

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

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**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

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

<b>AGENDA</b>		
<b>ITEM</b>	<b>RESPONSIBLE</b>	<b>ACTION</b>
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	<b>A. vote required</b> a. informational  <b>B. vote required</b> a. informational b. informational c. informational
3. <i>Adjournment</i>	Maureen Power	3. <b>vote required</b>

\*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
<b>Sullivan:</b> 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
<b>Student Center:</b> 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
<b>Parking Garage:</b> sealant refurbishment and various deferred maintenance.	\$ 350K
<b>Sheehan:</b> Campus Dining Hall carpet replacement.	\$ 130K
<b>Wasylean Hall:</b> New fire pump	\$ 210K
<b>Accessible Walkway,</b> Sullivan to SC	\$ 325K
<b>Total</b>	<b>\$10.07M</b>

### 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-3<sup>rd</sup> floor Student Center and LGBTQIA+ Community Center-1<sup>st</sup> 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
<b>Pell Eligible</b>	43%	43%	48%	54%	52%	21%
<b>Pell Amount</b>	\$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:

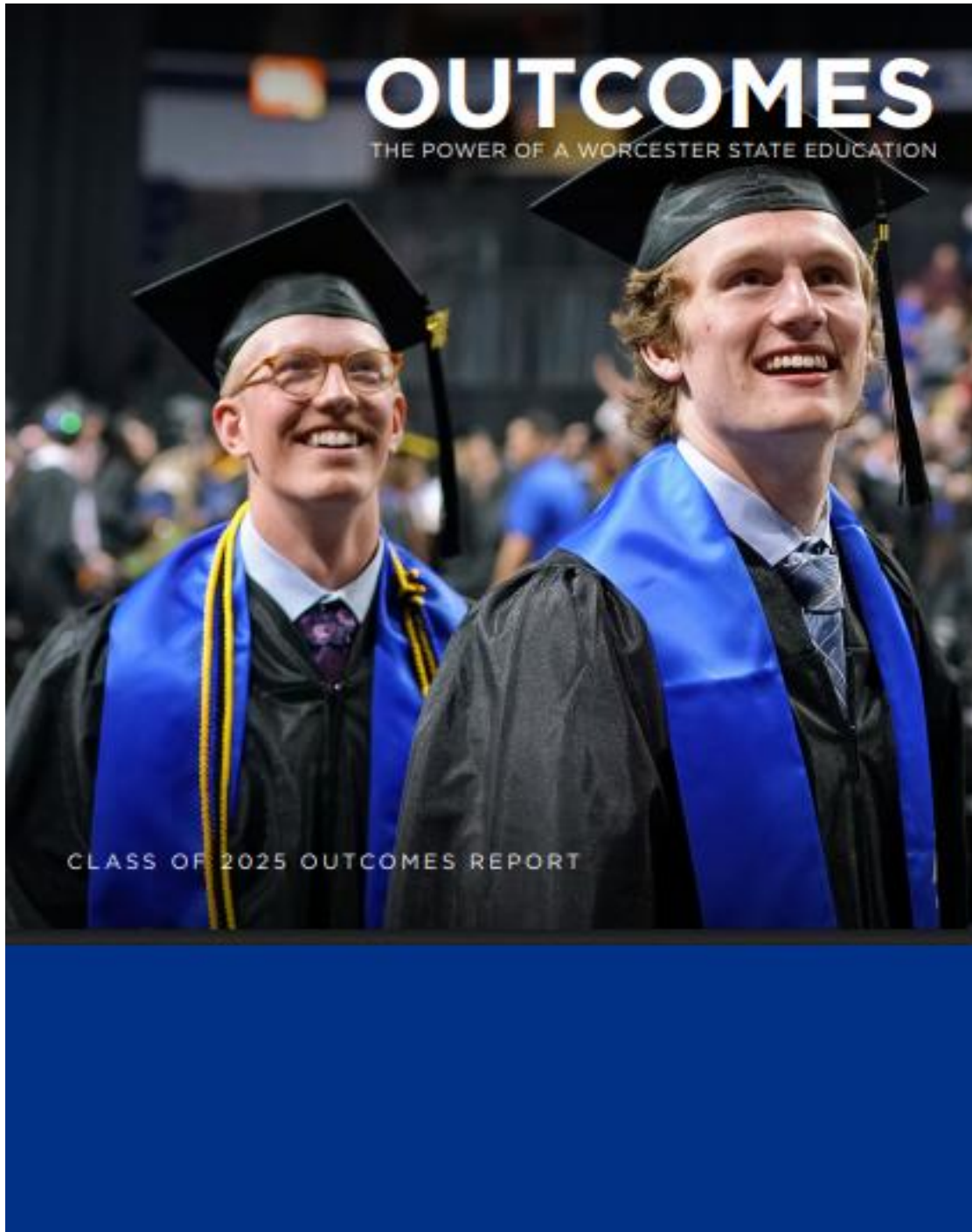
- a) Is enrolled in good academic and social standing in an Anna Maria College degree or certificate program; or
- b) Has been accepted for admission to Anna Maria College for an upcoming academic term.

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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MAIN OFFICE One Ashburton Place, Room 1401  
Boston, MA 02108  
TEL (617) 994-6950  
FAX (617) 727-0955  
WEB [www.mass.edu](http://www.mass.edu)

OFFICE of STUDENT FINANCIAL ASSISTANCE 135 Santilli Highway  
Everett, MA 02149  
TEL (617) 391-6070  
FAX (617) 391-6085  
WEB [www.mass.edu/osfa](http://www.mass.edu/osfa)

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](http://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

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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.

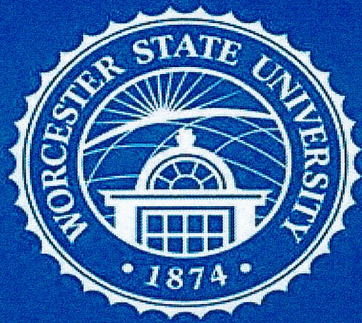
In January 2025 Stacey resigned from her position to leave for a new opportunity. Shortly after that the responsibilities of the General Counsel & Assistant to the President for Employment and Equal Opportunity were redistributed with the majority of them, except for general legal counsel duties, being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

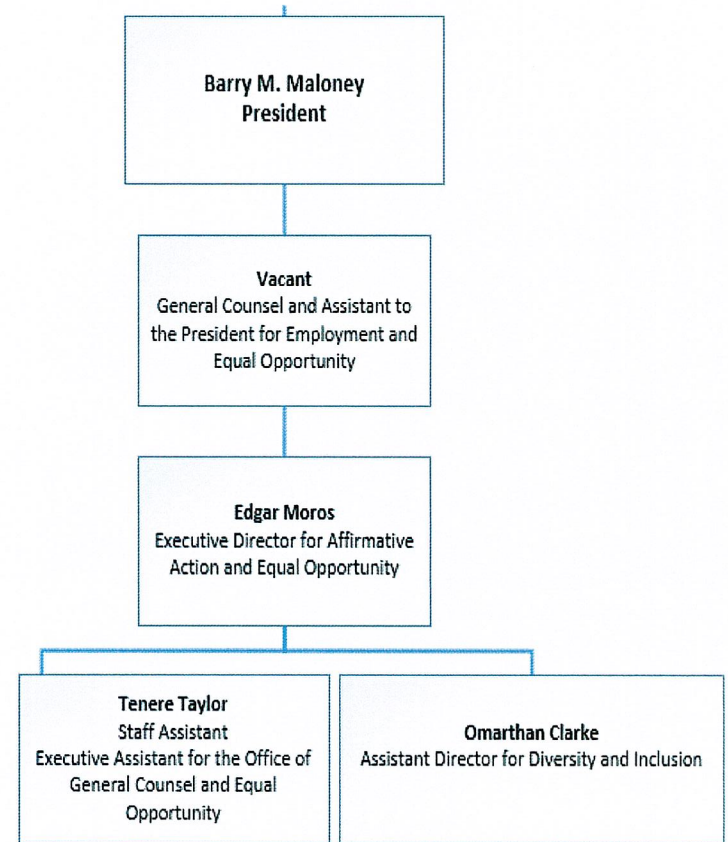
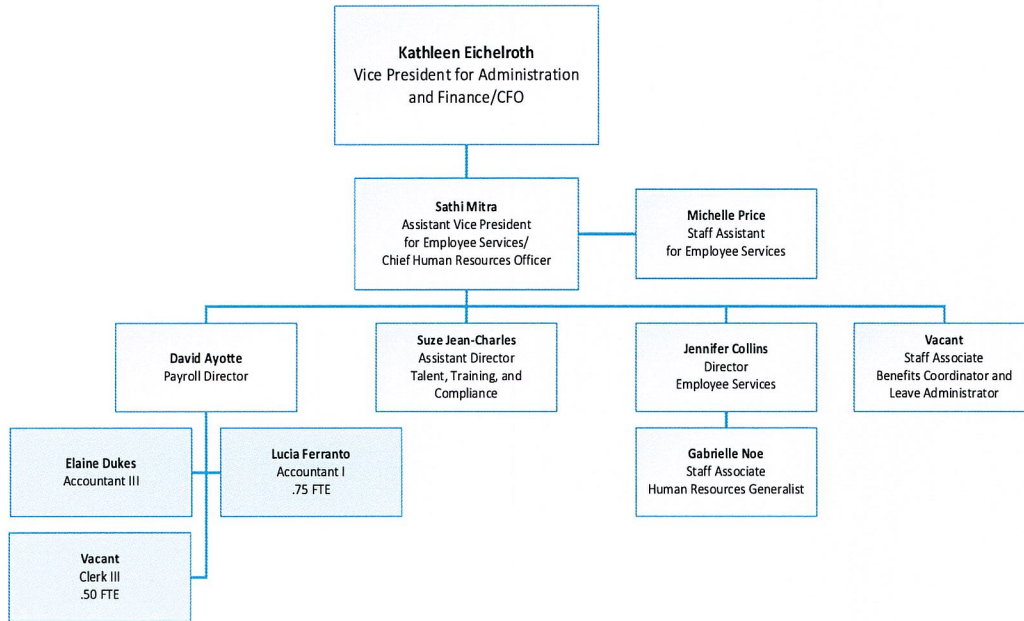
ES & DEI Re-Org

Jan 6<sup>th</sup>, 2025

# ES & DEI Reorg

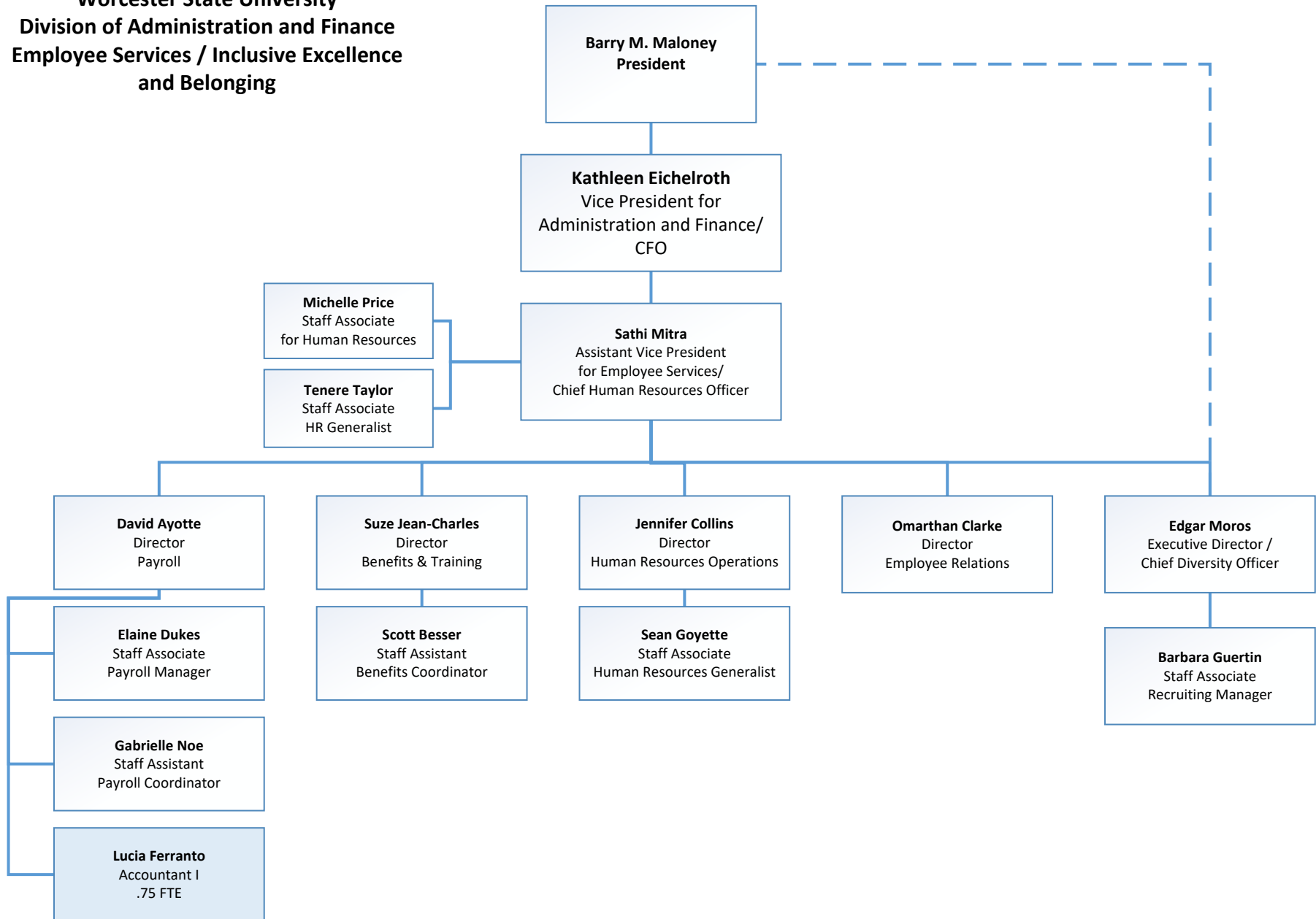
Worcester State University  
Division of Administration and Finance  
Employee Services

Current ES Org- 2024



- Non-Unit Professional
- APA
- Classified

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



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
<b>Duties:</b> 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	<b>Duties:</b> 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	<b>Duties:</b> Active sourcing of candidates Managing LinkedIn platform Managing Job Boards Resume Screening Conducting first round of interview Making Offers	<b>Duties:</b> 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	<b>Duties:</b> 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)
<b>Access/Systems:</b> HRCMS Warehouse MAGIC TASC, DFML, DUA Interview Exchange Perceptive Content	<b>Access/Systems:</b> HRCMS Warehouse Interview Exchange Perceptive Content	<b>Access/Systems:</b> HRCMS* Interview Exchange Perceptive Content  *not allowed if an "03"	<b>Access/Systems:</b> HRCMS Warehouse Interview Exchange Perceptive Content	<b>Access/Systems:</b> 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/>

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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.