. Oversees regulatory compliance with applicable federal and state laws, rules, regulations, and statutes.
3. Oversees and ensures proper authorization of all personnel actions.
4. Oversees the generation of internally and externally requested or mandated reports in the Department, and develops, manages, and oversees the maintenance of all Human Resource and Payroll Information Systems.
5. *Serves as a member of the President's Executive Cabinet, Cabinet, and Leadership Team; attends all Board of Trustee meetings.*
6. *Oversees the work of, and provides leadership to, the Director of Equal Opportunity and Affirmative Action to ensure the development of engaging and modern training opportunities and events to expand employee commitment to inclusive excellence and belonging.*
7. *Acts as a University thought leader, both internally and externally, sharing perspectives, best practices, and resources for inclusive excellence and belonging efforts.*
8. *Facilitates cross-divisional efforts to enhance equal opportunity, diversity and affirmative action education and initiatives throughout the University and the community; represents the University at campus and community events relating to these opportunities.*
9. *Ensures that the University's commitment, as stated in its strategic plan, to inclusion is incorporated in all University processes and programming.*
10. Ensures the maintenance, accuracy, and retention of all personnel records, including the official personnel files of all administrators and staff.
11. Oversees the management of the position classification and compensation of all state exempt and non-exempt titles
12. Responsible for the administration of the HR/CMS (state payroll system).
13. Develops and implements a system for the analysis and compensation of positions in the administrative workforce; conducts periodic compensation audits.
14. Oversees the implementation of evaluation systems for all personnel.
15. *Oversees the implementation of collective bargaining agreements, including the grievance functions of the contracts, and leads grievance process for APA and AFSCME at step II, including investigations, documentation, hearings, and arbitration preparation, and provides direction to academic and administrative personnel on collective bargaining matters.*



16. *Represents the University in litigation and responds to legal proceedings by coordinating efforts with external legal counsel.*
17. *Collaborates with the Title IX Office in investigations involving employees in accordance with applicable Title IX policies and federal regulations.*
18. *Manages compliance with federal immigration and employment eligibility regulations, including USCIS and Department of Labor requirements, while mitigating institutional risk through policy development, process oversight, and internal controls.*
19. Oversees and participates in all Employee Relations Programs as necessary, including but not limited to: Employee Communications, Employee Recognition Programs, Health and Recreation Programs, Life Planning Programs, employee referral services, and the Employee Assistance Program
20. Oversees the administration of all fringe benefit programs including health and dental insurance, life insurance, long term disability insurance, Dependent Care Program, retirement programs, and Tuition Remission Program.
21. Oversees the administration of the Worker's Compensation Program and may represent the College at conciliations, conferences, and hearings.
22. Oversees the university's remote and hybrid work programs.
23. Oversees and participates, as needed, in the development and implementation of all Employee Onboarding and Employee Development Programs
24. Serves as internal consultant for executives, managers, and supervisors in dealing with employee performance and disciplinary issues. As needed, creates conflict resolution strategies and processes throughout the organization.
25. Responsible for the integrity and use of the applicant tracking, onboarding, and background check systems, including CORI checks.
26. Oversees the maintenance of employee data in a manner that complies with current collective bargaining agreements and applicable laws.
27. Oversees and/or participates in orientation sessions for new employees.
28. Develops and maintains the Employee Services budget.
29. Serves on committees as assigned by the Vice President or President.
30. *Completes special projects assigned by the President.*
31. Demonstrates civility and professional, customer-service oriented behavior, worthy of emulation by other staff and students.
32. Responsible for contributing to the Worcester State University Strategic Plan.
33. Responsible for contributing to Equal Opportunity/Affirmative Action objectives.
34. Performs other duties as assigned.

Required Qualifications:

1. Bachelor's degree in a related field
2. At least 10 years of full-time, progressively responsible, professional experience in human resources
3. At least 3 years of supervisory experience in human resources
4. Experience as a human resource administrator in a collective bargaining environment
5. Excellent oral and written communication skills
6. Ability to address challenging and complicated situations tactfully and appropriately
7. Ability to work effectively in a remote capacity, when necessary
8. Strong attention to detail, excellent organizational and time management skills, ability to effectively balance multiple tasks with competing deadlines and demands
9. Ability to remain objective in all situations and appropriately apply logic and the parameters of collective bargaining agreements, regulations, law, policies, etc.
10. Ability to successfully pass a thorough background check and CORI check
11. Ability to perform the essential functions of the position with or without reasonable accommodation



12. Knowledge of current trends and issues in the Human Resources field

Preferred Qualifications:

1. Master's degree in business management, human resource management, or similar field
2. Professional HR certification(s)
3. Experience working in higher education

By signing below, I acknowledge that I have received a copy of this job description. I understand that this is a professional position, exempt from overtime under the Fair Labor Standards Act. I acknowledge that I must be able to successfully 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.

Employee Signature

Date

Supervisor or Human Resources Signature

Date

SATHI MITRA

Human Resources Executive

585.978.2526 | Boston, Massachusetts

sathinag@gmail.com

<https://www.linkedin.com/in/sathimitra/>

Senior human resources executive with 15+ years of progressive leadership experience across higher education and corporate environments, driving HR strategy, organizational effectiveness, labor relations, talent management, and institutional change. Proven ability to partner with senior leadership to align people strategy with institutional priorities, strengthen culture, and lead complex organizational transformation. Expertise includes employee relations, workforce planning, succession planning, compensation, M&A integration, HR operations, DE&I, and leadership development. Recognized for building trusted relationships across diverse stakeholders and delivering measurable improvements in efficiency, engagement, and compliance.

CORE COMPETENCIES

HR Strategy | Organizational Design | Employee & Labor Relations | Executive Partnership | Talent Acquisition | Succession Planning | Compensation Design | Change Management | M&A Integration | HR Operations | DE&I | Workforce Planning | HRIS Optimization | Employee Engagement | Compliance

EXPERIENCE

Worcester State University, Worcester, MA

04/2023 - Present

Assistant VP/Chief Human Resources Officer

- Report directly to the CFO with a dotted-line relationship to the President, providing leadership to a 13-member HR organization across Benefits, Payroll, Labor Relations, HR Operation, Recruiting, and Talent Management.
- Serve as a strategic advisor to executive leadership, aligning HR priorities with institutional goals, workforce needs, and operational excellence.
- Partnered with the President to drive a data-driven transformation initiative evaluating and optimizing resource allocation and advancing institutional strategy.
- Managed high-stakes labor relations with MSCA, APA, and AFSCME, mitigating organizational risk through effective negotiation, dispute resolution, and consistent contract interpretation across the University.
- Integrated inclusive excellence principles into HR operations, policy development, workforce strategy, and leadership practices to promote equity, transparency, institutional effectiveness, and employee success.
- Managed compliance with federal immigration and employment eligibility regulations, including USCIS and Department of Labor requirements, while mitigating institutional risk through policy and process oversight, and internal controls.

Methods Machine Tools Inc., Sudbury, MA

09/2018 – 03/2023

Senior Director/Head of HR, (03/2022 – 03/2023)

- Reported to the CEO and partnered with the CFO to provide strategic HR leadership to the executive team, senior leaders, and general managers.
- Designed and implemented MBO-based executive compensation plans in partnership with leadership and an external consultant, aligning incentives with quarterly business deliverables.
- Led company-wide DE&I initiatives, including employee training, contributing to a 15% increase in employee satisfaction related to diversity and inclusion.

HR Director (03/2020 – 03/2022)

- Reported to the CEO and managed an 8-person HR team supporting U.S. operations.

- Served as a core member of the integration team during a \$25M acquisition, leading HR due diligence and supporting organizational and talent alignment.
- Developed and implemented workforce policies related to remote work, leave, benefits, and regulatory compliance during COVID-19, ensuring business continuity and employee support.
- Reduced annual U.S. benefits costs by \$1M through analysis of stop-loss coverage, vendor administration fees, and ACA-related taxes.
- Modernized retirement plan offerings by expanding low-cost mutual fund options and Roth IRA participation while reducing brokerage service costs by 25%.
- Improved the certificate of insurance process for the insurance/risk management program and identified a vendor with stronger contractual and policy terms.

HR & IT Operations Manager (Interim) (10/2019 – 03/2020)

- Led dual HR and IT operations functions, providing executive-level support for HR strategy and IT infrastructure management while leading a team of 11 across both functions.
- Defined business requirements for a cloud-based ERP upgrade, including scope, cost analysis, integration planning, and implementation approach.

HR Manager (09/2018 – 09/2019)

- Oversaw implementation and enhancement of HRIS applications, advancing the organization's HR technology strategy and operational effectiveness.
- Designed and implemented a compensation matrix to improve internal alignment, equity, and workforce structure.

Santander Group, Dorchester, MA

12/2015 - 07/2018

Senior Human Resources Manager (10/2017 – 07/2018)

- Reported to HR leadership in Spain and supported 300+ employees across cybersecurity, engineering, finance, and operations for two global IT subsidiaries.
- Served as a strategic business partner to regional leadership, advising on employee relations and legal matters while ensuring compliance with U.S. state and federal requirements.
- Led HR due diligence and integration planning during the M&A of Produban and Isban US, supporting policy consolidation and organizational alignment.
- Partnered with senior management to implement a U.S.-based performance evaluation program using 360 reviews across business units in MA, NY, CA, and PA.

Human Resources Manager (12/2015 - 10/2017)

- Reported to the SVP of HR and managed a team of 2 supporting 150+ employees across IT, engineering, operations, and cybersecurity.
- Partnered with Finance to manage a \$20M fiscal year compensation and talent acquisition budget for client groups.

Alstom, Rochester, NY

04/2013 - 08/2015

Human Resources Manager (06/2014 – 08/2015)

- Reported directly to the VPHR North America, managing over 250 employees across Engineering, Finance, and Operations for a \$10B manufacturing company with more than 30,000 employees.
- Partnered with functional Vice Presidents, Directors, and Managers across the U.S., France, China, Taiwan, and India to execute global and North American talent management strategy.

Human Resources Business Partner (04/2013 – 06/2014)

- Served as business partner to managers in Engineering, Software Development, and Operations.

ADDITIONAL EXPERIENCE

Rochester Gas and Electric, HR Advisor, Rochester, NY	05/2008 - 03/2013
Wegmans Food Markets Inc., Recruiter, Rochester, NY	08/2007 - 04/2008
Rochester Institute of Technology, Research Assistant, Rochester, NY	12/2006 - 06/2007
ObjectOne Information Technology Ltd., Business Analyst, India	07/2000 - 12/2004

EDUCATION

M.S., Human Resource Development, Rochester Institute of Technology, Rochester, NY	2007
M.A., Public Personal Management, Osmania University, India	1999
B.A., Economics, Public Administration and Political Science, Osmania University, India	1997

CERTIFICATIONS AND AWARDS

- Certification in Employment US Law: Avoiding the Legal Pitfalls of EEO, FMLA and ADA (AMA Management Association), 10/2016
- COBIT 5: Governance and Management of Enterprise IT, ISACA, 11/2016
- TIL Foundation Certificate (in IT Service Management), AMPG International, 10/2016
- Certification in PROFILOR 360 assessment tool, PDI Ninth House, Global Leadership Solutions (2012)
- Certification in HR: Foundations of Employee Relations, Cornell University (2012)
- Selected to Dean's List (2007), Rochester Institute of Technology

SKILLS AND AFFILIATIONS

Member, Society for Human Resource Management (SHRM)
 Proficient in MS Office, SAP, PeopleSoft, Fusion & Paylocity

Hanover Theatre and Conservatory for the Performing Arts, Worcester, MA 07/2024 – Present
Board of Director
 Served in an advisory capacity to committees and contributing to strategic governance.

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
FINANCE & FACILITIES MEETING
Thursday, June 4, 2026
11:00 A.M.
REMOTE PARTICIPATION

Meeting Called By: Lawrence Sasso (Chair)

Minutes: Nikki Kapurch

Board Members: Dr. Lawrence Sasso (Chair), Amy Peterson (Vice Chair), Monica Aryitey, Esq., Darnell Dunn, Jacob Sanders

WSU Staff: Barry Maloney; Ashlynn Allain; Kathy Eichelroth; Nikki Kapurch

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 09, 2026*	Dr. Lawrence Sasso	1. vote required
2. <i>Finance & Facilities Committee Report</i> A. 535 Chandler Street Deferred Maintenance Work Memo* B. Indirect Cost Recovery Trust Fund Memo* C. FY 2027 Comprehensive University Budget* D. FY 2026 Quarter 3 Comparative Financial Reports*	Dr. Lawrence Sasso Kathy Eichelroth	A. vote required B. vote required C. vote required D. informational
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
Meeting Minutes

CHAIR: Dr. Lawrence Sasso (Chair) DATE: April 9, 2026

LOCATION: Wellness Center, Rm 204 MINUTES BY: Nikki Kapurch

TIME: 2:00 PM

COMMITTEE MEMBERS PRESENT: Dr. Lawrence Sasso (Chair), Amy Peterson (Vice Chair) remotely, Darnell Dunn, Jacob Sanders

COMMITTEE MEMBERS ABSENT: Monica Aryitey, Esq

BOARD MEMBERS PRESENT: Dr. Lisa Colombo (Chair)

WSU STAFF: Ashlynn Allain; Kathy Eichelroth; Nikki Kapurch; Josh Katz; Barry Maloney; Lois Wims

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 Thursday, April 9, 2026, in room 204 of the Wellness Center. Chair Sasso called the meeting to order at 2:00 p.m. Trustee Sasso reported that one Trustee will participate by remote access and announced that all votes will be by recorded roll call.

FINANCE & FACILITIES COMMITTEE REPORT

Trustee Sasso called upon Vice President Kathy Eichelroth to walk the trustees through the FY 2027 Budget Planning PowerPoint (attached to the minutes).

- VP Eichelroth went over Worcester State's FY2027 budget planning progress, covering state funding updates, operational pressures, and a preview of the June budget proposal.
- Governor Healey's FY27 budget covers collective bargaining costs for employees, making full funding of these obligations a critical priority for all state universities.
- Formula funding — eliminated in FY26 and absent from the Governor's FY27 budget — remains the only state source that directly underwrites the operating budget, making its restoration a top advocacy priority.
- SUCCESS funding is included as a \$14M line item divided among state universities, with Worcester State averaging \$1.6M.
- The Governor's budget includes essentially level funding for many of the state financial aid programs.
- The BRIGHT Act bond bill is \$2.5B, has passed both chambers, and is now in conference committee, with full funding still pending.
- FY26 fair share supplemental funds include \$500K per campus for lab modernization design grants, intended to fund up to \$5M in projects per campus, plus an additional \$1.6M per university for repairs and campus security investments.
- Moody's affirmed an A2 rating with stable outlook in February; S&P also affirmed an A rating with stable outlook, citing solid financial management, robust state support, and healthy retention rates.
- Using EAB's five-level financial performance thermometer, finance leadership places Worcester State at Level 3, while the broader campus community tends to perceive it as Level 2. (Attached to the minutes)
- Post-COVID, the university has relied on cost containment, revenue enhancement, and enrollment retention strategies to offset the loss of formula funding and federal COVID subsidies.

- Budget development for FY27 will revisit previously prioritized commitments, evaluate operational-efficiency projects for continuous improvement, and assess temporary and part-time employee budgets for necessity and strategic alignment.
- Two priority new initiatives under consideration: expanding merit aid to secure first-year student deposits, and launching a multi-year major fundraising campaign focused on transformational leadership, regional vitality, and unlimited opportunities.
- A structural budget gap persists despite efficiencies and cost reductions, driven by cost escalation, inflation, and softening revenue. Restoring formula funding (\$1.8M average) would partially close this gap.
- For June, a balanced budget proposal will include identified state resources, savings, and a general fee increase not to exceed \$500, with a possible two-step implementation (\$250 in fall, \$250 reassessed after Thanksgiving based on state budget clarity).
- The House budget is expected before the end of April, and the Senate's before May; key lobbying priorities include maintaining collective bargaining cost coverage and Mass Grant Plus lines, both of which saw slight erosion this cycle.
- November ballot initiatives to roll back the Massachusetts income tax could trigger a 9C mid-year budget reduction, potentially cutting at least 10% of the state operating budget and affecting every program line.

Supplemental Audit Report

Included in the packet was the supplemental audit report covering Federal Funds expended by the university in FY 2025. This audit is a supplemental scope of work required by the federal government that expands the scope of the general financial statement audit to include testing of Federal Fund Awards.

- The first 52 pages of the report are the university's audited financial statements for the year ended June 30, 2025.
- Pages 54 through 63 reference the opinion letters and audit work performed solely on the federal funds expended in FY 2025. The most important pages of this report are on 61-62, Schedule of Findings and Questioned Costs. The results of this year's audit, as reported on these pages, are that the auditors did not find any items of concern that resulted in findings or questioned costs, and that the university is in full compliance with the rules for spending of its federally funded programs.
- We have been in contact with Bollus Lynch regarding the filing of this report with the federal oversight agency. The report must be filed by March 31, 2025. In the past, the federal government provided opportunities for extensions, which we have taken advantage of, however extensions of time to file are not available this year. So we did get Chair Sasso's approval and the presidential approval to file.

The clean audit results and compliance with federal requirements further highlight WSU's commitment to financial accountability and governance.

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

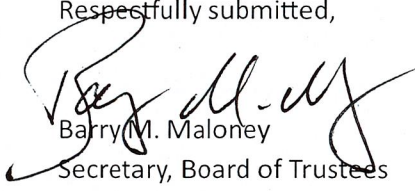
Upon a motion made by Trustee Dunn and seconded by Trustee Sanders, it was unanimously

VOTED: **to adjourn the meeting at 2:35 p.m.**

ROLL CALL VOTE: Dr. Lawrence Sasso (Chair), Amy Peterson (Vice Chair) remotely, Darnell Dunn, Jacob Sanders

WSU Board of Trustees
April 9, 2026

Respectfully submitted,



Barry M. Maloney
Secretary, Board of Trustees



WORCESTER
STATE
UNIVERSITY

FY 2027 Budget Planning

Kathleen Eichelroth

Vice President for Administration and Finance/CFO



FY 2027 State Budget Process

On February 12th President Maloney provided a FY 2027 Budget Update to the WSU community [President Maloney FY27 budget update](#)

- The communication noted that on January 28, Gov. Maura Healey released her FY27 budget recommendations, and it is now working its way through the legislative process.
- The following items have a direct impact on our operating budget:
 - **CBA obligations:** The governor's budget includes annualized funding for our FY26 union bargaining obligations for employees and partially funds our FY27 obligations. Securing full funding for FY27 CBA obligations is a critical priority for Worcester State and all state universities.
 - **Formula funding:** The state universities are advocating for restoration of formula funding that was eliminated in the FY26 budget and is not included in the Governor's budget. Formula funding provides a more equitable distribution of state funds according to each university's enrollment and performance.
 - **SUCCESS Funding:** The Governor's budget includes \$14 million in SUCCESS funding to be divided among the state universities. Worcester State's share of these dollars has averaged \$1.6 million and we support the third year of funding for SUCCESS.
 - **State Financial Aid:** The Governor's budget includes essentially level funding for many state financial aid programs, such as the MassGrant Plus program, which has helped Worcester State increase financial aid offers to students in recent years, including the university's [ValuePlus program](#). However, funding at FY26 levels remains significantly below what Worcester State received in FY25, creating challenges in delivering robust financial aid packages to students.

FY 2027 State Budget Process - continued

- Other supplemental funding initiatives in the works for FY 2027 include the following:
 - **Early College:** The Governor continues to strongly back Early College, and has included funds for expansion in her budget. Exposing high school students to the quality of a Worcester State education, as well as helping them gain college credits, is a win-win for the university and for students.
 - **BRIGHT Act:** This bond bill from Gov. Healey will provide \$2.5 billion from Fair Share tax revenue for deferred maintenance and capital investment in the state's public colleges and universities. In November, the House passed the bill, and the Senate adopted a version in February. The next step is for it to go to conference committee. Passing of the BRIGHT Act is critical to carrying out our Master Plan which is currently in development.
- FY 2026 Fair Share Supplemental Budget:
 - Additional deferred maintenance funds are being made available in FY 2026 with spend authorization through June 30, 2028.
 - Campuses are being provided \$500,000 Lab modernization design grants, with the Governor intending to fund the work with campus grants of \$5M each to be funded through the BRIGHT Act.
 - In an effort to reduce deferred maintenance backlogs each state university is receiving \$1.65M in supplemental funds to address needed repairs and improvements. There is also expanded flexibility to use these funds for campus security investments.

FY 2027 State Budget Process - continued

- Other State University Budget priorities being pursued include:
 - Level funding of the Internship Incentive Program
 - Additional funds for MassGrant Plus Expansion Program to cover tuition and fees for all students whose families make less than \$100k
 - Funds to restore student behavioral and mental health grants
- Operating Resources
 - The majority of state resources are earmarked to support specific programs and initiatives.
 - For many years Formula Funding has been the only resource that increases baseline operating appropriations to the campuses (in an effort to address increasing costs of operating a institution).
 - A Formula Funding allocation was not provided for in the final FY 2026 budget and was not proposed by the Governor for FY 2027.

Campus Resources

- Post-Covid, annual Formula Funding allocations had been relied upon heavily
 - to backfill the loss of federal operating subsidies during Covid
 - and compensate for the effects of enrollment decline due to the demographic cliff and changes in behavior patterns of college age students
- Without increased funding for operations in our base state appropriation
 - we have relied on opportunities for
 - cost containment
 - revenue enhancement
 - student recruitment
 - student retention.
- While pursuing these strategies we have found it necessary to increase rates annually in an effort to stabilize operating resources.
- In addition to these strategies, we will focus on prioritizing data-driven decisions as the basis for informing the allocation of limited resources.

FY 2027 Budget Discussions

Division Level meetings occurred during the months of February and March and the following information was shared

Good news: stable rating reviews by S&P and Moody's

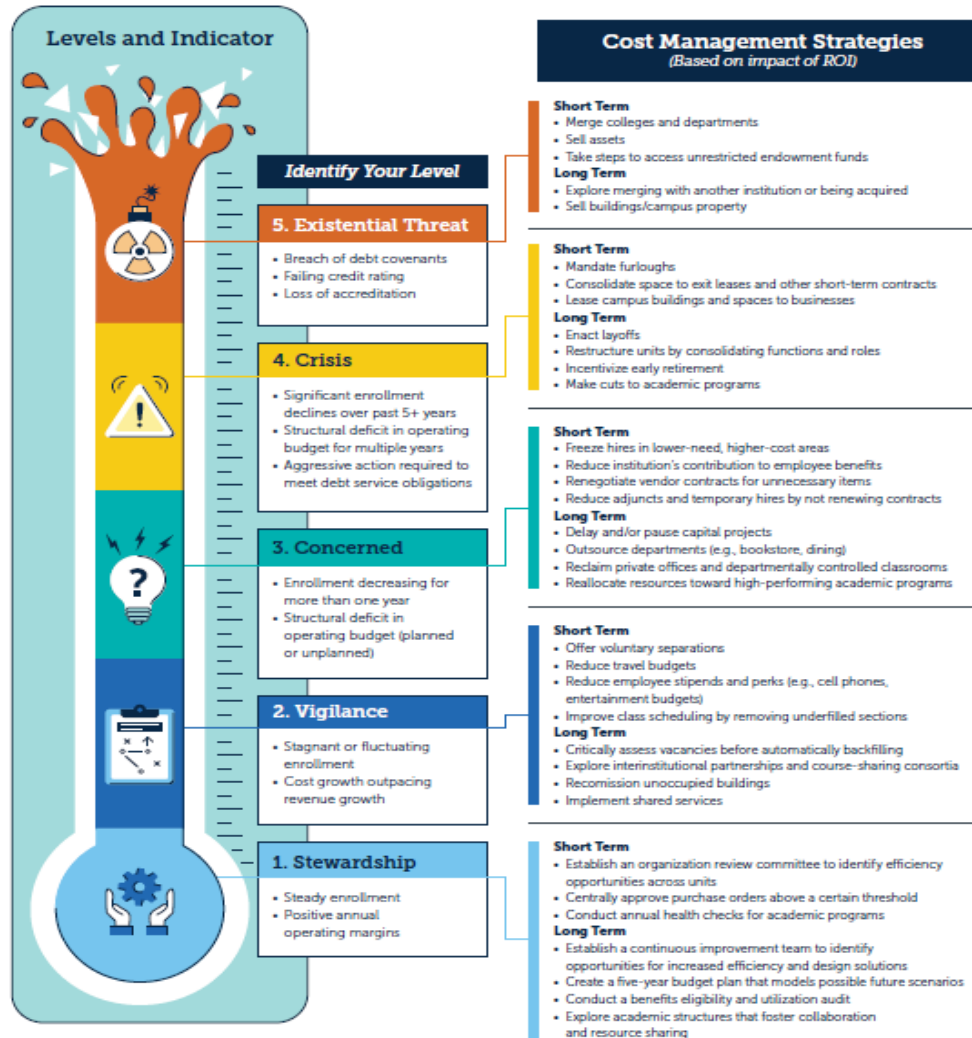
- ✓ As of February 2026, [Moody's Ratings](#) has affirmed the **A2 issuer and revenue bond ratings** for Worcester State University (MA), maintaining a stable outlook.
- ✓ In November 2025 S&P Global Ratings, affirmed Worcester State University (WSU) **A** rating with a stable outlook reflecting its **solid financial management, robust state support, healthy retention rates, pro-active management team, and somewhat variable enrollment trend.**

Discussed operational pressures using a thermometer graphic

The Five Levels of Financial Performance to Guide Proactive Planning in Higher Education

In response to the increased pressures facing higher education, EAB recommends a shift toward proactive financial planning: anticipating potential financial downturns and determining an institution's response in advance. This can break the cycle of reactive decision-making (and its unintended consequences), allowing leaders to chart a course toward sustainable financial health and longevity.

This infographic delineates five levels of financial performance and recommended cost management strategies for each. Use this infographic to determine your cost management strategy for both today and into the future.



FY 2027 Budget Discussions - continued

This slide was discussed during Division level meetings

“Budget managers and unit leaders were asked to take a careful, data-informed look at their current operations and planned requests—grounding decisions in enrollment trends, workload, outcomes, and alignment with institutional priorities. Building on our institutional commitment to operational excellence, we have an opportunity to engage thoughtfully in the process by asking questions, sharing ideas to improve efficiency or effectiveness, and supporting efforts that reduce costs, enhance revenue, or better align resources with student success.” [President Maloney FY27 Budget update](#)

Not So Good News: Significant Financial Pressures

- Enrollment
- Effectiveness of return from current programs:
 - UG
 - GR
 - CE
 - Other
- Residence Occupancy
- IT related investments
- Campus Safety Investments
- Direct Labor Costs
- Inflation
- Replacement Cycles
- Inventory of Enterprise Risks
- Fluctuating Structural Budget Deficit
- OTHER.....



Potential Response Actions

- Evaluation of existing practices with fresh eyes
- Optimize DL costs (greatest asset is people: are their efforts strategically focused)
- Focused approach to revenue opportunities
- Resource prioritization for best return
- Investment of resources to reduce costs or increase return
- Align decisions with Strategic Plan
- Implement Master Plan and use data for future planning
- Focus on being a data driven institution
- Set timelines and benchmarks
- Practice continuous improvement
- OTHER.....

FY 2027 Budget Development

Assessment and Reconciliation Process

- **Assessment**

- In FY 2025, through the collaborative budget process, various prioritized commitments were funded. As we plan for FY 2027 we will revisit these initiatives, assess the outcomes and determine the level of commitment to further fund the initiative going forward
- The outcome of various operational efficiency projects that have been accomplished in the most recent years will be evaluated to assess the outcomes and ensure they are being re-evaluated through a continuous improvement cycle.
- In line with the new data driven rubric for full time position hiring, the temporary and part-time employee budget categories will be reviewed and evaluated for operational necessity, strategic alignment, financial viability, and sufficiency of workload demand.

- **Reconciliation**

- Roll forward all direct labor costs, including collective bargaining increases, and re-setting benefit cost estimates in alignment with the Commonwealths negotiated fringe benefit rates.
- Identify and re-direct operating costs associated with resources outside the operating budget such as grants and other trust funds
- Review reliable trends and data evidencing potential revenue growth/decline.

FY 2027 Budget Development - continued

Initiatives and Gap Analysis

■ Initiatives

- Through the reconciliation process, continuing and new initiatives will be identified and resources from completed initiatives and unfunded items will be removed
- Priority initiatives under consideration include:
 - a proposal to expand merit aid in an effort to grow first year student deposits and at a minimum to maintain steady first year deposits at a time when other institutions are struggling to maintain their first year deposit numbers.
 - Investment in a multi-year Major fundraising campaign focusing on three major themes; Cultivate Transformational Leadership, Strengthen Regional Vitality, and Unlock Boundless Opportunity

■ Gap Analysis

- Once the reconciliation process is complete we anticipate having a budget gap similar in magnitude of what we have experienced over the past several years.
- While we continue to chip away at the budget deficit through efficiencies, cost reductions and selective rate increases we continue to experience a gap due to cost escalation, inflation and softening of our revenue streams
- While we continue to advocate for Formula Funding which would provide a boost to our operating budget and assist in underwriting the increasing costs of operating a university –
 - we fear that January 2027 may bring with it a series of reductions to our operating appropriation and Massachusetts financial aid resources

Preview of June Budget Package

Filling the Budget Gap

- The operating budget deficit will be identified
 - All identified state resources will be included in the plan
 - All cost saving/revenue generating initiatives will be identified and net savings/net new revenue estimated
 - a General Fee increase will be requested (not to exceed \$500 per yr.)
 - An amount of appropriated reserves will be identified
- Consideration will be given to the **risk of reductions to state funding at mid-year**
- Consideration will be given to implementing a fee increase in two steps allowing for reconsideration of any projected budget deficit should state resources not be reduced and/or additional operating resources are made available through the budget process
- Other trust fund budgets will be reconciled and balanced with consideration of the need for other program fee increases



WORCESTER
STATE
UNIVERSITY

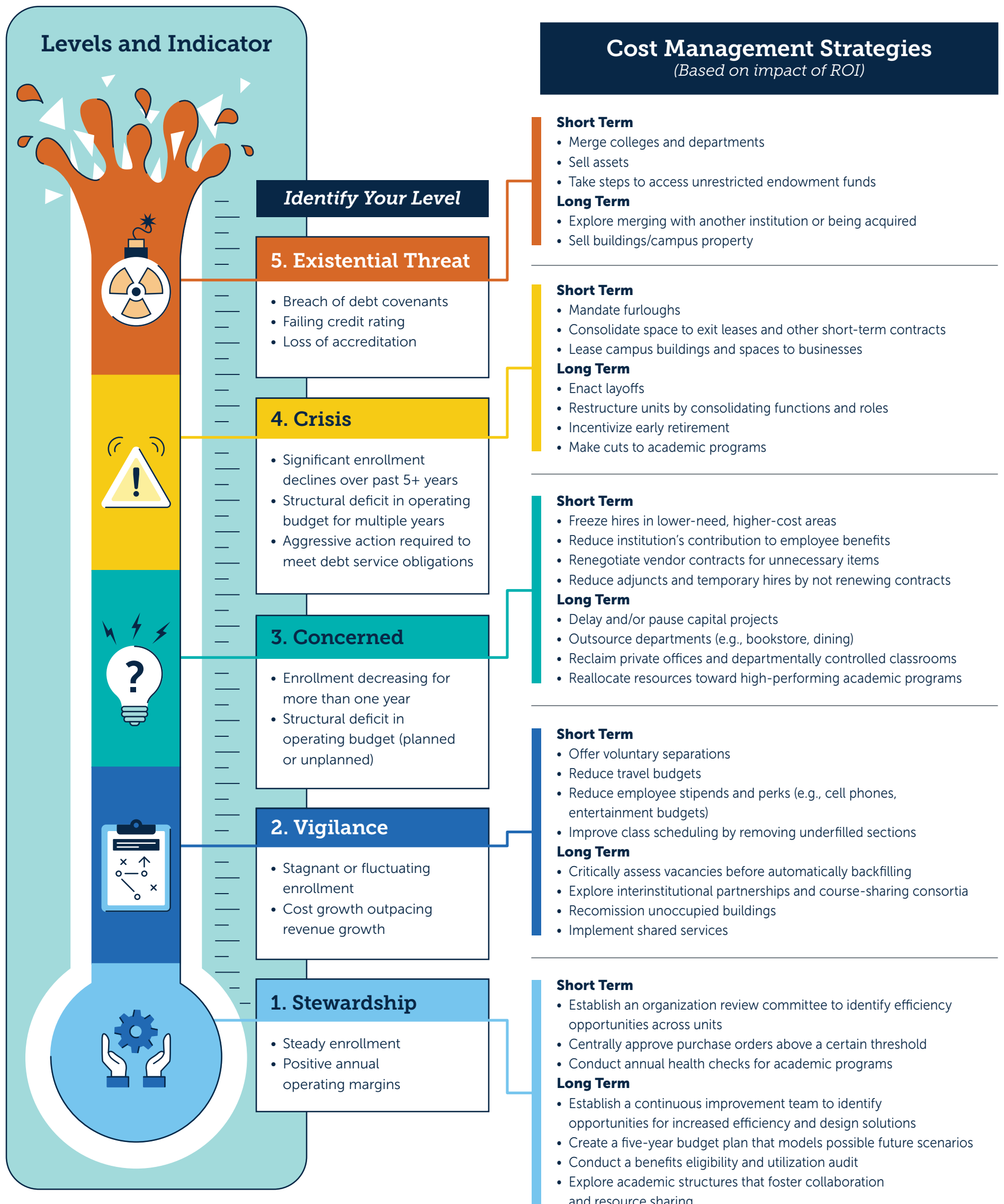
Questions and comments



The **Five Levels** of Financial Performance to Guide Proactive Planning in Higher Education

In response to the increased pressures facing higher education, EAB recommends a shift toward proactive financial planning: anticipating potential financial downturns and determining an institution's response in advance. This can break the cycle of reactive decision-making (and its unintended consequences), allowing leaders to chart a course toward sustainable financial health and longevity.

This infographic delineates five levels of financial performance and recommended cost management strategies for each. Use this infographic to determine your cost management strategy for both today and into the future.





Memorandum

DATE: May 14, 2026
TO: Barry M. Maloney, President
FROM: Kathleen Eichelroth, Vice President for Administration and Finance *Kathleen*
RE: 535 CHANDLER STREET DEFERRED MAINTENANCE WORK

Attached are three quotes for deferred maintenance repairs to be performed at the President House at 535 Chandler Street.

The proposed repairs include work necessary to address some ice dam damage that occurred in the bathroom during this past harsh winter season. The work includes scraping, applying mold killer, patching and repainting of the bathroom ceiling.

The second scope of work addresses deficiencies with the garage due to the age of the structure. Repairs planned include reinforcing the concrete footings in an effort to secure and stabilize the structure, in addition to replacing the garage door.

The total estimated combined costs for the described projects is \$21,823. Funding is available to perform this work as soon as it can be scheduled.

The Commonwealth of Massachusetts Trust Fund Guidelines issued by the DHE require board of trustee approval for the university to expend these funds.

Please let me know if you have any questions or concerns.

Stutman Contracting, Inc.**ESTIMATE**18 Sutton Avenue
Oxford, MA 01540**Phone:** (508) 987-9472
Fax: (508) 987-9856**No. 435**

TITLE: 535 Ceiling Repair**DATE:** 04/03/2026**PROJECT:** RFR 23-04
Carpentry and Painting Contract 23-26**TO:** Attn: Facilities
Worcester State College
486 Chandler St.
Worcester, MA 01602-2597
Phone:508-929-8026 Fax:508-929-8180

DESCRIPTION

Cost to repair bath ceiling at 535 Chandler Street per RFR 23-04

Work shall be as described below:

Scrape all peeling paint

Coat ceiling with mold killer

Patch ceiling as needed

Paint ceiling with a mold resistant paint for high humidity areas

Belongings must be removed from counters, shelves, and floor

Total: \$3,300.00**Prepared By:** Steven D. LeBoeuf
Steven LeBoeuf**Date:** 04/03/2026

Stutman Contracting, Inc.**ESTIMATE**18 Sutton Avenue
Oxford, MA 01540**Phone:** (508) 987-9472
Fax: (508) 987-9856**No. 411R1**

TITLE: 535 Chandler Garage Footing**DATE:** 02/03/2026**PROJECT:** RFR 23-04
Carpentry and Painting Contract 23-26**TO:** Attn: Facilities
Worcester State College
486 Chandler St.
Worcester, MA 01602-2597
Phone:508-929-8026 Fax:508-929-8180

DESCRIPTION

Cost to reinforce footing at garage on 535 Chandler Street per RFR 23-04

Work shall be as described below:

Sawcut asphalt on one side about 2' wide x 20' long and back corner about 4' each direction

Dig down to below base CMU about 12"

Pour concrete to fill under CMU and to about 3" above asphalt against CMU then pitched flush to asphalt.

Dispose of asphalt and extra soil.

Quote is using prevailing wage labor at normal hours

Total: \$12,885.00**Prepared By:** Steven D. LeBoeuf

Steven LeBoeuf

Date: 02/03/2026

Stutman Contracting, Inc.**ESTIMATE**18 Sutton Avenue
Oxford, MA 01540**Phone:** (508) 987-9472
Fax: (508) 987-9856**No. 410R1**

TITLE: 535 Chandler Garage Door**DATE:** 02/03/2026**PROJECT:** RFR 23-04
Carpentry and Painting Contract 23-26**TO:** Attn: Facilities
Worcester State College
486 Chandler St.
Worcester, MA 01602-2597
Phone:508-929-8026 Fax:508-929-8180

DESCRIPTION

Cost to replace garage door at 535 Chandler Street per RFR 23-04

Work shall be as described below:

Remove existing garage door and opener
Install new 16' wide x 7' tall overhead door
Install new vinyl weatherstripping
Install new automatic door opener. (assumes power works to existing)New door shall be skyline flush panel door (see attached)
New opener shall be Legacy 850 Operator (see attached)

Quote is using prevailing wage labor

Total: \$5,638.00**Prepared By:** Steven D. LeBoeuf
Steven LeBoeuf**Date:** 06/20/2025



Memorandum

DATE: May 11, 2026

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: INDIRECT COST RECOVERY TRUST FUND (406)

The purpose of an Indirect Cost Recovery Rate (ICRR) is to reimburse universities for the shared expenses and infrastructure costs that support research and programs but cannot be easily tied to a single specific externally funded project. Without this recovery, universities must divert funds from other institutional priorities like teaching or student services to cover the real costs of supporting research and programs.

Improving indirect cost recovery ensures more money remains available to fund direct operating expenses. Recovering costs frees up funds that can go toward other critical needs, new projects or assist in bridging budget gaps.

WSU has had a negotiated ICRR for almost two decades. While this recovery rate has been in place it has not been consistently applied when preparing grant and revenue contract proposals. Since the formation of the Office of Grants and Sponsored Research (OSGR) funding applications have increasingly included a cost recovery component. The work of the Financial Sustainability Task Force and Operational Excellence efforts have also drawn attention to the need to recover indirect costs as part of negotiating private revenue contracts.

For FY 2027 we are creating the Indirect Cost Recovery Trust Fund (ICRTF) as a means to bridge the operating budget gap. As with many back-office functions, the costs associated with the OGSR are included in the pool of indirect costs associated with supporting research and program activities. The pool of indirect costs are the basis of a university's overhead rate request that is negotiated with Department of Health and Human Services approximately every five years.

When evaluating the cost recoveries received in recent years a positive trend has been demonstrated since 2024 with a cumulative recovery over the past three years to date of \$751,198. The Indirect Cost Recovery Trust Fund will be funded initially by transferring the \$751,198 of funds recovered since 2024 from The General Fund Trust Fund reserve. Future recoveries beginning in July 1, 2026 will be deposited directly to the ICRTF. The initial goal of the trust fund will be to underwrite the costs of the OGSR. Transferring the departmental budget for the OGSR to the ICRTF will match recovered funds with the effort focused on securing vital funding for research and other programs to progress the mission of the university. Moving the departmental expenses from the operating budget also assists in bridging the budget gap.

Future efforts to improve our indirect cost recovery by regularly reviewing and updating our rate agreements, ensuring accurate documentation and consistent application of rates and advocating for full cost recovery where possible, will increase opportunities to shift additional costs to the ICRTF thereby freeing up resources in the operating budget.

The attached trust fund agreement for the Indirect Cost Recovery Trust Fund (406) describes the purpose of the trust fund and establishes a guideline for allowable revenue and expenditures. Also attached are the Standards for the Expenditure of Trust Funds as promulgated by the Board of Higher Education.

The ICRTF budget as prepared for FY 2027 reflects a transfer from The General Trust Fund reserves of indirect cost recovery earned between July 1, 2023 through April 30, 2026 that has been recorded as income in The General Trust Fund. Income for FY 2027 is budgeted at \$150,000. Expenditures of \$430,012 are budgeted to support the Office of Grants and Sponsored Research with anticipated surplus of resources to remain in the fund at the close of FY 2027 of \$471,186.

It is anticipated that the trust fund will be able to fund one additional year of operating costs for the OGSR in FY 2028, if the FY2027 budget is realized. Beyond that fiscal year it may be necessary to supplement cost recovery deposits with university operating resources, requiring a transfer into the ICRTF from The General Trust Fund. While supplemental funding may be necessary going forward, it is important to report the cost recovery deposits in an independent trust fund in an effort to apply the recovery receipts to appropriate expenditures to the fullest extent possible.

Going forward the A&F team will work with the OGSR to prepare and submit an annual budget for the Indirect Cost Recovery Trust Fund as part of the comprehensive budget package that is approved by the Board of Trustees.

<u>Name of Trust Fund</u>	Indirect Cost Recovery Trust Fund
<u>Date established</u>	July 1, 2026
<u>Purpose of Fund</u>	To hold money received by the university as reimbursement for services rendered in support of grants and contracts and to apply the recovered funds as an offset to those indirect costs in future budget cycles.
<u>Source number</u>	406
<u>Source of revenue</u>	Sources of revenue includes receipts from Indirect Cost Recovery funds assessed on grants and contract as permitted per agreement. Current accounts include federal (38001), state (38002) and private (38003). Transfers in from The General Trust Fund as necessary to offset budgeted expenses.
<u>Appropriate expenditures</u>	<p>The cost of actual expenditures that are essential to ensuring compliance with grant management and other administrative functions necessary to support and conduct the research/programs.</p> <p>The scope of expenditures includes those used to determine the Indirect Cost Recovery Rate. The recovery rate allows the university to recoup money spent on:</p> <ul style="list-style-type: none"> • Administration [grants office, procurement, accounting, payroll, legal services and departmental administrative support] • Compliance [ensuring research/programs meet federal, state and other regulations and ethical guidelines]
<u>Inappropriate expenditures</u>	Those in violation of the Worcester State University “Accounting Policy and Procedure Manual”.
<u>Separate bank account</u>	No

Worcester State University
 Indirect Cost Recovery Trust Fund (406)
 FY 2027 Budget

	FY2027 Requested Budget
Sources of Funds:	
Other Income	\$ 150,000
Transfer in- General Trust Fund	\$ 751,198
Total Sources	\$ 901,198
Uses of Funds:	
AA Regular Employees	\$ 279,170
BB Employee Related Expenses	10,000
CC Temporary Part-Time Employees	-
DD Staff Benefit Expenses	128,725
EE Administrative Expenses	8,480
FF Facility Operation Supplies	1,060
HH Professional Services	-
JJ Operational Services	500
LL Equipment Lease, Maintenance, Repair	1,060
RR Educational Assistance	-
UU Technology Expenses	1,017
Transfer Out - Reserves	471,186
Total Uses	\$ 901,198
Net Sources / (Uses)	\$ -

BOARD OF HIGHER EDUCATION

STANDARDS FOR THE EXPENDITURES OF TRUST FUNDS

Adopted May 9, 1989
Revised June 6, 1990
Revised October 13, 1992
Revised December 5, 2000

The Commonwealth of Massachusetts

ROLE OF TRUST FUNDS

The term “trust funds” as used in public higher education refers to non-appropriated funds held by the public institutions of higher education.

In Massachusetts, trust funds play an important role in financing the educational needs of all students in the public higher education system. The statutory authority for trust funds in Massachusetts is found in Massachusetts General Laws chapter 15A, Section 9 (N) and 22 (E), Chapter 73 Section 14 and Chapter 75 Section 11 . The language contained in the various statutes provide authority for the Board of Higher Education and institutional boards of trustees to seek, accept, establish and administer trust funds for campus projects, programs and activities. The statutes stipulate that all income received be held in trust and be expended for the purposes for which the trust funds were established. It is important, therefore, that institutions carefully review the purposes for which a trust fund has been established before making any expenditures from the trust fund. Trust funds are used to complement state appropriations in order to ensure sufficient funding of an institution’s total needs. Without trust funds, the Commonwealth’s appropriation would have to be increased or some services could not be undertaken. Trust funds can also provide a vehicle to manage supplemental programs to better meet the needs of the college or university community.

Typically, trust fund revenues are used in connection with a variety of campus activities such as auxiliary enterprises (e.g., student housing, bookstores, food service, vending machines), student activities, financial aid, medical services, public services and research. These funds are self-sustaining. The public colleges and the University have two primary sources of income: state appropriations and local campus revenues or trust funds.

- The expenditure of state appropriated funds is governed by detailed state regulations which control expenditures for all state agencies. Statutory authority for enforcing state regulations rests with several entities including the State Comptroller. The Office of the State Auditor has authority under Chapter 11, Section 12 of the Massachusetts General Laws to audit colleges and universities programmatic and financial activity including trust funds in accordance with General Accepted Government Auditing Standards.
- Trust funds expenditures, however, are regulated differently. Although technically “public” funds, trust funds are not “appropriated” funds, and therefore, are not subject to the same spending rules and regulations as appropriated funds. In many cases, other external regulations govern expenditures of campus trust funds. For example, sponsored research trust funds would be subject to federal and state regulations concerning the expenditure of research monies. Student housing funds may be governed by regulations pertaining to debt service payments associated with dormitory construction. Where external, third-party regulations do not exist, responsibility for regulating and controlling the expenditure of campus trust funds rests with local boards of trustees. The Board of Higher Education

does not have statutory authority over institutional trust funds. The Office of the State Auditor has statutory authority to audit Trust Fund revenue and expenditures.

Because trust fund regulations are locally developed and controlled, they vary from institution to institution and there is a wide spectrum of institutional policies, procedures and regulations which apply. They range from extremely limited regulations to conformity with all state regulations pertaining to appropriated funds. In the vast majority of cases, the guidelines can be considered general in nature, leaving much to the discretion of institutional boards and administrators.

PURPOSE OF THE STANDARDS

A generally shared objective of the Commonwealth of Massachusetts is to improve the quality and effectiveness of its public higher education system and to raise it to a position of leadership in the United States. It is important that the development, utilization, and management of trust funds be conducted in a manner that meets with general approval. Clearly, expenditures from trust funds should be consistent with this overall, long-range goal.

Therefore, these standards for the expenditure of trust funds are intended:

1. To provide some guidance and suggestions on selected expenditures made in the interest of promoting the mission of the institution.
2. To outline recommended standards for expenditures which have the appearance of providing personal benefits to college officials and friends, or of being lavish or extravagant in nature.

It is impossible to discuss every conceivable type of expenditure, which might be made from these funds. These standards are designed to provide greater clarity and more uniformity in the determination of appropriate and inappropriate expenditures of these funds.

The standards should be considered minimum standards. Local boards of trustees must develop institutional guidelines and standards which may be more but not less restrictive.

The standards in this report are designed to apply primarily to those trust funds, which permit broad, discretionary expenditures. However, they shall also be applied to expenditures from all trust funds established by boards of trustees, which are not governed by external (non-trustee) regulations or restrictions.

Underlying Principles

A number of important principles underlie these standards:

1. Institutional autonomy and flexibility as well as local decision-making are important and should be encouraged. These standards should not be construed as an attempt to usurp local authority or to centralize decision-making. Each institution must have the flexibility to fulfill its distinctive mission within the public higher education system.
2. No set of general or detailed guidelines can be a substitute for personal ethics and sound judgment. Expenditures of trust funds should be made with the assumption that those decisions and choices will become public knowledge.
3. Local boards of trustees have the responsibility to issue guidelines to ensure that all Trust Fund revenues due to be received have been received and properly deposited and accounted for.
4. Local boards of trustees have the responsibility to issue clear guidelines for the expenditure of trust funds and to establish the mechanism and structures to actively review these expenditures. Accountability is a critical component of local autonomy. Individuals and institutions should be held accountable for their choices and decisions, including the expenditure of trust funds.
5. Public colleges and the University are members of and participants in the larger communities they serve. As such, they must interact with community groups and civic associations and it can be appropriate for them to make modest and limited expenditures in support of these entities.
6. State institutions, like private institutions, must engage in activities which promote employee morale, generate philanthropic support and enhance the well-being of the institution. Accordingly, reasonable and appropriate expenditures to support such activities can and should be made.
7. Trust funds should not be spent in a manner which gives the impression of lavishness or extravagance. Travel, entertainment and other expenditures should be made in moderation and good taste.
8. Expenditure of trust funds may be subject to federal and state income taxation if they exceed normal allowances, are not adequately accounted for, and/or do not satisfy a requirement that the expenditure was accomplished to satisfy the business needs of the institution.

The following pages outline minimum standards to ensure the proper control of the receipt and expenditure of trust funds.

I. RESPONSIBILITY AND REPORTING

- (1) Responsibility for the specific trust fund guidelines and regulations rests with the institutional board of trustees. These guidelines should include policies

and procedures concerning trust fund revenue sources, appropriate and inappropriate expenditures, bank accounts, spending approval levels and required documentation.

- (2) Responsibility for trust administration rests with the president or chancellor of the institution. Records shall be maintained in accordance with proper accounting procedures, including documentation of receipts, disbursements and bank accounts.
- (3) Policies, procedures and internal controls should be established for all Trust Fund administrative and financial activity. All transactions and significant events should comply with Chapter 647 of the Acts of 1989, An Act Relative to Improving the Internal Controls within State Agencies, and the Office of the State Comptroller's Internal Control Guides for Departments.
- (4) All trust fund activities shall be subject to regular audit and inspection by the State Auditor's department and the Board of Higher Education.
- (5) Clear goals and objectives for the trust fund should be established by the institution and, where feasible, an annual budget should be developed, reviewed by the president and submitted to the board of trustees for approval before the beginning of each fiscal year. Such budgets should include sufficient detail to permit the identification of major expenditures. Expenditures should not exceed budgeted amounts for each Trust Fund without prior approval.
- (6) The president shall provide a detailed accounting of trust fund expenditures to the board of trustees on, at least, a quarterly basis and the audited financial statements to the Board of Higher Education on an annual basis. Additional reports may be requested at the discretion of either board.
- (7) The level of detail required in the quarterly and annual report is left to the discretion of the board of trustees at each campus. However, the level of detail must be sufficient to satisfy board member inquiries and audit requirements and it should also include:
 - certification by the president that all records were maintained in accordance with proper accounting procedures, including documentation of receipts, disbursements and bank accounts, and
 - relationship of the expenditure to institutional mission should be clearly stated or evident

In addition, the president and/or board of trustees should report all violations of trust fund expenditure standards as well as the follow-up action taken to address each violation to the Board of Higher Education. This report should be made on a quarterly basis if violations occur. If no violations occur during

the year, the audit report and management letter are required as confirmation of this fact.

- (8) Also in accordance with Chapter 647 of the Acts of 1989, An Act Relative to Improving the Internal Controls at State Agencies, all unaccounted for variances, losses, shortages or theft of funds or property shall be immediately reported to the Office of the State Auditor (OSA). The OSA is responsible to determine the internal control weaknesses that contributed to or caused an unaccounted-for variance, loss, shortage or theft of funds or property; make recommendations to correct the condition found; identify the internal control policies and procedures that need modification; and report the matter to appropriate management and, if appropriate, law-enforcement officials.
- (9) Wherever these standards require the board of trustees approval, approval may be given by any one of three entities: the full board, a sub-committee of the board or a designated trustee(s). The choice is up to the full board of trustees and should be included in the campus procedures or guidelines.
- (10) Wherever these standards require prior approval, the approval of the annual budget by the board of trustees satisfies prior approval requirements for any expenditure highlighted in these standards if that annual budget includes sufficient detail to permit the identification of said expenditure.
- (11) The president or his or her designees should have discretion over trust fund expenditures up to a ceiling specified by the board of trustees except in the following eight circumstances which require approval by the Board of Trustees regardless of the amount of the expenditures:
 - expenditures which personally benefit the president,
 - expenditures for renovations or repairs of president's office or home,
 - expenditures for individual's membership dues (in excess of \$500 for employees other than the president and for amounts in excess of \$1,000 for the president), except for fees or dues associated with professional organizations that directly advance the institution's mission,
 - expenditures for attendance at charitable dinners or events,
 - expenditures for trustee travel,
 - expenditures for entertainment of guests in president/chancellor's home,
 - expenditures for moving costs, and

- expenditures for purchase or lease of motor vehicles (for use by the president or other administrators.)

Additional discussion on the above expenditures are included in the following sections of the standards.

- (12) Individual expenditures over the ceiling as specified by the board of trustees require the prior approval of the board of trustees. Each board of trustees shall inform the Chancellor of the Board of Higher Education of the ceiling specified by that board.

II. CATEGORIES OF EXPENDITURE

(1) Expenditures of a Personal Nature

- A. Whenever an expenditure would personally benefit or might be seen to personally benefit an individual, that person is prohibited from approving such an expenditure, regardless of the dollar amount. In addition to any board approval required elsewhere in this document, in all such circumstances, an institutional official at a higher organizational level must approve the expenditure in advance.
- B. In the case of a president, the board of trustees must provide prior approval of such expenditures.

(2) General Campus Operations

- A. Facilities renovations, repairs, or decorations may be funded through a combination of the institution's appropriation from the Commonwealth and trust funds. When such expenditures for president/chancellor's home or office are to be made, they must have the prior approval of the board of trustees except in an emergency, in which case the board should be informed as soon as practicable. All such expenditures shall conform to the competitive bidding policies of the Commonwealth and to its associated procurement procedures.
- B. Contractor and consultant fees paid from trust funds should conform to state law pertaining to such activities.
- C. Publications, including president's reports, newsletters, advertisements, magazines, invitations and others should avoid the appearance of extravagance.
- D. Individual's membership fees for civic, academic and/or professional organizations in excess of \$500 must have prior approval by the board of trustees except for such memberships for the president so long as fees are not in excess of \$1,000.

- E. Outright contributions to charitable organizations are prohibited. However, where attendance at a charitable dinner or event will further the public purpose of the institution, expenditure may be permitted subject to prior approval by the board of trustees. The board of trustees may wish to impose a reasonable annual limit on such events for each organization.
- F. Contributions to individuals (or their associated committees) seeking elected, public office are prohibited.
- G. Contributions to political action committees (PACs) or equivalent organizations are prohibited.

(3) Travel and Substance Costs

- A. Employee Travel: When travelling to and from institutional business activities, actual expenditures for transportation, including bus, railroad, airline, subway, taxi and personal auto should be reimbursed to the extent that these expenditures exceed the normal daily cost of commuting to and from the institution. Where practical, the least expensive mode of transportation should be selected.

A comprehensive travel expense voucher must be filed for each trip. The voucher should reflect the cost of registration at a convention or meeting; transportation including local transportation, lodging, meals, and miscellaneous costs. Invoices in support of each item of cost shall be attached to the voucher. If one or more costs items have been separately paid by the institution (e.g. airfare), the cost item should be reported on the voucher, noted as paid and a copy of the airfare ticket or other invoice attached to the voucher. Adequate conference registration documentation should be attached to the voucher to demonstrate the extent to which meals were included in the registration fee.

In particular, all individuals should fly coach class or at discount fares where available.

Reimbursement for personal automobile mileage may be reimbursed at the prevailing state rate plus documented parking and tolls or the applicable collective bargaining agreement.

The circumstances of an out-of-town trip and the availability of public transportation may require the use of rental cars. Individuals should make every effort to take advantage of discount rates with car rental companies.

When travelling on institutional business, staff members should live and conduct business in a cost efficient manner which is both comfortable and safe. Where appropriate and available, discount rates on hotel and motel

stays should be taken advantage of. All charges, other than basic room charge and tax, such as meals, or phone calls should be separately identified on the expense report.

- Campus board of trustees should establish separate reimbursement policies for incidental travel expenses.

Business meals including food and beverages expenses must be reasonable and appropriate under the circumstances.

Examples of reasonable expenses:

- Meal expenditures which have a clear business purpose
- Meals while travelling out-of-town on institutional business
- Expenditures for the purpose of recruiting potential employees
- Meals incurred as part of attendance at conferences or meetings of professional organizations

Expense documentation should include:

- Date, city, restaurant and description of meal (lunch, dinner, etc.)
- Name(s), company, affiliation(s) and business relationship(s) of person(s) in attendance
- Business purpose and benefit to the institution for incurring the expenses
- Amount spent

In addition, business meal expenses must be documented by a receipt. Any meal not accompanied by a receipt may be reimbursed at the Commonwealth's per diem rate for meals. Also individuals monthly charges should be accompanied by an original receipt.

Expenditures of a personal nature, unreasonable or excessive expenses, and those not specifically related to the conduct of institutional business are not reimbursable. The following are indicative of the type of expenditures that should not be reimbursed:

- Excessive or extravagant costs (e.g., expensive wines, exclusive restaurants)
- Personal entertainment

- Travel insurance in excess of the amount automatically provided by the institution and the Commonwealth
 - Fines for traffic or parking violations
 - Insurance for a personally-owned car
 - Articles stolen from a personal or rental car
 - Briefcases and luggage
 - Expenses incurred in connection with personal business
 - Any unexplained expenses
- B. Non-employee Travel: Trust fund expenditures to pay for spouse or personal guest travel are not permitted. If the spouse or guest is a participant on a conference panel or program, expense reimbursement should be sought from the sponsoring organization or personal funds should be used.

At the president's direction, students may be allowed to incur travel expenses charged to the trust funds. Trustee travel must be approved by the chairman of the board of trustees. In all cases, the activities and expenses must be clearly related to the mission of the institution.

For such individuals, expense documentation should conform to the documentation required for employee expenses. In addition, the listing of unallowable expense noted for employees also applies to the aforementioned individuals.

(4) Personal and Student Loans

- A. Personal loans should not be granted to institutional staff, students or board members. This requirement does not apply to regular financial aid programs at the institution.
- B. In certain rare circumstances, it may be permissible to provide salary advances to employees if the institution cannot meet payroll due to technical difficulties (e.g., computer failure, etc.). Such advances should be repaid promptly to the trust fund.

(5) Employee and Student Recognition and Activities

- A. Within moderate limits set by the board of trustees, certain expenditures of trust funds to enhance employees and student morale or to recognize achievement, longevity, performance or retirement can be made. These circumstances include but are not limited to:
- institutional social functions, and

- employee and student recognition awards and dinners.

(6) Entertainment of institutional donors, alumni, friends, guests and visitors

- A. Such entertainment should be in moderation and good taste.
- B. It is appropriate for a college president to entertain guests in his or her home as part of official duties. Such expenditures must have prior approval of the board of trustees.
- C. Areas of expenditure for entertainment can include:
- Equipment and furniture rentals
 - Materials and supplies
 - Food and beverage
 - Entertainment
 - Service staff
 - Travel and related expenses (in conformity with the travel guidelines noted above)
- D. Sports, theatre and other entertainment tickets cannot be purchased with trust funds unless the event is being held on campus and the expenditure benefits the mission of the institution or directly supports its instructional programs.

(7) Miscellaneous

- A. Moving expenses are appropriate for the President and selected employees of the institution. Attracting individuals of high quality can require moving them from other parts of the state or country. Moving expenses should not exceed the regional, average cost of moving between two points, and must have the prior approval of the board of trustees. Competitive bids for moving costs should be sought in all cases. These expenditures should not include storage fees while an employee waits to sell or purchase a home.
- B. Purchase or lease of any motor vehicle with trust funds (for use by the president or other administrators) must have prior approval of the board of trustees. The lease or purchase of a full-sized, mid-priced automobile for the president's use may be appropriate. If a more expensive vehicle is desired by the president, the difference between the stated limits and the actual cost should be paid with the president's personal funds. Compliance with IRS guidelines for the personal use of an institutional vehicle should be adhered to by a president or other administrator.
- C. Purchase of flowers, gifts and cards in moderation from trust funds may be appropriate. Appropriate occasions include but are not limited to:

- death or illness of an employee, student, trustee or person of special importance to the institution, or immediate family of said persons, and
 - visit of special guests.
- D. Private clubs initiation fees and membership dues are not an allowable expense. Membership fees for professional or academic organizations and civic groups are an allowable expense; however, any initiation fee or annual membership fee for the president in excess of \$1,000 must have the prior approval of the institution's board of trustees. Membership fees in excess of \$500 for employees other than the president must have prior approval.
- E. Policies passed by the Board of Higher Education after approval of the Trust Fund Guidelines (last revised on December 5, 2000) shall supersede expenditure and reporting requirements as indicated in these Guidelines.

III. CLOSING COMMENTS

As noted previously, these proposed minimum standards for the expenditure of trust funds are not all-inclusive. It is impossible to outline every possible type of expenditure which might be made from these funds. However, when a trust fund expenditure decision must be made, it should be made in recognition of the public nature of these funds and in moderation of good taste.

Campus boards of trustees are expected to establish standards for the expenditures of trust funds that meet or exceed the Board of Higher Education's minimum standards as identified in this document. The institution's board of trustees shall approve campus-based standards. Each institution shall make its standards for the expenditure of trust fund available to the campus community.

The Board of Higher Education and the campuses will undertake a review of their standards for the expenditure of trust funds at least every five years.



WORCESTER
STATE
UNIVERSITY

FY 2027

Comprehensive
University Budget

**Worcester State University
FY 2027 Budget Package**

I Fiscal Year 2027 Budget Overview

II Fiscal Year 2027 Budget

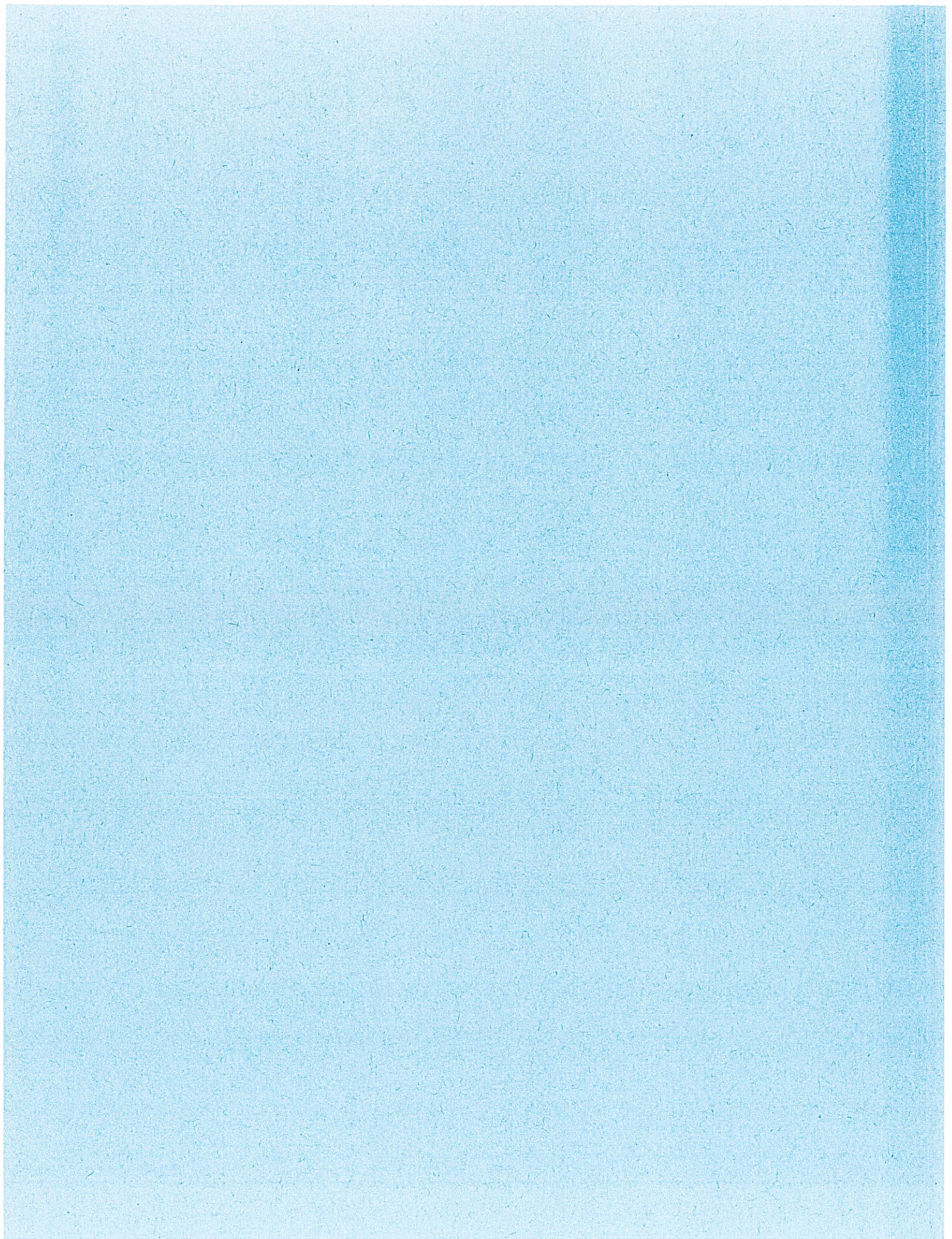
- 1 Summary FY2027 Budget - Sources and Uses of Funds
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- 3 Bar Chart: Use of Funds
- 4 FY 2027 Summary of Sources of Funds
- 5 FY2027 Trust Fund Summary
- 6 Pie Chart: Trust Fund Summary
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III Individual Fund Budgets compared with FY2026 Budget

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Appendix

- A Capital Adaptation and Renewal Spending Plan
- B FY 2027 Tuition and Fee Schedule
- C FY 2027 Budget Discussion April 9, 2026
- D New Indirect Cost Recovery Trust Fund





WORCESTER
S T A T E
UNIVERSITY

Memorandum

Vice President, Division of Administration and Finance

Phone: 508-929-8087

Fax: 508-929-8433

DATE: May 26, 2026

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: FY 2027 BUDGET

At the April 9th Finance and Facilities sub-committee meeting we discussed the legislative landscape surrounding the development of the Commonwealth's budget for FY 2027. Governor Healey had released her FY 2027 budget which had level funded state operating appropriations for the state universities, funded FY2027 collective bargaining commitments, level funded state financial aid accounts for the state universities, and provided funding for another round of SUCCESS grants.

The Senate Ways and Means budget committee report was released May 5, 2026. It generally follows the Governor's and House's spending plans for FY27. Items of concern continue to be the fact that funding has not been provided for the SU Funding Formula line item, and MassGrant Plus funding being undercapitalized compared to recent years. Two amendments have been filed for the state university system requesting funding of the Formula Funding line and a \$12M increase to the MassGrant Plus Line.

The Bright Act has not been approved into law yet, though individual versions have passed through the House and Senate. The House and Senate are currently working to reconcile the differences between the two versions before sending a final unified bill to Governor Healey for her approval.

FY 2027 Comprehensive Budget Package

The FY 2027 university wide budget package represents a balanced budget with \$151,276,806 of sources and uses of funds. Available resources are represented by three distinct categories: State funding for operations and student financial aid of \$70,949,550 (47%); Federal student aid of \$9,959,662 (6%); and institutional sources of \$70,367,594 (47%) representing ten distinct trust funds. Campus based trust funds include General, Parking Fines, Health Services, Residence Halls, Student Activities, Residence Hall Technology & Equipment, Capital Improvement, Parking Garage and Wellness Center trust funds, in addition to a new Indirect Cost Recovery Trust Fund.

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 2027

total operating resources are budgeted at \$114,182,866, with 56% funded by State resources and 44% from General fund revenue, specifically student fees.

There is a net increase in resources for the GO budget in FY 2027 mainly attributed to collective bargaining increases and fringe benefit costs funded by the Commonwealth. There have been modest fluctuations within campus generated revenue categories with a slight increase in tuition and other miscellaneous revenue categories. Adjustments have been made to the revenue budget for FY 2027 to reflect these trends. A \$450 annual General Fee increase 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 2025 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 2027 are shown below.

Expenditure Reconciliation

FY 2026 <u>General Operating Budget – Total Expenditures</u>		\$107,425,296
FY 2026 Add:		
FY 2026 Collective Bargaining Increases and other pay adjustments		<u>2,074,845</u>
Adjusted FY 2026 <u>Base Expenditures</u>		<u>\$109,500,141</u>
FY 2027 Adds:		
FY 2027 increase in fringe/payroll tax rate and collective bargaining reserve	3,741,154	
FY 2027 cost adjustments related to existing commitments	658,738	
FY 2027 investments in student recruitment and multi-year fundraising campaign	<u>1,500,000</u>	
Subtotal - Add		\$5,899,892
FY 2027 Deduct:		
Reductions to operating costs	<u>1,217,166</u>	
Subtotal – Subtract		<u>\$1,217,166</u>
FY 2027 <u>General Operating Budget – Total Expenditures</u>		<u>\$114,182,866</u>

The largest increase to the FY 2027 budget of \$3.7M is to fund commitments for negotiated direct labor cost increases and the related increase in fringe benefits. In addition to the typical increase in fringe costs linked to the increased salaries, the Comptroller of the Commonwealth of Massachusetts also notified state agencies of an 8% increase in the fringe benefit rate for FY 2027. The budget adjustments related to existing budget commitments reflect pricing and inflationary adjustments for ongoing obligations related to the procurement of goods and services.

Investment of new resources in FY2027 is tied to two initiatives that are intended to contribute to the growth of university resources in the coming years.

Resources are being committed to recruitment and yield efforts for designing and implementing an enrollment incentive program for applicants demonstrating meritorious academic achievement. Financial incentives will be offered to students in a manner that will increase our competitiveness to attract students and to secure a deposit from those applicants who are already considering enrolling due to the quality of our academic programs, attractiveness of our campus and the documented achievements and financial success of our graduates. This program will be overseen by the Vice President for Enrollment Management with direct involvement from the Admissions and Financial Aid Offices.

The university will embark on a multi-year fund raising campaign with planning activities already begun in FY 2026. FY 2027 resources will be invested in preparing the campaign and will provide for strategy development, communication planning and assembling the team necessary for donor outreach. The campaign will focus on three major themes with the intent of garnering significant resources to invest in an environment that will cultivate transformational leadership, strengthen the university's presence and contributions in the region and seek out and unlock boundless opportunities for Worcester state students, alumni and those who support them in the WSU community.

There are several cost items described below totaling \$1,217,166 that have been identified during the annual reconciliation process that will be removed from the operating budget or moved to other resources. Consistent underspending in several centralized accounts support reducing the lines by approximately \$75,000. Also identified were several non-recurring items that have been reduced at a cost of approximately \$325,000. Finally, we have identified various non-operating resources of approximately \$812,667 to fund program costs that have been previously carried as operating expenses.

Gap Analysis

The budget gap analysis provided below identifies a \$3,955,505 budget shortfall between revenue and expenses in FY 2027. The budget plan as presented identifies the revenue generated from a \$450 a year General Fee increase, and a budgeted drawn on reserve of \$2,496,605. In FY26 we budgeted a reserve draw of \$1.3M. As in previous years, we again expect to close the fiscal year without having incurred any deficit spending to support operations. A roll-forward of the FY26 budget gap emphasizes the need to identify opportunities to increase operating revenue and have our state operating appropriations increased in order to keep pace with direct labor costs, the pace of inflation, and investment in the strategic mission of the university.

FY 2027 Budget GAP Analysis

FY 2027 General Operating Budget -- Total Expenditures	\$114,182,866
FY 2027 General Operating Budget -- Baseline Revenue	<u>\$110,227,361</u>
FY27 Budget GAP	<u>\$ 3,955,505</u>

Roll-forward of PY Budget GAP

FY26 budgeted reserve draw	\$1,348,983
FY 27 Direct labor cost not funded through state appropriations	1,106,522
FY 27 Strategic Investments	<u>1,500,000</u>
FY27 Budget GAP	<u>\$3,955,505</u>

Resources for Backfill

General Fee Increase	\$1,458,900
Reserve draw	<u>\$2,496,605</u>
FY 27 GAP Resources	<u>\$3,955,505</u>

Residence Life Trust Fund (445)

The FY 2027 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 2025 and spring of 2026. Room rental rates for FY 2027 are increasing 4.17 – 4.55%, while occupancy continues to be below capacity resulting in an operating deficit. The FY 2027 budget has been right sized to reflect reduced capacity as in prior years, however there is still a revenue gap of \$908,570. Reserves will again be budgeted to bridge this gap. Depending up on the final results of operations for FY 2026, the trust fund reserve may dip below the MSCBA established floor of 5% of the previous year expenditures. If this occurs, we will seek a waiver for FY2027 to ensure compliance with MSCBA policy. It is likely the General Fund will need supplement the Residence Life Trust Fund in FY 2028 to ensure a balanced budget and ensure we are in compliance with MSCBA covenants.

Indirect Cost Recovery Trust Fund (406)

The purpose of an Indirect Cost Recovery Rate (ICRR) is to reimburse universities for the shared expenses and infrastructure costs that support research and programs but cannot be easily tied to a single specific externally funded project. Without this recovery, universities must divert funds from other institutional priorities like teaching or student services to cover the real costs of supporting research and programs. Improving indirect cost recovery ensures more money remains available to fund direct operating expenses. Recovering costs frees up funds that can go toward other critical needs, new projects or assist in bridging budget gaps.

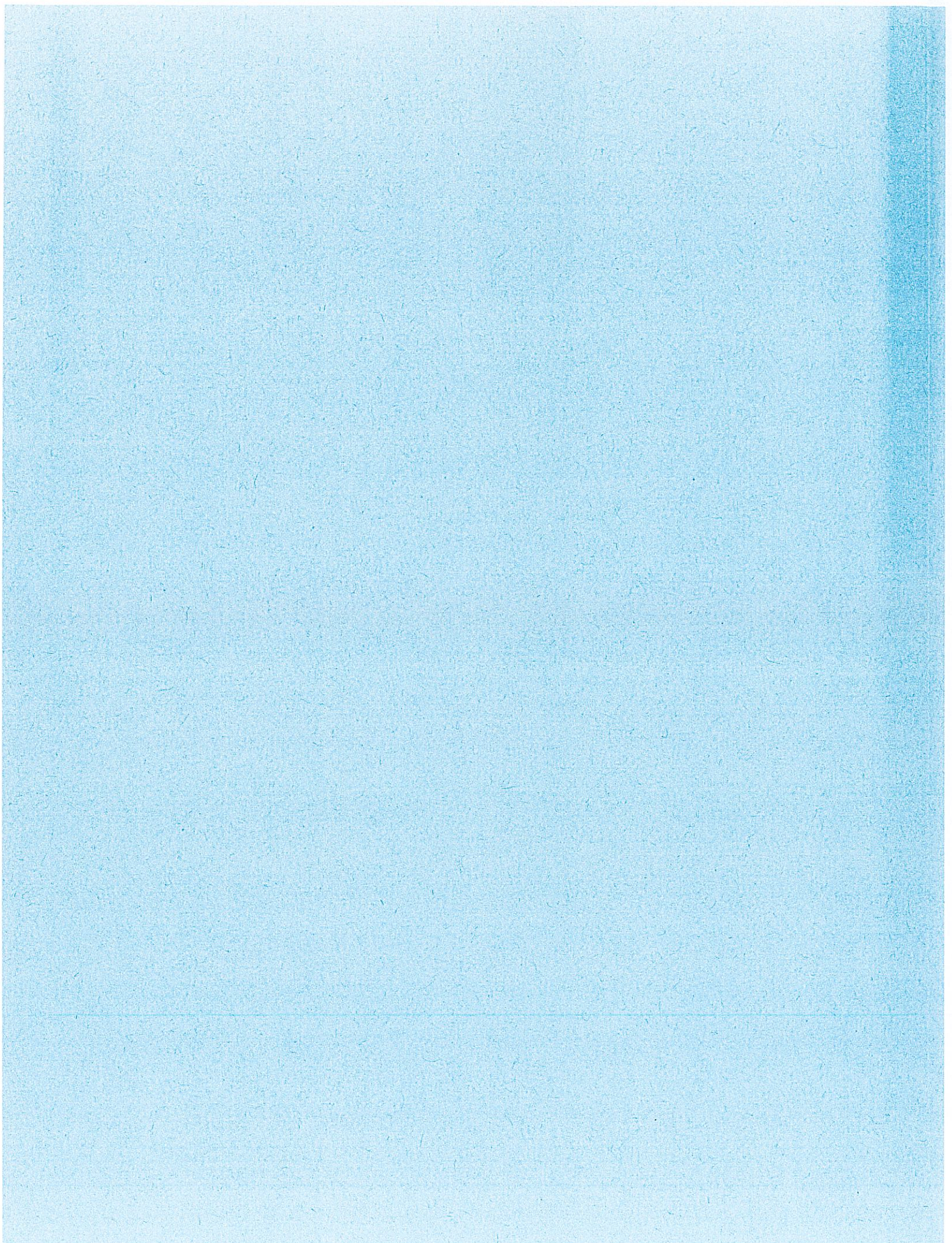
Appendix D to this budget package includes documentation describing the purpose of the trust fund and includes the trust fund agreement and the DHE Trust Fund Guidelines.

The ICRTF budget as prepared for FY 2027 reflects a transfer from The General Trust Fund reserves of indirect cost recovery earned between July 1, 2023 through April 30, 2026 that has been recorded as income in The General Trust Fund. Income for FY 2027 is budgeted at \$150,000. Expenditures of \$430,012 are budgeted to support the Office of Grants and Sponsored Research with anticipated surplus of resources to remain in the fund at the close of FY 2027 of \$471,186.

Other Trust Funds

The Wellness Center Trust Fund, Health Services Trust Fund, Capital Improvement Trust Fund, Parking Fines Trust Fund, Parking Garage Trust Fund, Student Activities 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 FY 2027 budget as presented for approval results in the annual cost of attendance for a full time in-state student who commutes to campus of \$12,794. The baseline cost for an in-state student who resides on campus per year is \$26,998. The baseline cost for an out-of-state student residing on campus per year is \$33,078.



Worcester State University
 Summary of Sources and Uses of Funds
 FY 2027 - All Sources and Trust Funds

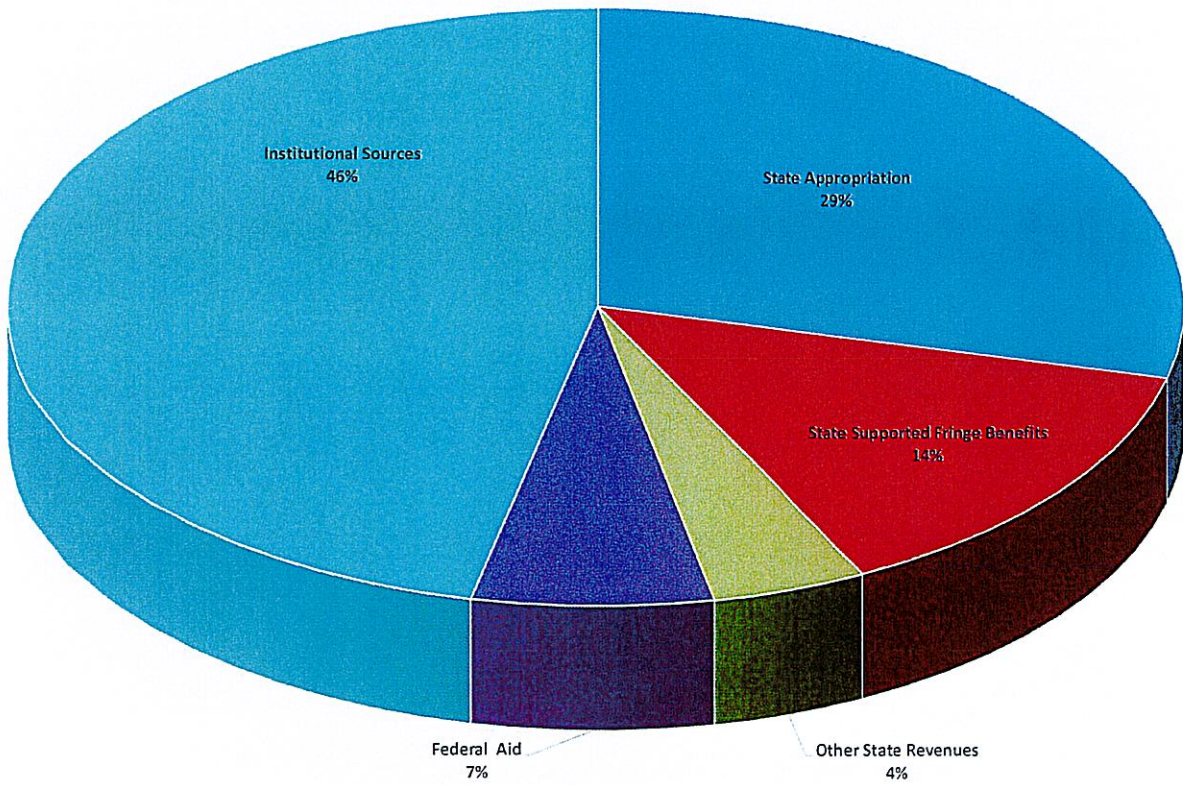
Sources of Funds:

State Appropriation	\$	43,642,881
State Supported Fringe Benefits		20,799,498
Other State Revenues		6,507,171
Federal Aid		9,959,662
Institutional Sources		70,367,594
Total Sources	\$	151,276,806

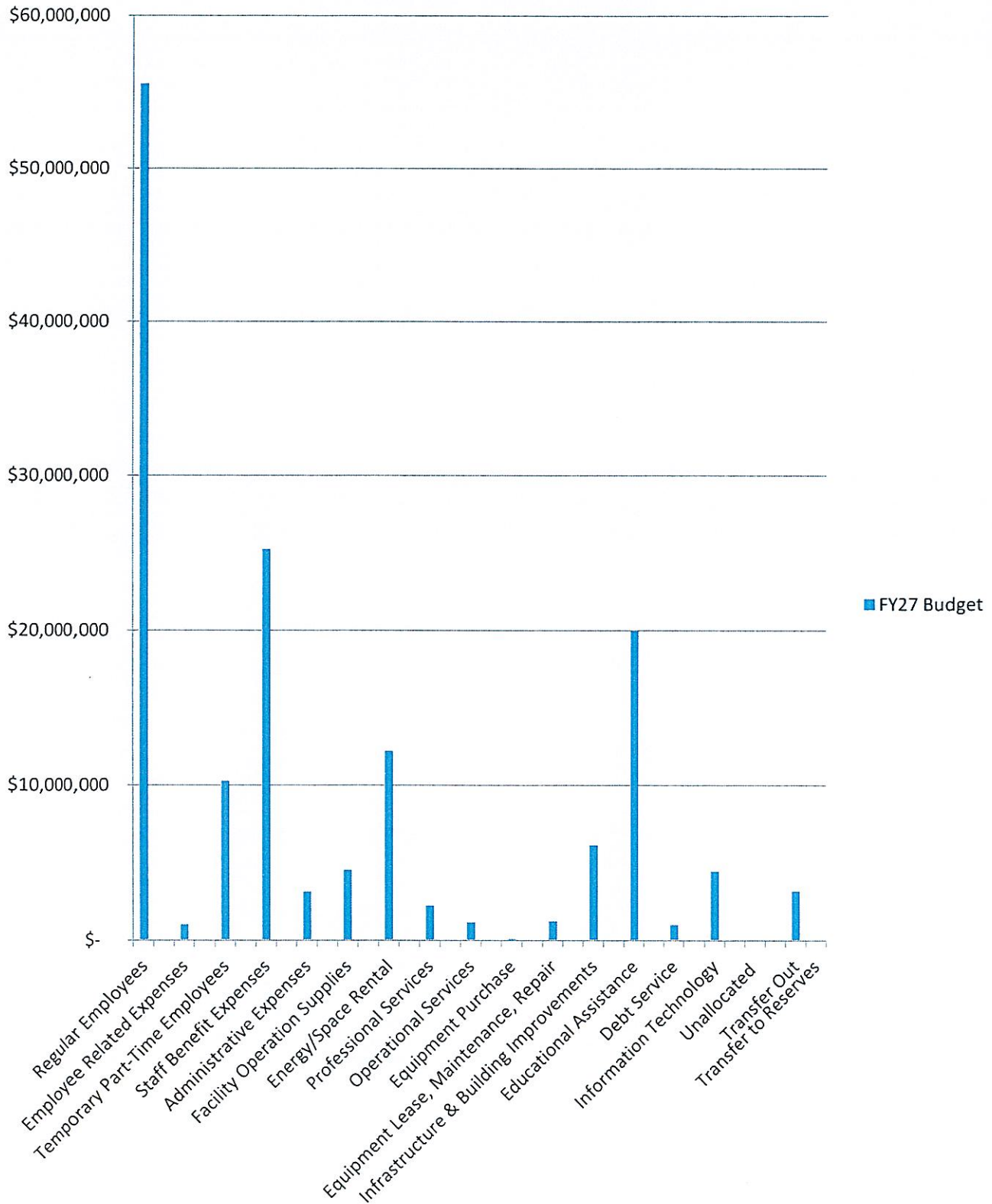
Uses of Funds:

AA	Regular Employees	\$	55,536,386
BB	Employee Related Expenses		1,015,136
CC	Temporary Part-Time Employees		10,269,098
DD	Staff Benefit Expenses		25,245,726
EE	Administrative Expenses		3,116,842
FF	Facility Operation Supplies		4,514,356
GG	Energy/Space Rental		12,208,870
HH	Professional Services		2,226,102
JJ	Operational Services		1,161,594
KK	Equipment Purchase		89,008
LL	Equipment Lease, Maintenance, Repair		1,239,102
NN	Infrastructure & Building Improvements		6,117,536
RR	Educational Assistance		19,944,697
SS	Debt Service		996,441
UU	Information Technology		4,433,926
XX	Unallocated		-
	Transfer Out		3,161,986
	Transfer to Reserves		
	Total Uses	\$	151,276,806

Worcester State University Sources Of Funds FY 2027 Budget



Worcester State University Uses of Funds FY 2027 Budget



Worcester State University
 Summary of Sources
 FY 2027 - All Sources and Trust Funds

State Sources

Annual State Maintenance Appropriation		\$ 43,642,881
State Supported Fringe Benefits	20,799,498	
Student Aid Program Mass Cash Grants	6,507,171	
Total Other State Sources		27,306,669
Total State Sources		70,949,550

Federal Sources

SEOG Program	262,744	
College Work Study Program	154,437	
Pell Grants	9,473,426	
<i>Local match (Transfer from General Trust Fund Reserve)</i>	69,055	
Total Federal Sources		9,959,662

Institutional Sources

Revenue		
General Trust Fund	47,243,882	
Parking Fines Fund	117,215	
Health Services Trust Fund	990,398	
Residence Halls Trust Fund	13,034,642	
Student Activities Trust Fund	415,353	
Residence Hall Tech. and Equip. Trust Fund	284,350	
Capital Improvement Trust Fund	2,568,858	
Wellness Center Trust Fund	79,479	
Indirect Cost Recovery Trust Fund	150,000	
Transfers In		
<i>*Transfer from Resident Hall Trust Fund Reserve</i>	908,570	
<i>*Transfer from Capital Improvement Trust Fund Reserve</i>	1,211,206	
<i>*Transfer from Wellness Center Trust Fund Reserve</i>	115,838	
<i>*Transfer from General Trust Fund</i>	751,198	
<i>*Transfer from Reserves</i>	2,496,605	
Total Institutional Sources		70,367,594
Total Sources		\$ 151,276,806

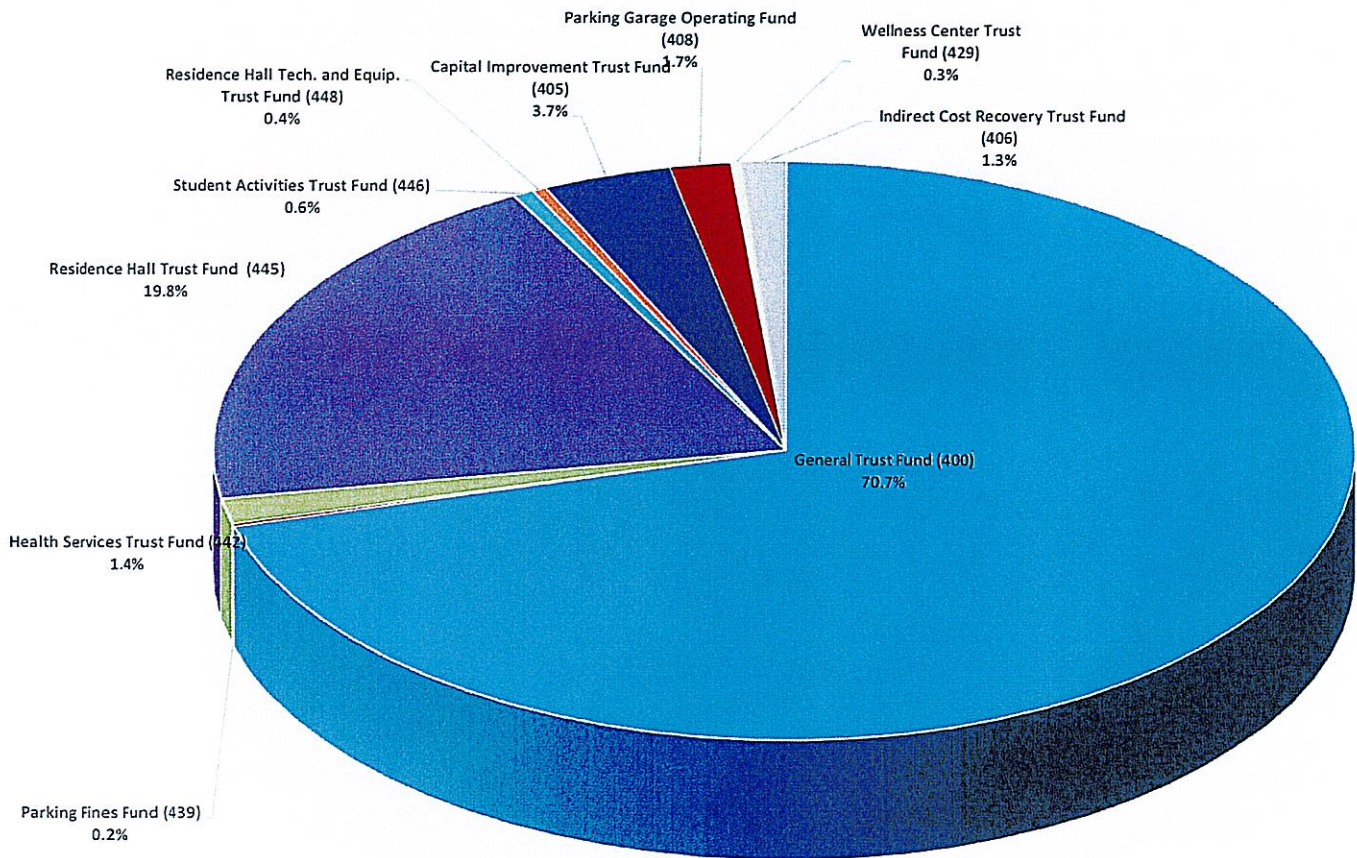
Worcester State University

Trust Fund Summary

FY 2027 Budget

	Budget FY 2025		
	Sources	Uses	
General Trust Fund (400)	\$49,740,487	\$ 49,740,487	70.7%
Parking Fines Fund (439)	117,215	117,215	0.2%
Health Services Trust Fund (442)	990,398	990,398	1.4%
Residence Hall Trust Fund (445)	13,943,212	13,943,212	19.8%
Student Activities Trust Fund (446)	415,353	415,353	0.6%
Residence Hall Tech. and Equip. Trust Fund (448)	284,350	284,350	0.4%
Capital Improvement Trust Fund (405)	2,568,858	2,568,858	3.7%
Parking Garage Operating Fund (408)	1,211,206	1,211,206	1.7%
Wellness Center Trust Fund (429)	195,317	195,317	0.3%
Indirect Cost Recovery Trust Fund (406)	901,198	901,198	1.3%
Total Trust Fund Budget	<u>\$70,367,594</u>	<u>\$ 70,367,594</u>	

Worcester State University Trust Fund Summary FY 2027 Budget

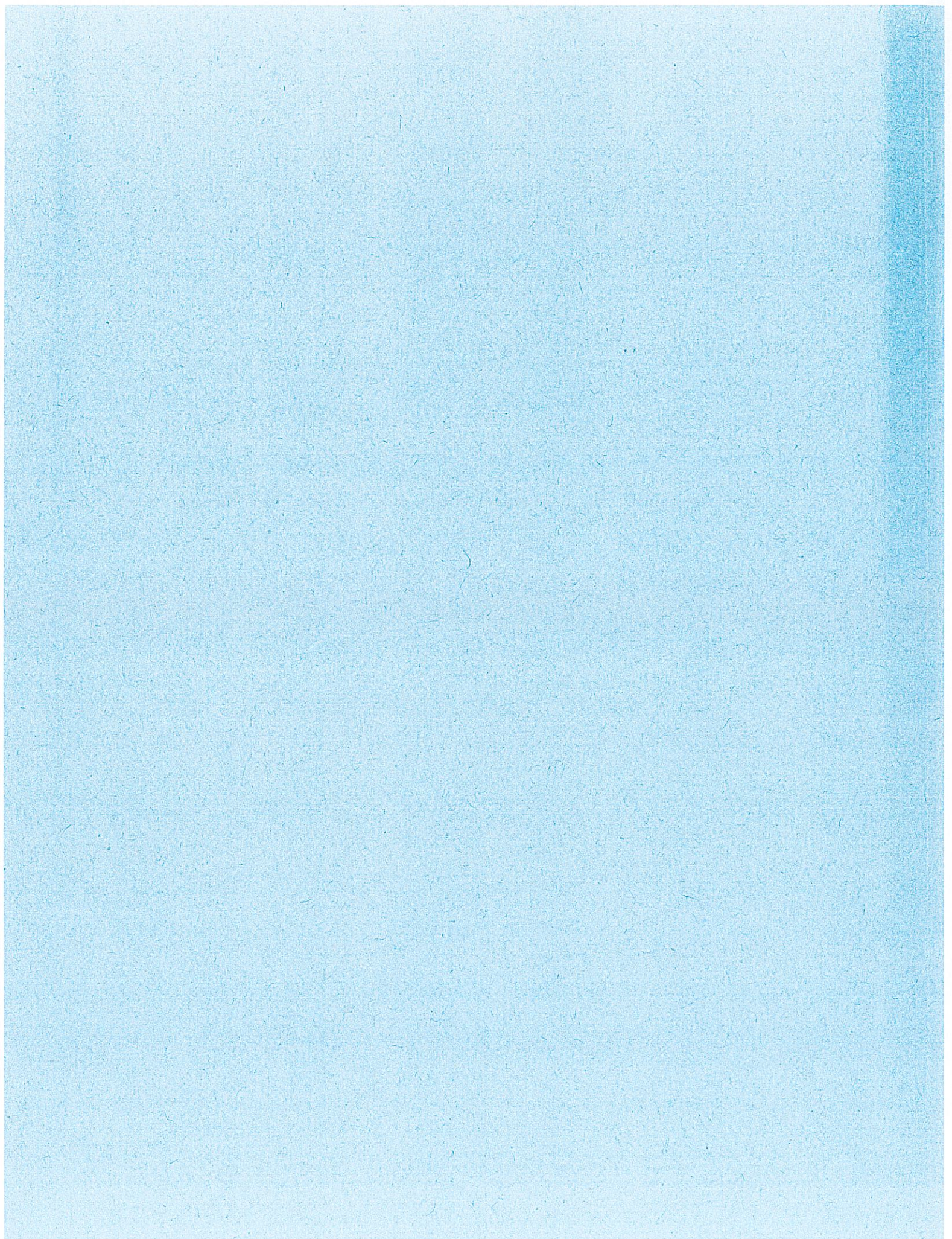


Worcester State University

Operating Revenue

FY 2027 Budget

	FY 2027 Proposed Budget	FY 2026 Approved Budget
State Sources		
State Maintenance	43,642,881	42,276,179
State Funded Fringe Benefits	20,799,498	19,049,646
Total State Sources	64,442,379	61,325,825
Institutional Sources		
General Trust Fund		
Tuition/ In state Undergraduate	4,766,279	4,153,067
Tuition/ Graduate	1,407,563	1,647,070
Tuition/ Out of State Undergraduate	1,465,551	1,397,261
Total Tuition	7,639,393	7,197,398
Waivers/Undergraduate	(125,292)	(120,704)
Waivers/Graduate	(169,247)	(163,766)
Total Tuition Waivers	(294,538)	(284,470)
Net Tuition	7,344,855	6,912,928
Undergraduate Day Division	34,840,801	33,273,354
Undergraduate Eve/Summer Programs	3,529,736	3,521,189
Graduate School	1,248,324	1,249,746
Total Fees	39,618,861	38,044,289
Undergraduate Day Division waivers	(796,049)	(1,095,941)
Undergraduate Eve/Summer Programs/waivers	(48,760)	(52,302)
Graduate Fee waiver	(150,576)	(143,922)
Total Fees Waivers	(995,385)	(1,292,165)
Net Fees	38,623,476	36,752,124
Application Fees	77,433	84,565
Special fees	267,420	241,541
Commencement Fees	6,060	5,340
Transcript Fees	49,332	49,608
Orientation Fees	100,351	104,415
Activity income	-	-
Commissions	128,343	128,343
Non-Credit Courses incl Restricted	179,700	113,025
Center for Effective Instruction	8,974	7,099
Facilities rentals	347,939	241,494
Miscellaneous	110,000	110,000
Other income	1,275,552	1,085,430
Total General Trust Fund Source	47,243,882	44,750,482
General Operating Budget Income	111,686,261	\$ 106,076,307



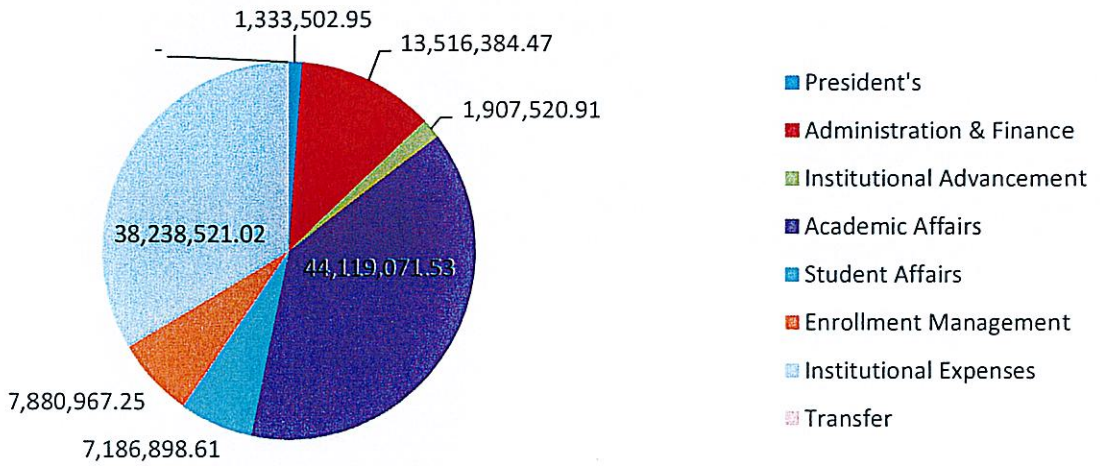
Worcester State University
 General Operating Budget (111 & 400)
 FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
Sources of Funds:		
Institutional Revenue	\$ 47,243,882	\$ 44,750,482
State Appropriation	43,642,881	42,276,179
State Funded Fringe Benefits	20,799,498	19,049,646
Transfer in -Reserves	2,496,605	1,348,990
Total Sources	\$ 114,182,866	\$ 107,425,297
Uses of Funds:		
AA Regular Employees	\$ 53,402,753	\$ 49,923,165
BB Employee Related Expenses	1,000,136	1,058,503
CC Temporary Part-Time Employees	9,974,215	10,348,199
DD Staff Benefit Expenses	24,255,658	22,161,988
EE Administrative Expenses	2,989,235	2,987,715
FF Facility Operation Supplies	3,937,796	2,917,621
GG Energy/Space Rental	2,164,132	2,140,200
HH Professional Services	1,583,602	1,567,927
JJ Operational Services	1,149,594	1,083,832
KK Equipment Purchase	69,008	1,008
LL Equipment Lease, Maintenance, Repair	1,097,792	1,175,177
NN Infrastructure & Building Improvements	4,727,536	4,727,536
RR Educational Assistance	2,916,964	2,416,964
SS Debt Service	567,536	567,536
UU Technology Expenses	4,346,909	4,347,926
Total Uses	\$ 114,182,866	\$ 107,425,297
Net Sources / (Uses)	\$ -	\$ -

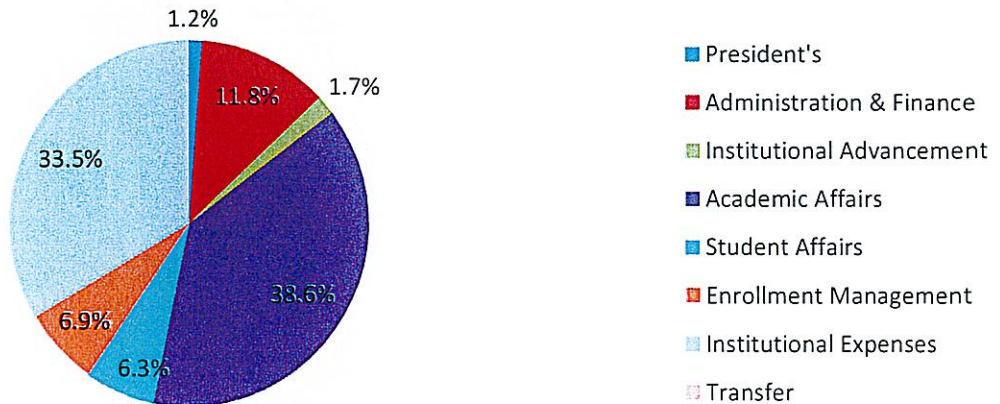
Worcester State University
 400/111 Expenditures by Division
 FY 2027 Budget

Class	Division	Budget FY25 Subtotals	Budget FY25 Exp %
2	President's	1,333,502.95	1.2%
3	Administration & Finance	13,516,384.47	11.8%
4	Institutional Advancement	1,907,520.91	1.7%
6	Academic Affairs	44,119,071.53	38.6%
7	Student Affairs	7,186,898.61	6.3%
8	Enrollment Management	7,880,967.25	6.9%
3	Institutional Expenses	38,238,521.02	33.5%
	Transfer	-	
		<u>114,182,866.74</u>	<u>100.0%</u>

**Budget FY2027
Subtotals by Division**



**Budget FY2027
Expense % by Division**



Worcester State University

General Trust Fund (400)

FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Institutional Revenue	47,243,882	44,750,482
Transfer in -Reserves	2,496,605	1,348,990
Total Sources	<u>\$ 49,740,487</u>	<u>\$ 46,099,472</u>
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 9,759,872	\$ 7,646,986
BB Employee Related Expenses	1,000,136	1,058,503
CC Temporary Part-Time Employees	9,974,215	10,348,199
DD Staff Benefit Expenses	3,456,160	3,112,342
EE Administrative Expenses	2,989,235	2,987,715
FF Facility Operation Supplies	3,937,796	2,917,621
GG Energy/Space Rental	2,164,132	2,140,200
HH Professional Services	1,583,602	1,567,927
JJ Operational Services	1,149,594	1,083,832
KK Equipment Purchase	69,008	1,008
LL Equipment Lease, Maintenance, Repair	1,097,792	1,175,177
NN Infrastructure & Building Improvements	4,727,536	4,727,536
RR Educational Assistance	2,916,964	2,416,964
SS Debt Service	567,536	567,536
UU Technology Expenses	4,346,909	4,347,926
Total Uses	<u>\$ 49,740,487</u>	<u>\$ 46,099,472</u>
Net Sources / (Uses)	<u>\$ -</u>	<u>\$ -</u>

Worcester State University
State Maintenance Appropriation (111)
FY 2027 Budget

		FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>			
	State Appropriation	\$ 43,642,881	\$42,276,179
	State Funded Fringe Benefits	\$ 20,799,498	\$19,049,646
	Total Sources	\$ 64,442,379	\$61,325,825
<u>Uses of Funds:</u>			
AA	Regular Employees	\$ 43,642,881	\$42,276,179
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	20,799,498	19,049,646
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	\$ 64,442,379	\$61,325,825
	Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Capital Improvement Trust Fund (405)
 FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Capital Improvement Fee	\$ 2,568,858	\$ 2,672,610
Total Sources	\$ 2,568,858	\$ 2,672,610
<u>Uses of Funds:</u>		
GG - Energy/Space rental	\$ -	\$ -
SS - Debt Service	428,905	536,617
Transfer Out - Parking Garage Oper. Fund	1,211,206	1,211,206
Transfer Out - To Reserves	928,747	924,787
Total Uses	\$ 2,568,858	\$ 2,672,610
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Indirect Cost Recovery Trust Fund (406)
 FY 2027 Budget

	FY2027 Requested Budget
<u>Sources of Funds:</u>	
Other Income	\$ 150,000
Transfer in- General Trust Fund	\$ 751,198
Total Sources	\$ 901,198
<u>Uses of Funds:</u>	
AA Regular Employees	\$ 279,170
BB Employee Related Expenses	10,000
CC Temporary Part-Time Employees	-
DD Staff Benefit Expenses	128,725
EE Administrative Expenses	8,480
FF Facility Operation Supplies	1,060
HH Professional Services	-
JJ Operational Services	500
LL Equipment Lease, Maintenance, Repair	1,060
RR Educational Assistance	-
UU Technology Expenses	1,017
Transfer Out - Reserves	471,186
Total Uses	\$ 901,198
Net Sources / (Uses)	\$ -

Worcester State University
 Parking Garage Operating Fund (408)
 FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Transfer In - Capital Improvement T. F.	\$ 1,211,206	\$ 1,211,206
Total Sources	\$ 1,211,206	\$ 1,211,206
<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	590,000
SS Debt Service	-	-
UU Technology Expenses	-	-
Total Uses	\$ 1,211,206	\$ 1,211,206
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
Wellness Center Trust Fund (429)
FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Revenues	\$ 79,479	\$ 82,908
Transfer in - Reserves	\$ 115,838	\$ 112,514
Total Sources	\$ 195,317	\$ 195,422
<u>Uses of Funds:</u>		
BB Employee Related Expenses	\$ -	\$ -
CC Temporary Part-Time Employees	15,000	20,000
DD Staff Benefit Expenses	317	422
EE Administrative Expenses	17,500	12,500
FF Facility Operation Supplies	113,500	113,500
GG Energy/Space Rental	-	-
HH Professional Services	-	20,000
JJ Operational Services	2,000	2,000
KK Equipment Purchase	20,000	-
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	\$ 195,317	\$ 195,422
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Parking Fines Fund (439)
 FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Fines and Other Income	\$ 117,215	\$ 112,315
Transfer in - Reserves		-
Total Sources	\$ 117,215	\$ 112,315
<u>Uses of Funds:</u>		
EE Administrative Supplies	\$ 30,000	\$ 30,000
RR Educational Assistance	60,000	60,000
Transfer Out - To Reserves	27,215	22,315
Total Uses	\$ 117,215	\$ 112,315
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Health Services Trust Fund (442)
 FY 2027 Budget

	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 990,398	\$ 986,463
Total Sources	\$ 990,398	\$ 986,463
<u>Uses of Funds:</u>		
AA Regular Employees	\$ -	\$ -
BB Employee Related Expenses	-	-
CC Temporary Part-Time Employees	-	8,000
DD Staff Benefit Expenses	-	169
EE Administrative Expenses	7,877	100
FF Facility Operation Supplies	-	10,000
HH Professional Services	596,000	600,000
JJ Operational Services	6,500	
LL Equipment Lease, Maintenance, Repair	-	500
RR Client Medical Services	100	100
UU Technology Expenses	-	-
Transfer Out - Reserves	379,921	367,594
Total Uses	\$ 990,398	\$ 986,463
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Resident Hall Trust Fund (445)
 FY 2027 Budget

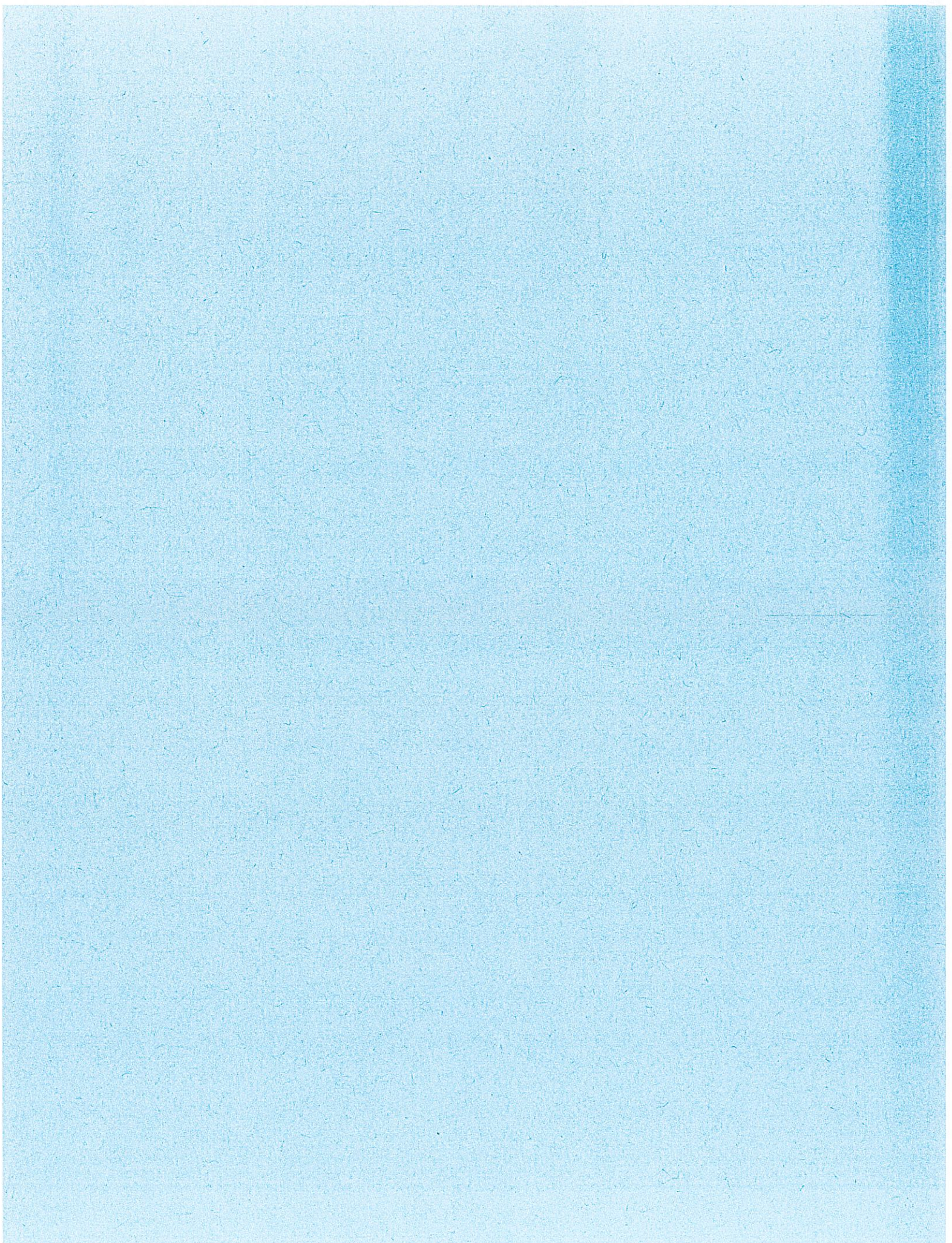
	FY2027 Requested Budget	FY2026 Approved Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 13,034,642	\$ 12,563,592
Transfer In - Reserves	\$ 908,570	\$ 1,448,863
Total Sources	\$ 13,943,212	\$ 14,012,455
<u>Uses of Funds:</u>		
AA Regular Employees	\$ 1,854,463	\$ 1,808,270
BB Employee Related Expenses	-	-
CC Temporary Part-Time Employees	279,883	235,000
DD Staff Benefit Expenses	861,026	814,806
EE Administrative Expenses	35,500	30,714
FF Facility Operation Supplies	215,000	285,000
GG Energy/Space Rental	9,247,540	9,400,766
HH Professional Services	19,500	10,700
LL Equipment Lease, Maintenance, Repair	78,500	78,500
NN Infrastructure & Building Improvements	800,000	853,749
RR Educational Assistance	500,800	468,950
SS Debt Service	-	-
UU Technology Related Expenses	51,000	26,000
Transfer Out - To Reserves	-	-
Total Uses	\$ 13,943,212	\$ 14,012,455
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
Student Activities Trust Fund (446)
FY 2027 Budget

	FY2027 Requested Budget	FY2026 Requested Budget
<u>Sources of Funds:</u>		
Fees	\$ 415,353	\$ 413,583
Transfer In - Reserves		\$ 42,000
Total Sources	\$ 415,353	\$ 455,583
<u>Uses of Funds:</u>		
BB Employee Related Expenses	\$ 5,000	\$ 8,000
CC Temporary Part-Time Employees	-	41,000
DD Staff Benefit Expenses	-	583
EE Administrative Expenses	28,250	36,000
FF Facility Operation Supplies	247,000	263,250
GG Energy/Space Rental	-	-
HH Professional Services	27,000	32,000
JJ Operational Services	3,000	27,500
KK Equipment Purchase	-	-
LL Equipment Lease, Maintenance, Repair	49,750	47,000
NN Construction/Maintenance/Improvements	-	-
UU Technology Expenses	20,000	250
Transfer Out - To Reserves	35,353	
Total Uses	\$ 415,353	\$ 455,583
Net Sources / (Uses)	\$ -	\$ -

Worcester State University
 Residence Hall Technology and Equipment Trust Fund (448)
 FY 2027 Budget

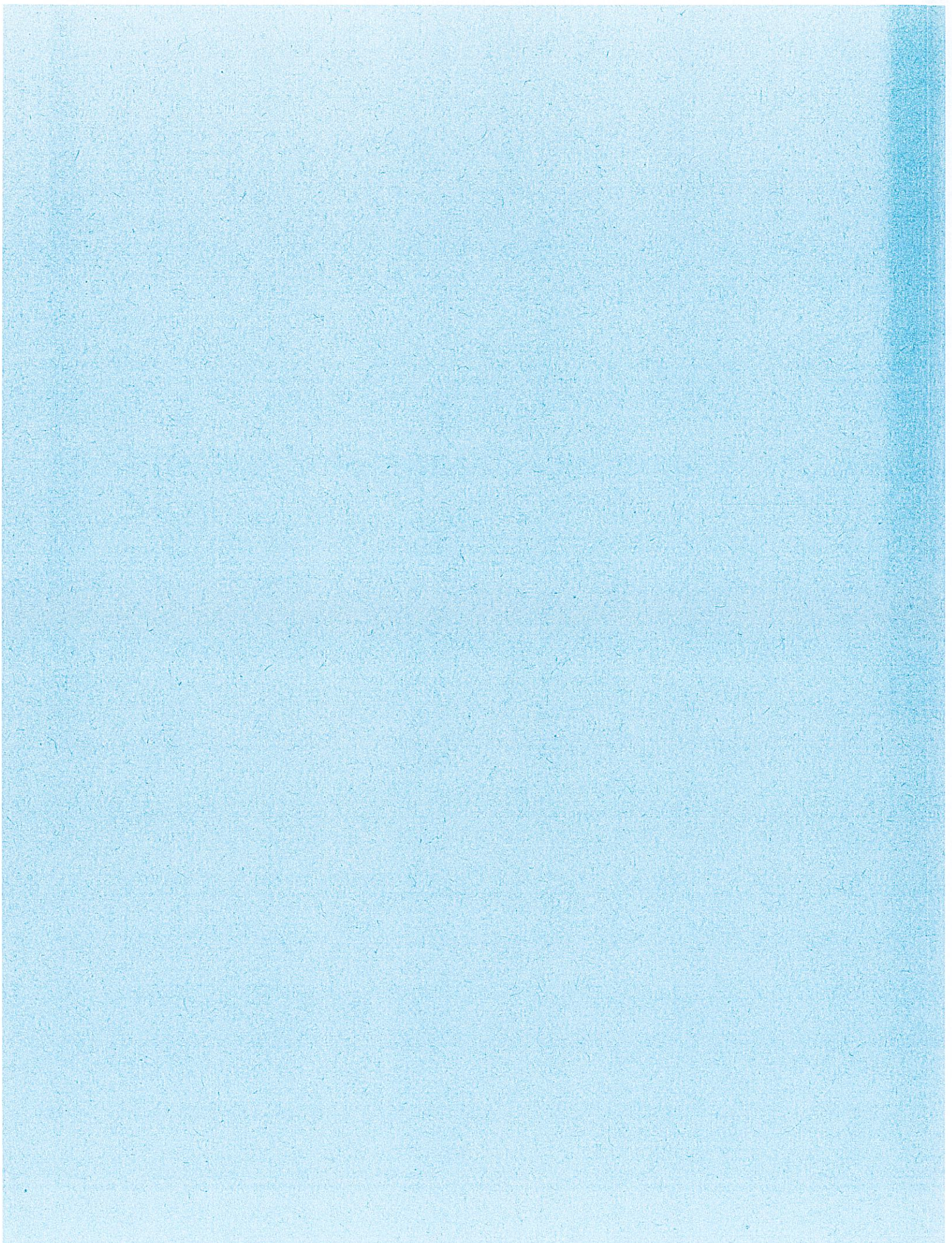
	FY2027 Requested Budget	FY2026 Requested Budget
<u>Sources of Funds:</u>		
Fees and Other Income	\$ 284,350	\$ 278,740
Total Sources	\$ 284,350	\$ 278,740
<u>Uses of Funds:</u>		
AA Regular Employees	\$ -	\$ -
DD Staff Benefits Expense	-	-
EE Administrative Expenses	-	-
GG Energy/Space Rental	175,992	192,944
LL Equipment Lease, Maintenance, Repair	-	-
SS Debt Service	-	-
UU Technology Expenses	-	-
Transfer Out - To Reserves	108,358	85,796
Total Uses	\$ 284,350	\$ 278,740



Worcester State University
Capital Adaptation and Renewal
FY 2027

A

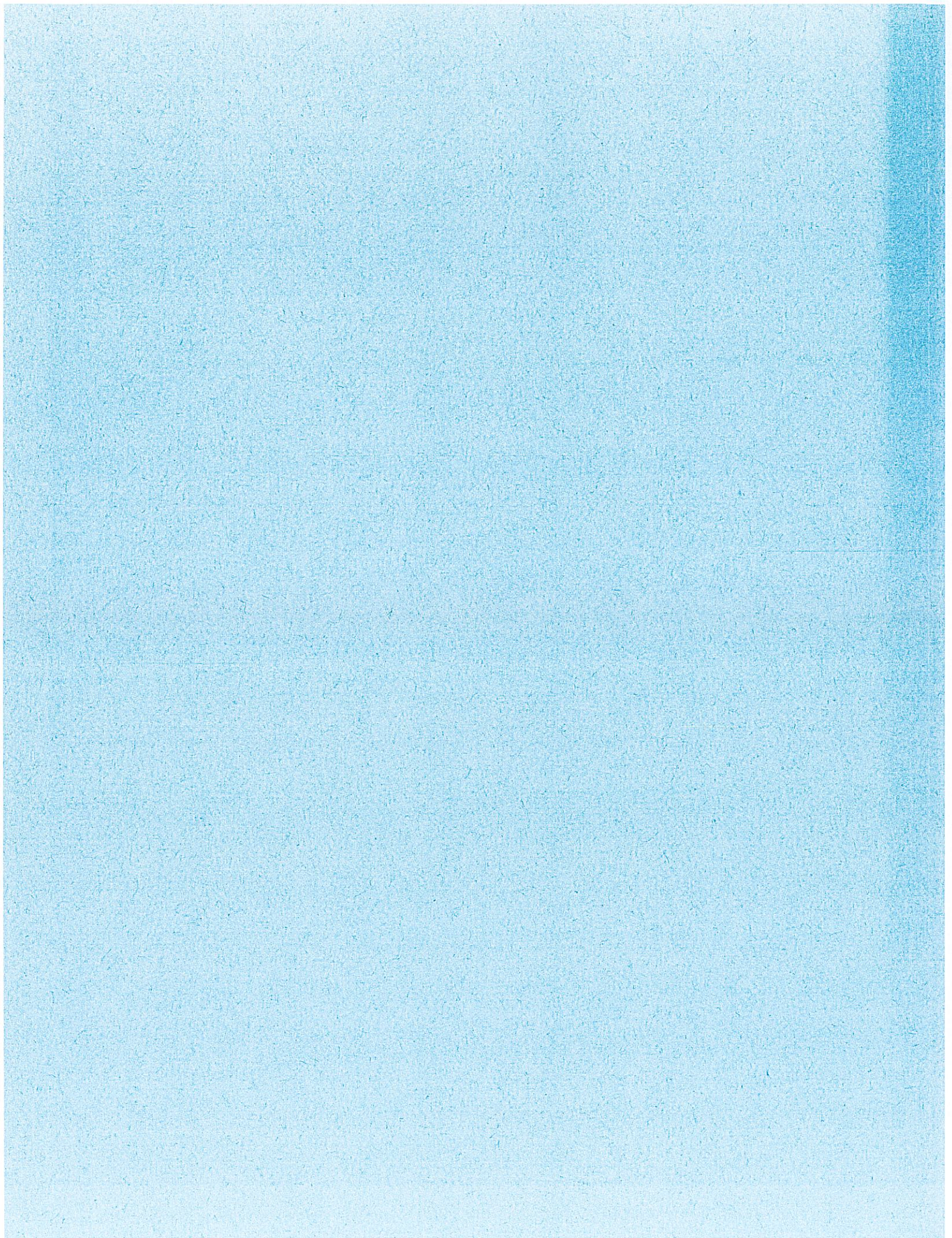
Sullivan Roof Replacement	\$	450,000.00
Student Affairs Renovation	\$	590,000.00
LRC VAV Replacement	\$	150,000.00
Wellness Center Comp Lighting	\$	162,000.00
Gordian Assessment	\$	28,815.00
POD Dishroom Renovation	\$	500,000.00
West Student Center ADA Walkway	\$	225,000.00
S&T RODI System Refurbishment	\$	575,000.00
Wasylean/CV Landscape Plan Implementation	\$	500,000.00
Varsity Weight Room	\$	325,000.00
Various Improvement Projects	\$	494,185.00
Total Project Estimates	\$	<u>4,000,000</u>



Worcester State University
Tuition and Fees - Academic Year 2026/2027

B

	Annual	Increase from FY 2026
<u>Undergraduate Day Division</u>		
<u>Cost for Full-Time In-State Student</u>	12,794.00	
Tuition:		
MA Resident	970.00	
Non-Resident	7,050.00	
NE Regional	1,455.00	
Fees:		
General Fee	4.37%	450.00
Student Activity Fee	130.00	-
Student Health Svc Fee	310.00	
Capital Improvement Fee	636.00	
Total Fees	11,824.00	450.00
Health Insurance	5,164.00	448.00
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	4.40%	400
Single		9,500.00
Lofted Single		10,500.00
Premium Single		11,000.00
Dowden Hall - Double		
Double	4.55%	400
Single		9,200.00
Premium Single		10,200.00
Wasylean Hall - Double		
Double	4.17%	400
Single		10,000.00
Premium Single		11,000.00
Sheehan Hall - Double		
Double	4.26%	400
Single		9,800.00
Premium Single		10,800.00
Residence Activity Fee		11,800.00
Residence Activity Fee		50.00
Technology and equipment fee		220.00
Resident Parking Fee		175.00
Board	4.00%	182
		4,734.00
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

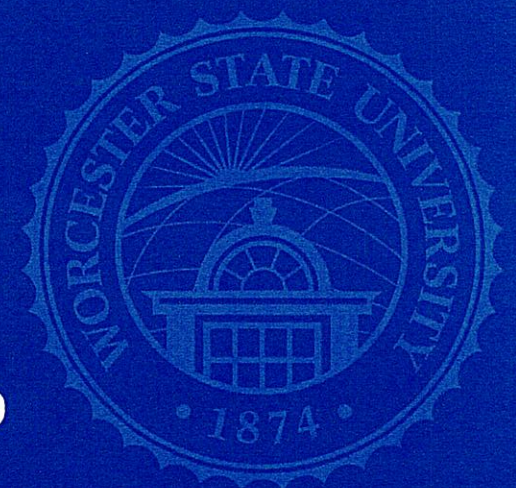




WORCESTER
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UNIVERSITY

FY 2027 Budget Planning

Kathleen Eichelroth
Vice President for Administration and Finance/CFO



FY 2027 State Budget Process

On February 12th President Maloney provided a FY 2027 Budget Update to the WSU community [President Maloney FY27 budget update](#)

- The communication noted that on January 28, Gov. Maura Healey released her FY27 budget recommendations, and it is now working its way through the legislative process.
- The following items have a direct impact on our operating budget:
 - **CBA obligations:** The governor's budget includes annualized funding for our FY26 union bargaining obligations for employees and partially funds our FY27 obligations. Securing full funding for FY27 CBA obligations is a critical priority for Worcester State and all state universities.
 - **Formula funding:** The state universities are advocating for restoration of formula funding that was eliminated in the FY26 budget and is not included in the Governor's budget. Formula funding provides a more equitable distribution of state funds according to each university's enrollment and performance.
 - **SUCCESS Funding:** The Governor's budget includes \$14 million in SUCCESS funding to be divided among the state universities. Worcester State's share of these dollars has averaged \$1.6 million and we support the third year of funding for SUCCESS.
 - **State Financial Aid:** The Governor's budget includes essentially level funding for many state financial aid programs, such as the MassGrant Plus program, which has helped Worcester State increase financial aid offers to students in recent years, including the university's [ValuePlus program](#). However, funding at FY26 levels remains significantly below what Worcester State received in FY25, creating challenges in delivering robust financial aid packages to students.

FY 2027 State Budget Process - continued

- Other supplemental funding initiatives in the works for FY 2027 include the following:
 - **Early College:** The Governor continues to strongly back Early College, and has included funds for expansion in her budget. Exposing high school students to the quality of a Worcester State education, as well as helping them gain college credits, is a win-win for the university and for students.
 - **BRIGHT Act:** This bond bill from Gov. Healey will provide \$2.5 billion from Fair Share tax revenue for deferred maintenance and capital investment in the state's public colleges and universities. In November, the House passed the bill, and the Senate adopted a version in February. The next step is for it to go to conference committee. Passing of the BRIGHT Act is critical to carrying out our Master Plan which is currently in development.
- FY 2026 Fair Share Supplemental Budget:
 - Additional deferred maintenance funds are being made available in FY 2026 with spend authorization through June 30, 2028.
 - Campuses are being provided \$500,000 Lab modernization design grants, with the Governor intending to fund the work with campus grants of \$5M each to be funded through the BRIGHT Act.
 - In an effort to reduce deferred maintenance backlogs each state university is receiving \$1.65M in supplemental funds to address needed repairs and improvements. There is also expanded flexibility to use these funds for campus security investments.

Campus Resources

- Post-Covid, annual Formula Funding allocations had been relied upon heavily
 - to backfill the loss of federal operating subsidies during Covid
 - and compensate for the effects of enrollment decline due to the demographic cliff and changes in behavior patterns of college age students
- Without increased funding for operations in our base state appropriation
 - we have relied on opportunities for
 - cost containment
 - revenue enhancement
 - student recruitment
 - student retention.
- While pursuing these strategies we have found it necessary to increase rates annually in an effort to stabilize operating resources.
- In addition to these strategies, we will focus on prioritizing data-driven decisions as the basis for informing the allocation of limited resources.

FY 2027 Budget Discussions

Division Level meetings occurred during the months of February and March and the following information was shared

Good news: stable rating reviews by S&P and Moody's

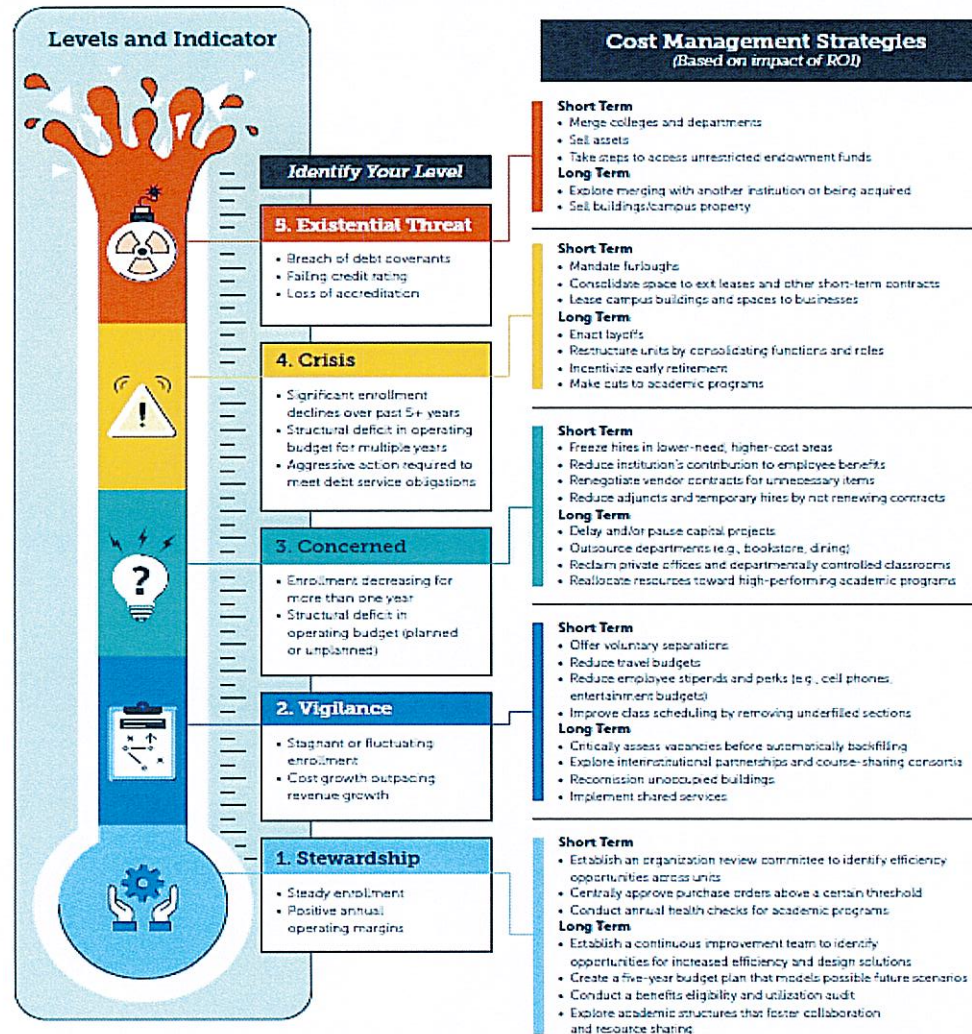
- ✓ As of February 2026, [Moody's Ratings](#) has affirmed the **A2 issuer and revenue bond ratings** for Worcester State University (MA), maintaining a stable outlook.
- ✓ In November 2025 S&P Global Ratings, affirmed Worcester State University (WSU) **A** rating with a stable outlook reflecting its **solid financial management, robust state support, healthy retention rates, pro-active management team, and somewhat variable enrollment trend.**

Discussed operational pressures using a thermometer graphic

The Five Levels of Financial Performance to Guide Proactive Planning in Higher Education

In response to the increased pressures facing higher education, EAB recommends a shift toward proactive financial planning: anticipating potential financial downturns and determining an institution's response in advance. This can break the cycle of reactive decision-making (and its unintended consequences), allowing leaders to chart a course toward sustainable financial health and longevity.

This infographic delineates five levels of financial performance and recommended cost management strategies for each. Use this infographic to determine your cost management strategy for both today and into the future.



FY 2027 Budget Discussions - continued

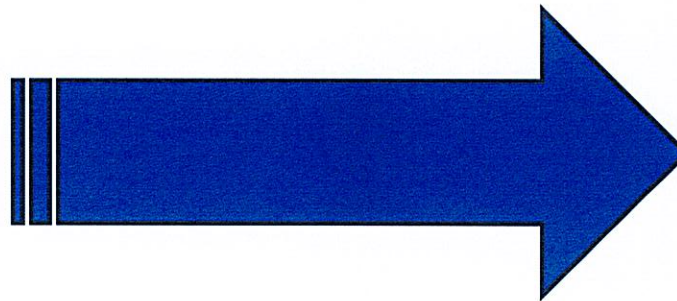
This slide was discussed during Division level meetings

“Budget managers and unit leaders were asked to take a careful, data-informed look at their current operations and planned requests—grounding decisions in enrollment trends, workload, outcomes, and alignment with institutional priorities. Building on our institutional commitment to operational excellence, we have an opportunity to engage thoughtfully in the process by asking questions, sharing ideas to improve efficiency or effectiveness, and supporting efforts that reduce costs, enhance revenue, or better align resources with student success.” [President Maloney FY27 Budget update](#)

Not So Good News:

Significant Financial Pressures

- Enrollment
- Effectiveness of return from current programs:
 - UG
 - GR
 - CE
 - Other
- Residence Occupancy
- IT related investments
- Campus Safety Investments
- Direct Labor Costs
- Inflation
- Replacement Cycles
- Inventory of Enterprise Risks
- Fluctuating Structural Budget Deficit
- OTHER.....



Potential Response Actions

- Evaluation of existing practices with fresh eyes
- Optimize DL costs (greatest asset is people: are their efforts strategically focused)
- Focused approach to revenue opportunities
- Resource prioritization for best return
- Investment of resources to reduce costs or increase return
- Align decisions with Strategic Plan
- Implement Master Plan and use data for future planning
- Focus on being a data driven institution
- Set timelines and benchmarks
- Practice continuous improvement
- OTHER.....

FY 2027 Budget Development

Assessment and Reconciliation Process

- **Assessment**

- In FY 2025, through the collaborative budget process, various prioritized commitments were funded. As we plan for FY 2027 we will revisit these initiatives, assess the outcomes and determine the level of commitment to further fund the initiative going forward
- The outcome of various operational efficiency projects that have been accomplished in the most recent years will be evaluated to assess the outcomes and ensure they are being re-evaluated through a continuous improvement cycle.
- In line with the new data driven rubric for full time position hiring, the temporary and part-time employee budget categories will be reviewed and evaluated for operational necessity, strategic alignment, financial viability, and sufficiency of workload demand.

- **Reconciliation**

- Roll forward all direct labor costs, including collective bargaining increases, and re-setting benefit cost estimates in alignment with the Commonwealths negotiated fringe benefit rates.
- Identify and re-direct operating costs associated with resources outside the operating budget such as grants and other trust funds
- Review reliable trends and data evidencing potential revenue growth/decline.

FY 2027 State Budget Process - continued

- Other State University Budget priorities being pursued include:
 - Level funding of the Internship Incentive Program
 - Additional funds for MassGrant Plus Expansion Program to cover tuition and fees for all students whose families make less than \$100k
 - Funds to restore student behavioral and mental health grants
- Operating Resources
 - The majority of state resources are earmarked to support specific programs and initiatives.
 - For many years Formula Funding has been the only resource that increases baseline operating appropriations to the campuses (in an effort to address increasing costs of operating a institution).
 - A Formula Funding allocation was not provided for in the final FY 2026 budget and was not proposed by the Governor for FY 2027.

FY 2027 Budget Development - continued

Initiatives and Gap Analysis

■ Initiatives

- Through the reconciliation process, continuing and new initiatives will be identified and resources from completed initiatives and unfunded items will be removed
- Priority initiatives under consideration include:
 - a proposal to expand merit aid in an effort to grow first year student deposits and at a minimum to maintain steady first year deposits at a time when other institutions are struggling to maintain their first year deposit numbers.
 - Investment in a multi-year Major fundraising campaign focusing on three major themes; Cultivate Transformational Leadership, Strengthen Regional Vitality, and Unlock Boundless Opportunity

■ Gap Analysis

- Once the reconciliation process is complete we anticipate having a budget gap similar in magnitude of what we have experienced over the past several years.
- While we continue to chip away at the budget deficit through efficiencies, cost reductions and selective rate increases we continue to experience a gap due to cost escalation, inflation and softening of our revenue streams
- While we continue to advocate for Formula Funding which would provide a boost to our operating budget and assist in underwriting the increasing costs of operating a university –
 - we fear that January 2027 may bring with it a series of reductions to our operating appropriation and Massachusetts financial aid resources

Preview of June Budget Package

Filling the Budget Gap

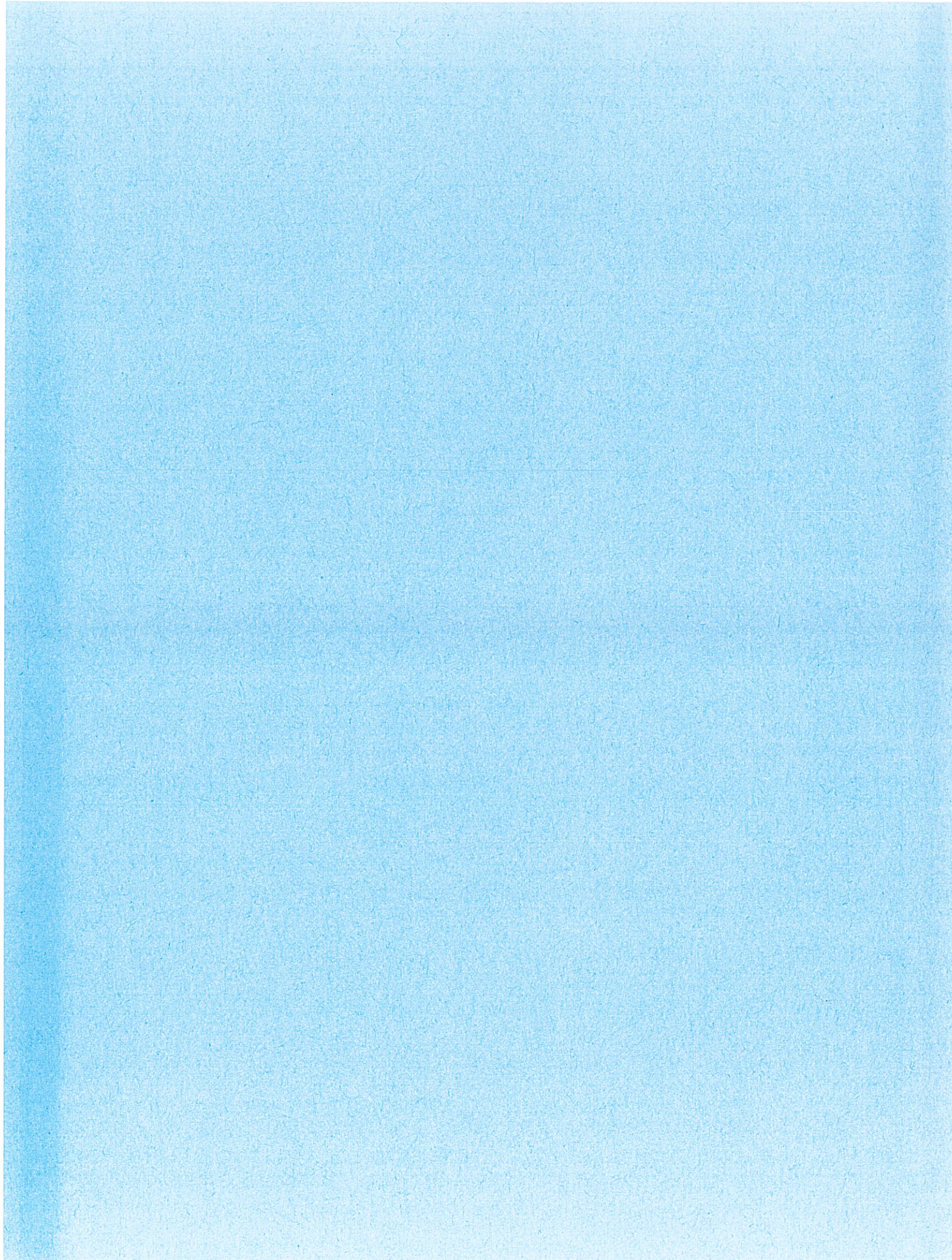
- The operating budget deficit will be identified
 - All identified state resources will be included in the plan
 - All cost saving/revenue generating initiatives will be identified and net savings/net new revenue estimated
 - a General Fee increase will be requested (not to exceed \$500 per yr.)
 - An amount of appropriated reserves will be identified
- Consideration will be given to the **risk of reductions to state funding at mid-year**
- Consideration will be given to implementing a fee increase in two steps allowing for reconsideration of any projected budget deficit should state resources not be reduced and/or additional operating resources are made available through the budget process
- Other trust fund budgets will be reconciled and balanced with consideration of the need for other program fee increases



WORCESTER
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Questions and comments







Memorandum

DATE: May 11, 2026

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: INDIRECT COST RECOVERY TRUST FUND (406)

The purpose of an Indirect Cost Recovery Rate (ICRR) is to reimburse universities for the shared expenses and infrastructure costs that support research and programs but cannot be easily tied to a single specific externally funded project. Without this recovery, universities must divert funds from other institutional priorities like teaching or student services to cover the real costs of supporting research and programs.

Improving indirect cost recovery ensures more money remains available to fund direct operating expenses. Recovering costs frees up funds that can go toward other critical needs, new projects or assist in bridging budget gaps.

WSU has had a negotiated ICRR for almost two decades. While this recovery rate has been in place it has not been consistently applied when preparing grant and revenue contract proposals. Since the formation of the Office of Grants and Sponsored Research (OSGR) funding applications have increasingly included a cost recovery component. The work of the Financial Sustainability Task Force and Operational Excellence efforts have also drawn attention to the need to recover indirect costs as part of negotiating private revenue contracts.

For FY 2027 we are creating the Indirect Cost Recovery Trust Fund (ICRTF) as a means to bridge the operating budget gap. As with many back-office functions, the costs associated with the OSGR are included in the pool of indirect costs associated with supporting research and program activities. The pool of indirect costs are the basis of a university's overhead rate request that is negotiated with Department of Health and Human Services approximately every five years.

When evaluating the cost recoveries received in recent years a positive trend has been demonstrated since 2024 with a cumulative recovery over the past three years to date of \$751,198. The Indirect Cost Recovery Trust Fund will be funded initially by transferring the \$751,198 of funds recovered since 2024 from The General Fund Trust Fund reserve. Future recoveries beginning in July 1, 2026 will be deposited directly to the ICRTF. The initial goal of the trust fund will be to underwrite the costs of the OGSR. Transferring the departmental budget for the OGSR to the ICRTF will match recovered funds with the effort focused on securing vital funding for research and other programs to progress the mission of the university. Moving the departmental expenses from the operating budget also assists in bridging the budget gap.

Future efforts to improve our indirect cost recovery by regularly reviewing and updating our rate agreements, ensuring accurate documentation and consistent application of rates and advocating for full cost recovery where possible, will increase opportunities to shift additional costs to the ICRTF thereby freeing up resources in the operating budget.

The attached trust fund agreement for the Indirect Cost Recovery Trust Fund (406) describes the purpose of the trust fund and establishes a guideline for allowable revenue and expenditures. Also attached are the Standards for the Expenditure of Trust Funds as promulgated by the Board of Higher Education.

The ICRTF budget as prepared for FY 2027 reflects a transfer from The General Trust Fund reserves of indirect cost recovery earned between July 1, 2023 through April 30, 2026 that has been recorded as income in The General Trust Fund. Income for FY 2027 is budgeted at \$150,000. Expenditures of \$430,012 are budgeted to support the Office of Grants and Sponsored Research with anticipated surplus of resources to remain in the fund at the close of FY 2027 of \$471,186.

It is anticipated that the trust fund will be able to fund one additional year of operating costs for the OGSR in FY 2028, if the FY2027 budget is realized. Beyond that fiscal year it may be necessary to supplement cost recovery deposits with university operating resources, requiring a transfer into the ICRTF from The General Trust Fund. While supplemental funding may be necessary going forward, it is important to report the cost recovery deposits in an independent trust fund in an effort to apply the recovery receipts to appropriate expenditures to the fullest extent possible.

Going forward the A&F team will work with the OGSR to prepare and submit an annual budget for the Indirect Cost Recovery Trust Fund as part of the comprehensive budget package that is approved by the Board of Trustees.

<u>Name of Trust Fund</u>	Indirect Cost Recovery Trust Fund
<u>Date established</u>	July 1, 2026
<u>Purpose of Fund</u>	To hold money received by the university as reimbursement for services rendered in support of grants and contracts and to apply the recovered funds as an offset to those indirect costs in future budget cycles.
<u>Source number</u>	406
<u>Source of revenue</u>	Sources of revenue includes receipts from Indirect Cost Recovery funds assessed on grants and contract as permitted per agreement. Current accounts include federal (38001), state (38002) and private (38003). Transfers in from The General Trust Fund as necessary to offset budgeted expenses.
<u>Appropriate expenditures</u>	<p>The cost of actual expenditures that are essential to ensuring compliance with grant management and other administrative functions necessary to support and conduct the research/programs.</p> <p>The scope of expenditures includes those used to determine the Indirect Cost Recovery Rate. The recovery rate allows the university to recoup money spent on:</p> <ul style="list-style-type: none"> • Administration [grants office, procurement, accounting, payroll, legal services and departmental administrative support] • Compliance [ensuring research/programs meet federal, state and other regulations and ethical guidelines]
<u>Inappropriate expenditures</u>	Those in violation of the Worcester State University “Accounting Policy and Procedure Manual”.
<u>Separate bank account</u>	No

Worcester State University
 Indirect Cost Recovery Trust Fund (406)
 FY 2027 Budget

	FY2027 Requested Budget
<u>Sources of Funds:</u>	
Other Income	\$ 150,000
Transfer in- General Trust Fund	\$ 751,198
Total Sources	\$ 901,198
<u>Uses of Funds:</u>	
AA Regular Employees	\$ 279,170
BB Employee Related Expenses	10,000
CC Temporary Part-Time Employees	-
DD Staff Benefit Expenses	128,725
EE Administrative Expenses	8,480
FF Facility Operation Supplies	1,060
HH Professional Services	-
JJ Operational Services	500
LL Equipment Lease, Maintenance, Repair	1,060
RR Educational Assistance	-
UU Technology Expenses	1,017
Transfer Out - Reserves	471,186
Total Uses	\$ 901,198
Net Sources / (Uses)	\$ -

BOARD OF HIGHER EDUCATION

STANDARDS FOR THE EXPENDITURES OF TRUST FUNDS

Adopted May 9, 1989
Revised June 6, 1990
Revised October 13, 1992
Revised December 5, 2000

The Commonwealth of Massachusetts

ROLE OF TRUST FUNDS

The term “trust funds” as used in public higher education refers to non-appropriated funds held by the public institutions of higher education.

In Massachusetts, trust funds play an important role in financing the educational needs of all students in the public higher education system. The statutory authority for trust funds in Massachusetts is found in Massachusetts General Laws chapter 15A, Section 9 (N) and 22 (E), Chapter 73 Section 14 and Chapter 75 Section 11 . The language contained in the various statutes provide authority for the Board of Higher Education and institutional boards of trustees to seek, accept, establish and administer trust funds for campus projects, programs and activities. The statutes stipulate that all income received be held in trust and be expended for the purposes for which the trust funds were established. It is important, therefore, that institutions carefully review the purposes for which a trust fund has been established before making any expenditures from the trust fund. Trust funds are used to complement state appropriations in order to ensure sufficient funding of an institution’s total needs. Without trust funds, the Commonwealth’s appropriation would have to be increased or some services could not be undertaken. Trust funds can also provide a vehicle to manage supplemental programs to better meet the needs of the college or university community.

Typically, trust fund revenues are used in connection with a variety of campus activities such as auxiliary enterprises (e.g., student housing, bookstores, food service, vending machines), student activities, financial aid, medical services, public services and research. These funds are self-sustaining. The public colleges and the University have two primary sources of income: state appropriations and local campus revenues or trust funds.

- The expenditure of state appropriated funds is governed by detailed state regulations which control expenditures for all state agencies. Statutory authority for enforcing state regulations rests with several entities including the State Comptroller. The Office of the State Auditor has authority under Chapter 11, Section 12 of the Massachusetts General Laws to audit colleges and universities programmatic and financial activity including trust funds in accordance with General Accepted Government Auditing Standards.
- Trust funds expenditures, however, are regulated differently. Although technically “public” funds, trust funds are not “appropriated” funds, and therefore, are not subject to the same spending rules and regulations as appropriated funds. In many cases, other external regulations govern expenditures of campus trust funds. For example, sponsored research trust funds would be subject to federal and state regulations concerning the expenditure of research monies. Student housing funds may be governed by regulations pertaining to debt service payments associated with dormitory construction. Where external, third-party regulations do not exist, responsibility for regulating and controlling the expenditure of campus trust funds rests with local boards of trustees. The Board of Higher Education

does not have statutory authority over institutional trust funds. The Office of the State Auditor has statutory authority to audit Trust Fund revenue and expenditures.

Because trust fund regulations are locally developed and controlled, they vary from institution to institution and there is a wide spectrum of institutional policies, procedures and regulations which apply. They range from extremely limited regulations to conformity with all state regulations pertaining to appropriated funds. In the vast majority of cases, the guidelines can be considered general in nature, leaving much to the discretion of institutional boards and administrators.

PURPOSE OF THE STANDARDS

A generally shared objective of the Commonwealth of Massachusetts is to improve the quality and effectiveness of its public higher education system and to raise it to a position of leadership in the United States. It is important that the development, utilization, and management of trust funds be conducted in a manner that meets with general approval. Clearly, expenditures from trust funds should be consistent with this overall, long-range goal.

Therefore, these standards for the expenditure of trust funds are intended:

1. To provide some guidance and suggestions on selected expenditures made in the interest of promoting the mission of the institution.
2. To outline recommended standards for expenditures which have the appearance of providing personal benefits to college officials and friends, or of being lavish or extravagant in nature.

It is impossible to discuss every conceivable type of expenditure, which might be made from these funds. These standards are designed to provide greater clarity and more uniformity in the determination of appropriate and inappropriate expenditures of these funds.

The standards should be considered minimum standards. Local boards of trustees must develop institutional guidelines and standards which may be more but not less restrictive.

The standards in this report are designed to apply primarily to those trust funds, which permit broad, discretionary expenditures. However, they shall also be applied to expenditures from all trust funds established by boards of trustees, which are not governed by external (non-trustee) regulations or restrictions.

Underlying Principles

A number of important principles underlie these standards:

1. Institutional autonomy and flexibility as well as local decision-making are important and should be encouraged. These standards should not be construed as an attempt to usurp local authority or to centralize decision-making. Each institution must have the flexibility to fulfill its distinctive mission within the public higher education system.
2. No set of general or detailed guidelines can be a substitute for personal ethics and sound judgment. Expenditures of trust funds should be made with the assumption that those decisions and choices will become public knowledge.
3. Local boards of trustees have the responsibility to issue guidelines to ensure that all Trust Fund revenues due to be received have been received and properly deposited and accounted for.
4. Local boards of trustees have the responsibility to issue clear guidelines for the expenditure of trust funds and to establish the mechanism and structures to actively review these expenditures. Accountability is a critical component of local autonomy. Individuals and institutions should be held accountable for their choices and decisions, including the expenditure of trust funds.
5. Public colleges and the University are members of and participants in the larger communities they serve. As such, they must interact with community groups and civic associations and it can be appropriate for them to make modest and limited expenditures in support of these entities.
6. State institutions, like private institutions, must engage in activities which promote employee morale, generate philanthropic support and enhance the well-being of the institution. Accordingly, reasonable and appropriate expenditures to support such activities can and should be made.
7. Trust funds should not be spent in a manner which gives the impression of lavishness or extravagance. Travel, entertainment and other expenditures should be made in moderation and good taste.
8. Expenditure of trust funds may be subject to federal and state income taxation if they exceed normal allowances, are not adequately accounted for, and/or do not satisfy a requirement that the expenditure was accomplished to satisfy the business needs of the institution.

The following pages outline minimum standards to ensure the proper control of the receipt and expenditure of trust funds.

I. RESPONSIBILITY AND REPORTING

- (1) Responsibility for the specific trust fund guidelines and regulations rests with the institutional board of trustees. These guidelines should include policies

and procedures concerning trust fund revenue sources, appropriate and inappropriate expenditures, bank accounts, spending approval levels and required documentation.

- (2) Responsibility for trust administration rests with the president or chancellor of the institution. Records shall be maintained in accordance with proper accounting procedures, including documentation of receipts, disbursements and bank accounts.
- (3) Policies, procedures and internal controls should be established for all Trust Fund administrative and financial activity. All transactions and significant events should comply with Chapter 647 of the Acts of 1989, An Act Relative to Improving the Internal Controls within State Agencies, and the Office of the State Comptroller's Internal Control Guides for Departments.
- (4) All trust fund activities shall be subject to regular audit and inspection by the State Auditor's department and the Board of Higher Education.
- (5) Clear goals and objectives for the trust fund should be established by the institution and, where feasible, an annual budget should be developed, reviewed by the president and submitted to the board of trustees for approval before the beginning of each fiscal year. Such budgets should include sufficient detail to permit the identification of major expenditures. Expenditures should not exceed budgeted amounts for each Trust Fund without prior approval.
- (6) The president shall provide a detailed accounting of trust fund expenditures to the board of trustees on, at least, a quarterly basis and the audited financial statements to the Board of Higher Education on an annual basis. Additional reports may be requested at the discretion of either board.
- (7) The level of detail required in the quarterly and annual report is left to the discretion of the board of trustees at each campus. However, the level of detail must be sufficient to satisfy board member inquiries and audit requirements and it should also include:
 - certification by the president that all records were maintained in accordance with proper accounting procedures, including documentation of receipts, disbursements and bank accounts, and
 - relationship of the expenditure to institutional mission should be clearly stated or evident

In addition, the president and/or board of trustees should report all violations of trust fund expenditure standards as well as the follow-up action taken to address each violation to the Board of Higher Education. This report should be made on a quarterly basis if violations occur. If no violations occur during

the year, the audit report and management letter are required as confirmation of this fact.

- (8) Also in accordance with Chapter 647 of the Acts of 1989, An Act Relative to Improving the Internal Controls at State Agencies, all unaccounted for variances, losses, shortages or theft of funds or property shall be immediately reported to the Office of the State Auditor (OSA). The OSA is responsible to determine the internal control weaknesses that contributed to or caused an unaccounted-for variance, loss, shortage or theft of funds or property; make recommendations to correct the condition found; identify the internal control policies and procedures that need modification; and report the matter to appropriate management and, if appropriate, law-enforcement officials.
- (9) Wherever these standards require the board of trustees approval, approval may be given by any one of three entities: the full board, a sub-committee of the board or a designated trustee(s). The choice is up to the full board of trustees and should be included in the campus procedures or guidelines.
- (10) Wherever these standards require prior approval, the approval of the annual budget by the board of trustees satisfies prior approval requirements for any expenditure highlighted in these standards if that annual budget includes sufficient detail to permit the identification of said expenditure.
- (11) The president or his or her designees should have discretion over trust fund expenditures up to a ceiling specified by the board of trustees except in the following eight circumstances which require approval by the Board of Trustees regardless of the amount of the expenditures:
 - expenditures which personally benefit the president,
 - expenditures for renovations or repairs of president's office or home,
 - expenditures for individual's membership dues (in excess of \$500 for employees other than the president and for amounts in excess of \$1,000 for the president), except for fees or dues associated with professional organizations that directly advance the institution's mission,
 - expenditures for attendance at charitable dinners or events,
 - expenditures for trustee travel,
 - expenditures for entertainment of guests in president/chancellor's home,
 - expenditures for moving costs, and

- expenditures for purchase or lease of motor vehicles (for use by the president or other administrators.)

Additional discussion on the above expenditures are included in the following sections of the standards.

- (12) Individual expenditures over the ceiling as specified by the board of trustees require the prior approval of the board of trustees. Each board of trustees shall inform the Chancellor of the Board of Higher Education of the ceiling specified by that board.

II. CATEGORIES OF EXPENDITURE

(1) Expenditures of a Personal Nature

- A. Whenever an expenditure would personally benefit or might be seen to personally benefit an individual, that person is prohibited from approving such an expenditure, regardless of the dollar amount. In addition to any board approval required elsewhere in this document, in all such circumstances, an institutional official at a higher organizational level must approve the expenditure in advance.
- B. In the case of a president, the board of trustees must provide prior approval of such expenditures.

(2) General Campus Operations

- A. Facilities renovations, repairs, or decorations may be funded through a combination of the institution's appropriation from the Commonwealth and trust funds. When such expenditures for president/chancellor's home or office are to be made, they must have the prior approval of the board of trustees except in an emergency, in which case the board should be informed as soon as practicable. All such expenditures shall conform to the competitive bidding policies of the Commonwealth and to its associated procurement procedures.
- B. Contractor and consultant fees paid from trust funds should conform to state law pertaining to such activities.
- C. Publications, including president's reports, newsletters, advertisements, magazines, invitations and others should avoid the appearance of extravagance.
- D. Individual's membership fees for civic, academic and/or professional organizations in excess of \$500 must have prior approval by the board of trustees except for such memberships for the president so long as fees are not in excess of \$1,000.

- E. Outright contributions to charitable organizations are prohibited. However, where attendance at a charitable dinner or event will further the public purpose of the institution, expenditure may be permitted subject to prior approval by the board of trustees. The board of trustees may wish to impose a reasonable annual limit on such events for each organization.
- F. Contributions to individuals (or their associated committees) seeking elected, public office are prohibited.
- G. Contributions to political action committees (PACs) or equivalent organizations are prohibited.

(3) Travel and Substance Costs

- A. Employee Travel: When travelling to and from institutional business activities, actual expenditures for transportation, including bus, railroad, airline, subway, taxi and personal auto should be reimbursed to the extent that these expenditures exceed the normal daily cost of commuting to and from the institution. Where practical, the least expensive mode of transportation should be selected.

A comprehensive travel expense voucher must be filed for each trip. The voucher should reflect the cost of registration at a convention or meeting; transportation including local transportation, lodging, meals, and miscellaneous costs. Invoices in support of each item of cost shall be attached to the voucher. If one or more costs items have been separately paid by the institution (e.g. airfare), the cost item should be reported on the voucher, noted as paid and a copy of the airfare ticket or other invoice attached to the voucher. Adequate conference registration documentation should be attached to the voucher to demonstrate the extent to which meals were included in the registration fee.

In particular, all individuals should fly coach class or at discount fares where available.

Reimbursement for personal automobile mileage may be reimbursed at the prevailing state rate plus documented parking and tolls or the applicable collective bargaining agreement.

The circumstances of an out-of-town trip and the availability of public transportation may require the use of rental cars. Individuals should make every effort to take advantage of discount rates with car rental companies.

When travelling on institutional business, staff members should live and conduct business in a cost efficient manner which is both comfortable and safe. Where appropriate and available, discount rates on hotel and motel

stays should be taken advantage of. All charges, other than basic room charge and tax, such as meals, or phone calls should be separately identified on the expense report.

- Campus board of trustees should establish separate reimbursement policies for incidental travel expenses.

Business meals including food and beverages expenses must be reasonable and appropriate under the circumstances.

Examples of reasonable expenses:

- Meal expenditures which have a clear business purpose
- Meals while travelling out-of-town on institutional business
- Expenditures for the purpose of recruiting potential employees
- Meals incurred as part of attendance at conferences or meetings of professional organizations

Expense documentation should include:

- Date, city, restaurant and description of meal (lunch, dinner, etc.)
- Name(s), company, affiliation(s) and business relationship(s) of person(s) in attendance
- Business purpose and benefit to the institution for incurring the expenses
- Amount spent

In addition, business meal expenses must be documented by a receipt. Any meal not accompanied by a receipt may be reimbursed at the Commonwealth's per diem rate for meals. Also individuals monthly charges should be accompanied by an original receipt.

Expenditures of a personal nature, unreasonable or excessive expenses, and those not specifically related to the conduct of institutional business are not reimbursable. The following are indicative of the type of expenditures that should not be reimbursed:

- Excessive or extravagant costs (e.g., expensive wines, exclusive restaurants)
- Personal entertainment

- Travel insurance in excess of the amount automatically provided by the institution and the Commonwealth
 - Fines for traffic or parking violations
 - Insurance for a personally-owned car
 - Articles stolen from a personal or rental car
 - Briefcases and luggage
 - Expenses incurred in connection with personal business
 - Any unexplained expenses
- B. Non-employee Travel: Trust fund expenditures to pay for spouse or personal guest travel are not permitted. If the spouse or guest is a participant on a conference panel or program, expense reimbursement should be sought from the sponsoring organization or personal funds should be used.

At the president's direction, students may be allowed to incur travel expenses charged to the trust funds. Trustee travel must be approved by the chairman of the board of trustees. In all cases, the activities and expenses must be clearly related to the mission of the institution.

For such individuals, expense documentation should conform to the documentation required for employee expenses. In addition, the listing of unallowable expense noted for employees also applies to the aforementioned individuals.

(4) Personal and Student Loans

- A. Personal loans should not be granted to institutional staff, students or board members. This requirement does not apply to regular financial aid programs at the institution.
- B. In certain rare circumstances, it may be permissible to provide salary advances to employees if the institution cannot meet payroll due to technical difficulties (e.g., computer failure, etc.). Such advances should be repaid promptly to the trust fund.

(5) Employee and Student Recognition and Activities

- A. Within moderate limits set by the board of trustees, certain expenditures of trust funds to enhance employees and student morale or to recognize achievement, longevity, performance or retirement can be made. These circumstances include but are not limited to:
- institutional social functions, and

- employee and student recognition awards and dinners.

(6) Entertainment of institutional donors, alumni, friends, guests and visitors

- A. Such entertainment should be in moderation and good taste.
- B. It is appropriate for a college president to entertain guests in his or her home as part of official duties. Such expenditures must have prior approval of the board of trustees.
- C. Areas of expenditure for entertainment can include:
 - Equipment and furniture rentals
 - Materials and supplies
 - Food and beverage
 - Entertainment
 - Service staff
 - Travel and related expenses (in conformity with the travel guidelines noted above)
- D. Sports, theatre and other entertainment tickets cannot be purchased with trust funds unless the event is being held on campus and the expenditure benefits the mission of the institution or directly supports its instructional programs.

(7) Miscellaneous

- A. Moving expenses are appropriate for the President and selected employees of the institution. Attracting individuals of high quality can require moving them from other parts of the state or country. Moving expenses should not exceed the regional, average cost of moving between two points, and must have the prior approval of the board of trustees. Competitive bids for moving costs should be sought in all cases. These expenditures should not include storage fees while an employee waits to sell or purchase a home.
- B. Purchase or lease of any motor vehicle with trust funds (for use by the president or other administrators) must have prior approval of the board of trustees. The lease or purchase of a full-sized, mid-priced automobile for the president's use may be appropriate. If a more expensive vehicle is desired by the president, the difference between the stated limits and the actual cost should be paid with the president's personal funds. Compliance with IRS guidelines for the personal use of an institutional vehicle should be adhered to by a president or other administrator.
- C. Purchase of flowers, gifts and cards in moderation from trust funds may be appropriate. Appropriate occasions include but are not limited to:

- death or illness of an employee, student, trustee or person of special importance to the institution, or immediate family of said persons, and
 - visit of special guests.
- D. Private clubs initiation fees and membership dues are not an allowable expense. Membership fees for professional or academic organizations and civic groups are an allowable expense; however, any initiation fee or annual membership fee for the president in excess of \$1,000 must have the prior approval of the institution's board of trustees. Membership fees in excess of \$500 for employees other than the president must have prior approval.
- E. Policies passed by the Board of Higher Education after approval of the Trust Fund Guidelines (last revised on December 5, 2000) shall supersede expenditure and reporting requirements as indicated in these Guidelines.

III. CLOSING COMMENTS

As noted previously, these proposed minimum standards for the expenditure of trust funds are not all-inclusive. It is impossible to outline every possible type of expenditure which might be made from these funds. However, when a trust fund expenditure decision must be made, it should be made in recognition of the public nature of these funds and in moderation of good taste.

Campus boards of trustees are expected to establish standards for the expenditures of trust funds that meet or exceed the Board of Higher Education's minimum standards as identified in this document. The institution's board of trustees shall approve campus-based standards. Each institution shall make its standards for the expenditure of trust fund available to the campus community.

The Board of Higher Education and the campuses will undertake a review of their standards for the expenditure of trust funds at least every five years.

FY 2026 Quarter 3 Comparative Financial Reports

All Trust Funds

Year-to-Date Revenue through March 31, 2026, with comparative information from FY 2025 Year-to-Date Expenses through March 31, 2026, with comparative information from FY 2025

Operating Budget (*State Appropriations and General Purpose Trust Fund*)

Year-to-Date Revenue through March 31, 2026, with comparative information from FY 2025 Year-to-Date Expenses through March 31, 2026, with comparative information from FY 2025

Resident Hall Trust Fund

Year-to-Date Revenue through March 31, 2026, with comparative information from FY 2025 Year-to-Date Expenses through March 31, 2026, with comparative information from FY 2025



All Trust Funds



Worcester State University
All Trust Fund Report - Quarter 3
FY26 vs FY25 Budget vs Actuals
Revenues 3/31/2026 & 3/31/2025

Account Description	FY 2026					FY 2025				
	Original Budget - BOT	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned	Original Budget - BOT	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned
General Trust Fund (400)	46,099,472.00	44,750,482.00	45,973,883.55	102.73%	(1,223,401.55)	47,357,796.00	43,539,800.00	46,065,488.07	105.80%	(2,525,688.07)
Capital Improvement Trust Fund (405)	2,672,610.00	2,672,610.00	2,515,332.45	94.12%	157,277.55	2,689,788.00	2,689,788.00	2,604,186.00	96.82%	85,602.00
Parking Garage Operating Fund (408) (funded by transfers)	1,211,206.00	-	-	0.00%	-	721,206.00	-	-	0.00%	-
Strategic Plan Trust Fund (410) (funded by transfers)	20,000.00	-	-	0.00%	-	335,000.00	-	-	0.00%	-
Wellness Center Trust Fund (429)	195,422.00	82,908.00	73,396.41	88.53%	9,511.59	100,422.00	48,010.00	65,596.66	136.63%	(17,586.66)
Parking Fines Fund (439)	112,315.00	112,315.00	116,805.00	104.00%	(4,490.00)	96,849.00	96,849.00	98,420.00	101.62%	(1,571.00)
Health Services Trust Fund (442)	986,463.00	986,463.00	974,061.06	98.74%	12,401.94	998,306.00	998,306.00	971,373.68	97.30%	26,932.32
Resident Hall Trust Fund (445)	14,012,455.00	12,563,592.00	12,635,079.75	100.57%	(71,487.75)	13,590,649.00	12,277,962.00	11,861,801.22	96.61%	416,160.78
Student Activities Trust Fund (446)	455,583.00	413,583.00	409,101.19	98.92%	4,481.81	455,744.00	231,852.00	225,592.07	97.30%	6,259.93
Residence Hall Technology and Equipment Trust Fund (448)	278,740.00	278,740.00	284,350.00	102.01%	(5,610.00)	275,000.00	275,000.00	278,740.00	101.36%	(3,740.00)
	66,044,266.00	61,860,693.00	62,982,009.41	101.81%	(1,121,316.41)	66,620,760.00	60,157,567.00	62,171,197.70	103.35%	(2,013,630.70)

Worcester State University
All Trust Fund Report - Quarter 3
FY26 vs FY25 Budget vs Actuals
Expenses 3/31/2026 & 3/31/2025

Account Description	FY2026					FY2025				
	Original Budget - BOT	Expenditure Budget	Expenditure Actual	Percent of Budget Spent	Available	Original Budget - BOT	Expenditure Budget	Expenditure Actual	Percent of Budget Spent	Available
General Trust Fund (400)	46,099,472.00	46,099,471.74	28,458,601.47	61.73%	17,640,870.27	47,357,796.00	47,357,795.87	28,721,180.90	60.65%	18,636,614.97
Capital Improvement Trust Fund (405)	2,672,610.00	536,617.00	428,905.42	79.93%	107,711.58	2,689,788.00	536,617.00	735,684.55	137.10%	(199,067.55)
Parking Garage Operating Fund (408)	1,211,206.00	1,211,206.00	281,811.05	23.27%	929,394.95	721,206.00	721,206.00	307,742.33	42.67%	413,463.67
Strategic Plan Trust Fund (410)	20,000.00	20,000.00	20,442.00	102.21%	(442.00)	335,000.00	335,000.00	300,000.00	89.55%	35,000.00
Wellness Center Trust Fund (429)	195,422.00	195,422.00	51,438.82	26.32%	143,983.18	100,422.00	100,422.00	40,322.24	40.15%	60,099.76
Parking Fines Fund (439)	112,315.00	90,000.00	86,636.63	96.26%	3,363.37	96,849.00	90,000.00	35,616.93	39.57%	54,383.07
Health Services Trust Fund (442)	986,463.00	618,869.00	314,357.70	50.80%	304,511.30	998,306.00	619,969.00	363,787.27	58.68%	256,181.73
Resident Hall Trust Fund (445)	14,012,455.00	14,012,455.00	8,587,366.73	61.28%	5,425,088.27	13,590,649.00	13,590,649.00	8,915,101.38	65.60%	4,675,547.62
Student Activities Trust Fund (446)	455,583.00	455,583.00	278,043.38	61.03%	177,539.62	455,744.00	463,721.08	245,417.34	52.92%	218,303.74
Residence Hall Technology and Equipment Trust Fund (448)	278,740.00	192,944.00	182,585.78	94.63%	10,358.22	275,000.00	192,944.00	188,849.78	97.88%	4,094.22
	66,044,266.00	63,432,567.74	38,690,188.98	60.99%	24,742,378.76	66,620,760.00	64,008,323.95	39,853,702.72	62.26%	24,154,621.23

Operating Budget



Worcester State University
FY26 vs FY25 Budget vs Actuals - Quarter 3
Revenues 400, 111, & Closing Sources
Revenues 3/31/2026 & 3/31/2025

Description	FY 2026					FY 2025				
	Original Budget - Upload	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned	Original Budget - Upload	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned
Academic Fees	(38,529,758.00)	(38,529,758.00)	(37,478,571.04)	97.27%	(1,051,186.96)	(37,394,175.00)	(37,394,175.00)	(36,163,485.71)	96.71%	(1,230,689.29)
Fee Waivers	1,292,165.00	1,292,165.00	1,481,727.24	114.67%	(189,562.24)	1,033,879.00	1,033,879.00	1,292,165.25	124.98%	(258,286.25)
Tuition	(7,317,522.00)	(9,217,522.00)	(7,978,958.15)	86.56%	(1,238,563.85)	(7,100,768.00)	(9,000,768.00)	(8,737,702.25)	97.08%	(263,065.75)
Tuition Waivers	284,470.00	284,470.00	301,473.44	105.98%	(17,003.44)	298,916.00	298,916.00	284,469.00	95.17%	14,447.00
Activity Income	(110,000.00)	(110,000.00)	(280,815.91)	255.29%	170,815.91	(112,190.00)	(112,190.00)	(273,600.87)	243.87%	161,410.87
Other Income	(369,837.00)	(415,427.00)	(2,882,986.28)	693.98%	2,467,559.28	(265,462.00)	(312,052.00)	(2,699,962.50)	865.23%	2,387,910.50
State Maintenance	(61,325,825.00)	(61,325,825.00)	(36,880,859.38)	60.14%	(24,444,965.62)	(55,982,443.00)	(55,982,443.00)	(46,090,742.91)	82.33%	(9,891,700.09)
	(106,076,307.00)	(108,021,897.00)	(83,718,990.08)	77.50%	(24,302,906.92)	(99,522,243.00)	(101,468,833.00)	(92,388,859.99)	91.05%	(9,079,973.01)

Worcester State University
FY26 vs FY25 Budget vs Actuals - Quarter 3
Expenses 400, 111, & Closing Sources
Expenses 3/31/2026 & 3/31/2025

		FY 2026					FY 2025				
Account Description	Object	Original Budget - BOT	Current Budget	Actual	Percent of Budget Spent	Available	Original Budget - BOT	Current Budget	Actual	Percent of Budget Spent	Available
Regular Employees	AAA	49,923,165.00	49,923,165.00	25,276,369.65	50.63%	24,646,795.35	48,359,308.00	48,359,308.13	32,999,976.47	68.24%	15,359,331.66
Employee Related Expenses	BBB	1,058,503.00	891,833.80	628,883.08	70.52%	262,950.72	607,453.00	728,383.26	501,597.72	68.86%	226,785.54
Temporary Part-Time Employees	CCC	10,348,199.00	10,436,550.49	7,671,808.10	73.51%	2,764,742.39	9,979,580.00	10,012,540.00	7,340,209.55	73.31%	2,672,330.45
Staff Benefit Expenses	DDD	22,161,988.00	22,162,448.87	9,269,770.40	41.83%	12,892,678.47	21,695,448.00	21,695,448.09	14,697,542.41	67.74%	6,997,905.68
Administrative Expenses	EEE	2,987,715.00	3,102,488.85	16,800,097.79	541.50%	(13,697,608.94)	2,890,154.00	2,974,033.48	2,056,801.34	69.16%	917,232.14
Facility Operation Supplies	FFF	2,917,621.00	1,793,873.48	982,722.08	54.78%	811,151.40	2,615,975.00	1,671,382.04	960,322.96	57.46%	711,059.08
Energy/Space Rental	GGG	2,140,200.00	1,941,700.00	1,418,086.97	73.03%	523,613.03	2,140,200.00	1,992,720.00	1,160,727.54	58.25%	831,992.46
Professional Services	HHH	1,567,927.00	4,404,855.33	3,399,847.01	77.18%	1,005,008.32	894,652.00	3,710,904.09	2,361,478.31	63.64%	1,349,425.78
Operational Services	JJJ	1,083,832.00	1,102,450.18	1,107,366.46	100.45%	(4,916.28)	1,069,146.00	1,095,341.14	1,161,289.19	106.02%	(65,948.05)
Equipment Purchase	KKK	1,008.00	267,150.55	71,984.48	26.95%	195,166.07	-	66,819.06	69,469.05	103.97%	(2,649.99)
Equipment Lease, Maintenance, Repair	LLL	1,175,177.00	1,448,144.58	1,009,894.58	69.74%	438,250.00	1,100,177.00	1,334,662.38	965,297.71	72.33%	369,364.67
Infrastructure & Building Improvements	NNN	4,727,536.00	4,314,352.46	1,129,293.85	26.18%	3,185,058.61	5,228,226.00	4,823,661.40	1,726,005.87	35.78%	3,097,655.53
Educational Assistance	RRR	2,416,964.00	2,416,964.00	2,835,214.00	117.30%	(418,250.00)	2,416,964.00	2,416,964.00	2,321,059.04	96.03%	95,904.96
Debt Service	SSS	567,536.00	567,536.00	94,306.25	16.62%	473,229.75	567,536.00	567,536.00	72,137.50	12.71%	495,398.50
Loans & Special Pmts	TTT	-	-	-	0.00%	-	-	-	-	0.00%	-
Technology Expenses	UUU	4,347,926.00	4,597,373.41	3,023,523.07	65.77%	1,573,850.34	3,775,420.00	3,837,125.93	3,025,444.20	78.85%	811,681.73
		107,425,297.00	109,370,887.00	74,719,167.77	68.32%	34,651,719.23	103,340,239.00	105,286,829.00	71,419,358.86	67.83%	33,867,470.14

Residence Hall Trust Fund



Worcester State University
FY26 vs FY25 Budget vs Actuals - Quarter 3
Residence Hall Trust Fund Revenue (Source 445)
3/31/2026 & 3/31/2025

	6					FY 2025				
Description	Original Budget - Upload	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned	Original Budget - BOT	Revenue Budget Excluding Transfers	Revenue Earned Actual	Percent of Budget Earned	Unearned
Academic Fees	-	-	64,595.00	0%	(64,595.00)	-	-	63,350.00	0%	(63,350.00)
Res Hall Room Charges	14,012,455.00	12,563,592.00	12,445,855.86	99%	117,736.14	13,590,649.00	12,277,962.00	11,635,918.54	95%	642,043.46
Other Student Charges	-	-	124,628.89	0%	(124,628.89)	-	-	162,532.68	0%	(162,532.68)
	14,012,455.00	12,563,592.00	12,635,079.75	1.01	(71,487.75)	13,590,649.00	12,277,962.00	11,861,801.22	0.97	416,160.78

Worcester State University
FY26 vs FY25 Budget vs Actuals - Quarter 3
Residence Hall Trust Fund Expenses (Source 445)
3/31/2026 & 3/31/2025

FY 2026							FY 2025				
Account Description	Object	Original Budget - BOT	Current Budget	Actual	Percent of Budget Spent	Available	Original Budget - BOT	Current Budget	Actual	Percent of Budget Spent	Available
Regular Employees	AAA	1,808,270.00	1,808,270.00	984,700.29	54.46%	823,569.71	1,639,968.00	1,639,968.00	1,102,501.30	67.23%	537,466.70
Employee Related Expenses	BBB	-	10,200.00	4,004.21	39.26%	6,195.79	-	5,435.00	5,772.81	106.22%	(337.81)
Temporary Part-Time Employees	CCC	235,000.00	235,000.00	233,481.62	99.35%	1,518.38	225,000.00	225,000.00	202,173.75	89.86%	22,826.25
Staff Benefit Expenses	DDD	814,806.00	814,806.00	395,243.61	48.51%	419,562.39	751,270.00	751,269.77	463,267.04	61.66%	288,002.73
Administrative Expenses	EEE	30,714.00	38,989.80	14,955.73	38.36%	24,034.07	32,500.00	28,820.00	11,885.23	41.24%	16,934.77
Facility Operation Supplies	FFF	285,000.00	267,584.00	122,056.76	45.61%	145,527.24	275,000.00	213,115.97	115,870.36	54.37%	97,245.61
Energy/Space Rental	GGG	9,400,766.00	5,912,440.80	2,127,059.08	35.98%	3,785,381.72	9,400,766.00	9,400,765.51	2,067,126.83	21.99%	7,333,638.68
Professional Services	HHH	10,700.00	27,850.00	15,550.00	55.83%	12,300.00	10,200.00	9,900.00	5,063.19	51.14%	4,836.81
Operational Services	JJJ	-	-	-	0.00%	0.00	-	-	-	0.00%	0.00
Equipment Purchase	KKK	-	-	-	0.00%	0.00	-	-	-	0.00%	0.00
Equipment Lease, Maintenance, Repair	LLL	78,500.00	66,496.00	41,104.67	61.82%	25,391.33	37,500.00	45,400.00	42,395.10	93.38%	3,004.90
Infrastructure & Building Improvements	NNN	853,749.00	819,359.20	544,682.90	66.48%	274,676.30	697,084.00	736,074.75	557,184.39	75.70%	178,890.36
Educational Assistance	RRR	468,950.00	468,950.00	580,862.52	123.86%	(111,912.52)	468,950.00	468,950.00	586,076.00	124.98%	(117,126.00)
Debt Service	SSS	-	3,488,325.20	3,488,325.20	100.00%	0.00	-	-	3,678,545.50	0.00%	(3,678,545.50)
Technology Expenses	UUU	26,000.00	54,184.00	35,340.14	65.22%	18,843.86	52,411.00	65,950.00	77,239.88	117.12%	(11,289.88)
		14,012,455.00	14,012,455.00	8,587,366.73	61.28%	5,425,088.27	13,590,649.00	13,590,649.00	8,915,101.38	65.60%	4,675,547.62



WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
PLANNING AND DEVELOPMENT COMMITTEE MEETING
Thursday, June 4, 2026
10:00 A.M.
REMOTE PARTICIPATION

Meeting Called By: Lawrence Sasso (Chair)

Minutes: Nikki Kapurch

Board Members: Dr. Lawrence Sasso (Chair), Kelly Brissette, Darnell Dunn, Jacob Sanders

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

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	Dr. Lawrence Sasso	
2. <i>Planning And Development Committee Report</i> A. Master Plan Update Presentation*	Kathy Eichelroth	A. informational
3. <i>Administrative Updates</i> A. Other Business	Dr. Lawrence Sasso	
4. <i>Adjournment</i>	Dr. Lawrence Sasso	4. vote required

*Attachments



Our Place.
Our Purpose.

WORCESTER STATE
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MASTER PLAN 2036

Master Plan Process Update: Emerging Direction & Leadership Alignment

An update on planning progress, leadership validation, mid-point outcomes, and next-phase considerations informing continued Master Plan development.

Master Plan Initiative

Kathleen Eichelroth, Vice President/CFO

Sandra Olson, AVP for Facilities Operations & Planning

Jesilka Cortez, Strategic Portfolio Officer

Administration & Finance, Sponsoring Division

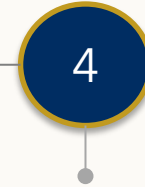
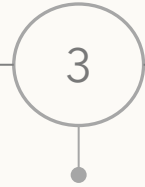
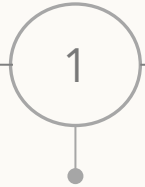
Planning Process Status & Overview

Since October 2025, the Master Plan Update has progressed from current-state discovery through engagement, findings, and recommendations, positioning the Campus Advisory Group and leadership to refine the preferred direction for the October 2026 final Master Plan presentation.

OCTOBER 2025

CURRENT PHASE

OCTOBER 2026



CURRENT STATE

- Upper-lower campus disconnection
- Fragmented campus core identity
- Accessibility + circulation barriers
- Deferred Student Center + LRC modernization
- Limited Interdisciplinary adjacencies
- Parking constraining campus experience

ENGAGEMENT

- Student groups sessions
- Faculty + staff town halls + interviews
- CAG review + feedback
- Executive leadership coordination
- Transparent process communications

FINDINGS + RECOMMENDATIONS

- Redevelop Student Center + LRC
- Accessible upper/lower campus
- Reduce pedestrian + vehicular conflicts
- Expand parking options
- Right-size classrooms/labs + exp. learning
- Create multipurpose student + visitor spaces
- Centralize operations space
- Reprogram Admin. office + meeting space
- Expand food + coffee options

VALIDATION + REFINEMENT

- Three draft scenarios + stakeholder synthesis
- Leadership validation of findings
- CAG + EC scenario evaluation
- Infrastructure + feasibility constraints identified
- Refined scenario targeted for by mid-June

FINAL STAGE

- Identify preferred direction
- High level costing estimates
- Phasing + sequencing strategies
- Implementation planning
- Oct, 22 Final Recommendation to BOT

MID-POINT OUTCOME: Phase 3 produced three draft scenarios testing approaches to campus connectivity, accessibility, student-centered redevelopment, expanded green space, operational alignment, and strategic opportunity sites.

Scenario Testing & Directional Evaluation

Three exploratory scenarios were used to test tradeoffs, feasibility, constraints, and strategic priorities to inform refinement of the emerging campus direction.

1 STITCHING CAMPUS CONNECTIONS



- Renovate LRC & Student Center
- Improve upper/lower campus pathway
- Build Operations Center/Connector
- Relocates loading dock

2 FRAMING THE GATEWAY



- New Student Center + Operations Hub
- Create gateway + campus arrival
- Enhance Binienda Green
- Reorganize parking outside core

3 EMBRACING A NEW (GREEN HEART)



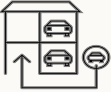





- Create new green heart of campus
- Build combined student-facing core
- Integrate LRC, Operations + Events
- Expansive new campus infrastructure

Executive Insight: The future direction will need to combine elements across multiple scenarios rather than advance as a stand-alone option, while addressing key gaps, unresolved tradeoffs, and concepts requiring further development.

Zooming Out: What Has Persisted?

The current planning process builds on nearly two decades of institutional planning and investment.

Many of the themes identified through the current planning process reinforce longstanding institutional priorities previously identified across earlier campus planning efforts.

	HISTORICAL PLANNING DIRECTION (2006 Plan and 2011 Update)	CURRENT PLANNING DIRECTION (2025/2026 Planning Process)	STRATEGIC RELEVANCE (Why it Still Matters)
	Structured Parking Strategies	→ Parking as enabling infrastructure and Campus Organization	<i>Remains the enabling condition for shifting parking out of the core and unlocking broader campus transformation</i>
	Accessibility + Campus Circulation	→ Accessible Upper + Lower Campus Connections	<i>Resolves circulation barriers across upper and lower campus to support safer, more accessible movement</i>
	Greener Pedestrian Campus Core	→ Expanded "Green Heart", Binienda Green + Reduced Core Conflicts	<i>Differentiates WSU through a student-focused campus landscape that supports well-being, purpose, and safe connectivity</i>
	Student Center + Library Improvements	→ Student Center + LRC redevelopment and Broader Student-Facing modernization	<i>Repositions WSU for the future by strengthening the student experience, persistence, retention, and enrollment sustainability</i>
	Campus Edge Identity + Arrival	→ Stronger Gateway + Arrival Experience for All	<i>Elevates arrival experience and deepens the University's connection to community, city, and state partners</i>
	Facilities Center + Service Modifications	→ Operations Space + Public Safety	<i>Modernized spaces will improve staff morale, campus safety, service reliability, space utilization, and operational efficiencies</i>

ENABLING CONDITIONS REMAIN UNRESOLVED

Campus transformation remains dependent on the implementation of **interconnected enabling conditions** including parking, circulation, accessibility, and campus organization – rather than driven primarily by immediate infrastructure needs, deferred maintenance pressures, or incremental funding opportunities; they must advance together as a unified strategy.

Next: Campus Advisory Group + Leadership Charge

VP | LOOKING AHEAD

EXECUTIVE STEERING FOR MASTER PLAN REFINEMENT

FOCUS: The CAG and leadership will continue to test the emerging final design through four strategic domains – probing enabling conditions, sequencing priorities, potential funding pathways, and the strongest path toward sustained implementation.

01

Internal + External Enabling Conditions

- Evaluate Parking Options
- Confirm Circulation + Accessibility Priorities
- Integrate Q Lot + May Street Planning
- Public Infrastructure Impacts + Campus Access

02

Constraints: Feasibility + Funding

- Student Center/LRC + Renovation Viability
- Underground Utility Corridor + Green Heart Tradeoffs
- Review High-Level + Potential Costs
- Evaluate Capital Logic, BRIGHT Act + Foundation + Partnership Funding

03

Opportunity + Special Use Sites

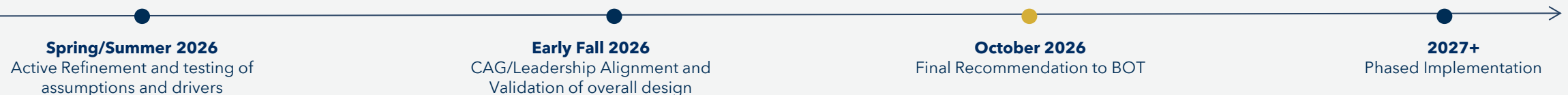
- Stress-Test Program or Operational Adjacencies
- Ensure Sites Unlock Long-Held Vision
- Reference Prior Studies + Carried-Forward Themes
- Consider Chandler Village Future Possibilities

04

Implementation Road Map + Governance

- Verify Enabling Projects + Sequencing
- Define Near-, Mid- + Long-Term Path with DCAMM
- Minimize Academic Disruption Through Phasing
- Plan for Post-Plan Implementation Stewardship

NEXT PHASE KEY MILESTONES



Questions and Comments



WORCESTER
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Bias Incident Reports and Other Inclusive Excellence and Belonging Updates

Dr. Edgar Moros, Executive Director for
Inclusive Excellence and Belonging

Definitions

“Bias” is an inclination or preference either for or against an individual or group based upon their membership in a protected class that interferes with impartial judgment.

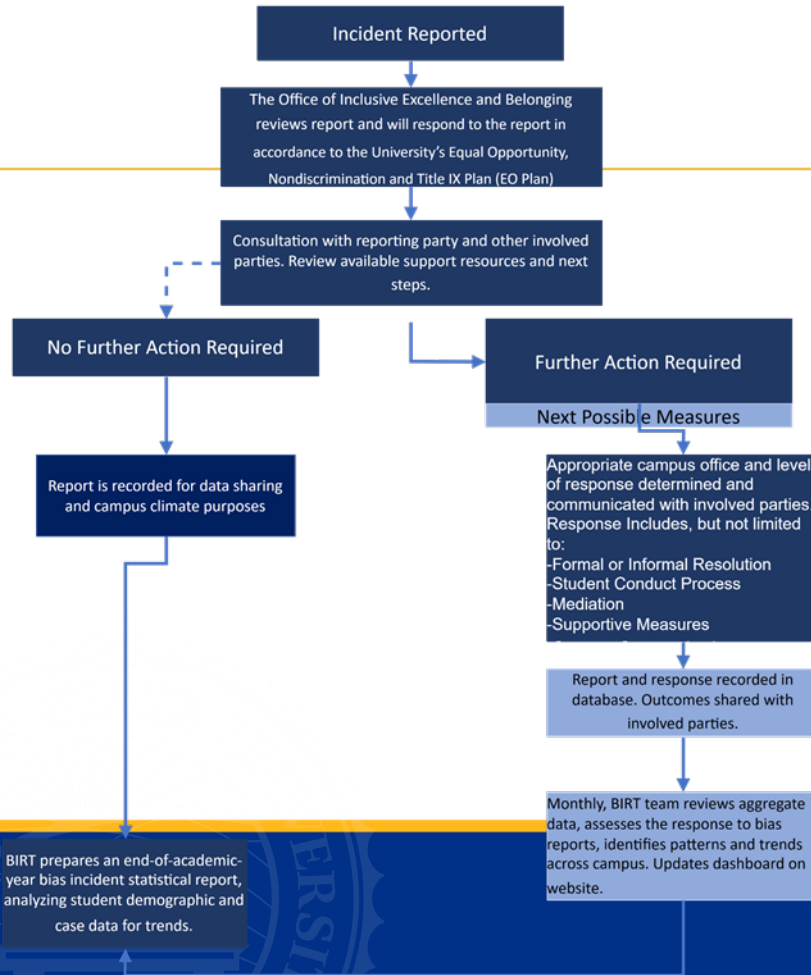
A “Bias Incident” is defined as speech or conduct toward a person or group motivated at least in part by such person’s or group’s identifying or perceived race, color, religion, national origin, age, disability, gender, sexual orientation, gender identity, gender expression, genetic information, marital or parental status, or veteran status*.

*These are protected classes, per the Massachusetts State Universities' [Equal Opportunity, Nondiscrimination, and Title IX Plan](#).

Reporting Bias

Any member of the Worcester State community [can report a bias incident](#) to the Bias Incident Review Team (BIRT) if they experience or witness a bias incident on campus.

BIAS REPORTING FLOWCHART



Bias Incident Review Team

- If needed, meets regularly throughout the academic year.
- Conducts an end of academic year audit to identify strengths and weaknesses, to improve efficiency and effectiveness, and to evaluate data from the previous academic year.

BIRT Dashboard

[Please click here to access the Dashboard.](#)



Other IEB Updates

Office Changes:

- Since January of 2025, Inclusive Excellence and Belonging is part of Employee Services.
- We hired a recruiter, Barbara Guertin.
- Omarthan Clarke is now Director of Employee Relations, reports to Sathi Mitra, CHRO, directly.



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Questions?

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Meeting Schedule
FY 2026-2027

FULL BOARD MEETING

Thursday, October 22, 2026
Thursday, November 19, 2026
Thursday, January 7, 2027
Thursday, April 8, 2027
Thursday, June 10, 2027

Subcommittee meetings will be scheduled as needed.

President's Update

June 2026

President's Message



Fresh from the high note of two outstanding graduate and undergraduate commencement ceremonies, I turn to reflecting upon and assessing progress for the academic year that has just ended and the fiscal year that is winding down toward completion on June 30. In the Board of Trustees June packet, you will find the [self-evaluation](#) I've prepared for the Human Resources Committee.

The year's highlights include:

- External validation that we are **the best value bachelor's-degree-granting higher education institution in the Commonwealth**. Our students graduate with the lowest debt among the 28 campuses; their earnings five years out are on par with UMass graduates'; and an extremely high percentage are either in graduate school or in career-related jobs, earning competitive salaries, within six months of graduation. I am bolstered by this compelling return-on-investment story!
- Leveraging the high-level partnerships and relationships I have in the state and region to become a **first-destination university for Anna Maria College's** incoming and current students, who sadly will be unable to begin or complete their education at AMC. Our flexibility and timely outreach – as well as what we've learned from this process – will position us to self-servingly capture transfers from other colleges likely to close in the constricting higher education marketplace, while aiding students who most need a smooth transition – one that offers them a high-quality, affordable education.
- Receiving a [\\$1.3 million TRIO grant](#) for student support services, which applies a holistic, case management-style approach for students who meet certain qualifications. The five-year federal grant was awarded in October 2025, in a bid process that was highly competitive at time when the program is being scaled back nationally.



PRESIDENT'S OFFICE

Worcester State University
486 Chandler Street
Worcester, MA 01602
508-929-8000

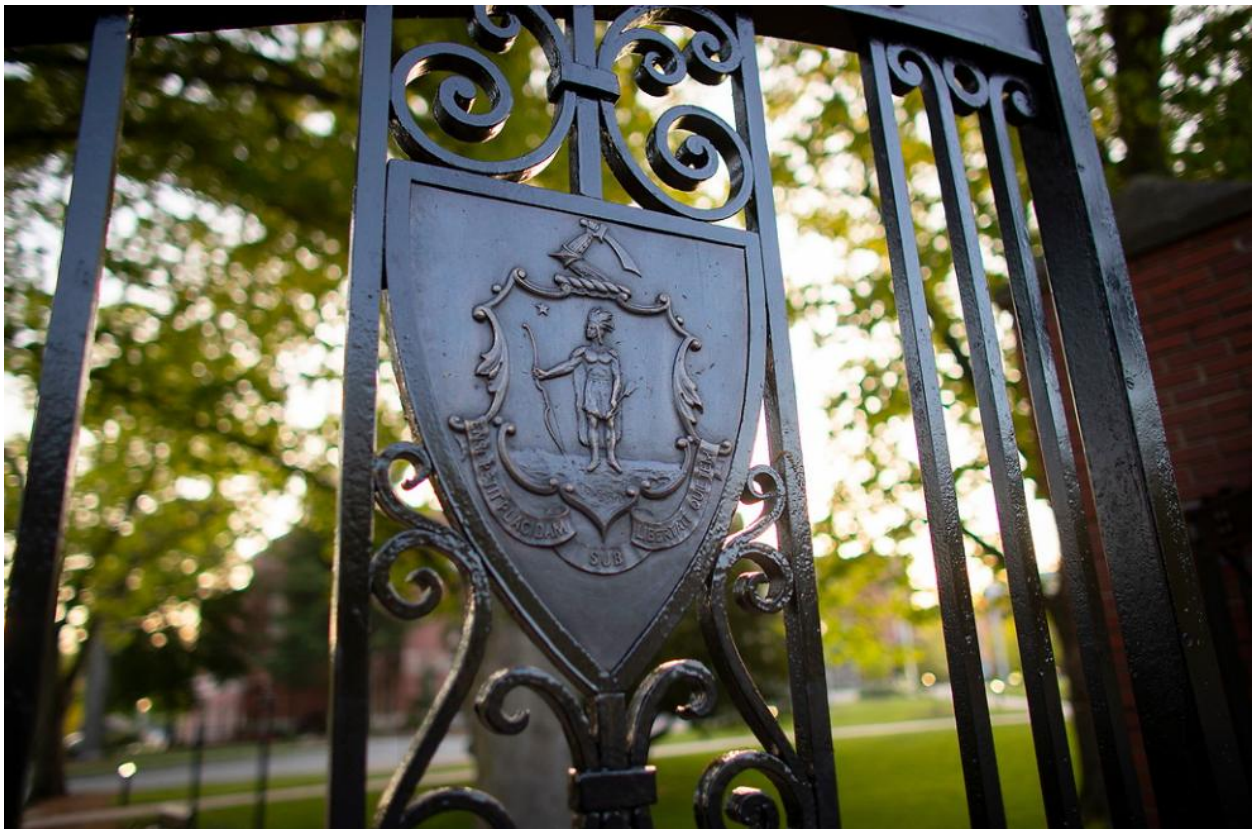
www.worcester.edu



President's Update

- The **revamping of our General Education curriculum**, so that it aligns more fully with our signature MajorPlus academic framework, which is not only attracting admissions applicants, but also providing the foundation for the post-graduate success noted above. Completing the requirements for two programs makes our alumni valuable to employers, and Sheehan scholarship awardees – our highest academic achievers – are citing the dual credentials as something that motivates and/or benefits them.
- New transfer pathways, which help our students speed up the timeline for completing advanced degrees, thereby reducing their costs. In December 2025, I signed one with University of Limerick in Ireland, for example.
- External validation, via our bond rating agencies, that we are a very good investment choice in the marketplace, at a time when many other higher education institutions are seeing their ratings downgraded.

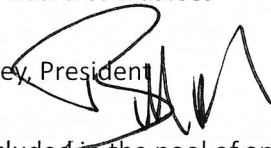
While celebrating our achievements, we must acknowledge the fiscal challenges facing universities across the Northeast. Our Administration continues to prioritize efficiency and creative adaptation with the Board's oversight. Thank you for your invaluable partnership and support.





WORCESTER STATE UNIVERSITY

TO: Members, WSU Board of Trustees

FROM: Barry M. Maloney, President 

RE: Names to be included in the pool of approved speakers, honorary degree, and award recipients

DATE: May 20, 2026

At its May 7 meeting, the Speakers and Awards Committee approved two recommendations for inclusion on the University's standing list of approved commencement speakers and award recipients. Those names were submitted to the All University Committee (AUC) and approved at their May 12 meeting. I am seeking your approval for the speakers/awardees indicated below. Their biographical information, as provided by the nominators, is included to support their inclusion on the list.

By way of background on the process, I'll note that a call is sent to the campus community at the beginning of each semester to solicit nominations for commencement speaker, honorary degree recipients, and community service awardees. Nominations can be submitted directly to the Speakers and Awards Committee via the [Call for Speakers and Awards](#), which is open year-round. They are evaluated by the Speakers and Awards Committee during both the fall and spring semesters. That committee then develops a list to recommend to the All University Committee, which then forwards all finalists as recommendations to the President. The Board of Trustees grants final approval, upon the President's recommendation.

Please find below my recommendations for commencement speaker, honorary degree recipients, and community service awardees for inclusion in the pool of approved speakers, degree recipients, and awardees, followed by summary biographical information for each.

William Murphy - Murphy has previously been approved for a Community Service Award. He was more recently nominated as commencement speaker.

U.S. Rep. Ayanna Pressley - It was noted during the Speakers & Awards Committee meeting that Pressley is the first choice of the 2027 Class Committee for commencement speaker.

Biographical Summaries - Speakers & Awards Committee recommended candidates

William Murphy '93

As a proud WSU alumnus, Bill Murphy embodies resilience, purpose-driven leadership, and a deep commitment to service. A Wall Street Journal bestselling author, keynote speaker, and executive leader at a billion-dollar organization, Bill is widely recognized as one of America's top producers in the

mortgage industry. In 2008, he was honored as a Distinguished Alumnus and was also named to the Worcester Business Journal's "40 Under 40." His dedication to his alma mater and the Worcester community has only grown since then. In 2024, Bill received the Key to the City of Worcester in recognition of his ongoing support of Worcester Public Schools, where he himself is a proud graduate. A long-time champion of student success, Bill has been providing internship opportunities to Worcester State students since 2007. He has also established two scholarships: the Adopt-a-Scholar Program and the William B. Murphy Scholarship, further demonstrating his investment in future generations. An inspiring high-performance athlete, Bill completed 7 marathons on 7 continents in 7 days, raising over \$320,000 for Make-A-Wish through his Run the World for Wishes initiative and totaling almost \$1,000,000 since 2007. Bill frequently returns to campus to speak with student-athlete team captains as well as students in the Business and Psychology departments, sharing his insights on leadership, performance, and personal growth. Bill Murphy's career is a testament to meaningful achievement, impact through excellence, and leadership with conviction. His presence as commencement speaker would not only honor Worcester State but also inspire graduates to lead boldly in a changing world. In addition to his degree at WSU, Bill has a Master's Degree in Counseling Psychology from Framingham State University. For more information, see <https://tinyurl.com/onesheet-Bill-Murphy>.

Congresswoman Ayanna Pressley (MA-07)

U.S. Rep.. Ayanna Pressley is an activist, a legislator, a survivor, and the first woman of color to be elected to Congress from the Commonwealth of Massachusetts. Throughout her career as a public servant, Congresswoman Pressley has fought to ensure that those closest to the pain are closest to the power - driving and informing policymaking. Throughout her time in Congress, Congresswoman Pressley has been a champion for justice and healing: reproductive justice, justice for immigrants, consumer justice, justice for seniors, justice for workers, justice for survivors of sexual violence, justice for the formerly and currently incarcerated individuals, and healing for those who have experienced trauma.

<https://pressley.house.gov/>

<https://ayannapressley.com/>

The 2026 Washington, D.C. leadership trip participants met with Pressley and were impressed by her story.

This nominee is supported by the 2027 Class Committee.