WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Thursday, October 22, 2026
4:00 P.M.
Wellness Center, Room 204

Meeting Called By: Dr. Lisa Colombo (Chair) **Minutes**: Nikki Kapurch

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

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

---

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

AGENDA		
ITEM	**RESPONSIBLE**	**ACTION**
1. *Administrative Business* A. Call to Order B. Approval of the Minutes: 1. Human Resources Committee - June 11, 2026* 2. Full Board Meeting- June 11, 2026*	Dr. Lisa Colombo	**1. vote required** **2. vote required**
2. *Inclusive Excellence and Belonging Presentation - 15 minutes w/ Q&A* A. Title IX Presentation I. Title IX End-of-Year Report Academic Year 2025-2026* II. Sexual Misconduct Campus Climate Survey 2026* III. Title IX Training Presentation*	Edgar Moros Dinah Moore	I. Informational II. Informational III. Informational
3. *Lt. Col. James F. Sheehan '55 Commonwealth Honors Program Presentation* -- 15 minutes w/ Q & A*	Nicole Rosa	3. Informational
4. *Planning & Development Committee Report* A. Planning & Development Committee Packet*	Darnell Dunn	A. Informational & **vote required**
5. *Finance & Facilities Committee Report* A. Finance & Facilities Committee Packet*	Dr. Lawrence Sasso	A. Informational & **vote required**
6. *Administrative Updates* A. Report of the Chair I. Committee Assignments* II. Next meeting: November 19, 2026 B. Report of the Student C. Report of the President I. President's Update* II. Campaign Update III. Enrollment Update IV. 2027 Strategic Plan Update V. Road Project Update	Dr. Lisa Colombo Maria Caires Barry Maloney Tom McNamara Ryan Forsythe Lois Wims Carl Herrin	 I. Informational I. Informational II. Informational III. Informational IV. Informational V. Informational
7. *Adjournment*	Dr. Lisa Colombo	**7. vote required**

*Attachments

WORCESTER STATE UNIVERSITY

HUMAN RESOURCES COMMITTEE MEETING

Meeting Minutes

CHAIR:	Amy Peterson (Vice Chair)	DATE:	June 11, 2026
LOCATION:	Wellness Center, Room 204	MINUTES BY:	Nikki Kapurch
TIME:	2:30 PM		
COMMITTEE MEMBERS PRESENT:	Maureen Power, Chair (remotely), Amy Peterson, Vice Chair (remotely), Monica Aryitey, Esq., Kristen Garvey		
BOARD MEMBERS PRESENT:	Dr. Lisa Colombo		
WSU STAFF:	Barry Maloney; Ashlynn Allain; Nikki Kapurch; Sathi Mitra; Lois Wims		

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Human Resources Committee was held on Thursday, June 11, 2026, in room 204, located in the Wellness Center. Vice Chair Peterson called the meeting to order at 2:30 p.m. Trustee Peterson reported that two trustees would participate via remote access and announced that all votes would be taken by recorded roll call.

Human Resources Committee Report

Trustee Peterson opened the meeting to discuss the first agenda item, the 2025-2026 annual evaluation of President Maloney.

President Maloney's 2025–2026 Evaluation

- Trustee Peterson thanks everyone for participating in the 2025-2026 annual evaluation of President Maloney.
- The Human Resource Committee is charged with conducting the annual evaluation of President Maloney, as called for in his appointment contract, and as requested by DHE Commissioner Ortega.
- The deadline for submitting the presidential evaluation is September 30, 2026, as set by Commissioner Ortega.
- The following documents were provided for us in conducting the evaluation:
    - Correspondence from Commissioner Ortega
    - BHE Compensation and Evaluation Guidelines/Procedures
    - President Maloney's 2025-2026 self-evaluation
    - Performance Assessment Form
- The evaluation will follow criteria, as required by the BHE, as well as criteria requested by the Board of Trustees:
    1. Retention and Student Success
    2. Academic Management / Leadership
    3. Assessment
    4. Infrastructure
    5. Fiscal Management / Budgeting

6. Communication
7. Administrative Management / Leadership
8. Decision Making and Problem Solving
9. Fundraising
10. Campus Climate
11. External Relationships / Leadership in the Community
12. Affordability / Access

- The evaluation will be conducted using an assessment form to rate and comment on the listed areas.

  A numeric rating (whole number only) is to be used as follows:

  5=A 4=B 3=C 2=D I=E

- We will begin the process by having a member rate the President and provide comments from the Assessment Form provided. Another member may then make additional comments if she feels they would add to the review. We will repeat this process for all 12 evaluation areas. At the conclusion of the meeting, the forms will be submitted in order to tally the results for the final reporting on the various areas used in the evaluation.

1. **Retention and Student Success** **Average Rating: 5**

Comments:

- Against the backdrop of stagnant and declining higher education participation over the last decade, the President has been committed to ensuring quality and affordable higher education for all and following through with the establishment of ValuePlus and the MajorPlus programs. These two programs greatly enhance graduates' marketability and economic mobility.
- Full-time enrollment is at 86%, and students who return after the first year is at 77%, the third highest among the state colleges and universities.
- WSU's 63% graduation rate is the third highest among the nine state colleges and universities.
- Median earnings of students are higher than the national midpoint average, currently at $65,000 plus.
- Ninety-eight percent of Worcester State graduates are employed, enrolled in graduate school, or both within 6 months of graduation.
- President Maloney's leadership facilitated the rapid development of a transfer partnership with Anna Maria College following its closure announcement, ensuring that displaced students had an accessible pathway to continue their education and make timely progress toward graduation.
- Worcester State was ranked among the top 10 Massachusetts public colleges and universities for graduate earnings, demonstrating the university's success in preparing students for meaningful careers and advancing economic mobility for graduates and their families.
- Fall 2024 total enrollment increased 3.4% year-over-year; Spring 2025 returning student registration was up 1.01%.
- Awarded a $1.3 million federal TRIO Student Support Services grant in 2025 to expand targeted academic and financial support for low-income, first-generation, and disabled students.

- High percentage of students who identify as BIPOC/African, Latine, Asian, Native American (ALANA), which continues to climb, reaching 43% in Fall 2025, which is improving our accessibility to all.

2. **Academic Management and Leadership** **Average Rating: 5**

Comments:

- Revision of the General Education curriculum to better equip students with relevant and essential knowledge, skills, and abilities, preparing graduates to successfully navigate and lead in today's world.
- Expanding experiential learning opportunities, which allows students to bridge classroom theory with practical, professional, and community practice through hands-on initiatives, notably the Student Clinic for Immigrant Justice and the Community Fellows Program.
- Developing WSU's AI implementation plan to help optimize the use of AI to enhance teaching, learning, and operations while addressing potential risks.
- Developing an academic framework for a pre-engineering program in partnership with WPI, which would enable students to complete core coursework at WSU and seamlessly transfer to WPI. This also would make obtaining a bachelor's degree in engineering affordable.
- Graduated the largest number of graduate students in institutional history in both 2024 and again in 2025.
- WSU Nursing program ranked #1 in Massachusetts; MSN ranked #2; faculty recognized with Fulbright awards and peer-reviewed publications in 2024–2025.
- Increased Center for Teaching and Learning funding; grew student participation in research, internships, practica, and study-away in 2024–2025.
- Led the continued implementation and expansion of the MajorPlus initiative, allowing students to complete a major plus a minor, certificate, or second major within four years, enhancing academic value and career readiness.
- Implemented and promoted the Worcester State ValuePlus Program, which provides eligible Massachusetts students with pathways to attend Worcester State tuition-free.

3. **Assessment** **Average Rating: 5**

Comments:

- Tremendous progress with the 7-year strategic plan (in higher ed, only 5% of institutions reach highest levels of execution). Success rates of 90 percent plus in the different focus areas is a great achievement.
- Successfully creating a data-driven culture that touches all areas of management, including a data-driven budget process, a data-driven hiring process, and helping to make highly informed decisions
- As of 2026, the Beyond 150: Lead, Succeed, Engage (2020–2027) strategic plan appears to be significantly ahead of schedule and is one of President Maloney's strongest accomplishments from an assessment and accountability perspective.
- 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.

- FY2025 financial statements received a clean independent audit opinion from Bollus Lynch, LLP, with net position of $78.4M.
- Inclusive Excellence and Belonging Strategic Plan (Nov. 2024) sets specific equity goals and assigns accountability to newly formed committees.

4. **Infrastructure** **Average Rating: 5**

Comments:

- Launched the university's 2026–2036 Master Planning Initiative in partnership with DCAMM. The planning process will guide facilities, infrastructure, accessibility, resilience, sustainability, deferred maintenance, and capital investment decisions over the next decade while aligning campus resources with enrollment and academic needs.
- Creating essential and meaningful spaces for students and student engagement, learning and workforce engagement.
- Upgrading spaces that support student success.
- Continuing WSU's long-term investment in strategic planning, capital improvements, and infrastructure renewal.

5. **Fiscal Management and Budgeting** **Average Rating: 5**

Comments:

- FY2025 independent audit by Bollus Lynch, LLP resulted in a clean opinion with net position of $78.4M; unrestricted operational reserves of $27.6M
- WSU's S & P A-bond rating and stable outlook.
- Operational Excellence (OpEx) initiative in full operation by 2024 with a public dashboard tracking $5.5M in achieved efficiencies.
- Grant and sponsored research revenue reached $4.5M in FY25, up from $1.4M in FY21, driven by the Grants and Sponsored Research office built out during this presidency.
- WSU received $1.62M in FY26 SUCCESS program funding—the highest allocation among Central Massachusetts state universities—based on its Pell and enrollment share.
- Provided leadership in the implementation of the Worcester State ValuePlus, a data-driven affordability initiative that removes tuition, fee, and book costs for eligible Massachusetts students, reducing financial barriers and increasing access to higher education.
- Initiated a comprehensive campus Master Planning process in partnership with DCAMM to guide facilities, infrastructure, and capital investment decisions through 2036. The planning process aligns campus facilities with projected enrollment, academic programs, deferred maintenance needs, sustainability goals, and the university's strategic priorities.

6. **Communication** **Average Rating: 5**

Comments:

- Introduced a new "First Look" program for high school juniors, providing prospective students with an early opportunity to experience campus life, learn about academic programs, and engage with faculty, staff, and current students. The initiative reflects a proactive approach to recruitment and helps build awareness of Worcester State's educational opportunities among future applicants.
- Strengthened collaboration and communication with Worcester Public Schools through the

Early College Partnership, reinforcing Worcester State's role as a regional leader in expanding educational opportunity and college access.

- During his undergraduate commencement address, President Maloney connected with graduates through a thoughtful and memorable message that included a reference to *Prayers for Rain* by The Cure. Using the song's imagery as a metaphor for resilience, hope, and the positive impact graduates can have on their communities, he delivered an inspiring message that resonated with students and families. His remarks celebrated the perseverance of the Class of 2026 while reinforcing Worcester State University's values of leadership, service, and civic engagement. This address demonstrated his ability to communicate the university's mission in a meaningful and memorable way while strengthening institutional pride and student connection to Worcester State.
- Visible leadership
- ValuePlus program was announced publicly in November 2024, impacting the next year's recruitment and enrollment, with full press coverage and transparent program information at worcester.edu/valueplus.
-
- Entered a multi-year partnership with Wellpoint, a leading Massachusetts health benefits provider, to support student academic success and physical well-being on campus.
- Excellent coverage of the Ana Maria students transfer program, both in print, web, and video coverage, which was quick and excellent.
- Advertising in Spanish during the World Cup and on Telemundo is innovative, and so is the WSU Spanish sub-website.

7. **Administrative Management and Leadership** **Average Rating: 5**

Comments:

- Cultivating "rising stars" within the administrative team to develop a strong internal bench to ensure the university has a ready pipeline of talent when opportunities arise.
- Continued partnership with EAB, to guide post-COVID decision-making focused on key areas such as fiscal planning, enrollment management, federal compliance, AI integration, and board engagement.
- Associate Provost position created and approved by the BOT Human Resources Committee in June 2025 to strengthen academic management capacity.
- Campaign readiness work is actively underway as presented to BOT Jan. 2025; Advancement operations restructured, new leadership hired, and prospect data analyzed in preparation for a comprehensive fundraising campaign.
- As the longest-serving college president in Central Massachusetts, President Maloney has spent 15 years advancing Worcester State's mission of expanding access to higher education, particularly for first-generation, low-income, and historically underrepresented students.
- The university's Early Support Program exemplifies President Maloney's focus on proactive student support by providing early intervention strategies that promote persistence, retention, and degree completion. The initiative reflects Worcester State's student-centered approach to helping students navigate their college experience at WSU.

- Completed and measured progress through the fifth year of 2020–2027 Strategic Plan with 91% metric achievement. Appointed in 2025 by DHE Commissioner Noe Ortega to the MassTransfer Steering Committee—a signal that the state trusts WSU's voice on transfer policy.

8. **Decision-Making and Problem-Solving** **Average Rating: 5**

Comments:

- Solution-oriented, values driven, collaborative leadership and decision-making.
- Replacement of the WSU General Education core with one that equips graduates with essential skills and competencies required to navigate their lives and careers and to compete effectively in today's world.
- President Maloney continues to advance Worcester State's mission of preparing graduates for lives of leadership, service, and professional achievement. The recognition of Omer Rafiq '14 as the 2025 Outstanding Young Alumnus reflects the university's success in developing graduates who make significant contributions in public service, national security, and emerging technology fields.
- President Maloney's leadership has been characterized by stability, thoughtful decision-making, and effective team building. Over his 15-year tenure, he has maintained an exceptionally stable senior leadership team with virtually no turnover, providing continuity in institutional priorities and execution. His ability to remain calm during challenging circumstances has strengthened the university's capacity to respond effectively to changing conditions while maintaining focus on student success and institutional goals.
- Launched ValuePlus in November 2024—a decisive response to affordability pressure—providing tuition-free attendance for Pell-eligible MA commuter students beginning Fall 2025.
- Initiated a fundraising campaign readiness process in 2024–2025—assessing Advancement operations, restructuring staff, and migrating to a new fund management system—as reported to BOT Jan. 2025.

9. **Fundraising** **Average Rating: 5**

Comments:

- In 2025 alone: secured $1.24M endowed scholarship (Becker College), $760K Foundation grant, and $10K St. Vincent Hospital nursing sponsorship.
- Annual fundraising increased 101.7% over the presidency; endowment reached $60.8M in 2025.
- Comprehensive fundraising campaign readiness underway: Case for Support in development, Campaign Readiness Workgroup engaged, Advancement operations restructured, and new leadership hired—as presented to BOT Jan. 2025.
- Oversaw 400+ donor-funded student scholarships annually with a 90% graduation rate among recipients.
- Grant revenue grew to $4.5M in FY25; WooGives 2025 campaign raised $37,270 from 644 donors through student-run competition.
- WooGives demonstrates President Maloney's commitment to institutional advancement and support for Worcester State students, including its athletic programs. Through his outreach to alumni, students, faculty, staff, and community members, President Maloney promotes a

culture of philanthropy and encourages investment in the university's mission. The annual day of giving helps generate resources that enhance student opportunities, strengthen athletic programs, and build pride across the Worcester State community.

- WSU ranked fourth among 54 New England institutions in total endowment market value growth.
- Significant increase in the amount of new and continuing awards, from $1M to $4.2M since 2021.
- WSU secured a five-year, $1.3 million TRIO Student Support grant to provide the academic coaching and resources needed to boost graduation rates for low-income, first-generation students, and/or students with disabilities.
- WSU's fundraising efforts and endowment consistently outperform peer institutions, enabling the university to award more scholarship dollars that directly drive higher retention and graduation rates.
- The Worcester State Foundation remains on track to qualify for the Commonwealth's endowment match of $555,555.

10. **Campus Climate** **Average Rating: 5**

Comments:

- Congratulations Day!! - Congratulations Day reflects President Maloney's commitment to student success and community building. By recognizing and celebrating admitted students, the event fosters school pride, strengthens students' connection to the university, and reinforces Worcester State's student-centered culture
- Proud Lancer Day reflects President Maloney's commitment to fostering a strong sense of community and school pride at Worcester State. The event celebrates the university's students, faculty, staff, and alumni while strengthening connections across the campus community. By promoting engagement and institutional pride, Proud Lancer Day supports a positive campus culture and reinforces the values and traditions of Worcester State University.
- The Latino Education Institute celebrated its 25th anniversary with a City Hall flag-raising ceremony and year-long series of events recognizing its impact on educational access, leadership development, and community engagement. The milestone reflects Worcester State's longstanding commitment to fostering an inclusive campus climate and supporting the educational success of Latino students and families throughout Central Massachusetts.
- Worcester State continued to support the Alternative for Individual Development (AID) Program, a summer bridge initiative designed to assist determined students from first-generation, low-income, and historically underrepresented backgrounds in successfully transitioning to college. The program helps reduce barriers to access and promotes college readiness before students begin their first semester.
- Taking meaningful steps to ensure a safe and inclusive campus climate, including creating diverse and inclusive spaces for students: The LGBTQIA+ Community Center, the expanded Veterans' lounge, and Thea's Pantry's relocation to offer more access to students.
- Focusing on bringing in and keeping both staff and students from historically marginalised communities.
- TRIO program: Increased sense of belonging on campus.

- Several student-serving spaces were redesigned or expanded to meet emerging needs and enhance campus life.
- Unity Day continues to serve as a vibrant celebration of Worcester State's commitment to fostering equity, identity and community (diversity and inclusion). It remains a signature event on WSU's calendar.
- 24/7 telehealth mental health support and JED Campus certification maintained through 2024–2025.
- Paraprofessional Educator to Bachelor's Program — a partnership with Worcester Public Schools — helps school staff earn full teacher licensure while addressing the state teacher shortage, supported by donor-funded stipends.

11. **External Relationships/Leadership in the Community** **Average Rating: 5**

Comments:

- Serving as Chair, St. Vincent Hospital Governing Board (since Jan. 2023) and Chair, First Wednesday Group business roundtable; member of Worcester Business Development Corporation, Worcester Regional Research Bureau, Ascentria Care Alliance, and GWCF boards.
- Signed a renewed MOU with Worcester Public Schools and the Latino Education Institute in fall of 2025, marking 25 years of that partnership.
- Appointed in 2025 to the DHE MassTransfer Steering Committee by Commissioner Noe Ortega and BHE Chair Chris Gabrieli.
- WSU received $1.62M in FY26 SUCCESS program funding—highest of the three Central MA state universities—tied to its Pell and enrollment share as a high-need institution in the Worcester region.
- When Anna Maria College announced its closure, WSU moved quickly to establish a teach-out agreement guaranteeing admission to displaced students, with waived application fees and access to residential housing — the first major regional response to the closure.
- Recognized as Worcester Business Journal's 2025 Large Business Leader of the Year. (Quote: *"A steady leader at a powerful Central Massachusetts institution, President Maloney has defied the odds and grown enrollment at the university during a turbulent time for the industry, all while making higher education more accessible for underrepresented populations. It is an absolute honor to have him as WBJ's Large Business Leader of the Year."*)
- Listed for the third straight year (in 2026) in WBJ's Power 100 group of influential business leaders in Central MA.
- Remaining visible and relevant in the Worcester Community and beyond; forming strategic partnerships for the benefit of students; engaging with key stakeholders and creating community engagement opportunities for students.
- The partnership between Worcester State University and the Worcester Red Sox reflects President Maloney's commitment to community engagement and institutional visibility. By establishing a presence at Polar Park and showcasing university ambassadors during WooSox events, Worcester State increases awareness among prospective students, families, alumni, and community members. This collaboration strengthens community partnerships, enhances the university's profile, and promotes pride in the Worcester State community.

12. **Affordability /Access** **Average Rating: 5**

Comments:

- Prioritizing delivering high-quality yet affordable education to all with special focus on students from underserved communities.
- College Score Card ranks WSU as most affordable among the 9 state universities and colleges and the four UMass colleges.
- Growing Pell-eligible students is linked to economic mobility for lower income families.
- Latiné enrollment grew to 793 students in Fall 2025 as WSU approaches Hispanic Serving Institution (HSI) status.
- Additionally, the broader undergraduate BIPOC/ALANA population has steadily risen, reaching 41% in Fall 2025 compared to 32% in Fall 2021.
- The Early College program is creating visibility for the school, benefiting Worcester's diverse populations and expanding access, which will positively impact enrollment numbers.
- The Early College Partnership promotes long-term economic mobility by enabling students to earn college credits at no cost, reducing future college expenses, and accelerating progress toward degree completion and workforce opportunities.
- Financial aid packaging, as well as ValuePlus, are ensuring affordability for many students.
- Free and low-cost textbook adoption saved students nearly $2M in course materials in the most recent year; library expanded eBook access through 2025 HELM grant
- $23M awarded in scholarships and grants; 78% of students receive aid with avg. $10,111/year; first-gen students exceeded 45%, and Pell-eligible exceeded 50%, of the 2025 incoming class.
- Early College Worcester: 61 classes, 20 HS partner schools in 2024; 1,000+ WPS and Veritas Prep students enrolled since 2019.
- Awarded $1.3M federal TRIO Student Support Services grant (2025) to provide academic, financial, and personal support to low-income, first-generation, and/or disabled students.

Based on the trustees' comments and ratings for each area, the Chair noted that President Maloney remains a strong supporter of WSU and a prominent leader in Worcester. He continues to make positive contributions and is actively planning and strategizing with his leadership team to advance WSU.

President Maloney thanked the Board for their support and commitment.

President Maloney's overall average rating across all evaluation areas was 60/60.

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

VOTED: **to recommend to the full board the report of the Human Resources Committee and approve the FY2026 Annual Evaluation of President Maloney as presented, and forward it to Commissioner Ortega as requested, with appropriate documents to meet the September 30, 2026, deadline, and further recommend the maximum allowance when the merit/salary increase parameters are authorized by the Commissioner.**

ROLL CALL VOTE: Maureen Power (Chair), Amy Peterson (Vice Chair), Monica Aryitey, Esq., Kristen Garvey

The second agenda item for discussion was the approval of Sathi Mitra's promotion from Assistant Vice President for Employee Services to Associate Vice President for Employee Services at Worcester State University.

- President Maloney presented the recommendation to the board and mentioned that supplemental materials were included in the packet to support this promotion.
- President Maloney highlighted some of Ms. Mitra's accomplishments.
- President Maloney reminded board members that any position at the rank of dean or higher requires Board approval.
- President Maloney is seeking approval to promote Sathi Mitra as the Associate Vice President for Employee Services

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

VOTED: **to recommend to the full board the approval of a promotion for Sathi Mitra to the position of Associate Vice President for Employee Services, Chief Human Resources Officer, as presented.**

ROLL CALL VOTE: Maureen Power (Chair), Amy Peterson (Vice Chair), Monica Aryitey, Esq., Kristen Garvey

With no further business to conduct, we would like to request a motion to adjourn the meeting.

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

VOTED: **to adjourn the meeting at 3:22 pm**

ROLL CALL VOTE: Maureen Power (Chair), Amy Peterson (Vice Chair), Monica Aryitey, Esq., Kristen Garvey

Respectfully submitted,

Nikki Kapurch
Assistant Secretary, Board of Trustees

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Meeting Minutes

CHAIR:	Dr. Lisa Colombo (Chair)	DATE:	June 11, 2026
LOCATION:	Wellness Center, Room 204	MINUTES BY:	Nikki Kapurch
TIME:	4:00 p.m.		
BOARD MEMBERS:	Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders		
WSU STAFF:	Barry Maloney; Ashlynn Allain; Ryan Forsythe; Carl Herrin; Nikki Kapurch; Josh Katz; Julie Kazarian; Tom McNamara; Sathi Mitra; Edgar Moros; Lois Wims		

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Board of Trustees was held on Thursday, June 11, 2026, in room 204, located in the Wellness Center. Chair Colombo called the meeting to order at 4:00 p.m., reported that one trustee would participate remotely, and announced that all votes would be made by recorded roll call.

Administrative Business

APPROVAL OF THE MINUTES - Full Board Meeting - April 9, 2026

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

VOTED: **to approve the April 9, 2026, full Board meeting minutes as presented.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders

APPROVAL OF THE MINUTES - Academic & Student Development -April 9, 2026

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

VOTED: **to approve the minutes of the April 9, 2026, Academic & Student Development Committee meeting as presented.**

ROLL CALL VOTE: **4 approved.** Maureen Power (Chair); Kelly Brissette (Vice Chair); Kristen Garvey; Brandol Ogando Saladin

NOMINATING COMMITTEE REPORT

- Trustee Peterson, chair of the committee, reported that the group convened on May 12 at 1 p.m. and provided a summary of that meeting.
- The Nominating Committee was appointed by Chair Colombo at the April 9th meeting and charged

with presenting a slate of officers for election at the full Board meeting on June 11, 2026.

- Chair Colombo appointed Trustee Peterson, Trustee Brissette, and Trustee Power to serve.
- Trustee Peterson also acknowledged that an email was sent to all trustees prior to the meeting, seeking any voluntary interest in the available positions. She received an expression of interest from Trustee Colombo to continue in the chairperson role and from Trustee Sasso to continue in the vice chair role.
- After a thorough discussion, the trustees agreed to reappoint Trustee Colombo as chair. Trustees Sasso and Dunn will serve as vice chairs.
- After a healthy discussion among the trustees, it was agreed to present the following slate of officers to the full Board at the June 11, 2026, meeting.

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

VOTED: **to accept the recommendation of the Nominating Committee and approve the Slate of Officers for 2026- 2027 as presented.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders

POSITION:	**NEW SLATE 2026/2027**
CHAIR	**Trustee Lisa Colombo**
(2) VICE-CHAIRS	**Trustee Darnell Dunn** **Trustee Lawrence Sasso**
SECRETARY	**President Barry Maloney**
ASSISTANT SECRETARY	**Nikki Kapurch**
(2) FOUNDATION BOARD	**Trustee Kristen Garvey** **Trustee Jake Sanders**
EXECUTIVE COMMITTEE: ALTERNATE	**Trustee Maureen Power** **Trustee Monica Aryitey**
MA STATE COLLEGES PRESIDENTS/TRUSTEES ASSOCIATION ALTERNATE (CHAIR AND VICE-CHAIRS AS ALTERNATE):	**Trustee Lisa Colombo** **Trustee Darnell Dunn** **Trustee Lawrence Sasso**

WSU Board of Trustees
June 11, 2026
HUMAN RESOURCES COMMITTEE REPORT

Trustee Power reported that the committee met at 2:30 p.m. today. The first agenda item that was discussed was President Maloney's 2025–2026 Self-Evaluation.

- The HR Committee was charged with conducting the annual evaluation of President Maloney, as called for in his appointment contract and in accordance with the guidelines distributed by Department of Higher Education Commissioner Ortega.
- Once approved by the Board of Trustees, an executive summary and the appropriate materials will be prepared and forwarded to the Commissioner by the September 30, 2026, deadline.
- As we have done in the past, we provided comments for each area and used a numeric rating system.
- President Maloney's overall evaluation was highly commendable. He received top scores and a very positive review.
- Due to today's meeting schedule, the final results have not been tallied.

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

VOTED: **to accept the recommendation of the Human Resources Committee and approve the FY26 Annual Evaluation of President Maloney, as presented, and to forward to Commissioner Ortega, as requested, with the appropriate documents to meet the September 30, 2026, deadline, and further recommend the maximum allowance when the merit/salary increase parameters are authorized by the Commissioner.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders

The second order of business for discussion was the approval of Sathi Mitra's promotion from Assistant Vice President for Employee Services to Associate Vice President for Employee Services, Chief Human Resources Officer at Worcester State University.

- President Maloney presented the recommendation to the Board and mentioned that supplemental materials were included in the packet to support this promotion.
- President Maloney highlighted some of Ms. Mitra's accomplishments.
- President Maloney reminded board members that any position at the rank of dean or higher requires Board approval.
- President Maloney is seeking approval to promote Sathi Mitra to Associate Vice President for Employee Services and Chief Human Resources Officer, as presented.

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

VOTED: **to accept the recommendation of the Human Resources Committee and approve the promotion for Sathi Mitra to the position of Associate Vice President for Employee Services, Chief Human Resources Officer, as presented.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders

APPROVAL OF THE MINUTES - Nominating Committee - May 12, 2026
Upon a motion made by Trustee Brissette and seconded by Trustee Power, it was

VOTED: **to approve the minutes of the May 12, 2026, Nominating Committee meeting as presented.**

ROLL CALL VOTE: **3 approved.** Amy Peterson (remotely); Kelly Brissette; Maureen Power

FINANCE & FACILITIES COMMITTEE REPORT
FY2027 Comprehensive University Budget

- Trustee Sasso, chair of the committee, reported that the group convened on Thursday, June 4, at 11 a.m. Trustee Sasso provided a brief summary of the meeting. Trustee Sasso noted that at the April 9th Finance and Facilities committee meeting, the committee members spent a lot of time discussing the budget.
- VP Eichelroth and her team presented a detailed, well-organized PowerPoint on the budget.
- Some key points regarding the FY2027 budget:
    - The university has identified a $3,955,505 budget shortfall between revenue and expenses in FY 2027.
    - **Addressing the Budget Deficit:** To bridge the $3,955,505 structural shortfall between revenue and expenses for FY 2027, the university is implementing a multi-pronged financial strategy.
    - **Fee Adjustment:** The FY 2027 budget introduces a 4% ($450) increase to the general fee, adjusting the total cost of attendance for commuter students to $11,824.
    - **Strategic Reserve Utilization:** University reserves will be strategically drawn down to mitigate immediate costs and directly subsidize a new fundraising campaign designed to bolster student recruitment.
    - Moody's has affirmed an A2 credit rating for the university, citing healthy student retention, robust state support, and strong overall financial management.
- State formula funding was excluded from the FY27 budget, which limits Worcester State's ability to close its base appropriation gap relative to peer institutions. However, the Healy Administration remains supportive of public higher education. Two amendments have been filed for the state university system, requesting funding of the formula funding line and a $12M increase to the MassGrant Plus Line.
- If the BRIGHT Act is passed, it would direct $2.4B to public higher education, funded through the Fair Share Amendment.
    - Timeline: $125M is earmarked for annual debt service, but campus-level dollars are not anticipated to arrive until approximately FY29.
    - The conversations the Board has been privy to regarding the master plan work are tethered to the BRIGHT Act. All campuses must have an updated master plan to draw down those dollars.

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

VOTED: **to accept the recommendation of the Finance and Facilities Committee and approve the WSU FY 2027 Comprehensive University Budget as presented.**

ROLL CALL VOTE: **10 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Dr. Lawrence Sasso (Vice Chair); Jake Sanders

1 No - Brandol Ogando Saladin

Other items up for discussion and a vote were Deferred Maintenance and the Indirect Cost Recovery Trust Fund. Information on both topics is included in the packet. Board members voted unanimously to approve deferred maintenance repairs at 535 Chandler Street and the Indirect Cost Recovery Trust Fund. This new trust fund formalizes the tracking and reinvestment of retained grant overhead dollars.

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

VOTE: **to accept the recommendation of the Finance and Facilities Committee and approve the deferred maintenance repairs at 535 Chandler Street, as described in the memo dated May 14, 2026.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin, Dr. Lawrence Sasso (Vice Chair); Jake Sanders

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

VOTED: **to accept the recommendation of the Finance and Facilities Committee and approve the creation of the Indirect Cost Recovery Trust Fund.**

ROLL CALL VOTE: **11 approved.** Monica Aryitey, Esq; Kelly Brissette; Dr. Lisa Colombo (Chair); Darnell Dunn; Mary Foley; Kristen Garvey; Amy Peterson (remotely); Maureen Power (Vice Chair); Brandol Ogando Saladin; Dr. Lawrence Sasso (Vice Chair); Jake Sanders

PLANNING & DEVELOPMENT COMMITTEE REPORT

Trustee Sasso, chair of the committee, reported that the group convened on Thursday, June 4, at 10 a.m. Trustee Sasso provided a brief summary of the meeting.

- The Master Plan Update is transitioning from current-state discovery and stakeholder engagement into the validation and refinement phase. Led by VP Eichelroth and her team, the process aims to deliver a final recommendation to the Board of Trustees on October 22, 2026, with phased implementation anticipated to begin in 2027.
- The Administration is focusing on Option #2 as the preferred direction, emphasizing greening the campus core, redeveloping the Student Center and LRC, addressing a ~700-space parking deficit, and coordinating with MassDOT's Chandler Street reconstruction. A final board vote is expected in October, when a comprehensive presentation will be provided.
- The master plan work is tethered to the BRIGHT Act. All campuses must have an updated master plan to draw down those dollars.
    - If the BRIGHT Act is passed, it would direct $2.4B to public higher education, funded through the Fair Share Amendment.
    - Timeline: $125M is earmarked for annual debt service, but campus-level dollars are not anticipated to arrive until approximately FY29.

Inclusive Excellence and Belonging Presentation

BIRT Dashboard and Inclusive Excellence and Belonging Updates

- President Maloney welcomed Edgar Moros, Executive Director of Inclusive Excellence and Belonging,

who walked us through the PowerPoint presentation that was included in the packet.

- The bias incident reporting dashboard is publicly available, with 14 reports logged this fiscal year.
- Mentioned the hiring of a new recruiter, Barbara Guertin.

REPORT OF THE CHAIR

Trustee Colombo mentioned that this is the time of year when she will reach out to Trustees over the summer to discuss next academic year committee assignments.

Chair Colombo presented the 2026-2027 meeting schedule and noted that we will continue to meet on Thursdays. Chair Colombo asked for a motion to approve the 2026-2027 meeting schedule as presented.

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

VOTED: to approve the 2026-2027 Meeting Schedule as presented.

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

REPORT OF THE STUDENT TRUSTEE

Trustee Ogando Saladin provided his final report as student trustee, having graduated.

- He provided data on Thea's Pantry, noting over 1,000 visits, as well as some Office of Student Involvement data on student programming.
- He discussed the new event he started, Proud Lancer Day, its success, and his hope that the new student trustee will continue the event.
- He thanked everyone for their support, and the trustees thanked him for his leadership and his thorough report-outs to the board.

PRESIDENT'S REPORT

- Thanked Trustee Ogando Saladin for his leadership and expressed how proud he was of him starting Proud Lancer Day on campus.
- He thanked the trustees and the board chair for volunteering their time. He also expressed gratitude to the board members for attending the end-of-the-year commencement ceremonies.

President's Update

- The packet included the President's Update. If any trustees have questions, please let the President know. The report includes a hyperlink to the President's self-evaluation, which, for all intents and purposes, is the same as our year-end report.
- Thanked them for their continued support throughout the evaluation process and for the Board's continued trust and confidence in the President and the team.
- The fundraising campaign was greenlit through FY27 budget approval; it is planned as a three-year sprint focused on experiential learning, STEM, and scholarships, with 100% board participation noted as a key donor signal.
- Provost Wims provided an update on the new general education curriculum, which launches in fall

2026 for all incoming first-year students, and replaces LASC - the current general education curriculum. Key features include a navigable structure, experiential learning, and interdisciplinary, team-taught courses, with 10 faculty teams designing courses this summer.

- VP Forysthe provided an enrollment update. Fall 2026 enrollment shows a 3.5–3.8% increase in new student deposits, growth in Hispanic/Latinx and BIPOC populations, and 260 Anna Maria College applicants (50+ deposited) following that institution's closure.
- State university presidents are jointly opposing four "applied bachelor's degree" proposals (90 credit hours) from Merrimack College and Suffolk University, citing equity concerns, employer credentialing expectations, and the risk of eroding enrollment in programs such as criminal justice and psychology.

President Maloney Memo to Trustees

- Approval of Nominees For Speaker/Awards Pool
    - Nominees for commencement speaker, honorary degree recipients, and community service awards are accepted throughout the year. They are evaluated by the Speakers and Awards Committee on a rolling basis; applications are reviewed during both the Fall and Spring semesters. The committee then creates a list of nominees to recommend to the All-University Committee, which forwards all finalists to the president. The Board of Trustees grants final approval upon the president's recommendation.
    - Below is a list of President Maloney's recommendations for commencement speakers and honorary degree recipients for inclusion in the pool of approved speakers and award recipients.
    - The Board of Trustees voted to approve nominees for the speaker awards pool, including commencement speakers and multiple candidates for honorary degrees.

Chair Colombo asked for a motion to approve William Murphy and Congresswoman Ayanna Pressley for inclusion in the university's speaker and awards pool for potential consideration at commencement.

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

VOTED: **to approve the following nominees for inclusion in the Speaker/Awards pool:**

William Murphy '93
Congresswoman Ayanna Pressley (MA-07)

With there being no further business, the WSU Board of Trustees meeting was adjourned at 5:49 p.m.

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

VOTED: **to adjourn the meeting at 5:49 p.m.**

Respectfully submitted,

Barry M. Maloney
Secretary, Board of Trustees

Title IX
End-of-Year Report

July 1, 2025 - June 30, 2026

Prepared by: Jennifer Quinn

Message from Jennifer Quinn, University Title IX Coordinator

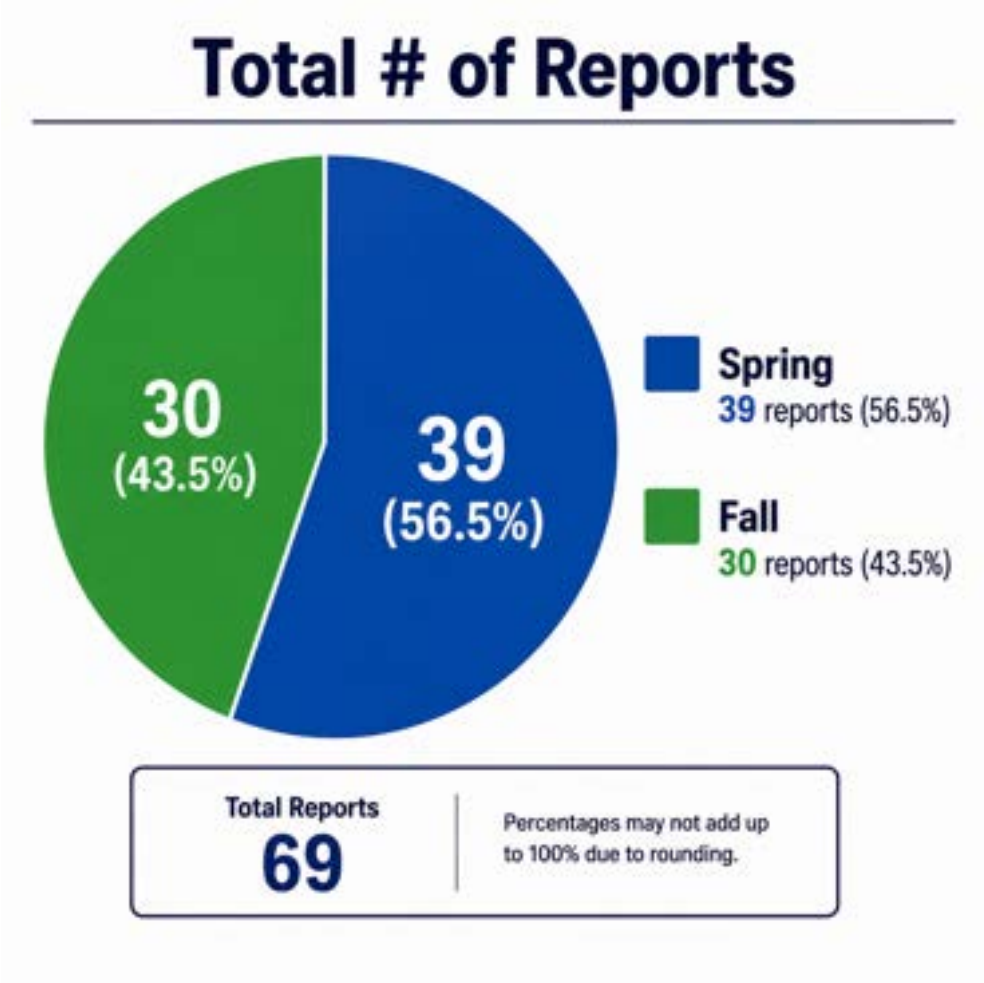
The 2025–2026 year reflected consistent activity within the University's Title IX processes, with sustained reporting and ongoing implementation of supportive measures. The Title IX Office continued to manage intake, response, and case coordination in alignment with federal and state requirements while working collaboratively with campus partners to provide timely, coordinated, and trauma-informed support to students and employees.

This year, the University also completed its second Campus Sexual Assault Climate Survey, providing valuable insight into the experiences of our students. The survey findings reinforce the continued prevalence and impact of sexual violence and related trauma experienced by our students and underscore the ongoing need for accessible supportive measures, prevention initiatives, and coordinated institutional response.

Over the past year, the Title IX Office further strengthened its partnerships with the Office of Inclusive Excellence and Belonging and Employee Services, enhancing collaboration, reinforcing shared knowledge and best practices, and promoting consistent, coordinated responses across the University.

While year-to-year reporting trends remained relatively stable, the continued volume and complexity of cases highlight the importance of maintaining institutional capacity, fostering cross-functional collaboration, and continually refining our processes to support effective response, compliance, and care for our campus community. In recognition of these evolving needs, the University is expanding the Title IX Office through the hiring of a full-time Title IX Coordinator, further strengthening its capacity to provide timely response, comprehensive support, and ongoing education. This investment reflects the University's continued commitment to fostering a safe, equitable, and supportive environment for all members of the campus community.

Title IX Data

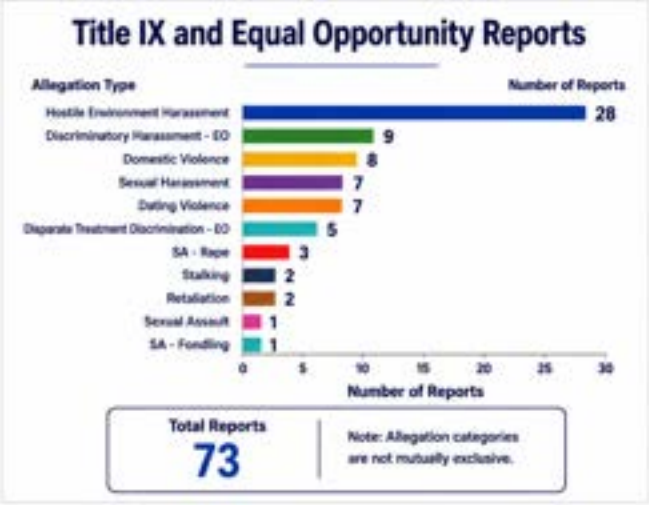


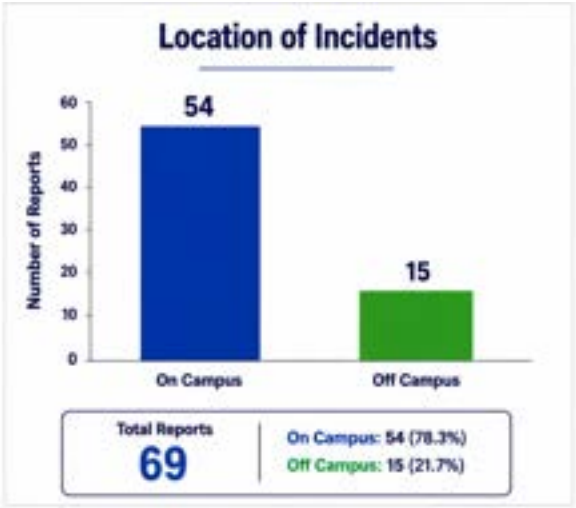
Reports of Sexual Misconduct and Discrimination

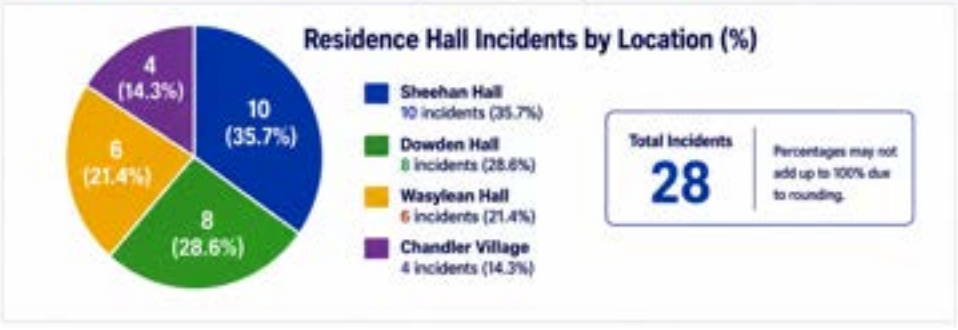
Policy definitions referenced in this report can be found in the *Equal Opportunity, Nondiscrimination, and Title IX Plan* (effective August 2024) and the *MA State Universities Title IX Sexual Harassment Policy* (effective August 2020).

These figures do not include reports made to confidential resources.

Additionally, in compliance with the Jeanne Clery Campus Safety Act, the University publishes annual data on Criminal Offenses and VAWA Offenses. Variations between the data sets may occur due to differences in the definitions of policy violations, the definitions of criminal offenses, and the jurisdictional scope of the Clery Act.







Please note the number of types of violations may be higher than the number of reports because one complainant may have been impacted by more than one policy violation. Although there were 69 Reports there were 73 policy violations reported.

Supportive Measures

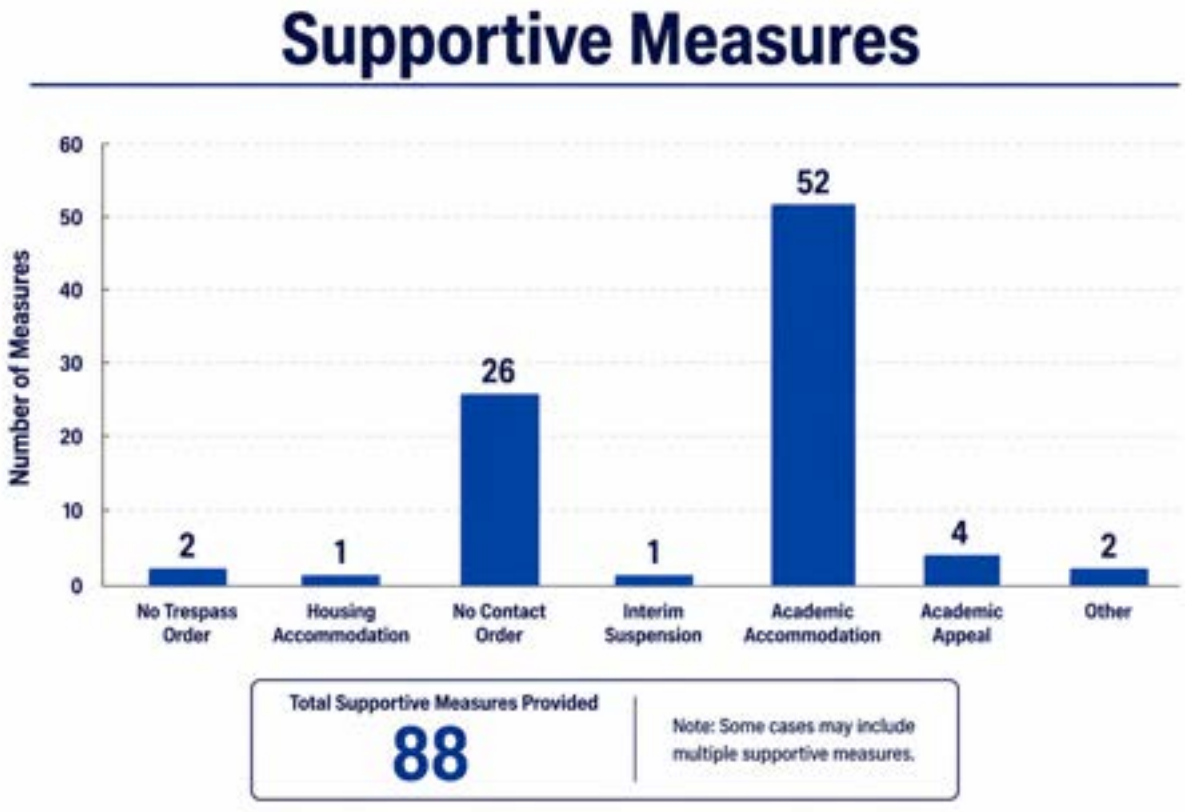
Supportive Measures are individual measures offered as appropriate and as reasonably available without unreasonably burdening a complainant or respondent, not for punitive or disciplinary reasons, and without fee or charge to the complainant or respondent to:

A. Restore or preserve that party's access to the University's program or activity, including measures that are designed to protect the safety of the parties or the University's environment;

Or

B. Provide support during the University's complaint investigation and resolution procedures or during an informal resolution process.

A formal complaint is not required to request or access supportive measures and are available currently under both the 2020 Title IX Sexual Harassment Policy and the 2024 Equal Opportunity, Nondiscrimination and Title IX Policy.



Title IX Coordinators Case Management:

Jen Quinn - 54 Cases, 86 student/employee meetings

Stephanie Teixeira - 15 Cases, (unknown student meetings as employee data is not available)



WORCESTER STATE UNIVERSITY

2026 Sexual Misconduct Campus Climate Survey

Report Completed July 2026

TABLE OF CONTENTS

INTRODUCTION....3

SURVEY DESIGN AND METHODS....4

TERMINOLOGY....5

DEMOGRAPHICS....6

KEY FINDINGS....8

PREVALENCE OF SEXUAL MISCONDUCT....9

- Alcohol and Other Drugs (AOD)....12

HARASSMENT and DISCRIMINATION....13

- Sexual Harassment....13
- Bias and Discrimination....15

STALKING....17

INTIMATE PARTNER VIOLENCE (IPV)....19

UNWANTED SEXUAL CONTACT....21

IMPACT....22

DISCLOSURES AND REPORTING....26

ATTITUDES ABOUT SEXUAL MISCONDUCT....28

POLICY & PROCEDURE AWARENESS....29

COMMUNITY PERCEPTIONS....30

- Differences by Population....30

EDUCATION and TRAINING....31

BYSTANDER INTERVENTION....32

AREAS OF NOTE....33

ACKNOWLEDGMENTS....33

INTRODUCTION

In November 2023, Worcester State University conducted its first comprehensive, campus-wide Sexual Misconduct Climate Survey to help the community better understand the incidence of sexual misconduct and its impact on the university community. The survey not only meets the requirements of M.G.L. c. 6, § 168D(e) of the Massachusetts statute, it also represents our commitment to combating sexual assault and misconduct on campus.

The campus-wide survey is completed every two academic years and aims to understand the lived experiences of our full-time, part-time, undergraduate, and graduate students as it relates to sexual misconduct. Administered in February 2026, 10% (520) students participated and 505 students completed more than the demographics. The overall response rate was 11% for undergraduate students, 5% for graduate students. Non-degree-seeking students were not identified in this survey.

Our goals in conducting the survey include the following:

- Understand the prevalence of sexual misconduct experienced by our students
- Gather information on the effectiveness of our efforts to educate, prevent, and respond to sexual misconduct and discrimination on our campus
- Gather rates of sexual misconduct on high-risk populations
- Assess knowledge of reporting options and support resources
- Collect student perceptions on university resources as well as feedback on how effective these were for students who utilized these options
- Measure knowledge and use of positive bystander behaviors
- Use the survey information to implement improvements to campus prevention, education, and response efforts

<u>Note regarding the Clery Act:</u>
The Clery Act (officially known as the Jeanne Clery Campus Safety Act) requires universities to disclose specific crime statistics and safety policies for consumer protection.

The yearly crime statistics provided in Worcester State's Annual Security Report (ASR) cover a broad range of criminal sexual activity that must fit the U.S. Department of Education definitions, and the offenses must occur either on campus, on public property adjacent to campus, or in/on non-campus buildings or property that the university controls or owns. Most importantly, the university can only report those incidents reported to us.

It is important to recognize, based on the criteria listed above, that the statistics published in the ASR and the data collected in this survey understandably do not complement each other.

SURVEY DESIGN AND METHODS

The Sexual Misconduct Climate Survey was developed with the goal of gathering data regarding sexual misconduct at Worcester State University, including prevalence, student perceptions and beliefs, and awareness of resources and support. The questions were adapted from the Commonwealth of Massachusetts Task Force Report on Sexual Misconduct Surveys (May 2022).

The survey was conducted online, and no questions were administered during or after in a live format. The survey was cross-sectional and qualitative. The survey crossed all university student demographics and asked students to respond to questions regarding their personal experiences. The questions were a mixture of drop down, yes/no/prefer not to answer, multiple choice, multiple answer (select all that apply), and rating scales. Respondents were able to skip as many questions as they chose.

The survey comprised the following sections:

- Demographic Information
- Education and Resources
- Sexual Harassment
- Stalking
- Intimate Partner Violence
- Unwanted Sexual Contact
- Circumstances, Reporting and Impact
- Perception and Beliefs
- Community Perceptions
- Bystander Intervention
- Resource List

The survey was anonymous, and responses could not be traced back to individuals. The survey was administered in February 2026 and deployed to all Worcester State University students via email and social media. The survey was kept open until March 9, 2026. Reminders were sent to students periodically directly and through faculty and staff.

Incentives included a raffle for a Nintendo Switch, Beats earbuds (2) and JBL headphones. Participants could self-select to enter the raffle through entering their information into a separate form that was not connected to their survey answers. Raffle winners were selected through a random name generator.

TERMINOLOGY

The following definitions were provided within the survey:

Affirmative Consent - A knowing, voluntary, and mutual decision among all participants to engage in a specific sexual activity. Consent can be given by words or actions, as long as those words or actions create a clear permission regarding a willingness to engage in sexual activity or contact. Silence does not constitute consent.

Coercion - (can be verbal or nonverbal) - This can include telling you lies, making promises you knew were untrue, threatening to end a relationship, threatening to spread rumors about you, threatening to share images without your consent, threatening harm to self, showing displeasure, criticizing you, getting angry, and/or verbally pressuring you after you indicated you didn't want to have sexual contact.

Force - Could include someone holding you down with their body weight, pinning your arms, hitting or kicking you, or using (or threatening to use) a weapon against you.

Protected Class - Includes a person's race, color, religion, national origin, age, ability, gender, sexual orientation, gender identity, gender expression, genetic information, marital or parental status, or Veteran status.

Retaliation - Taking adverse action against a person who has experienced sexual misconduct; who files reports, claims, complaints, or charges due to such contact; is suspected of having filed such claims, complaints, or charges; and/or has assisted or participated in an investigation or resolution of such claims, complaints, or charges. This may include behaviors such as coercion, intimidation, harassment, threats, or interference with reports, procedures, investigations, or supportive measures.

Sexual Contact - This may include fondling (touching of a private body part of another person for the purpose of sexual gratification), oral sex, sexual intercourse, and sexual assault and rape (the penetration, no matter how slight, of the vagina or anus, with any body part or object, or oral penetration by a sex organ of another person without the consent of the victim). The person with whom this occurred could have been a stranger or someone you know, such as a family member, a dating or romantic partner, an acquaintance, a friend, or another student.

Stalking - This may include being followed or spied on or sent unsolicited or repeated calls, text messages, or letters or them showing up in places where they were not invited or you did not expect them, leaving items for you to find, etc.

DEMOGRAPHICS

Age	Population	Sample
17-24	89%	87%
25+	11%	13%

Sex Assigned at Birth	Population	Sample
Female	61%	70%
Male	39%	29%
Intersex not option in system, <1% in sample		

Racial Group	Population	Sample
ALANA/BIPOC	40%	37%
White	56%	61%
Prefer not to answer	4%	2%
Race/Ethnicity	**Population**	**Sample**
African American/Black	10%	10%
Asian	6%	7%
Latine	20%	15%
Middle Eastern / Northern African	1%	2%
Multiracial	4%	3%
White	57%	61%
Prefer not to answer	2%	2%

Living Arrangement	Population	Sample
Commuter	66%	51%
Resident	34%	49%

Class Year	Population	Sample
First Year	28%	22%
Sophomore	25%	22%
Junior	25%	24%
Senior	23%	24%

Other Demographics	Population	Sample
First Generation	49%	45%
Military/Veteran	2%	4%

Gender Identity*	Sample
Agender	1%
Gender-nonconforming	2%
Man	27%
Non-binary	3%
Transgender	2%
Woman	63%
Prefer not to answer	1%

LGBTQIA+*	Sample
LGBTQIA+	33%
Not LGBTQIA+	67%

Sexual Orientation*	Sample
Asexual	3%
Bisexual	16%
Fluid	1%
Gay	2%
Heterosexual	64%
Lesbian	5%
Pansexual	4%
Prefer not to answer	4%

Disability Status*	Sample
Disability	19%
No Disability	77%
Prefer not to answer	4%

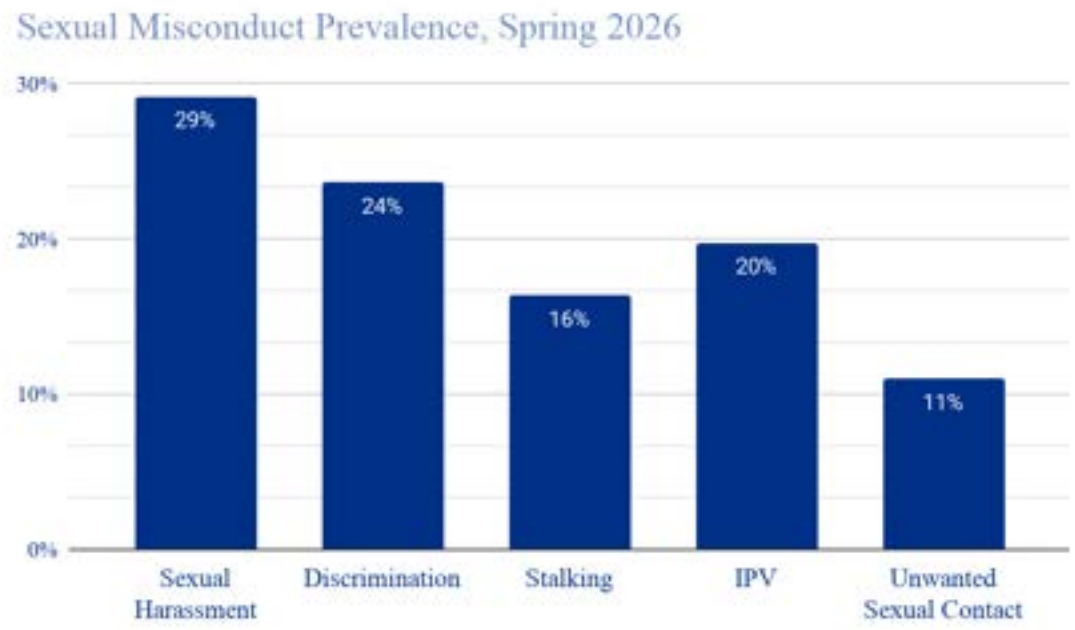
**The above demographic information cannot be compared against the general student population because it is optionally reported information.*

KEY FINDINGS

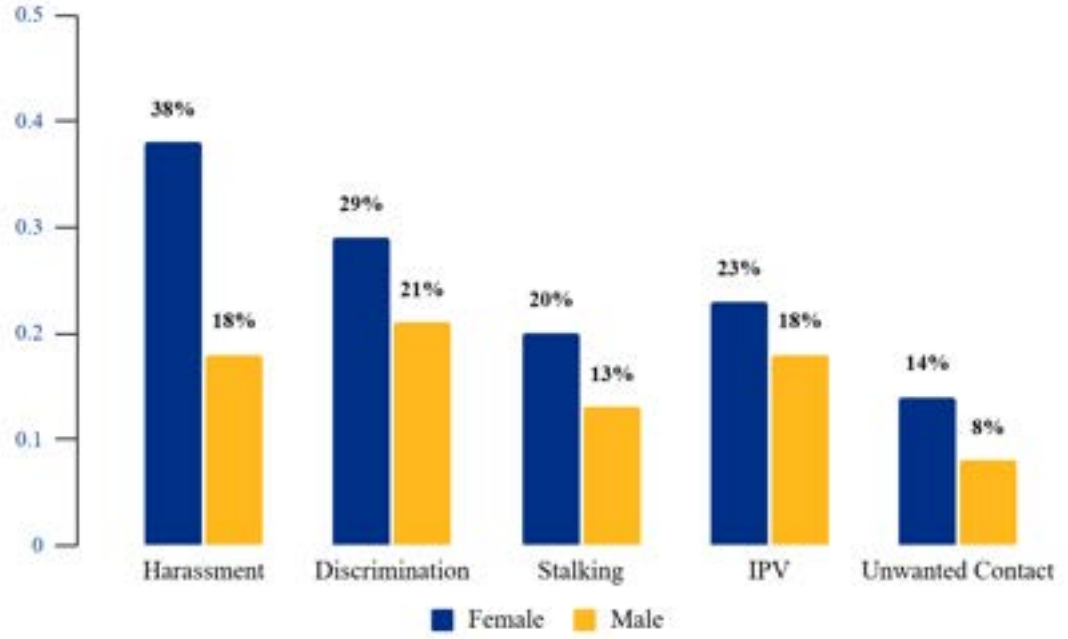
1. Students were familiar with the policies and procedures relating to sexual misconduct, affirmed that these policies and procedures were easily accessible and easy to understand, and knew how to report sexual misconduct.
2. Female, LGBTQIA+, transgender/non-binary and disabled students experienced all forms of sexual misconduct at higher rates than their counterparts.
3. Unwanted sexual comments, jokes, gestures or advances were the most common forms of sexual harassment.
4. Intimidation and manipulation were the most common forms of IPV experienced by students.
5. The majority of incidents of unwanted sexual contact involved someone outside of WSU and occurred off campus.
6. The majority of students who experienced sexual misconduct did not tell anyone. Of those who did disclose, the majority told a family member, friend or partner.
7. The most common reason for not reporting continued to be not recognizing the incident as a form of sexual misconduct.
8. Students reported notable impacts on their mental/emotional health, academic classes and relationships.
9. 60% of students reported receiving some type of prevention/education training.
10. 90% of students are very familiar with how to access University Police, Counseling Services and Health Services, but significantly less know how to access 24/7 support, the Confidential Resource Provider and Pastoral Services.
11. The majority of students reject victim blaming and strongly support affirmative consent.
12. Students are more likely to directly reach out to a person impacted in situations of sexual and gender harassment or intimate partner violence, whereas they are more likely to directly intervene in situations of nonconsensual sexual contact.
13. The majority of students feel safe at WSU and feel the University is committed to preventing sexual misconduct on campus.

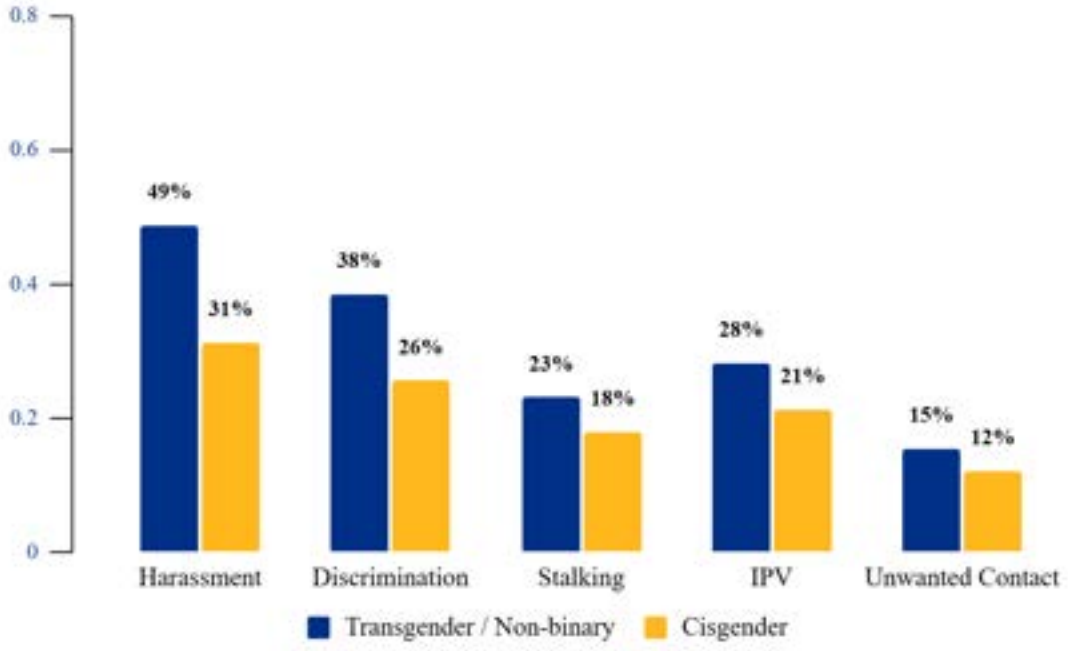
PREVALENCE OF SEXUAL MISCONDUCT

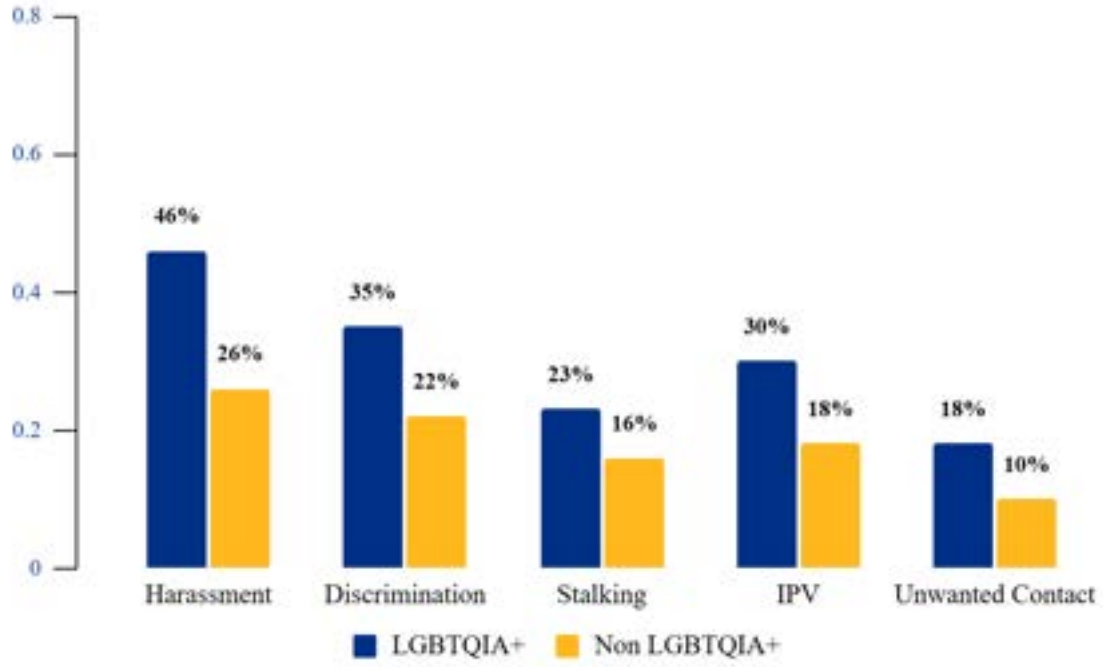
Survey results indicate that 46% of students experienced at least one incident of sexual misconduct since enrolling at Worcester State University. 37% of incidents occurred on campus or at University sponsored events, 34% occurred off campus, and 29% occurred electronically. Most incidents occurred with someone other than a Worcester State student or employee.

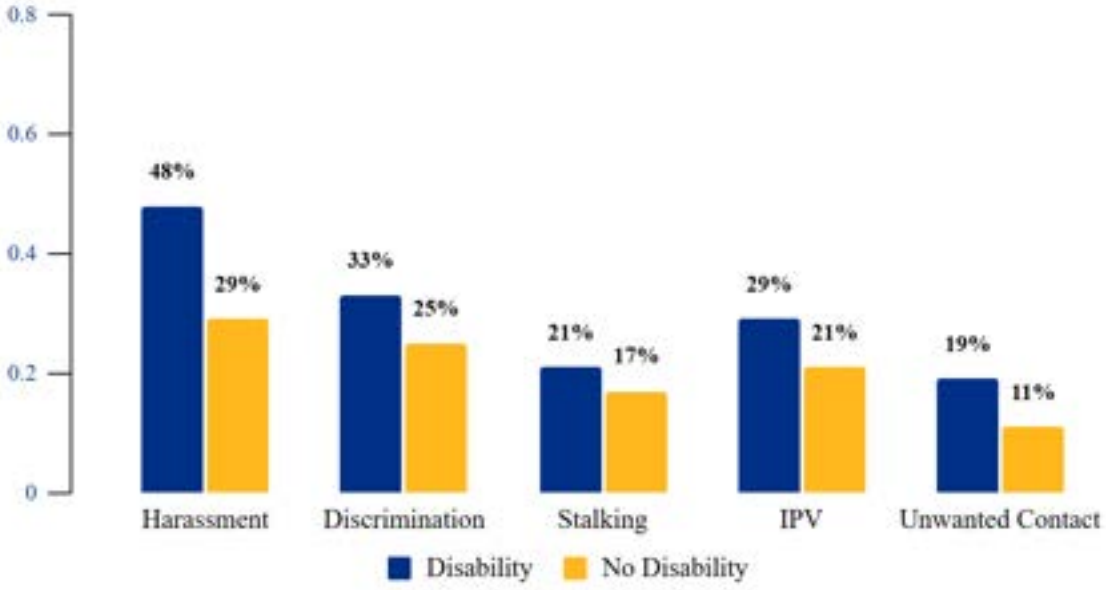


Female, LGBTQIA+, transgender/non-binary and disabled students experienced all forms of sexual misconduct at higher rates than their counterparts.



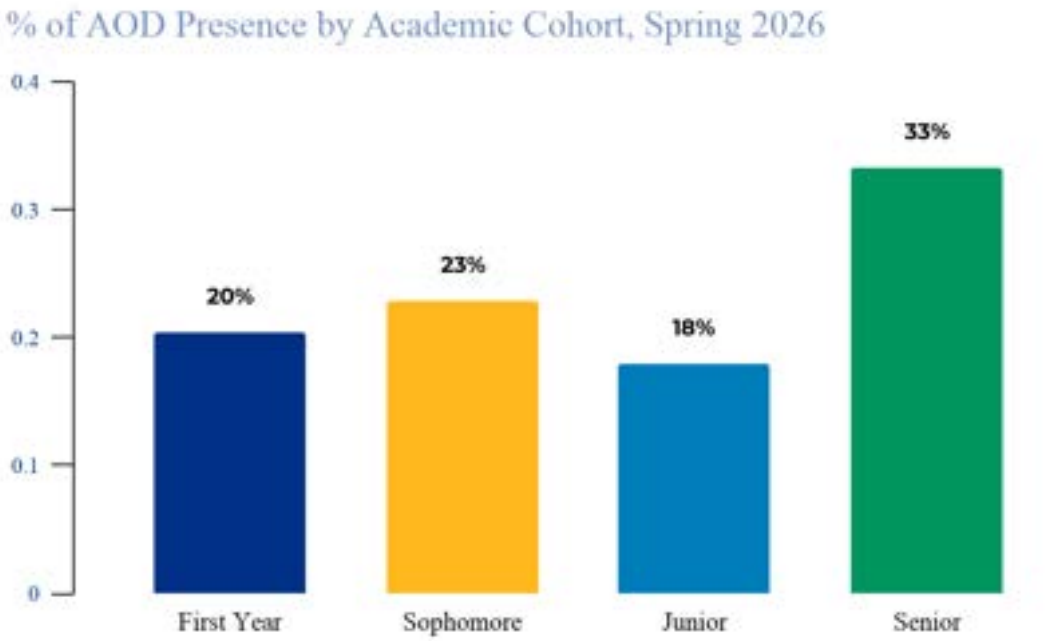


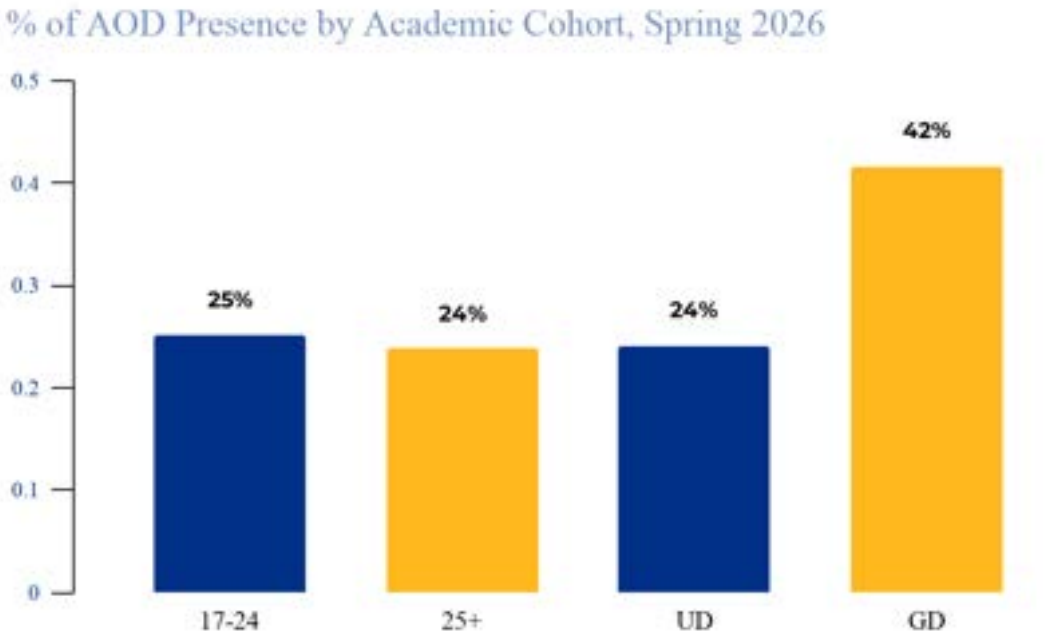

0.8
0.6
0.4
0.2
0
46%
26%
35%
22%
23%
16%
30%
18%
18%
10%
Harassment
Discrimination
Stalking
IPV
Unwanted Contact
LGBTQIA+
Non LGBTQIA+


0.8
0.6
0.4
0.2
0
48%
29%
33%
25%
21%
17%
29%
21%
19%
11%
Harassment
Discrimination
Stalking
IPV
Unwanted Contact
Disability
No Disability

Alcohol and Other Drugs (AOD)

Twenty-five percent of students who experienced sexual misconduct stated the incident involved the use of alcohol and/or drugs. Seniors and graduate students reported the presence of alcohol and other drugs at significantly higher rates than other academic cohorts.





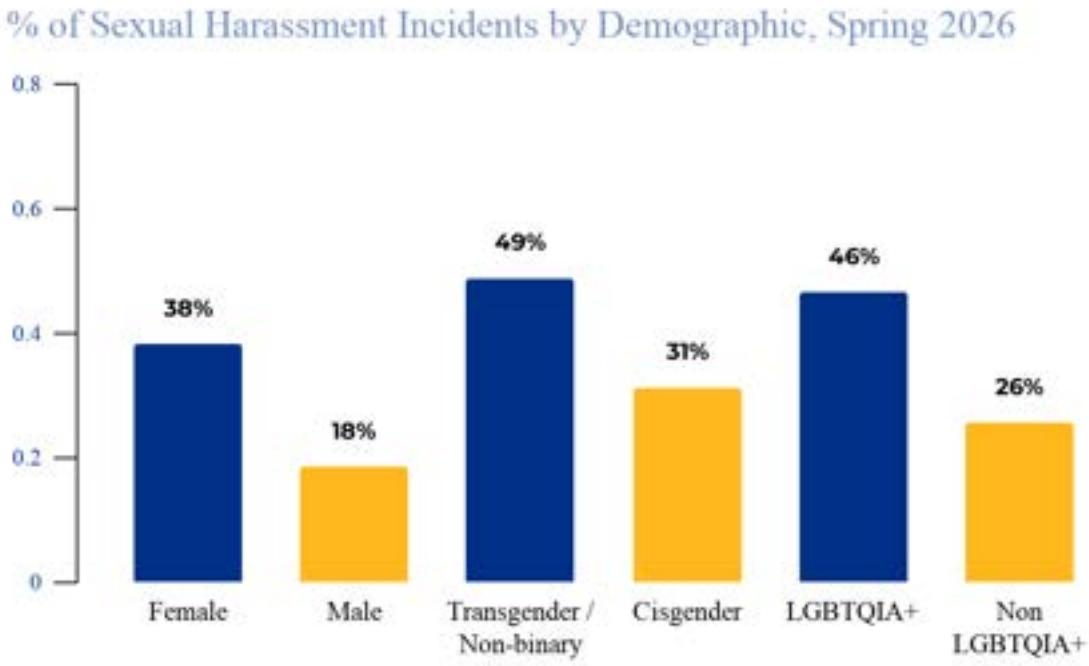
HARASSMENT and DISCRIMINATION

The majority of incidents of sexual harassment and discrimination occurred in campus spaces or residence halls. Most incidents occurred with someone other than a Worcester State student or employee.

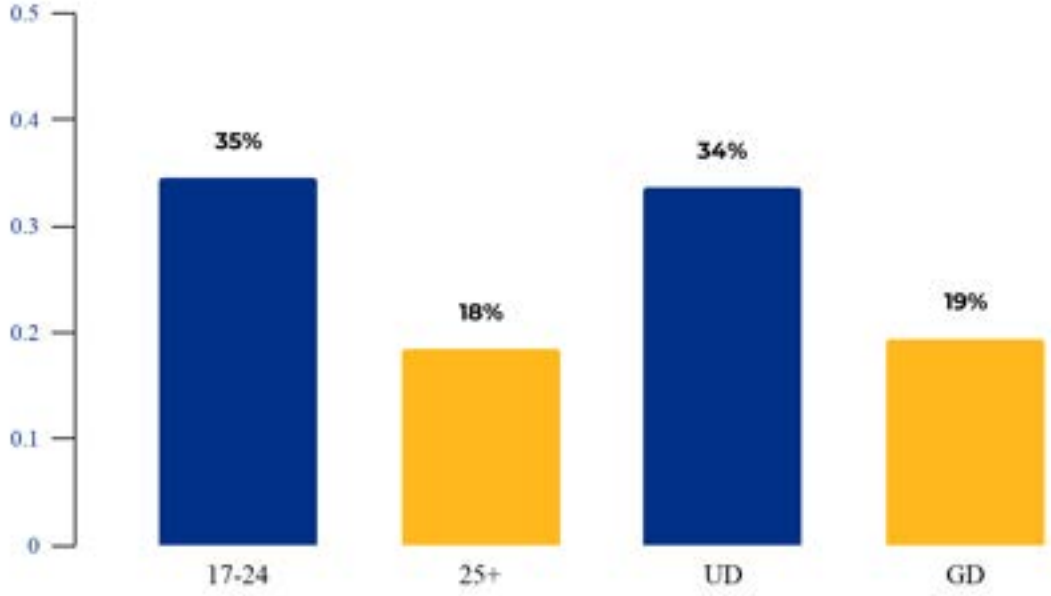
Harassment / Discrimination Location	%
On Campus	21%
Res Hall	24%
Off Campus	26%
Electronic	28%
Sponsored Event	1%

Sexual Harassment

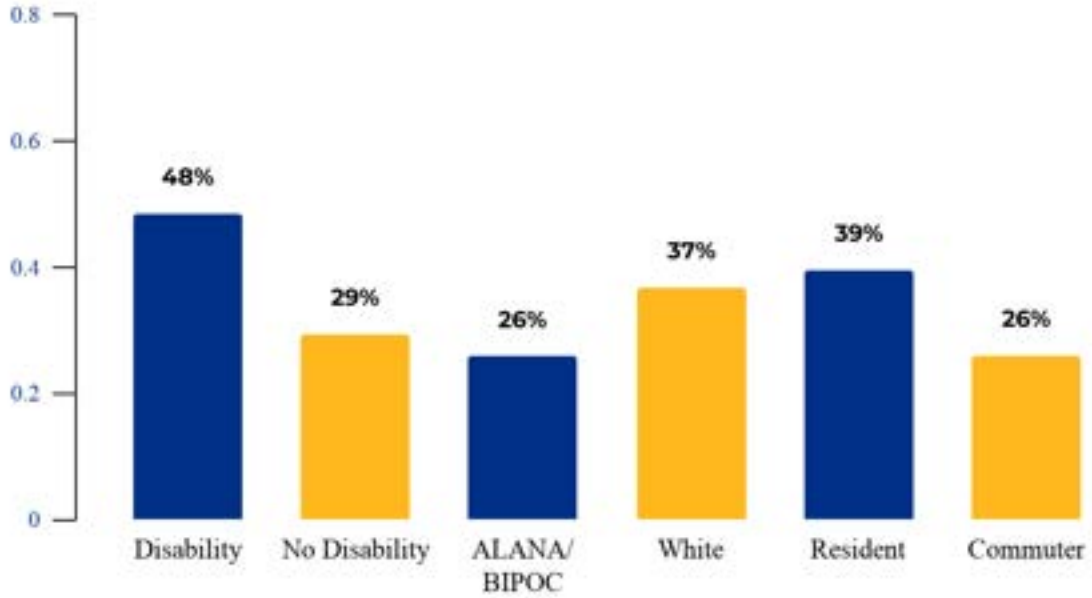
Sexual harassment was the most reported form of sexual misconduct. 29% of students reported experiencing sexual harassment since enrolling at Worcester State University; 14.1% indicated it occurred once and 13.5% indicated it occurred more than once. Students reported that "unwanted sexual advances, comments, gestures, or jokes toward them" was the most common form of sexual harassment.



% of Sexual Harassment Incidents by Demographic, Spring 2026

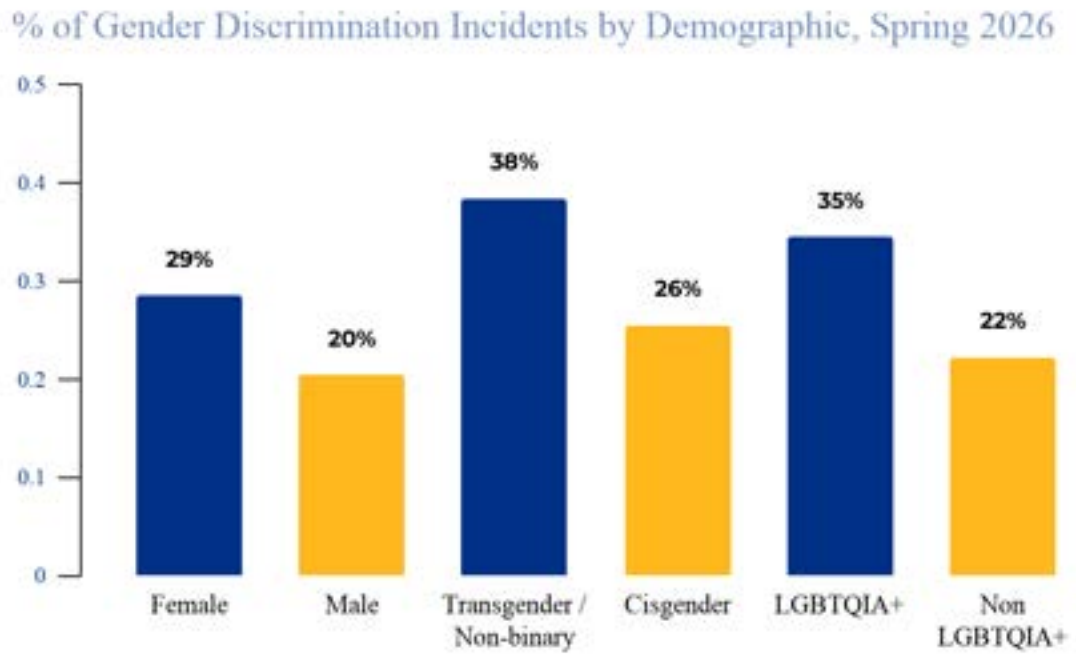


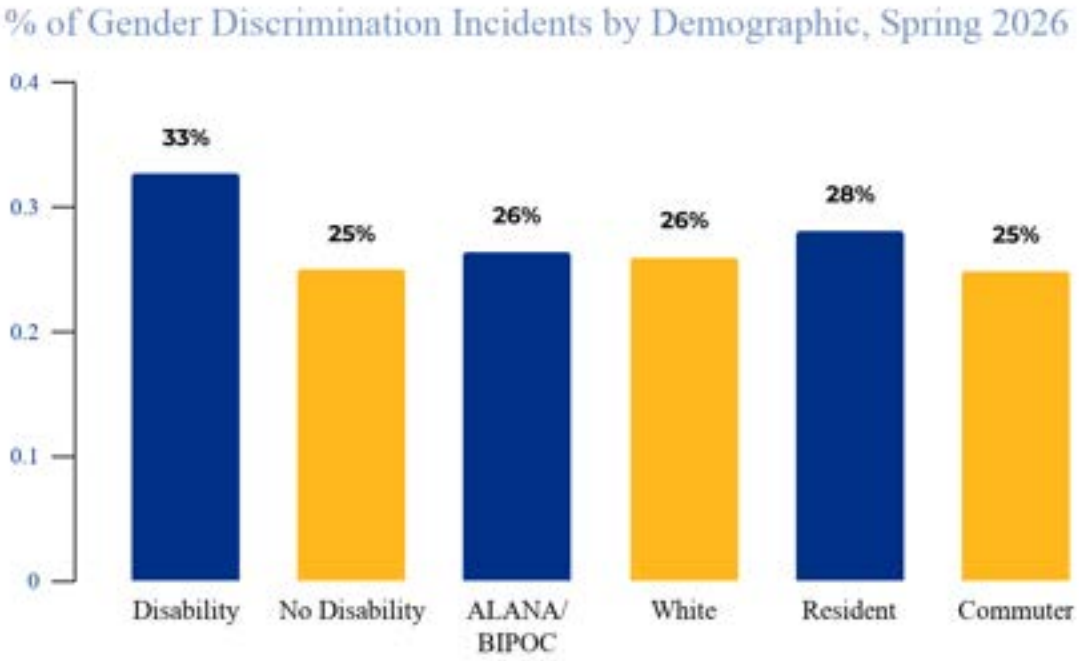
% of Sexual Harassment Incidents by Demographic, Spring 2026

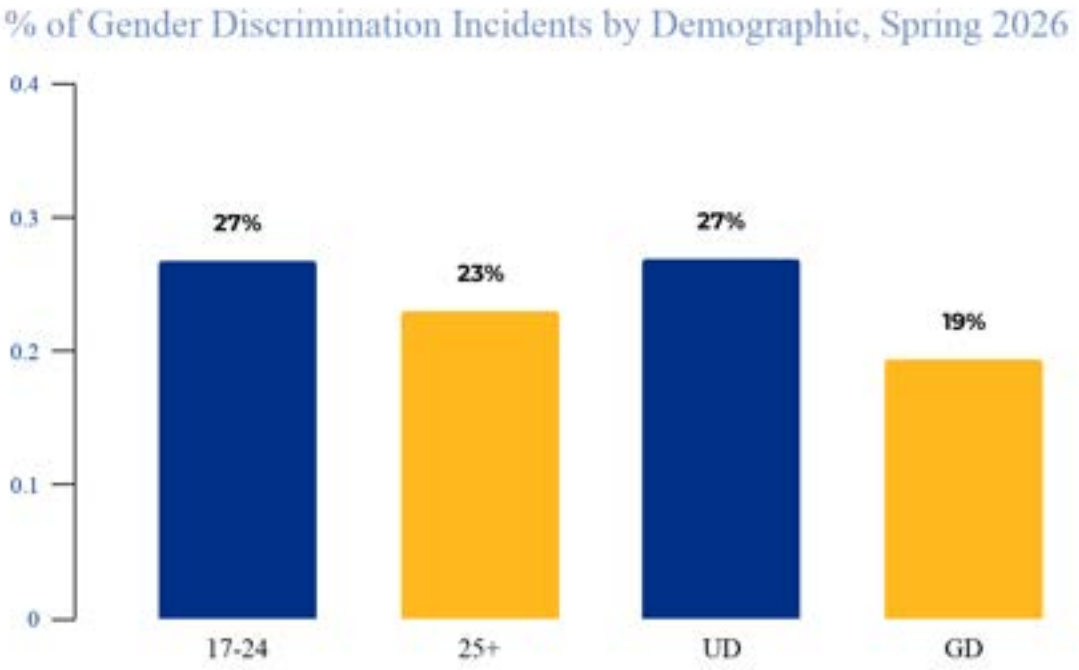


Bias and Discrimination

Twenty-four percent of students reported being treated differently or negatively because of their gender, gender identity, gender expression or sexual orientation. Higher rates of incidents were reported by those who identify as female, LGBTQIA+, transgender/non-binary and disabled.



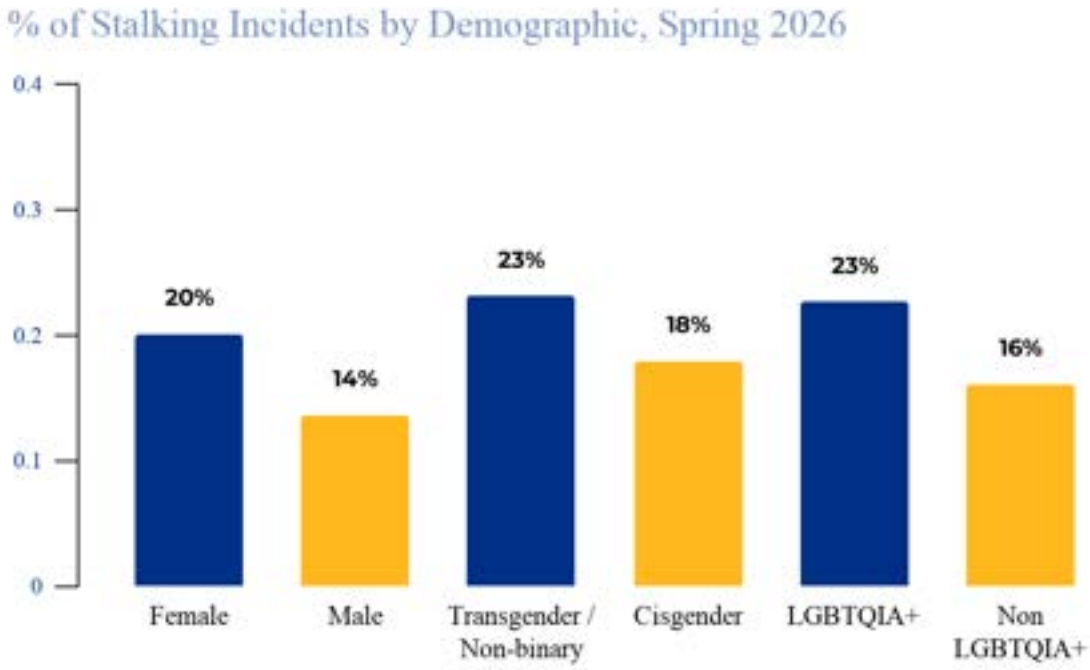

% of Gender Discrimination Incidents by Demographic, Spring 2026
0.4
0.3
0.2
0.1
0
33%
25%
26%
26%
28%
25%
Disability
No Disability
ALANA/ BIPOC
White
Resident
Commuter

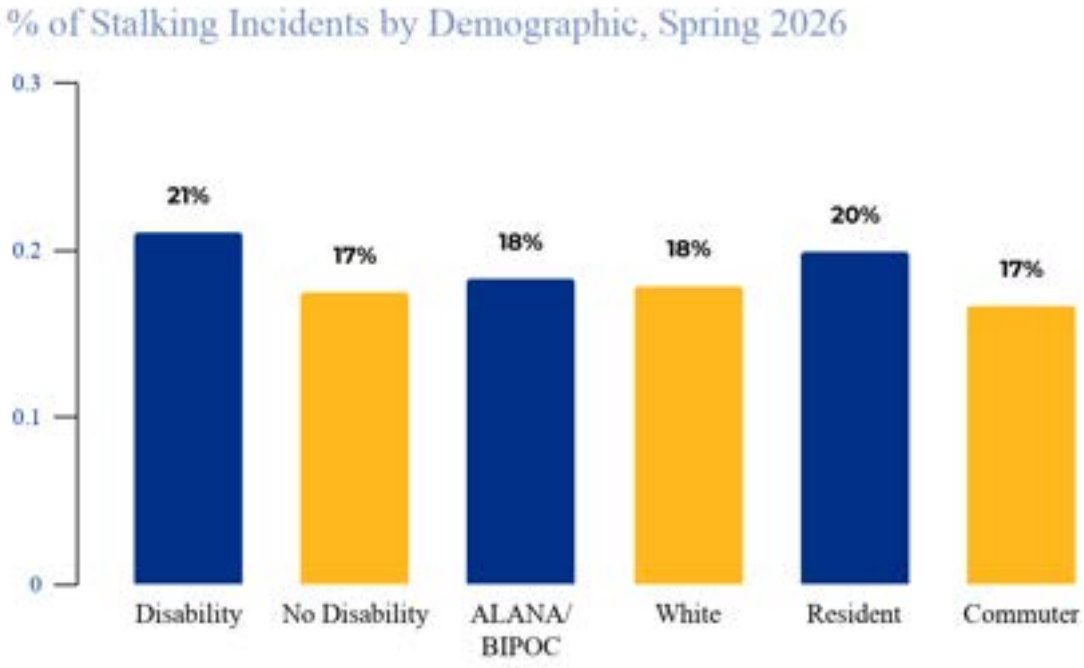

% of Gender Discrimination Incidents by Demographic, Spring 2026
0.4
0.3
0.2
0.1
0
27%
23%
27%
19%
17-24
25+
UD
GD

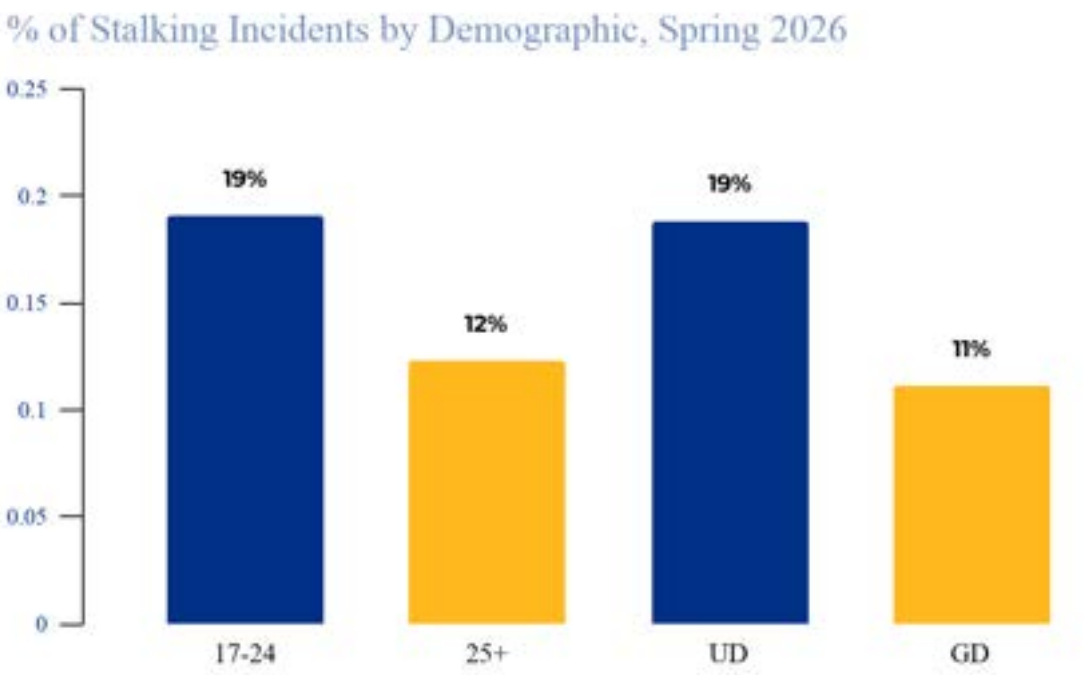
STALKING

Sixteen percent of survey respondents reported experiencing stalking since enrolling at Worcester State University. The majority of stalking incidents (56%) involved someone who was not a University student or employee.

Compared with the 2023 survey, reports of stalking by another Worcester State student increased from 5.0% to 9.8%, while reports involving someone not affiliated with the University increased from 7.0% to 13.2%.

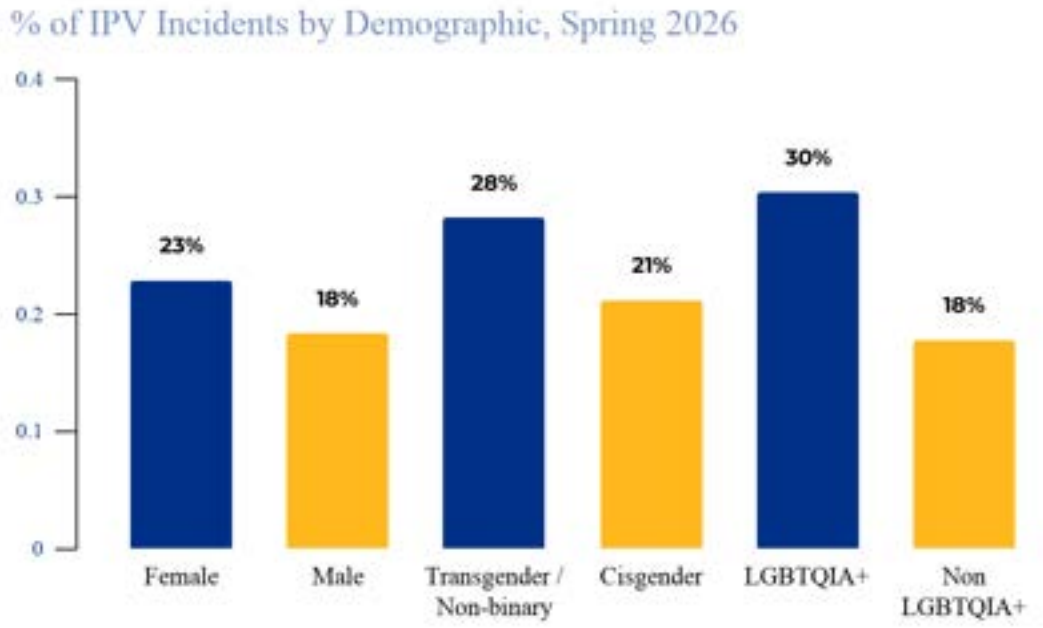


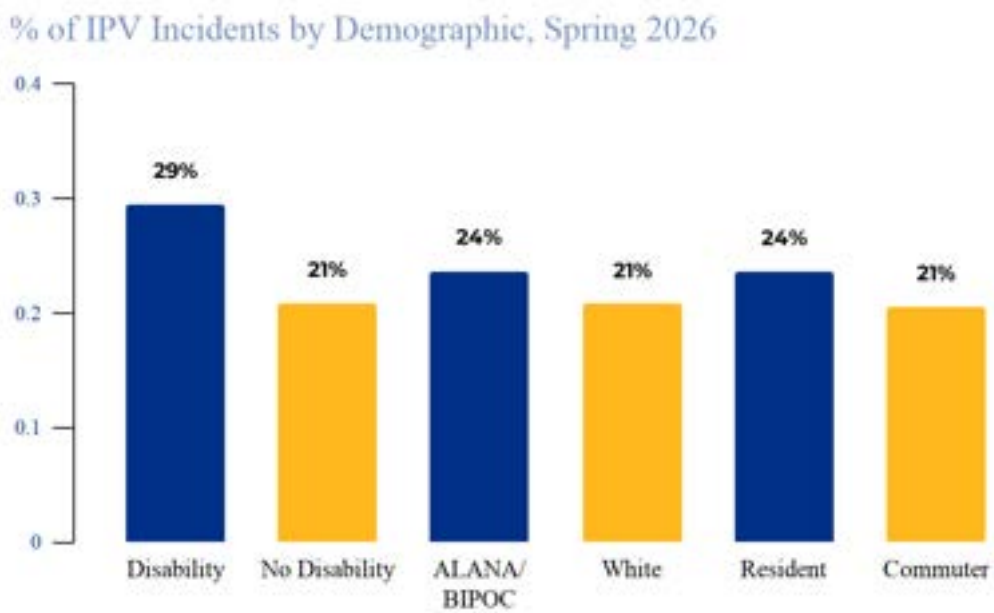

% of Stalking Incidents by Demographic, Spring 2026
0.3
0.2
0.1
0
21%
17%
18%
18%
20%
17%
Disability
No Disability
ALANA/ BIPOC
White
Resident
Commuter

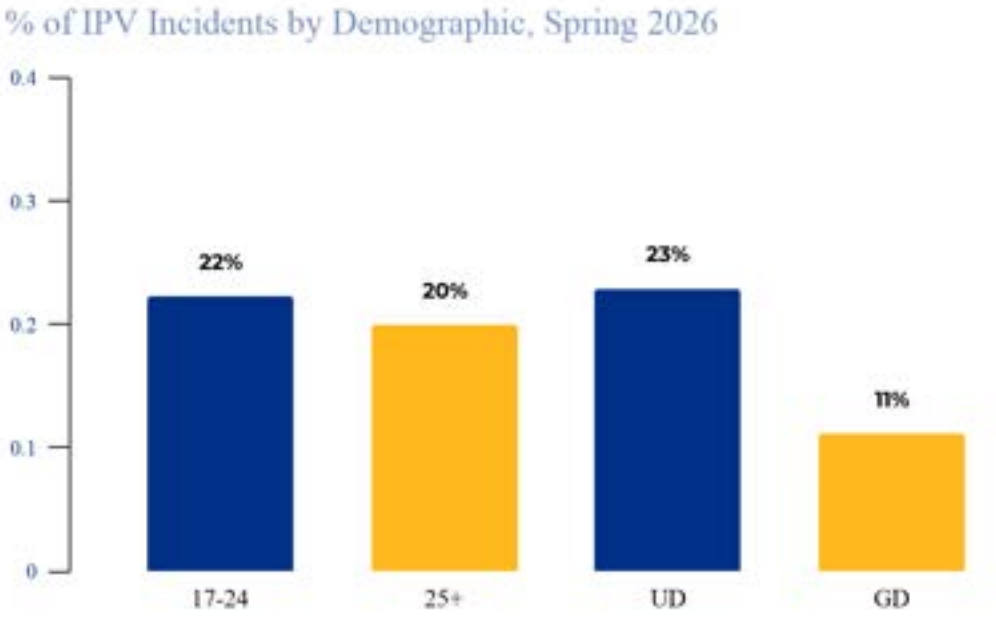

% of Stalking Incidents by Demographic, Spring 2026
0.25
0.2
0.15
0.1
0.05
0
19%
12%
19%
11%
17-24
25+
UD
GD

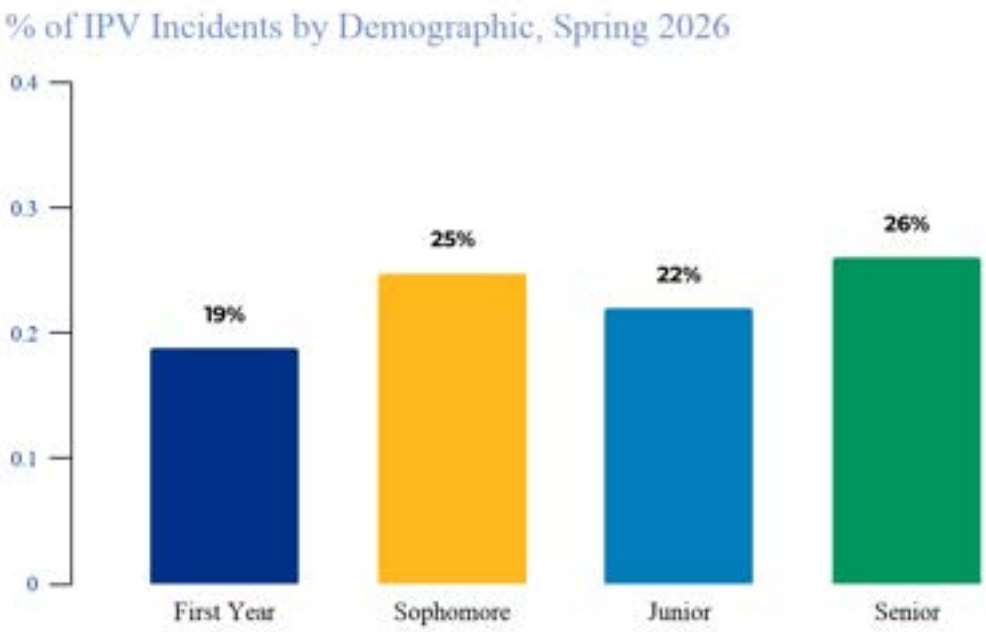
INTIMATE PARTNER VIOLENCE (IPV)

Twenty percent of students have experienced IPV since enrolling at Worcester State University. This survey showed an increase in reported verbal degradation/ humiliation, intimidation/manipulation, and physical harm (13.4%, 17.0%, and 6.0% respectively). Most incidents occurred with a non WSU individual, off campus (66%) or electronically (41%).



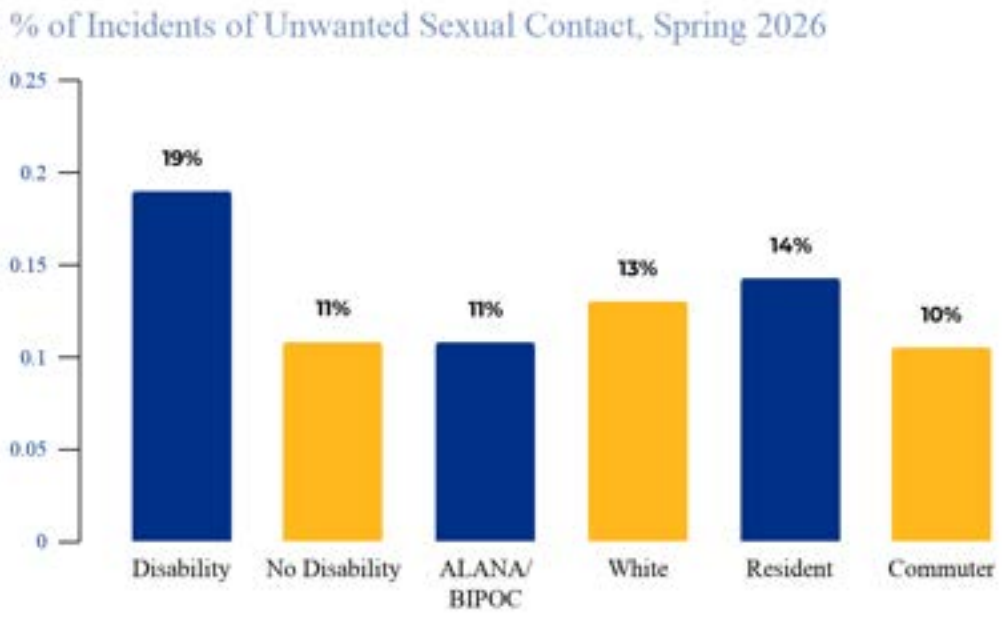


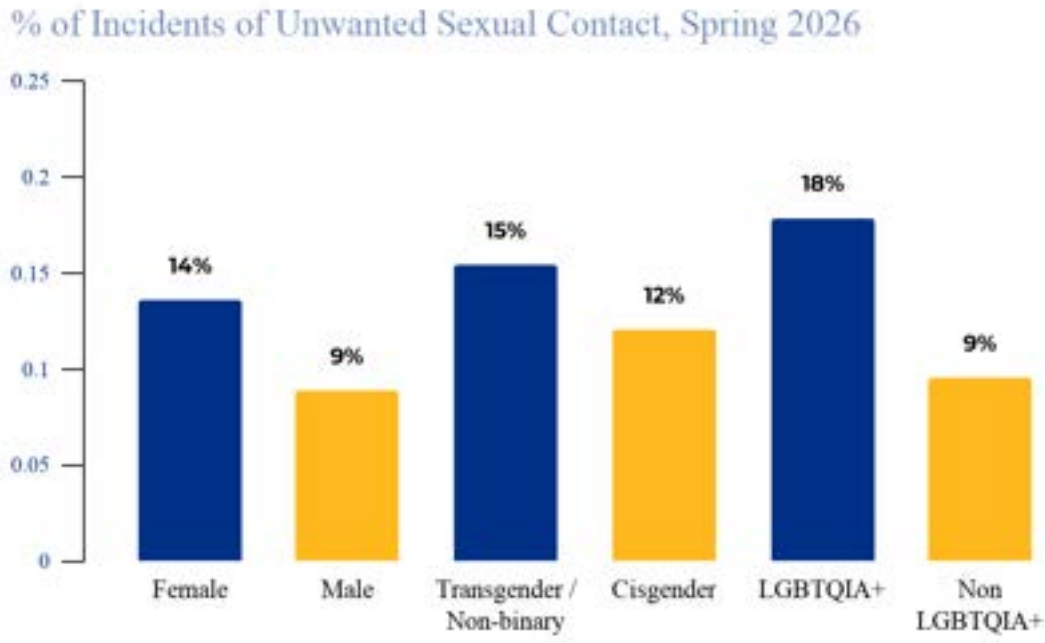

% of IPV Incidents by Demographic, Spring 2026
0.4
0.3
0.2
0.1
0
22%
20%
23%
11%
17-24
25+
UD
GD


% of IPV Incidents by Demographic, Spring 2026
0.4
0.3
0.2
0.1
0
19%
25%
22%
26%
First Year
Sophomore
Junior
Senior

UNWANTED SEXUAL CONTACT

Eleven percent of students reported unwanted sexual contact since enrolling at Worcester State University. 4% reported experiencing force or threats, and 8% reported verbal or non-verbal intimidation or coercion. 30% of incidents of unwanted sexual contact involved incapacitation. Most incidents (51%) occurred off campus with someone who was not affiliated with Worcester State (58%).

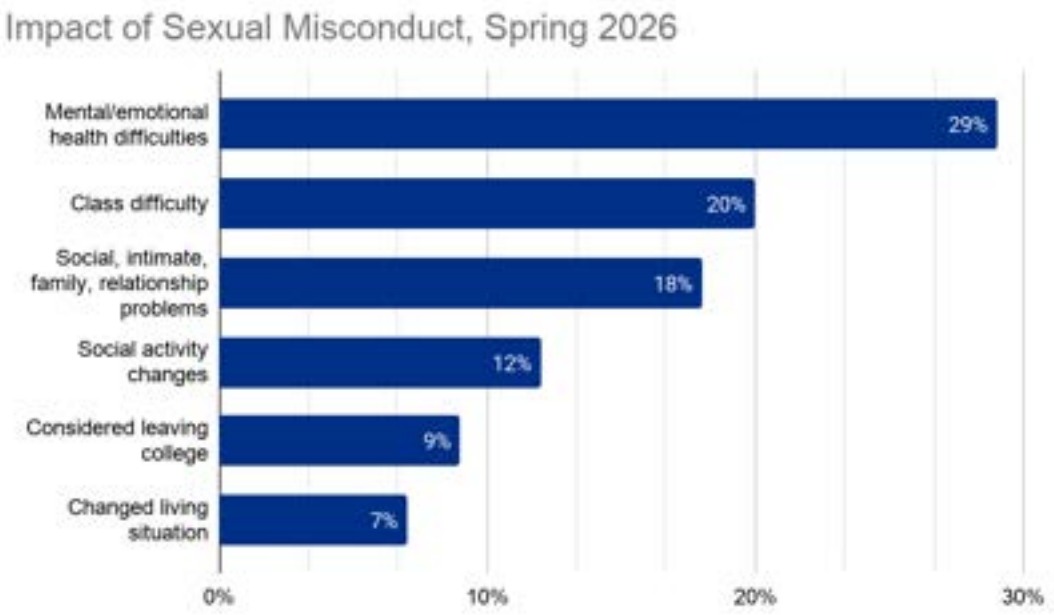




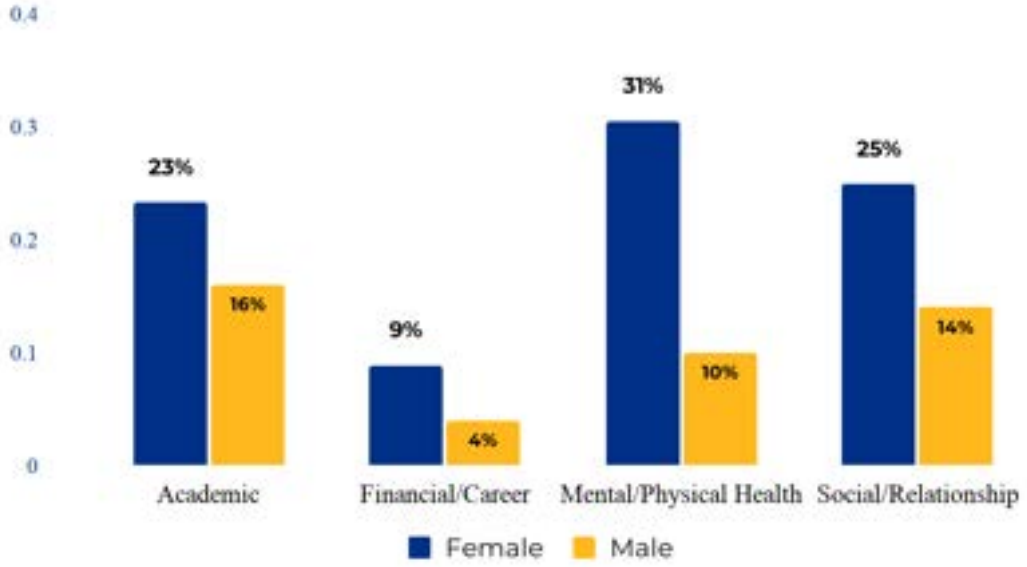
IMPACT

Over 50% of students who reported experiencing sexual misconduct reported that it impacted one or more areas of their lives. The areas most impacted included mental and/or emotional difficulties, social and/or relationship difficulties, class difficulties, and changed recreation/social activities.

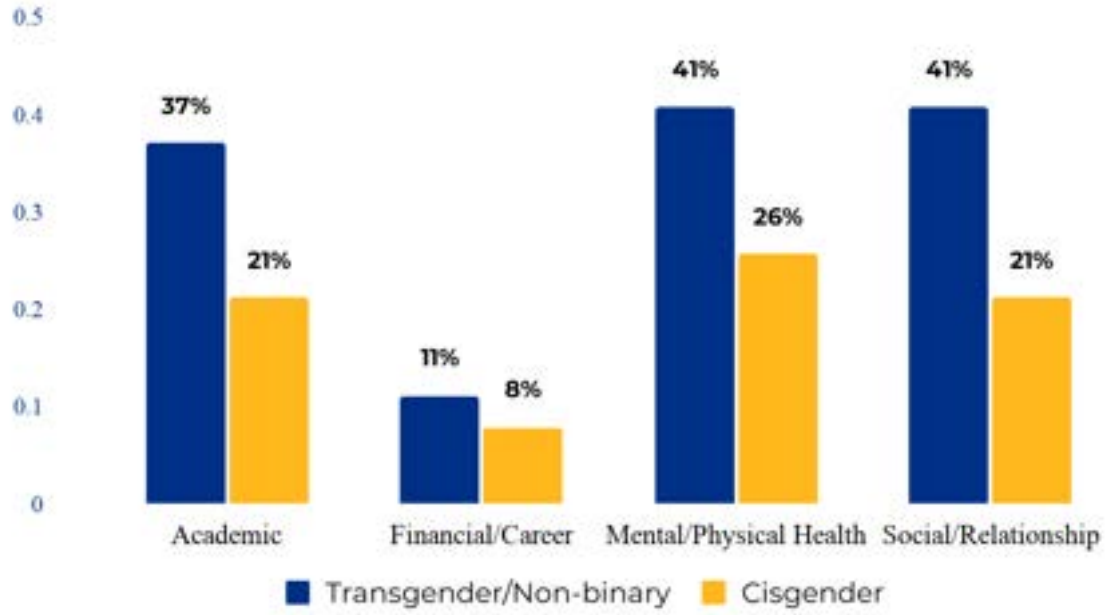
Female, transgender/non-binary, LGBTQIA+ and disabled students were the most impacted (69%, 78%, 75%, 78% respectively).

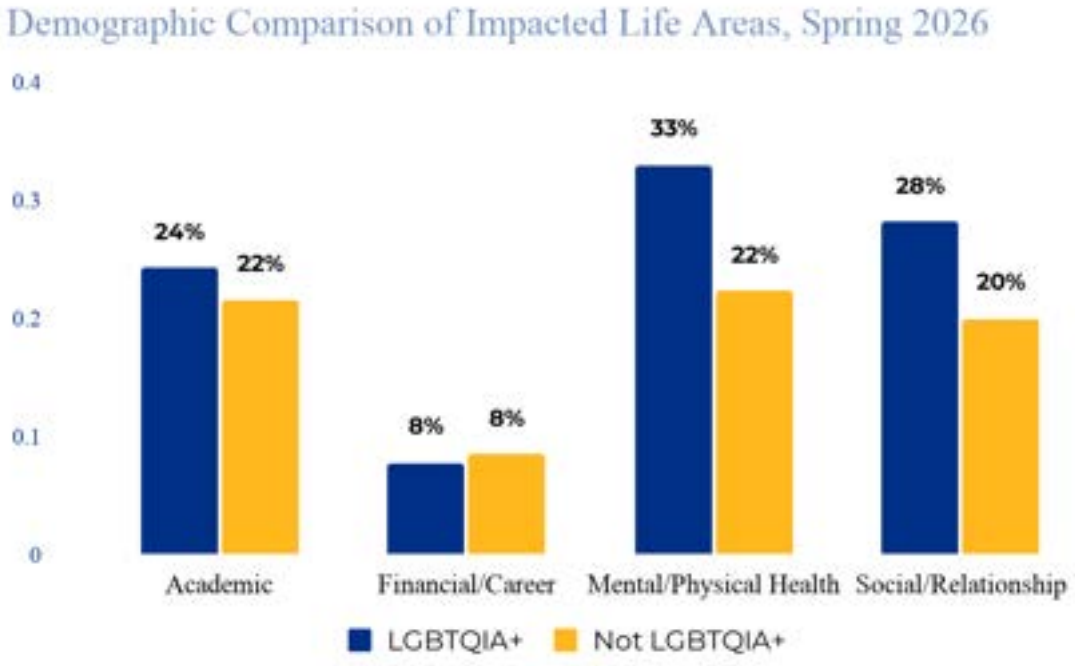


Demographic Comparison of Impacted Life Areas, Spring 2026

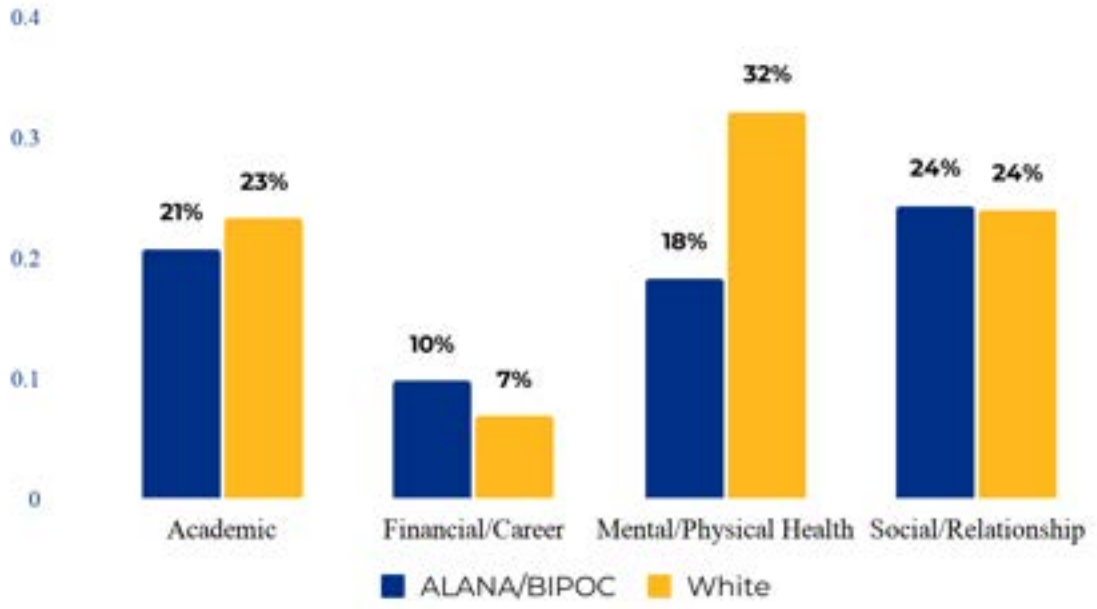


Demographic Comparison of Impacted Life Areas, Spring 2026

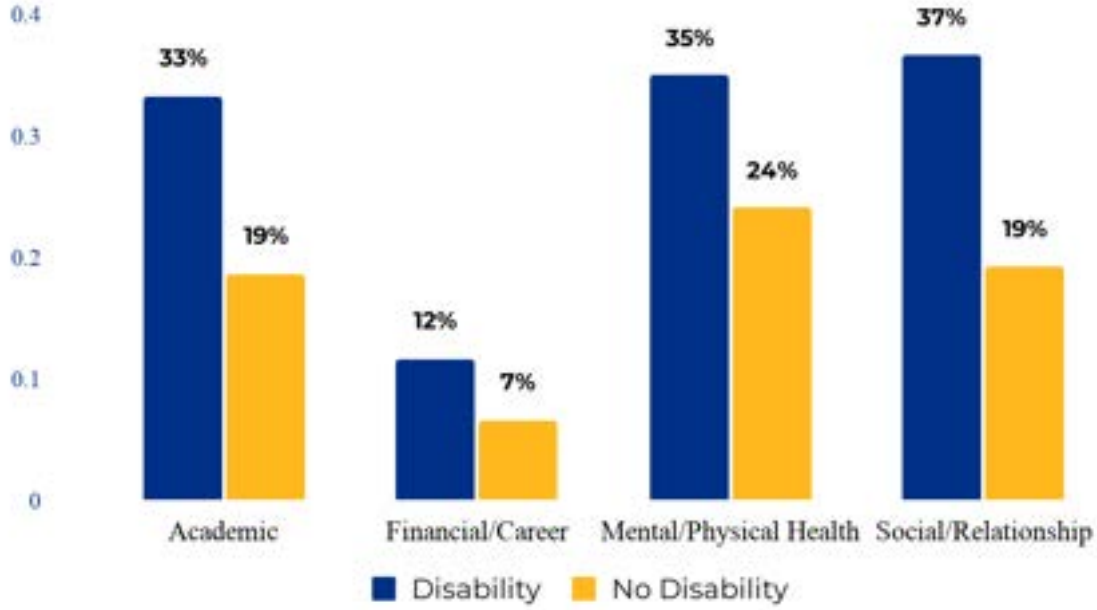



Demographic Comparison of Impacted Life Areas, Spring 2026
0.4
0.3
0.2
0.1
0
24%
22%
8%
8%
33%
22%
28%
20%
Academic
Financial/Career
Mental/Physical Health
Social/Relationship
LGBTQIA+
Not LGBTQIA+

Demographic Comparison of Impacted Life Areas, Spring 2026



Demographic Comparison of Impacted Life Areas, Spring 2026

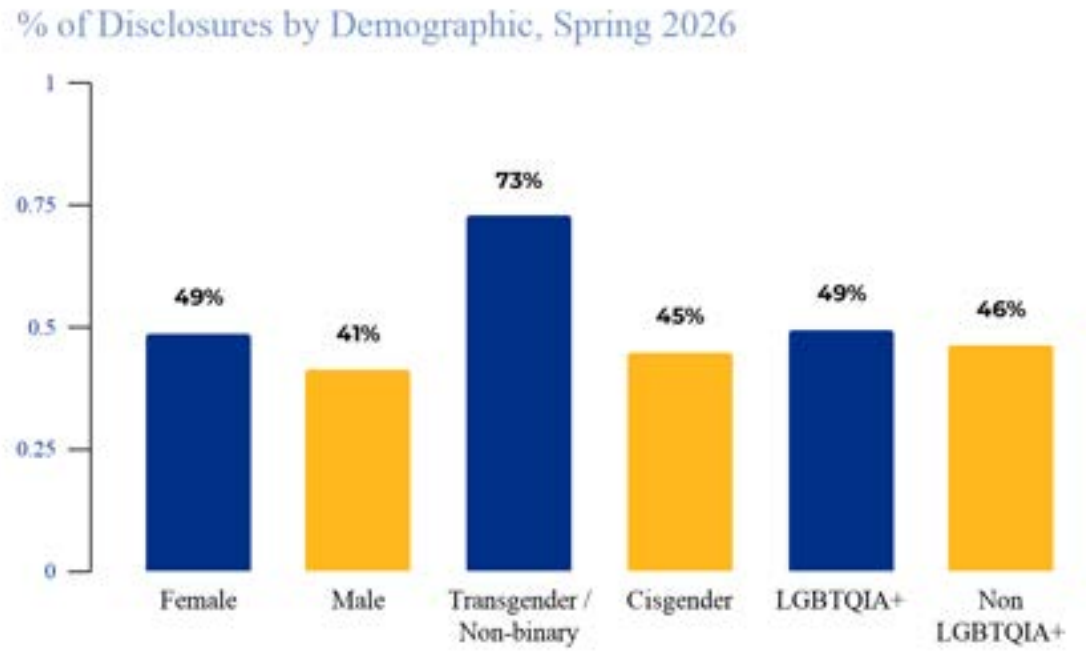


DISCLOSURES AND REPORTING

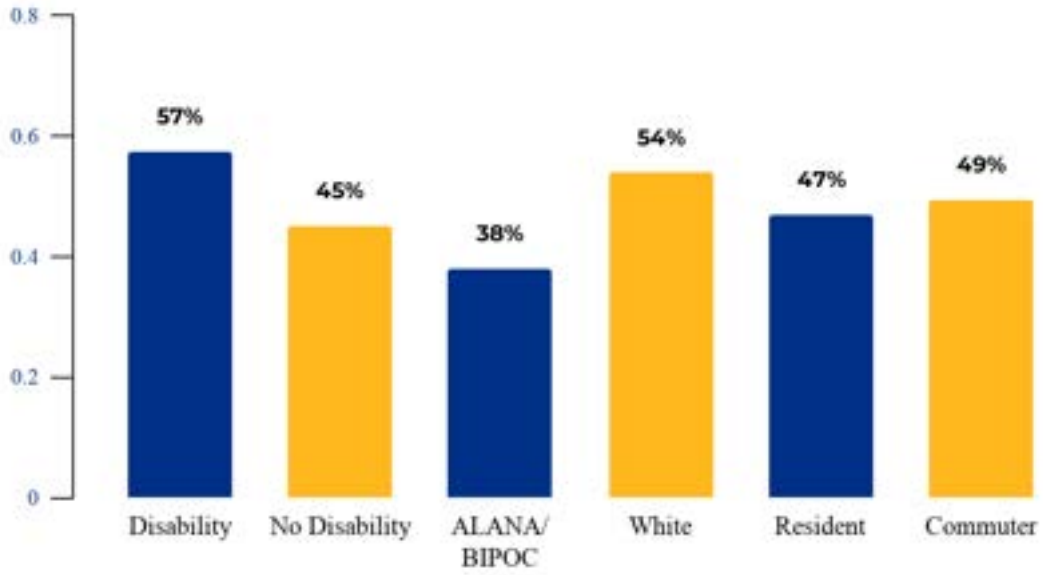
The majority (53%) of sexual misconduct incidents were not reported. There were numerous and varied reasons why students did not disclose incidents of sexual misconduct. Students most commonly reported they did not recognize the experience as sexual misconduct (23%), did not think anything would be done (14%), felt ashamed or embarrassed (12%).

Forty-seven percent of incidents were reported. Students were most likely to disclose incidents to a friend, roommate, family member, or partner. Versus the spring 2023 survey, students reported an increase in reports to the Title IX Office (9 reports in 2023 to 19 in spring 2026).

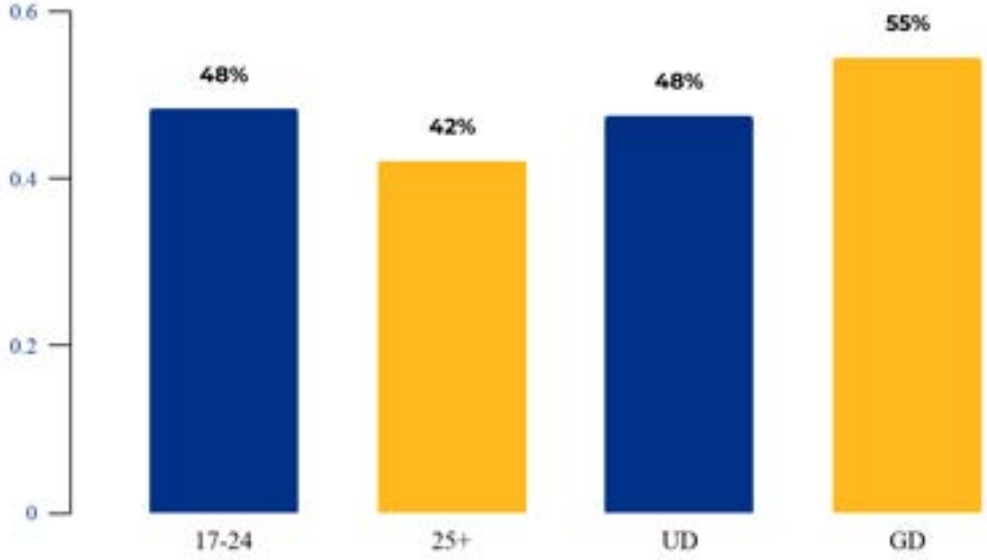
Who did you tell?	%
Friend/Family	36%
Someone Else	16%
WSU Title IX	11%
WSU Counseling/Health Services	11%
WSU Faculty/Staff	10%
WSU Police	4%
Off Campus Resource	11%



% of Disclosures by Demographic, Spring 2026



% of Disclosures by Demographic, Spring 2026



ATTITUDES ABOUT SEXUAL MISCONDUCT

The majority of students strongly support affirmative consent and overwhelmingly reject victim blaming. It is notable that 82% agreed with the statement, “Clear, verbal, and sober permission is the best way to make sure a person is okay with sexual activity.”

	Strongly Agree/ Agree
Clear, verbal, and sober permission is the best way to make sure a person is okay with sexual activity.	88%
Anyone can experience sexual misconduct, regardless of their race, gender, sexuality, military status, disability, age or religion.	84.5%
	Strongly Disagree/ Disagree
If someone is assaulted while drunk or under the influence, it is their fault if they are assaulted.	94%
If someone goes to a room alone with someone, they have a responsibility for what happens.	97%
If both people are drinking, it's not sexual assault or rape.	89%
It's not sexually misconduct (or rape) if someone dosen't verbally say no.	95%
Sexual assault can’t occur if you are in a committed relationship or married.	96%
Sexual assault can’t occur if you are in a same sex relationship.	96%

POLICY & PROCEDURE AWARENESS

Students were familiar with the policies and procedures relating to sexual misconduct, affirmed that these policies and procedures are easily accessible and easy to understand, and knew how to report sexual misconduct on campus. Students knew where to find a variety of support options on campus although they were less aware of how to access the Confidential Resource Provider and Pastoral Services.

	Strongly Agree/ Agree
I understand how to report sexual misconduct at my school.	81%
I am familiar with Worcester State's sexual misconduct policies and procedures.	81%
Worcester State's sexual misconduct policies and procedures are easy to understand.	78%
Worcester State's sexual misconduct policies and procedures are easily accessible.	77%
I know how to access:	Strongly Agree/ Agree
University Police Department	91%
Counseling Services	90%
Health Services	86%
Website Resources	78%
Supportive Measures	78%
RAVE Guardian	71%
24/7 support related to sexual misconduct	67%
The Confidential Resource Provider	53%
Pastoral Services	39%

COMMUNITY PERCEPTIONS

A majority of students (84%) reported feeling safe on campus and believed that Worcester State is committed to preventing sexual misconduct (72%).

	Strongly Agree/ Agree
I feel safe at WSU.	84%
WSU genuinely cares about my wellbeing.	70%
WSU treats students fairly.	72%
Sexual misconduct is a problem at WSU.	26%
WSU is committed to preventing sexual misconduct on campus.	77%
WSU is doing enough to prevent and respond to sexual misconduct on campus.	62%
WSU's Title IX Office follows the procedures necessary to address complaints of sexual misconduct fairly.	67%
University Police treat students fairly.	67%
Having University Police on campus brings me a feeling of safety.	67%
I would feel comfortable reporting an incident of sexual misconduct to University Police.	53%
University Police protect students from harm.	68%

Differences by Population

Students with disabilities consistently reported the least positive perceptions across all four areas: overall perceptions, feelings of safety, perceptions of University Police, and perceptions of WSU's commitment to preventing and addressing sexual misconduct.

Transgender/non-binary and LGBTQ+ students also consistently reported less positive perceptions, particularly regarding feelings of safety and University Police.

Women generally reported somewhat less positive perceptions than men, although these differences were smaller and less consistent.

Few meaningful differences were observed between White and ALANA/BIPOC respondents, which contrasts with many broader campus climate surveys and suggests that perceptions related to sexual misconduct may vary more by disability status, gender identity, and sexual orientation than by race within this sample.

EDUCATION and TRAINING

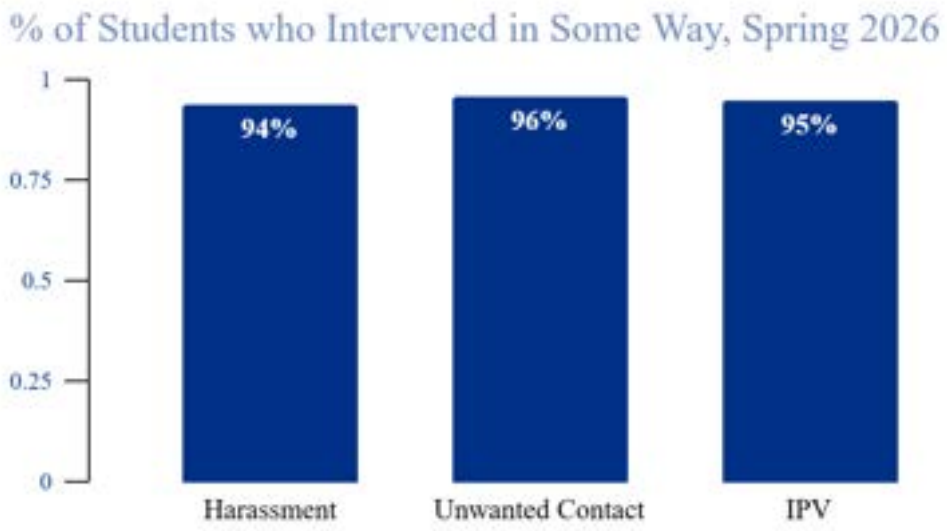
A majority of students reported engagement in a variety of training and workshops; the most common being consent education and healthy relationships. However, 40% of students selected “none of the above,” meaning a substantial portion of the 2026 sample reported no participation in prevention programming.

Training Topic	
Consent	44%
Healthy Relationships	36%
Bystander Intervention	35%
Domestic Violence/ Intimate Partner Violence	37%
Sexual Misconduct Policies	32%
Sexual/Gender-based Violence	27%
Reporting Incidents	27%
Stalking	22%
Survivor Support	15%

BYSTANDER INTERVENTION

Students reported being more likely to **directly reach out to the person impacted** in situations of sexual and gender harassment or intimate partner violence, whereas they were more likely to **directly intervene in situations** of nonconsensual sexual contact.

Students were most unsure of how to intervene when witnessing someone making unwanted sexual comments, jokes, gestures or inappropriate comments about someone's gender or sexual identity. The most common reason to not intervene was, "because I'm not sure what to do".



AREAS OF NOTE

Although students were randomly encouraged to participate in this survey through campus wide emails and social media outreach, some departments took a more active role in encouraging student participation. These departments include Residence Life, the LGBTQIA+ Community Center and Student Accessibility Services. This may account for the greater percentages of participation by these populations.

The training and education section of the survey was revised for 2026. Rather than asking students to identify specific training programs they attended, respondents were asked to indicate whether they had received education or training on particular topic areas. This change was made to improve the accuracy of responses and better capture students' exposure to training, regardless of the program or delivery method.

Open ended questions were eliminated from this survey in order to ensure more consistent and comparable response data.

Since the survey utilized an open access link, some students may have submitted multiple responses, potentially creating duplicates in the data.

Although there were differences regarding feeling safe with UPD on campus, UPD protecting students from harm, and feeling comfortable reporting to UPD, perceptions of whether UPD treats students fairly did not differ significantly across groups. This pattern suggests that disparities are more closely related to students' sense of safety and willingness to engage with UPD than to perceptions of fairness in how they are treated.

ACKNOWLEDGMENTS

Data analysis and graphs provided by:
Dr. Sarah Strout, Assistant Vice President, Assessment and Planning

FY 25/26 Sexual Misconduct Campus Climate Survey Members
A sub-committee of the Sexual Misconduct Review Team (SMRT)
Jennifer Quinn, M.Ed.
Associate Dean of Student Affairs / Title IX Coordinator
Sarah Valois, LICSW
Assistant Director, Counseling Services
Sexual Violence Response and Prevention Coordinator
Dr. Stephanie Teixeira, M.S., L.P.D.
Director, Military Affairs and Veteran Services / Deputy Title IX Coordinator

WORCESTER STATE UNIVERSITY

Title IX

Dinah Moore, M.S.
Director, Title IX Coordinator

October 2026



Content Warning

What is Title IX?

"No person in The United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any educational program or activity receiving federal financial assistance."

** WSU policies comply with:*

- MA State Universities Title IX Sexual Harassment Policy
- The State Universities Equal Opportunity, Nondiscrimination and Title IX Plan (EO Plan), Aug. 2024
- Violence Against Women Reauthorized Act of 2018 ("VAWA"), including the Campus SaVE Act
- The Jeanne Clery Campus Safety Act ("Clery Act") (renamed Jan. 2025)
- MA Legislature S. 2979, *An Act relative to sexual violence on higher ed. campuses,* Aug. 2021
- Title VII- Civil Rights Act of 1964, Protects employees from discrimination.
- NCAA Sexual Violence Policy (NCAA/MASCAC/WSU Student-Athlete Disclosure Form)

Sexual Misconduct Statistics?

23% of women and 6% of men experience sexual assault in college (RAINN) (At WSU, that's 30% of our students.)	75%-90% of sexual assaults are perpetrated by a non-stranger (Nat. Inst. Justice)	14.76% of WSU first year students stated they experiences unwanted sexual contact prior to coming to school (Vector Solutions 23-24)
Less than 5% of sexual assaults are reported (Nat. Inst. Justice)	Intimate Partner Violence (IPV) is most common against women between the ages of 18-24 (NCADV.org) 26% of men experience IPV in their lifetime, including physical violence, sexual violence, or stalking (CDC)	20% of WSU students having experience intimate partner violence since being at Worcester State (Worcester State Sexual Misconduct Climate Survey, 2026)
LGBTQIA+ people are twice as likely to experience abuse than non-LGBTQIA people and One in two transgender people experience dating violence in their lifetime. (One Love)	14.1% of respondents have experienced unwanted sexual advances, comments, gestures or jokes toward them at least once since they have become a student. (Worcester State Sexual Misconduct Climate Survey, 2026)	More than 90% of persons with developmental disabilities will experience a sexual assault in their lifetime. (Justice Department 2024)

Title IX Office

- Position of Title IX Coordinator is required by law
- The Title IX Office has an obligation to respond to allegations of Sexual Harassment
- The Title IX Coordinator is responsible for determining whether a report falls under Title IX or another applicable university policy (EO Plan, Student Code of Conduct)
- The Title IX Coordinator oversees the appropriate policy grievance process
- The Title IX Coordinator is responsible for ensuring compliance with prevention education and training requirements

Definition of Sexual Harassment under Title IX

Unwelcome conduct on the basis of sex that is **severe, pervasive and objectively offensive** and must deny a person equal access to educational opportunities.

Three categories:

- Quid pro quo harassment by an employee of the institution
- Hostile Environment
- Sexual Assault, Dating Violence, Domestic Violence, or Stalking [as defined in VAWA and the Clery Act]

Definition of Sex-Based Discrimination under The EO Plan

Discrimination is an intentional or unintentional act that adversely affects employment and/or educational opportunities because of a person's membership in a protected class

Sex-based discrimination is any discrimination that depends in part on consideration of a person's sex including sex characteristics, sex stereotypes, sexual orientation, gender identity, gender expression, and pregnancy and childbirth, and related medical conditions.

Types of Sex- Based Discrimination:

- Disparate Treatment - Intentional treatment of an individual or group that is less favorable than treatment of others based on protected class.
- Disparate Impact - Unintentional discrimination based on policies and practices.
- Discriminatory Harassment - A form of prohibited discrimination including verbal and/or physical conduct based on membership in protected class, association with or perceived membership in a protected class

Definition of Sex-Based Harassment under The EO Plan

A form of sex discrimination that includes sexual harassment and harassment based on

- Sex stereotypes
- Sex characteristics
- Pregnancy or related orientation
- Gender identity

And may include:

- Sexual Assault
- Dating Violence
- Domestic Violence
- Stalking

*When Title IX does not apply the EO plan may be used as policy guidance

Jurisdiction

For Title IX

- Must happen in our program or activity
- Must be in the United States

EO Plan

May apply to off-campus conduct. (including placements)

- S. 2979 imposes a broader assortment of responsibilities on higher ed. institutions in connection with sexual misconduct and requires institutions to allow reports regardless of where the offense occurred

Types of Employees for Title IX & EO Purposes

Confidential Resources*	Required Reporters	Employee Responders
• Counseling Services • Health Services • Pastoral Services • Confidential Resource Provider ***Please Note:** Employees have the Employee Assistance Program (EAP), a work-based benefit that offers free confidential counseling.	Certain employees required to report incidents of sexual and gender based harassment, dating violence, domestic violence, stalking	Are faculty or staff who are otherwise not designated as Required Reporters or Confidential Resources. **Strongly encouraged to report** any information about such conduct to the Title IX Coordinator or a Confidential Resource.

Required Reporters Include

- Members of the Board of Trustees
- The President and Vice Presidents
- Asst./Assoc. Vice Presidents
- Title IX Coordinator
- EO Officer
- University Police
- Director of Human Resources
- Asst./Assoc. Director of HR
- Departmental Directors and Asst./Assoc. Directors
- Deans and Asst./Assoc. Deans
- Academic Dept. Chairs
- Residence Life Staff (including RD's and RA's)
- Athletic Coaches, Asst. Coaches, Athletic Administrators.
- Studio Managers
- Lab Managers
- Academic and Non-Academic Program Directors/Coordinators
- Staff who directly advise students (not faculty) (ex. OMA, ACS)
- Faculty/Staff leading or chaperoning travel or overnight trips
- Faculty/Staff advisors to student organizations

What to Report

All relevant details about the alleged sexual violence that the student or another person has shared and that the school will need to determine what occurred and to resolve the situation.

This includes:

1. The reporting party
2. The person being accused of violation (responding party)
3. Any relevant facts including date, time and location

*Reports should be made promptly directly to the Title IX Coordinator by calling, emailing or filling out the on-line report form on the Title IX web page.

Grievance Resolution Options

Formal Grievance Process

Informal Grievance Process

Non Pursue

Criminal Charges

Title IX /EO Grievance Process

Title IX Coordinator meets with reporting party

↓

Supportive Measures provided

↓

Both parties are notified that an investigation is opened

↓

Investigation (two investigators)

↓

Draft Investigative Report

↓

Administrative Review or Live Hearing Conducted

↓

Parties are notified of outcome- Appeal Period

Supportive Measures

- Access to counseling services
- Imposition of a no-contact order
- Rescheduling of exams and assignments
- Change in class schedule
- Change in work schedule or job assignment
- Change in student's campus housing
- Limiting access to certain University facilities or activities
- Provide escort to assure safe movement around campus
- Arrange for medical services

*Non-disciplinary, non-punitive, individualized services offered as appropriate, as reasonably available, and without fee or charge to either party before or after the filing of a formal complaint or where no formal complaint was filed.

Prevention and Awareness Campaigns

VAWA, Clery Act, S. 2979 and Title IX collectively require prevention education on sexual assault, domestic violence, dating violence, and stalking:

1. For all incoming new students and employees (within 45 days of matriculation or employment)
2. Ongoing prevention and awareness for students and employees
3. Training for Title IX Response Team members

*Prevention and Awareness campaigns must be reported annually in ASR.

SAVE
SEXUAL ASSAULT VIOLENCE EDUCATION

2026 Sexual Misconduct Climate Survey

Goal: Gather data regarding sexual misconduct at Worcester State University, including prevalence, student perceptions and beliefs, and awareness of resources and supports.

1st Administered: Fall 2023
Current survey administered: February- March 2026

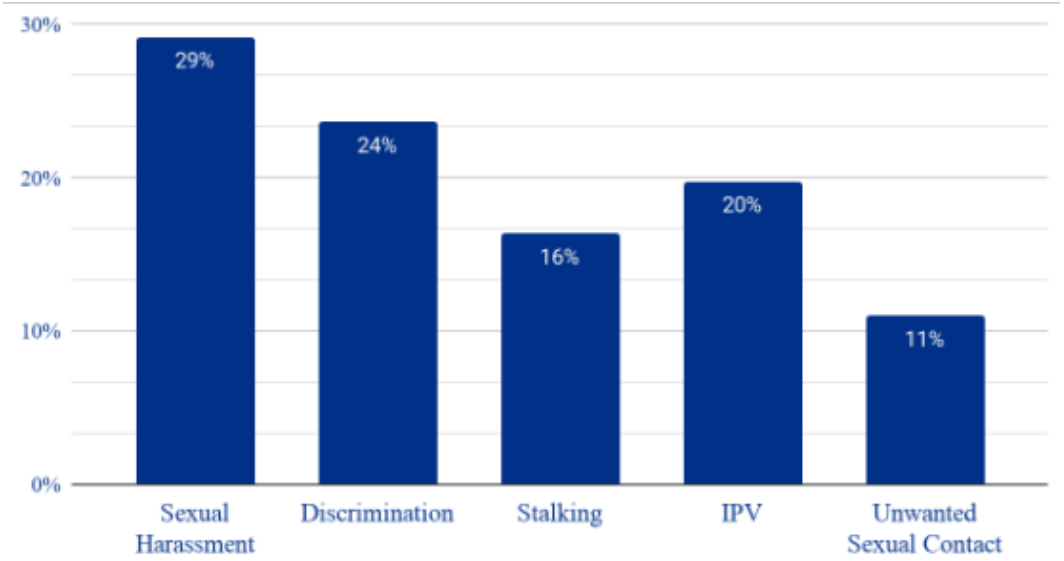
N= 520 (10%); 505 completed
11% for undergraduate students, 5% for graduate students

Higher rates of resident students (49%), females (70%), disabled students (19% v. 13% in 2023).

Sexual Misconduct Climate Survey: Prevalence of Sexual Misconduct

- 46% of students have experienced at least one incident of sexual misconduct since enrolling at WSU.
- Female students, LGBTQIA+ students, and students with disabilities have experienced all forms of sexual misconduct at higher rates than their counterparts.
- The most notable impacts were emotional or mental health difficulties.
- The most common reason for not disclosing was they “didn’t realize it was sexual misconduct.”

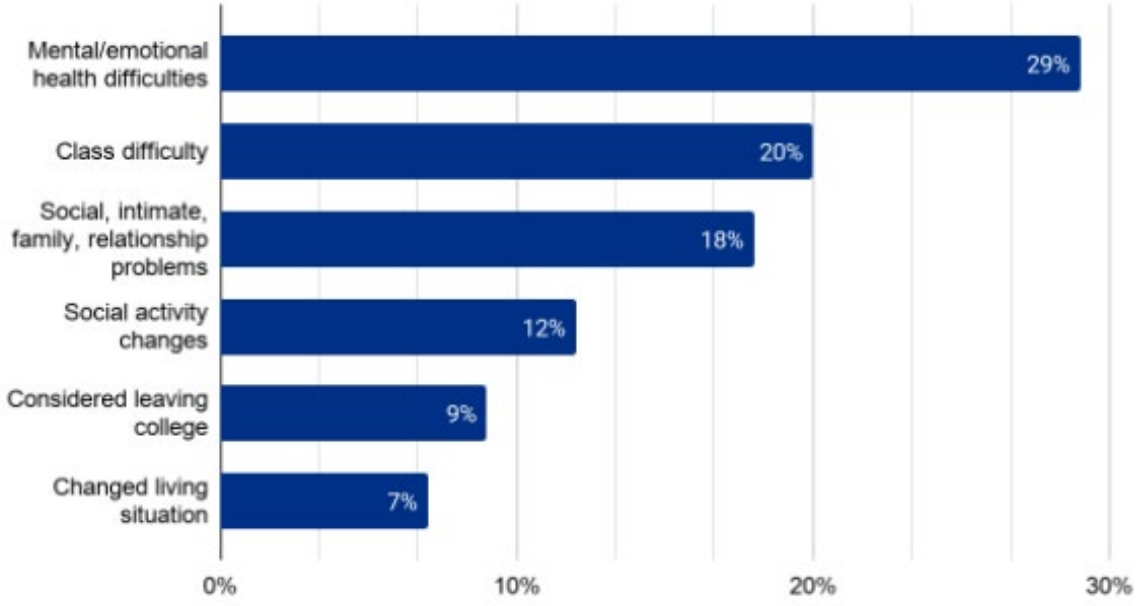
Sexual Misconduct Climate Survey: Prevalence of Sexual Misconduct



Sexual Misconduct Climate Survey: Incident Type (2023 vs. 2024)

Incident Type	Fall 2023	Spring 2026
Harassment	28%	29%
Discrimination	18%	24%
Stalking	11%	16%
IPV	15%	20%
Unwanted Contact	29%	11%

Sexual Misconduct Climate Survey: Impact of Sexual Misconduct



Sexual Misconduct Climate Survey: Disclosures and Reporting

- 53% of sexual misconduct incidents were not reported.
- The most common reason for not disclosing was they "didn't realize it was sexual misconduct."

Reporting	%
Friend/Family	36%
Someone Else	16%
WSU Title IX	11%
WSU Counseling/Health Services	11%
Off Campus Counselor/Police	11%
WSU Faculty/Staff	10%
WSU Police	4%

Sexual Misconduct Climate Survey: Attitudes and Bystander Intervention

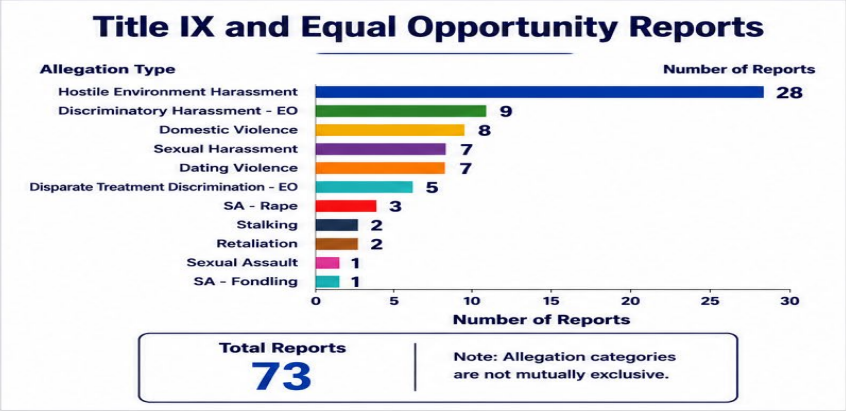
- Students reported being more likely to **directly intervene in situations** of nonconsensual sexual contact than other forms of sexual misconduct.
- Unsure of how to intervene when witnessing someone making unwanted sexual comments, jokes, gestures or inappropriate comments about someone's gender or sexual identity.
- The most common reason to not intervene was, "because I'm not sure what to do".

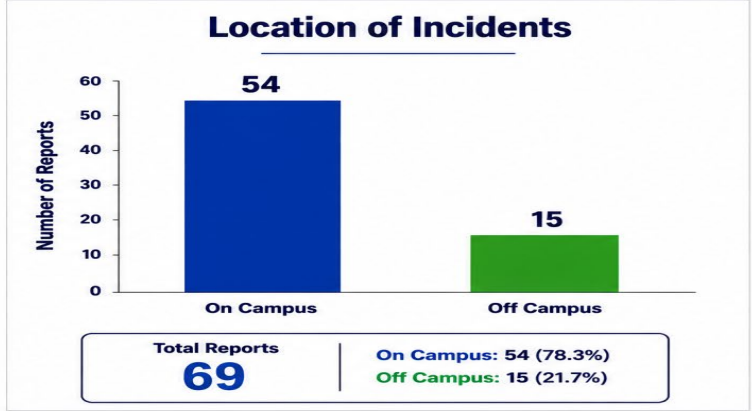
Annual Report Data (FY2026 Academic Year)

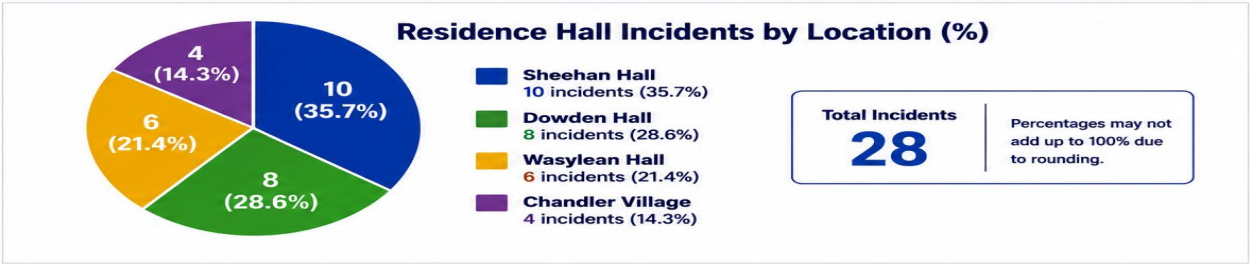
Total number of Reports:

	FY23	FY24	FY25	FY26
Fall	47	60	50	30
Spring	43	48	32	39
Total	90	118	82	69

Annual Report Data FY2026

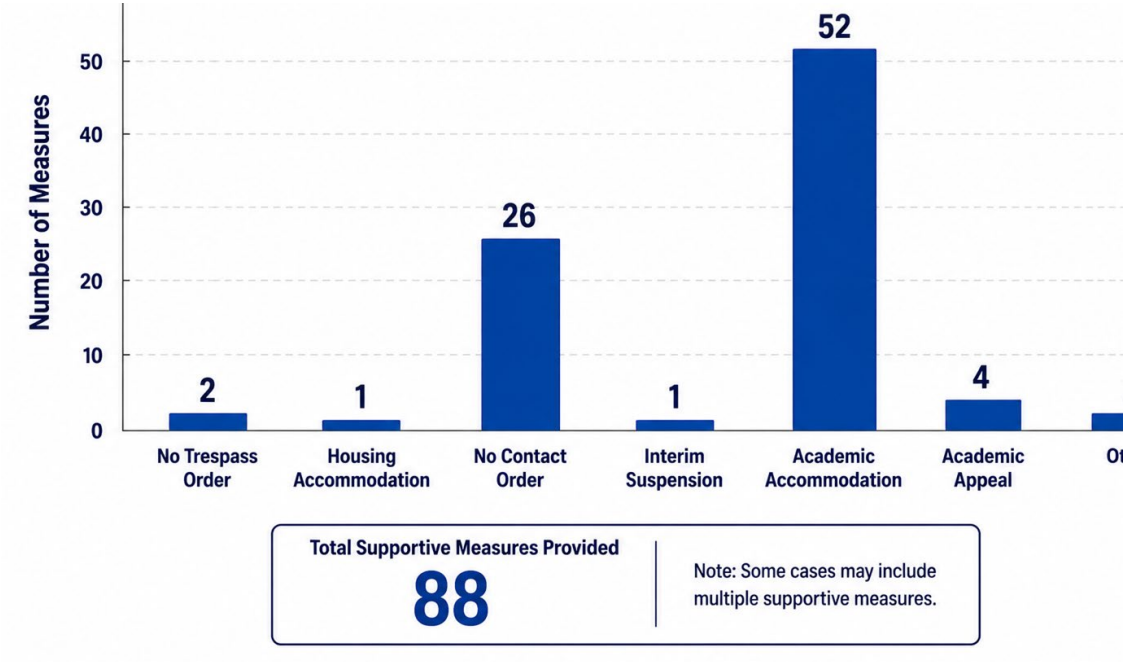






Please note the number of types of violations may be higher than the number of reports because one complainant may have been impacted by more than one policy violation. Although there were 69 Reports there were 73 policy violations reported.

Annual Report Data FY2026: Supportive Measures




WORCESTER STATE UNIVERSITY
1874
WORCESTER
STATE
UNIVERSITY
ADMINISTRATION
Questions?
Thank You

Lt. Col. James F. Sheehan Commonwealth Honors Program

Nicole M. Rosa, PhD
Honors Director
Professor of Psychology

Martin Fromm, PhD
Honors Faculty Fellow
Professor of History

Mission and Program Learning Outcomes

Established in 1996
Named in honor of Lt. Col. James F. Sheehan ‘55 in 2018

The Honors Program seeks to **challenge and transform students** through academically **rigorous and diverse coursework, multi-cultural experiences, and service learning**, enabling them to grow as **well-rounded scholars and engaged citizens**.

Students will:

- Be challenged and transformed through diverse and demanding coursework and experiences.
- Engage in guided scholarship and articulate ideas, concepts, and findings intelligently, clearly, and persuasively through writing and other forms of communication at an exceptional level.
- Develop self-directed learning practices that promote lifelong curiosity, inquiry, and engaged citizenship in an ever-changing world.
- Engage purposefully in a combination of leadership, service, mentorship and multicultural/intercultural activities.

Admission and Recruitment

New First Year Admissions:

- Recalculated high school GPAs (minimum 3.5, Nursing 4.0)
- AP classes and/or Honors classes, and earned all A's and B's for grades
- National Honor Society and involved in 2-3 activities
- When supplied, a minimum total score of 1080 (EBRW&M) or ACT composite of 26.
- Top 20% of the admissions pool

Internal and External Transfer Students:

- External students coming from Commonwealth Honors Program
- 3.5 cumulative GPA
- Fewer than 45 credits completed

Graduation and Recognition

Commonwealth Honors Program Scholar

- 3.2 GPA
- Six or seven honors courses with a B or better
- Capstone project/thesis presented in a public forum
- Awarded honors cords and honors stole

Honors Program Graduate

- 3.2 GPA
- Six or seven honors courses with a B or better.
- Awarded honors cords

Resources and Benefits

Funding to Support Students and Faculty

- *Study Abroad Funding:* Up to $1,000 to support long- and short-term study abroad.
- *Research and Travel Funding:* Eligible for up to $300 each year to offset the costs associated with research or travel to conferences.
- *Course Enrichment Grants:* Up to $250 to invite local speakers to class, bring students to area museums and labs, and access specialized equipment to enhance student learning

Priority Registration

Honors-only Lounge

Increased Access to Faculty and Advising

Enrichment and Co-Curricular Activities

Annual trips to NYC and Boston

- Transportation and Overnight accommodations for students
- Broadway Show and Theater visits

Speaker Series

Social Events

- Orientation
- Welcome Back open house
- 30th Anniversary
- Woo Sox
- Game and craft nights
- Finals stress relief

Enrollment and Retention Trend Snapshot

13%

Average Annual Growth
(Since 2018)

91%

New student 2 yr
Retention
(AY 24-25)

31%

BIPOC Enrollment
(AY 24-25)

37%

Pell Eligible
(AY 24-25)

39%

First Generation
(AY 24-25)

Honors Program Staff: Professional

- Honors Director: Nicole Rosa
  - 12 APR credits annually
  - Oversee all aspects of the Honors program
    - Recruiting honors students to expand and diversify the Honors Program
    - Developing honors courses and identifying instructors
    - Coordinating events for honors students
    - Create and review policies
    - Provide budgetary oversight

- Honors Faculty Fellow: Martin Fromm
  - 3 APR credits annually
  - Assists with all aspects of the Honors Program
    - Course and co-curricular event development
    - Student recruitment, retention, and advising
    - Faculty recruitment

- Administrative Assistant: Maria Bocka
  - Shared with Urban Studies

Honors Program Staff: Students

- Graduate Assistant: Julia Shanoudy
  - 12 hours/week
    - Serve as a peer mentor and advisor
    - Plan and host co-curricular events
    - Lead the student advisory committee
    - Weekly newsletter & calendar maintenance
    - Track and monitor student progress
    - Assist in recruitment efforts

- Undergraduate positions
  - Work study - Orin Futrell
  - Social Media Intern - Charlotte Collins

Reaccreditation Process

- Every 7 years
- Self-study report
- Site visit
  - CHC Representatives from UMass, State University, & Community College
  - Meetings with President Maloney, Provost Wims, Deans, Faculty, & Students
- Recommendation submitted to Commissioner of Higher Education
  - Reviewed by statewide council in April
- Reaccreditation approval by Board of Higher Education
- One year follow-up report

Program Review: Commendations

- Dedication and effectiveness of the Honors Program staff
- Flexibility in honors course offerings
- Visibility and student interest in program
- Community and belonging among honors students
- Broad support from faculty, deans, and administrators
- The program is named and supported

Program Review: Recommendations

- Continue work to increase the number of students completing honors thesis projects and graduating as Commonwealth Honors Scholars.
  - Improve communication to students
  - Create scaffolds/ supports
  - Create a repository of successful Commonwealth Honors projects
  - Develop specific guidelines

Program Review: Recommendations

- Strengthen Honors Director’s access to academic leadership.
- Clarify Honors transfer credit requirements.
- Strengthen data tracking and reporting mechanisms.

Program Review: Recommendations

- Enhance staffing and administrative support while supporting continuity in program leadership.
  - Increase Faculty Fellow compensation
  - Funding for Graduate Assistant

- Maximize the potential impact of the Sheehan Bequest Funds.

On the Horizon

- One year follow-up report
- Evaluating Honors requirements and General Education

- Statewide Commonwealth Honors Council
  - Sub-120 degrees
  - Program to College transition?

Thank you!!

Questions?

Follow us on social media
Instagram: @wsuhonorsprogram
LinkedIn: Honors Program at Worcester State

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
PLANNING AND DEVELOPMENT COMMITTEE MEETING
Thursday, October 22, 2026
2:00 P.M.
Wellness Center, Room 204

Meeting Called By: Darnell Dunn (Chair) **Minutes**: Nikki Kapurch

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

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

---

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

AGENDA

ITEM	RESPONSIBLE	ACTION
1. *Administrative Business* A. Call to Order B. Approval of the Minutes: 1. Planning and Development Committee - June 4, 2026*	Darnell Dunn	
2. *Planning And Development Committee Report* A. Master Plan Update Presentation* a. : Master Plan Mass State Project No. WOR2501. *	Kathy Eichelroth	A. **informational** a. **informational**
3. *Administrative Updates* A. Other Business	Darnell Dunn	
4. *Adjournment*	Darnell Dunn	4. **vote required**

*Attachments

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Planning and Development Committee Meeting
Meeting Minutes

CHAIR:	Dr. Lawrence Sasso (Chair)	DATE:	June 4, 2026
LOCATION:	President's Conference Room with remote option	MINUTES BY:	Barry Maloney
TIME:	10:00 AM		
COMMITTEE MEMBERS PRESENT:	Lawrence Sasso (remotely); Kelly Brissette; Darnell Dunn; Jake Sanders		
BOARD MEMBERS PRESENT:	Dr. Lisa Colombo (remotely)		
WSU STAFF:	Ashlynn Allain; Kathy Eichelroth; Carl Herrin; Kathy Eichelroth; Barry Maloney; Jesilka Cortez		

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Planning and Development Committee was held on Thursday, June 4, 2026, in room 250 of the Administration Building, with a remote option. Chair Sasso called the meeting to order at 10:00 a.m.

Planning and Development Committee Report: Kathy Eichelroth

- Trustee Sasso asked VP Eichelroth to walk the trustees through the Master Plan PowerPoint included in the meeting packet.
- The Master Plan Update is transitioning from current-state discovery and stakeholder engagement into the validation and refinement phase. Led by VP Eichelroth and her team, the process aims to deliver a finalized recommendation to the Board of Trustees on October 22, 2026, with phased implementation beginning in 2027.
- VP Eichelroth then called on Jesilka Cortez, Planning Liaison and Strategic Portfolio Officer, Office of the VP for Administration & Finance, to present the slideshow as shown in the posted materials.
    - Reviewing the next iteration of scenarios next week, and will move into the final stage.
- The master plan work is tethered to the BRIGHT Act. All campuses must have an updated master plan to draw down those dollars.
    - If the BRIGHT Act is passed, it would direct $2.4B to public higher education, funded through the Fair Share Amendment.
    - Timeline: $125M is earmarked for annual debt service, but campus-level dollars are not anticipated to arrive until approximately FY29.
- From now through October 2026, the Campus Advisory Group (CAG) and Executive Leadership will stress-test the emerging design across four strategic domains. The process aims to deliver a final recommendation to the Board of Trustees on October 22, 2026, with phased implementation beginning in 2027.
- The Administration is focusing on Option #2 as the preferred direction, focusing on greening the campus core, redeveloping the Student Center and LRC, addressing a ~700-space parking deficit, and coordinating with MassDOT's Chandler Street reconstruction, with a final board vote expected in October.

With there being no further business, the WSU Board of Trustees Planning and Development Committee meeting was adjourned at 10:43 am

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

VOTED: **to adjourn the meeting at 10:43 a.m.**

ROLL CALL VOTE: **4 approved.** Kelly Brissette; Darnell Dunn; Jake Sanders; Dr. Lawrence Sasso (Vice Chair)

Respectfully submitted,

Barry M. Maloney
Secretary, Board of Trustees

October 22 2026

Worcester State University

Campus Master Plan

Presentation to the Board of Trustees



Agenda

01 Introduction

02 Project Goals

03 Campus Needs

04 Preferred Alternate

05 Implementation Plan

Introduction

01 02 03 04 05

A. **Project Team**

B. **Process & Timeline**

PROJECT TEAM

Summary

Jones Architecture



Rick Jones
Director



Zara Silva-Landry
Project Designer

POINT OF CONTACT



Sarah Tarbet
Associate Principal

Rickes Associates (Space Optimization)



Monica Meyerhoff
Principal



Josh Barrett
Data Analyst

Crowley Cottrell (Landscape



Naomi Cottrell
Principal



JP Charboneau
Associate Principal



Echo Chen
Project Designer

DCAMM

WORCESTER STATE UNIVERSITY
1874

SCHEDULE

Overall Process

- Research
- Data Collection
- Engagement Sessions
- Program Recommendations
- Proposed Scenarios
- Scenario Refinement
- Implementation Planning
- Final Recommendation ⟵ WE ARE HERE



Project Goals

01 02 03 04 05

A. **Review 7 Goals**

PROJECT GOALS

Summary

1. Strengthen community and belonging by creating a **modern campus hub** that supports connection, engagement, and student experience.

2. Advance student success by creating a **Learning Commons** aligned with modern teaching and learning models.

3. Enhance **experiential learning** through modern academic, clinical, research, and creative environments.

4. Create a student-focused, **green campus landscape** that supports well-being, purpose, and safe connectivity.

5. Resolve circulation barriers across upper and lower campus to support safer, more **accessible movement**.

6. Address campus space needs through **optimizing existing space** and strategic investment in facilities where it provides the greatest value.

7. Deepen the University's **connection to community**, city, and state partners.

Campus Needs

01 02 03 04 05

A. Site Circulation & Accessibility
B. Space Utilization
C. Redistribution & Strategic Reuse
D. Critical Facilities
E. Space Recommendations

CAMPUS NEEDS

Space Utilization on Campus

- Overall, there is sufficient space, but it must be reconfigured and realigned to meet today's needs.
- Classrooms present the greatest opportunity for reuse.
- Course scheduling reform is foundational.
- Specialized instructional space requires targeted investment
- Office and Administrative Space requires optimization and reconfiguration.

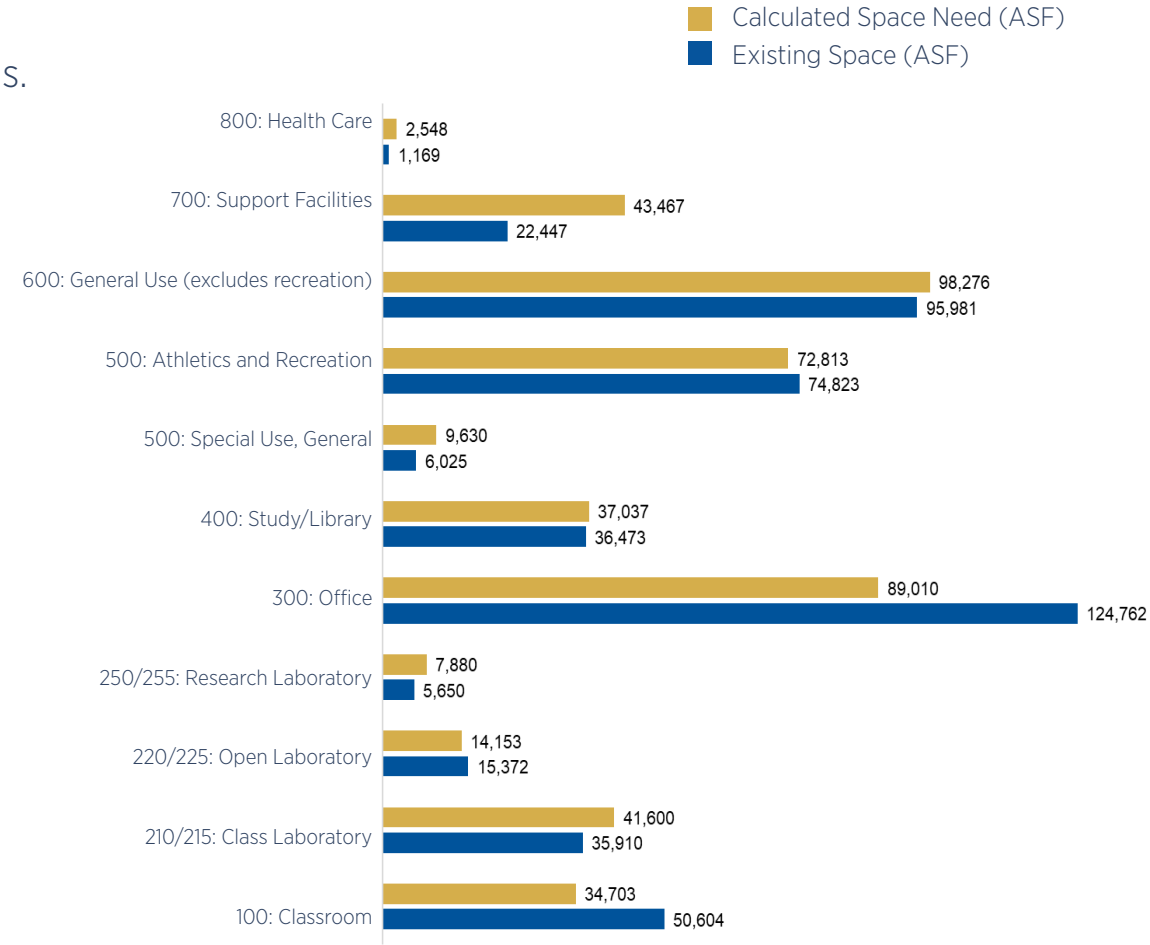
Total Existing Campus Square Footage*

469,216 ASF

Total Calculated Need

451,000 ASF

*Non-residential assignable square footage



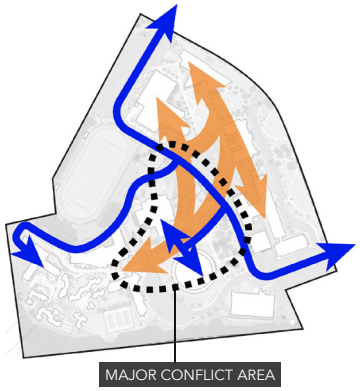
CAMPUS NEEDS

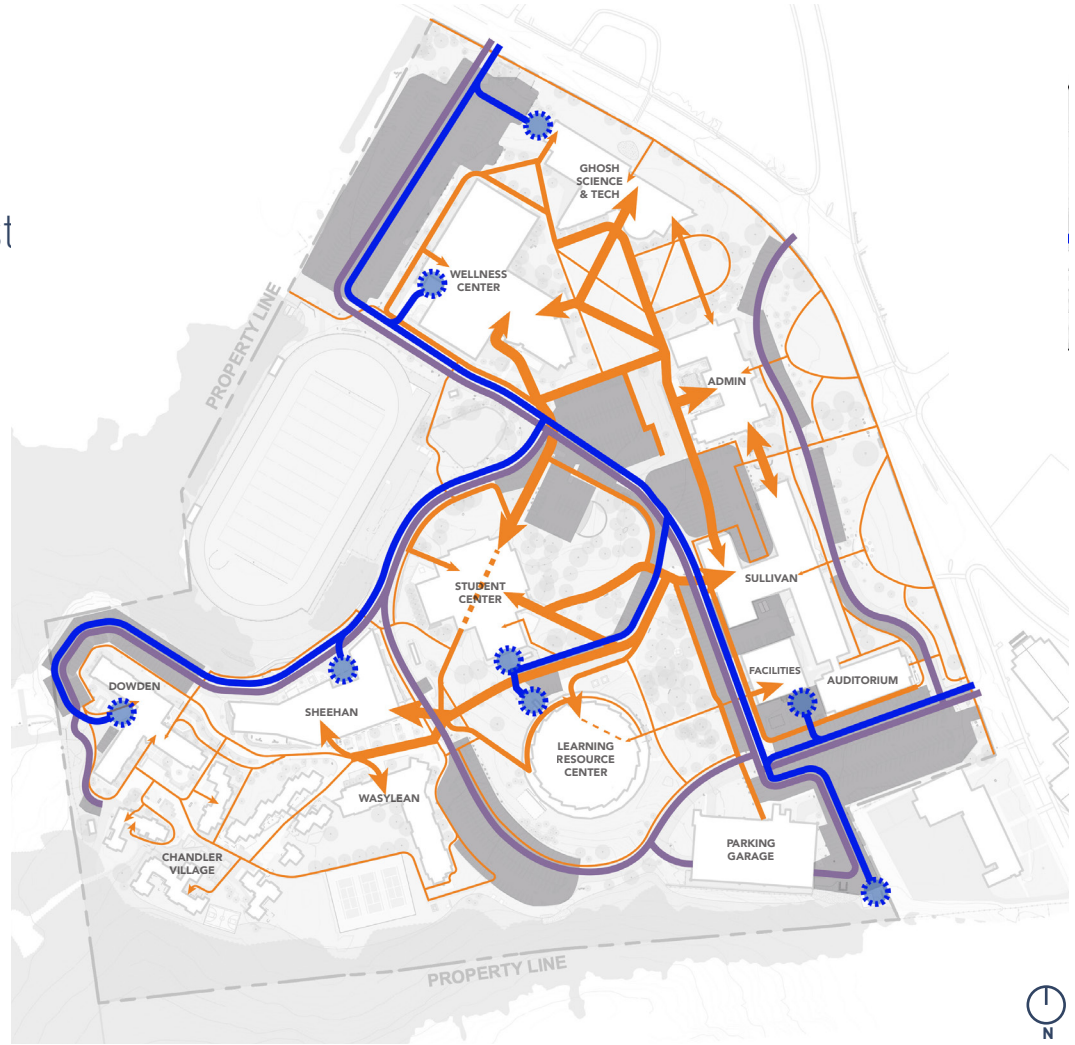
Site Circulation and Accessibility

- The Campus is divided by vehicular circulation, grade changes, and parking lots.
- They physical center of campus is the most congested.
- The "Knot" of circulation overlapping at the loading dock needs to be unraveled.

LEGEND

- EXISTING BUILDING
- HIGH-INTENSITY ROUTES
- MODERATE-INTENSITY ROUTES
- LOW-INTENSITY ROUTES
- ELEVATOR ACCESS
- CAR CIRCULATION
- SERVICE TRUCK CIRCULATION
- PARKING LOT
- LOADING / SERVICE DOCK





CAMPUS NEEDS

Critical Facilities

- Critical support facilities need renewal.
- Student Center, LRC, Chandler Village, May Street, and Facilities Operations face challenges.

Student Center: Accessibility, circulation, and systems.

LRC: Accessibility, building configuration, natural light, wayfinding, systems, and accessibility.

Facilities and Operations: Temporary modular building and space deficit.

Chandler Village: Accessibility, systems, building levels.

May Street: Accessibility, structure, current condition, space types.

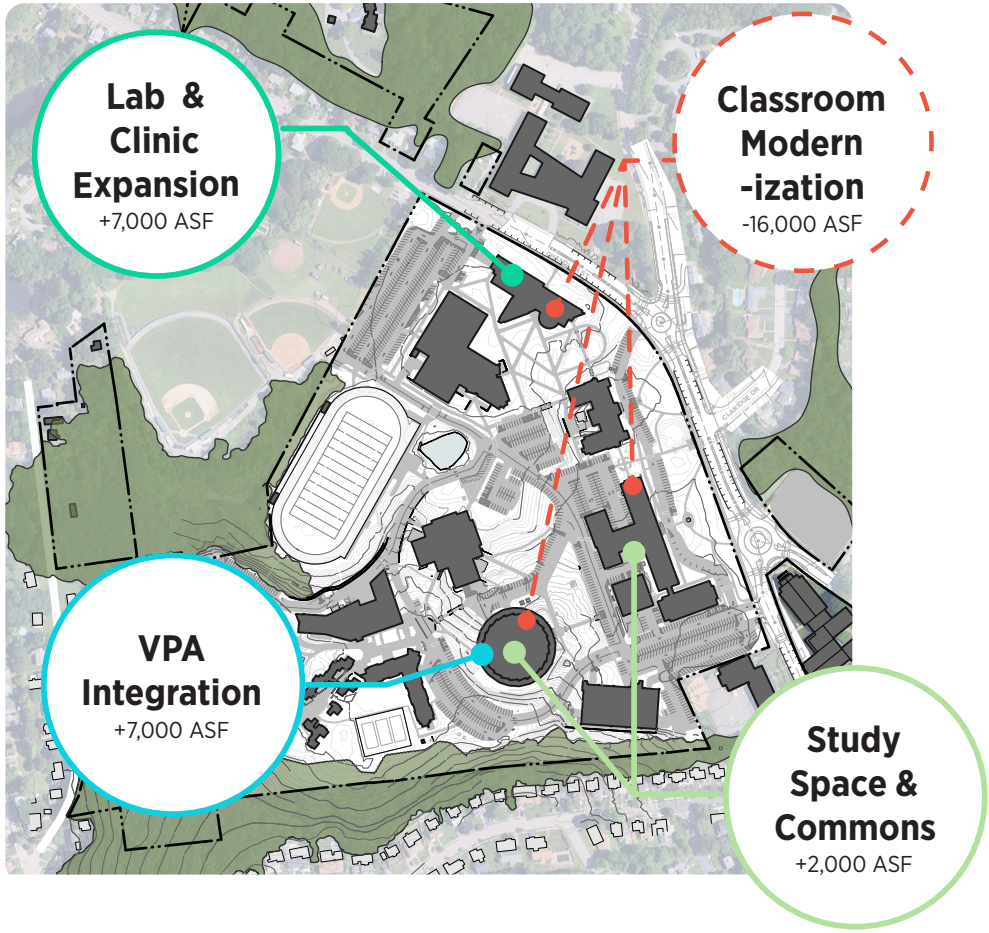




CAMPUS NEEDS

Redistribution & Strategic Reuse

- Existing space can be optimized, but there is still a deficit in some categories.
- Redistribution addresses a portion of the campus's need.
- New construction or major renovation required for modernizing specialized or evolving programs.



CAMPUS NEEDS

Space Recommendations

- After presenting the space needs, this should be prioritized:

  A Modernized Campus Core

  Facilities and Operations

  Experiential Learning and lastly,

  Community Facing Activities

- Connect projects to the project goals.

	Goal	Intervention
Student Success	Create library learning commons.	Library Learning Commons
	Modernize student hub.	Student Center
Support	Address Support Space deficit.	Facilities & Operations
Community	Deepen connection to community.	May Street
Academic	Expand experiential learning.	Health Building
	Right-size research and prep space.	S&T Renovation
	Right-size classroom space.	Sullivan Classroom Renovation
Student Life	Plan for future flexibility in bed types & quantities.	Residential Core.

CAMPUS NEEDS

Space Recommendations

- Parking and greening the campus center are interconnected.
- Garages and reorganized parking lots create opportunity to move to the perimeter
- Center of campus is dedicated to accessible connections & campus identity.

	Goal	Intervention
Landscape	Resolving circulation barriers, supporting accessible movement.	Sullivan Entry
	Strengthen community & create a vibrant, modern campus hub.	Amphitheater
	Student-focused, green campus landscape.	Expand Campus Green
	Resolve circulation barriers, strengthen connection between Upper and Lower Campus.	Central Pathway
Parking	Create a student-focused, green campus, resolving circulation barriers, and supporting more accessible movement by removing parking in the campus core.	North Parking Garage
		Parking behind Residential Core
		Re-organizing Surface Lots

Preferred Alternate

01 02 03 04 05

A. Site Plan

B. Site Diagrams

PREFERRED ALTERNATE

Site Plan

LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- NEW PLAZA
- NEW GARAGE
- PROPERTY LINE

NEW BUILDINGS

1. LIBRARY LEARNING COMMONS
2. HEALTH BUILDING
3. MAY STREET COMMUNITY HUB
4. OPERATIONS & FACILITIES IN NORTH GARAGE
5. RESIDENTIAL CORE

MAJOR RENOVATIONS

6. STUDENT CENTER

SUPPORTING RENOVATIONS

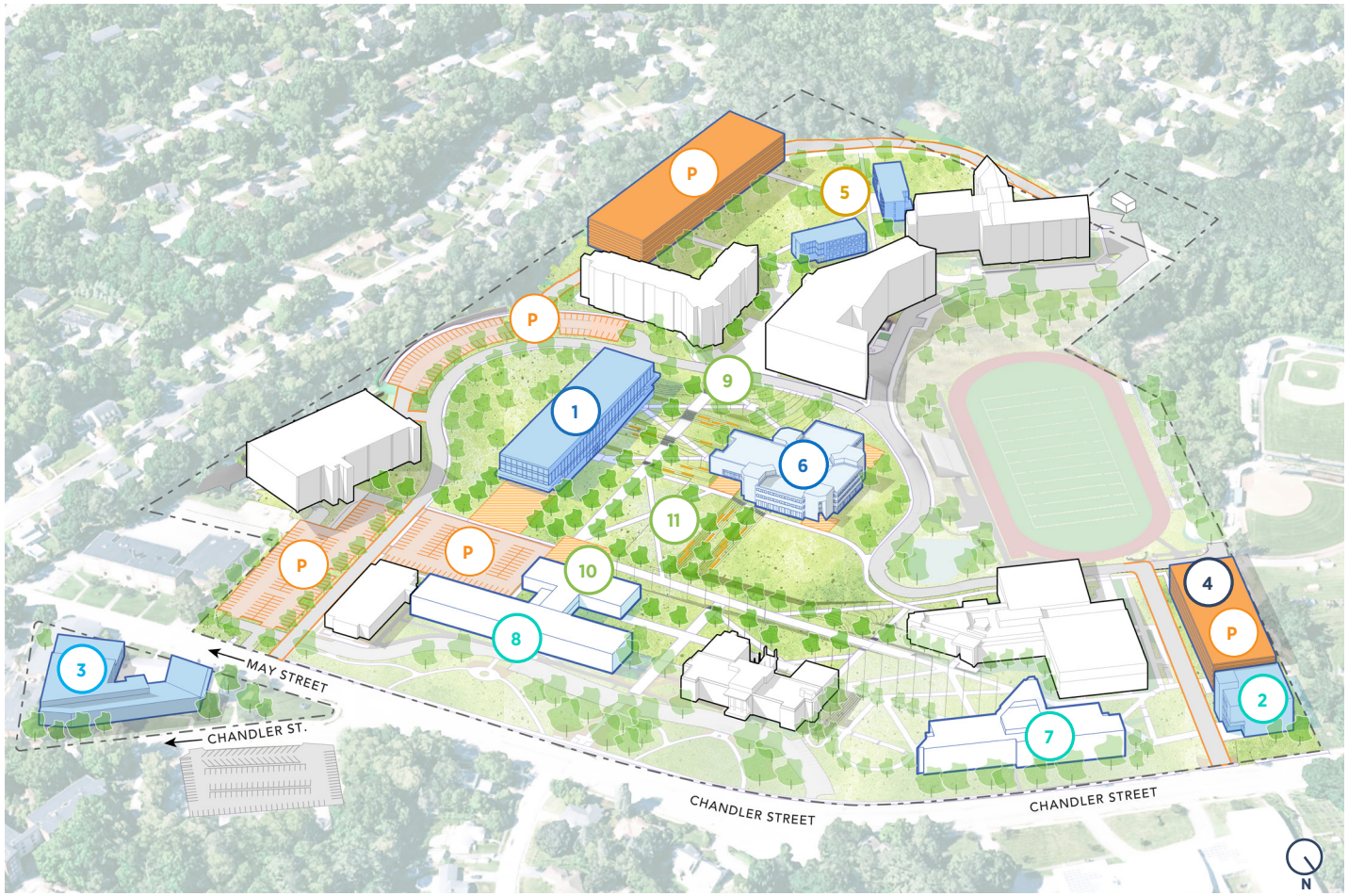
7. S&T RENOVATION
8. SULLIVAN RENOVATION

SITE AND LANDSCAPE

9. CENTRAL PATHWAY & AMPHITHEATER
10. SULLIVAN ENTRYWAY
11. EXPAND BINIENDA GREEN

PARKING

P. NEW PARKING



PREFERRED ALTERNATE

Parking

- To replace parking in the center of campus, lots and garages are located at the perimeter.
- Additional study will need to be done to assess need.

EXISTING PARKING
1,768

Existing Parking Remaining	Surface Parking Added	Garage Parking Added
992	+165	+1,192

TOTAL PROPOSED PARKING
2,349



JONES ARCH

PREFERRED ALTERNATE

Site Circulation

- Extending Binienda Green orients campus N/S
- Creating an accessible path from upper to lower campus anchors the E/W connection
- Occupiable and multi-purpose space outside the Student Center for additional programming.



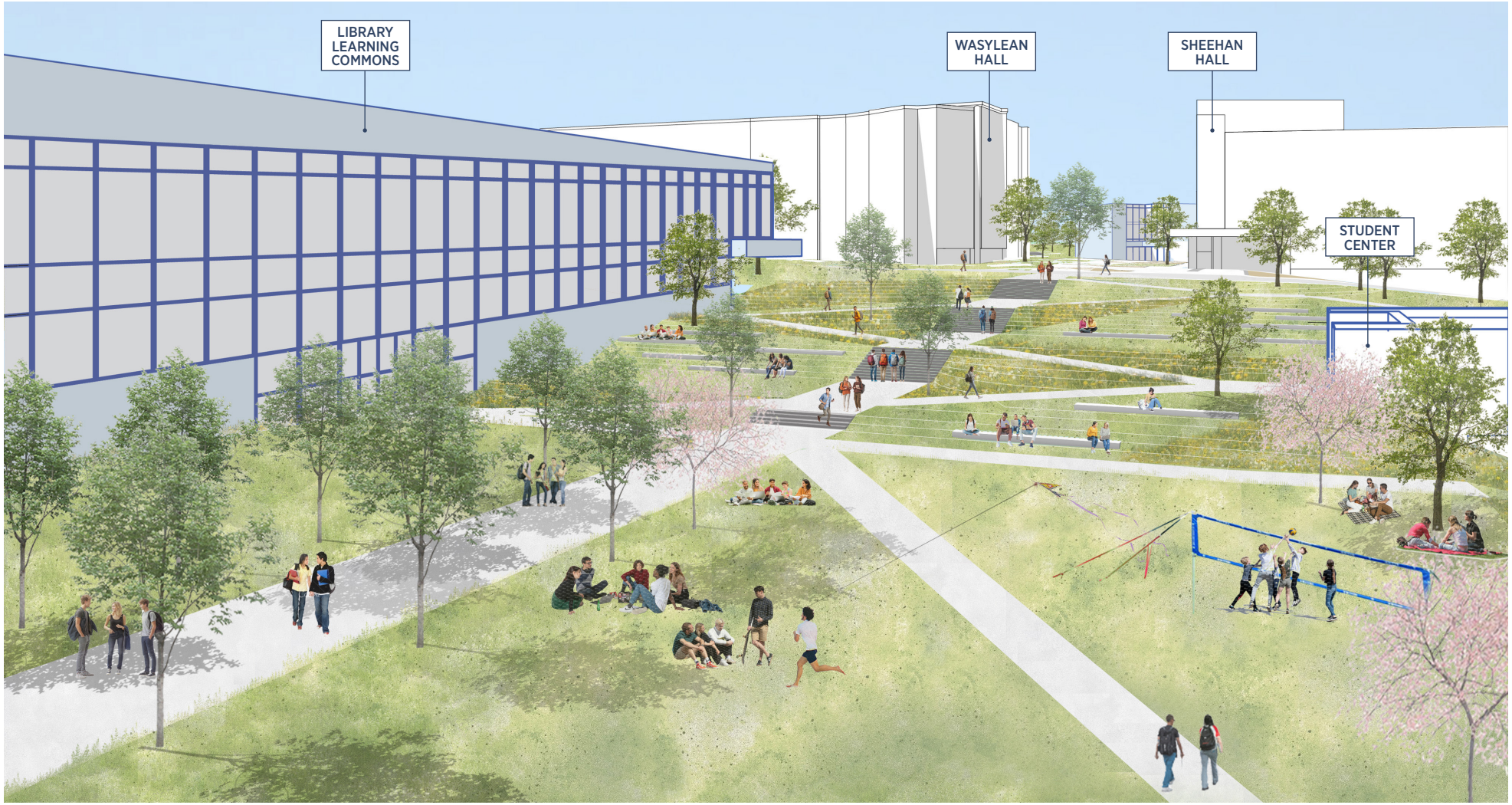
PREFERRED ALTERNATE

Campus Entry



PREFERRED ALTERNATE

Central Pathway



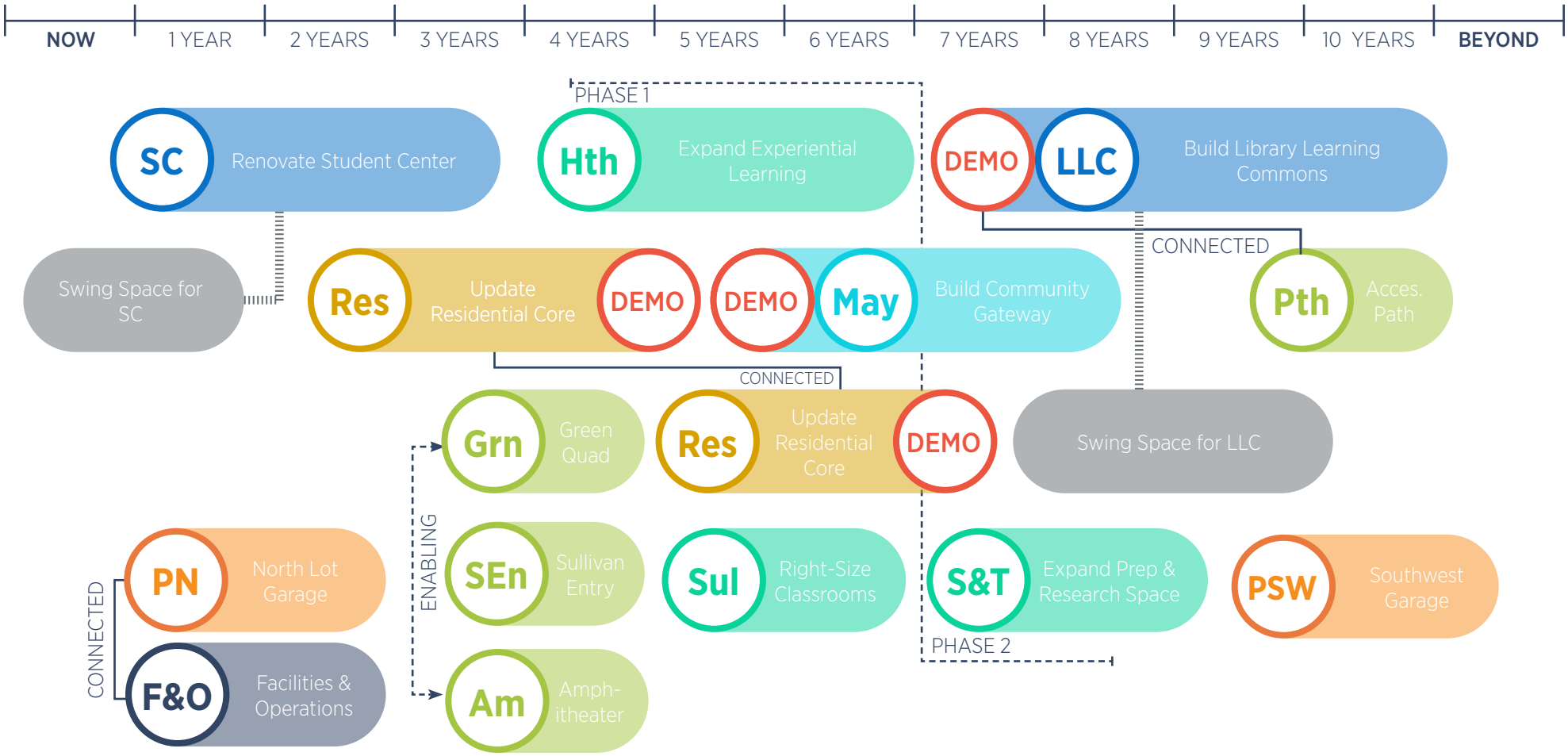
Implementation Plan

01 02 03 04 05

A. Preferred Option

PREFERRED IMPLEMENTATION PLAN

Option A: Prioritizing Student Space And University Operations Needs



PROPOSED TIMELINE

High-Level Summary

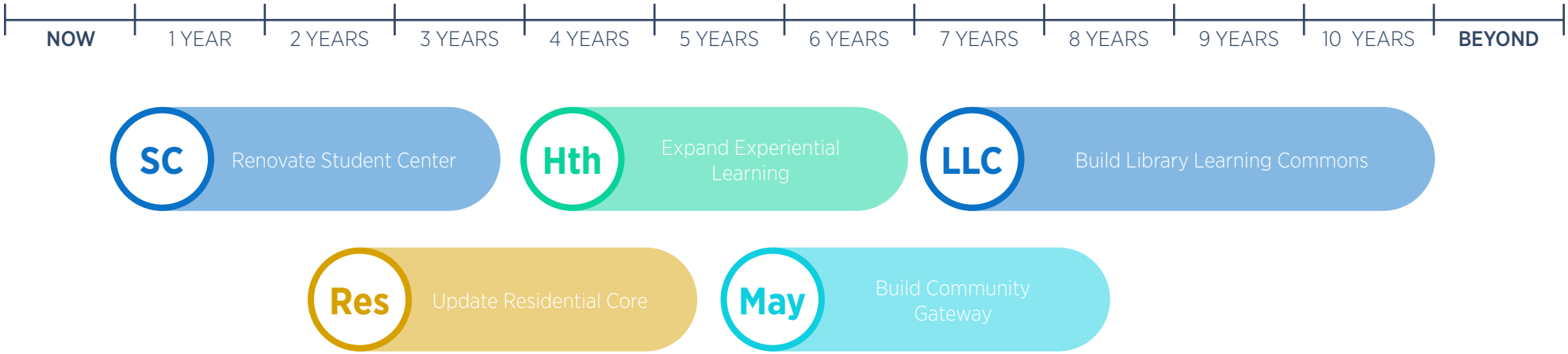
Build framework around **High-Impact and Major Investments**.



PROPOSED TIMELINE

High-Level Summary

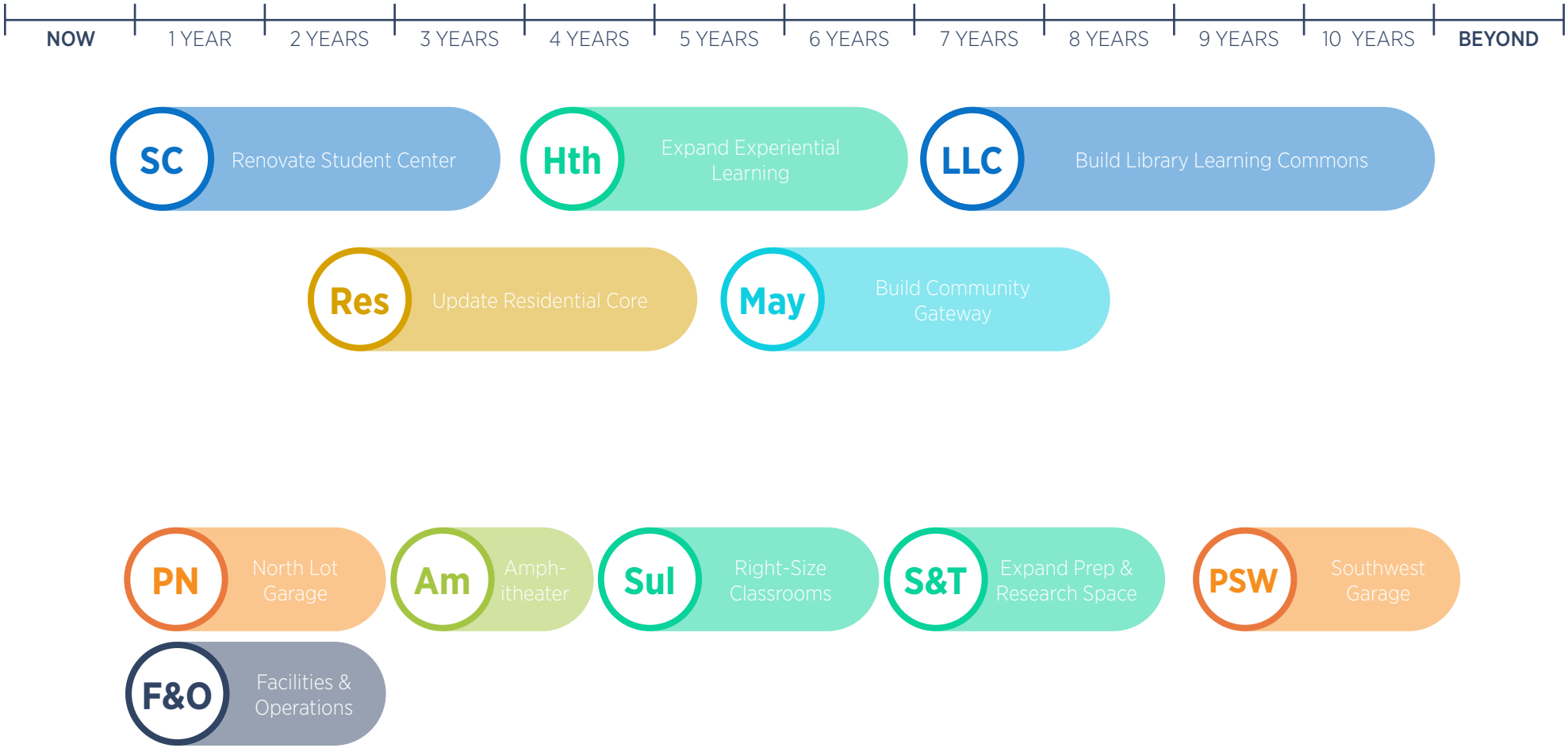
Strategically time **Long Term Priorities** offset from major investments.



PROPOSED TIMELINE

High-Level Summary

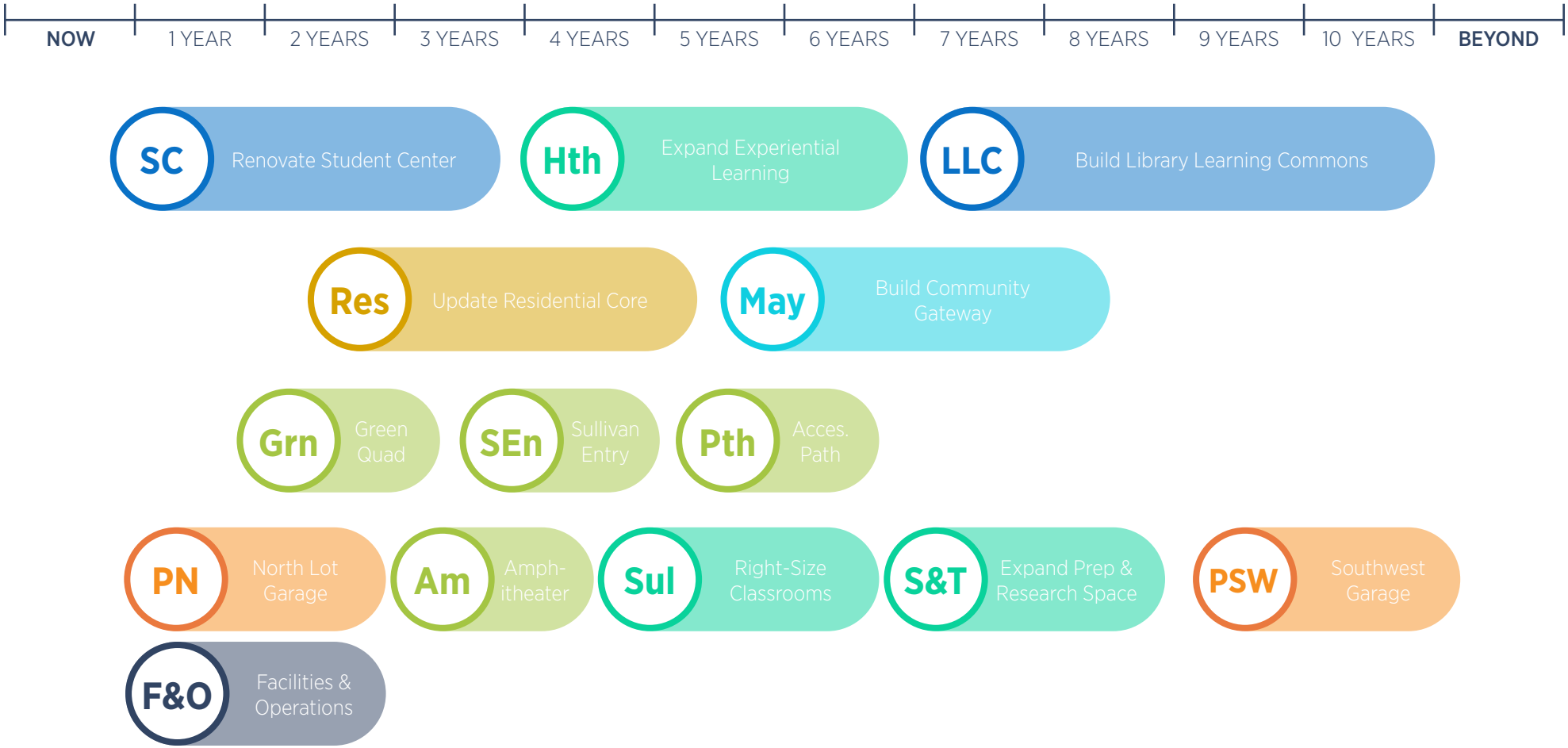
Add **supporting investments** where needed to facilitate growth.



PROPOSED TIMELINE

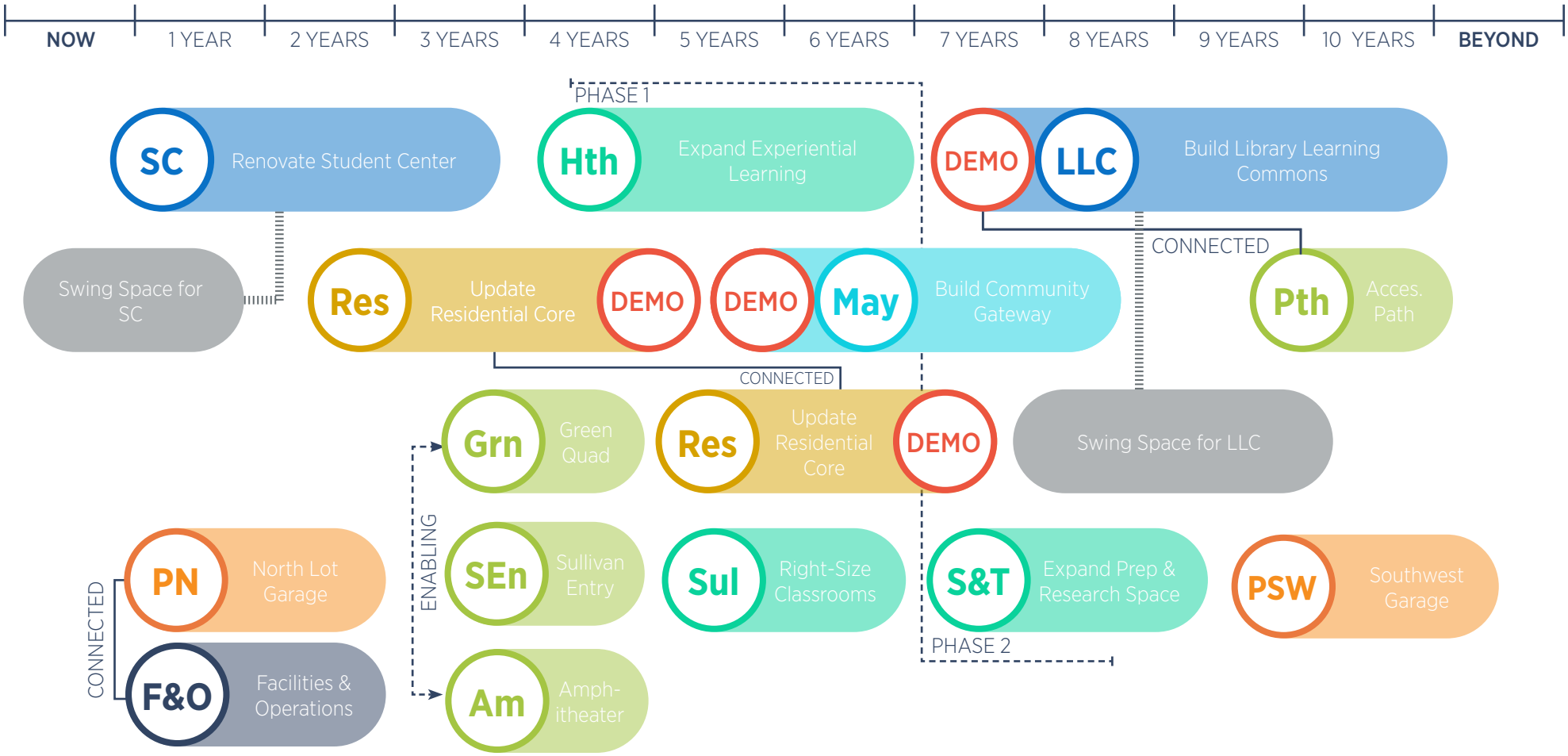
High-Level Summary

Consider **low-cost, high-impact** projects to target low-hanging fruit.



PREFERRED IMPLEMENTATION PLAN

Option A: Prioritizing Student Space And University Operations Needs



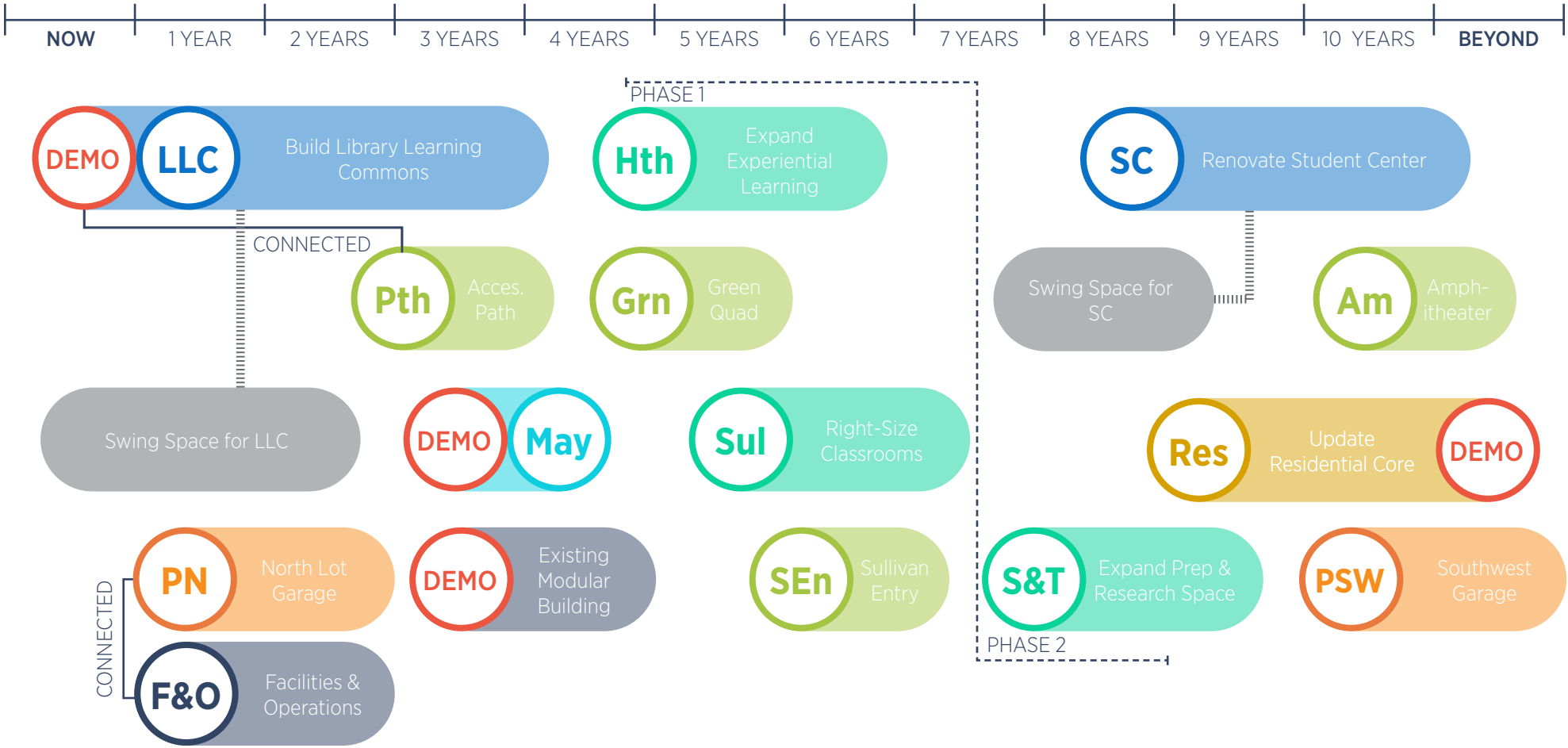
Implementation Plan

01 02 03 04 05

A. Other Options

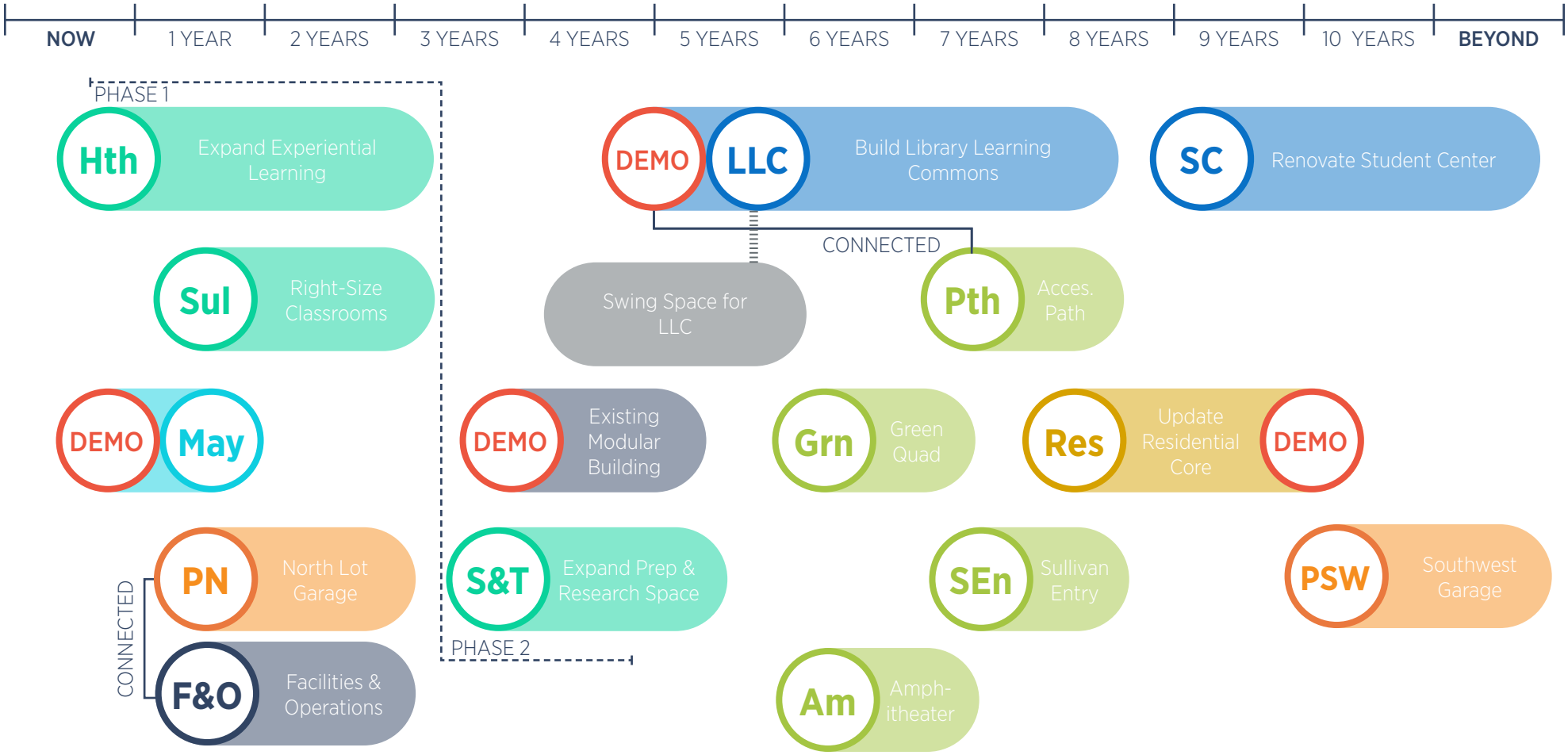
IMPLEMENTATION PLAN

Option B: Using The Library Learning Commons To Bridge The Need Between Experiential Learning And Student Spaces



IMPLEMENTATION PLAN

Option C: Prioritizing Health Science And Experiential Learning Space



PREFERRED ALTERNATE

Site Plan

LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- NEW PLAZA
- NEW GARAGE
- PROPERTY LINE

NEW BUILDINGS

1. LIBRARY LEARNING COMMONS
2. HEALTH BUILDING
3. MAY STREET COMMUNITY HUB
4. OPERATIONS & FACILITIES IN NORTH GARAGE
5. RESIDENTIAL CORE

MAJOR RENOVATIONS

6. STUDENT CENTER

SUPPORTING RENOVATIONS

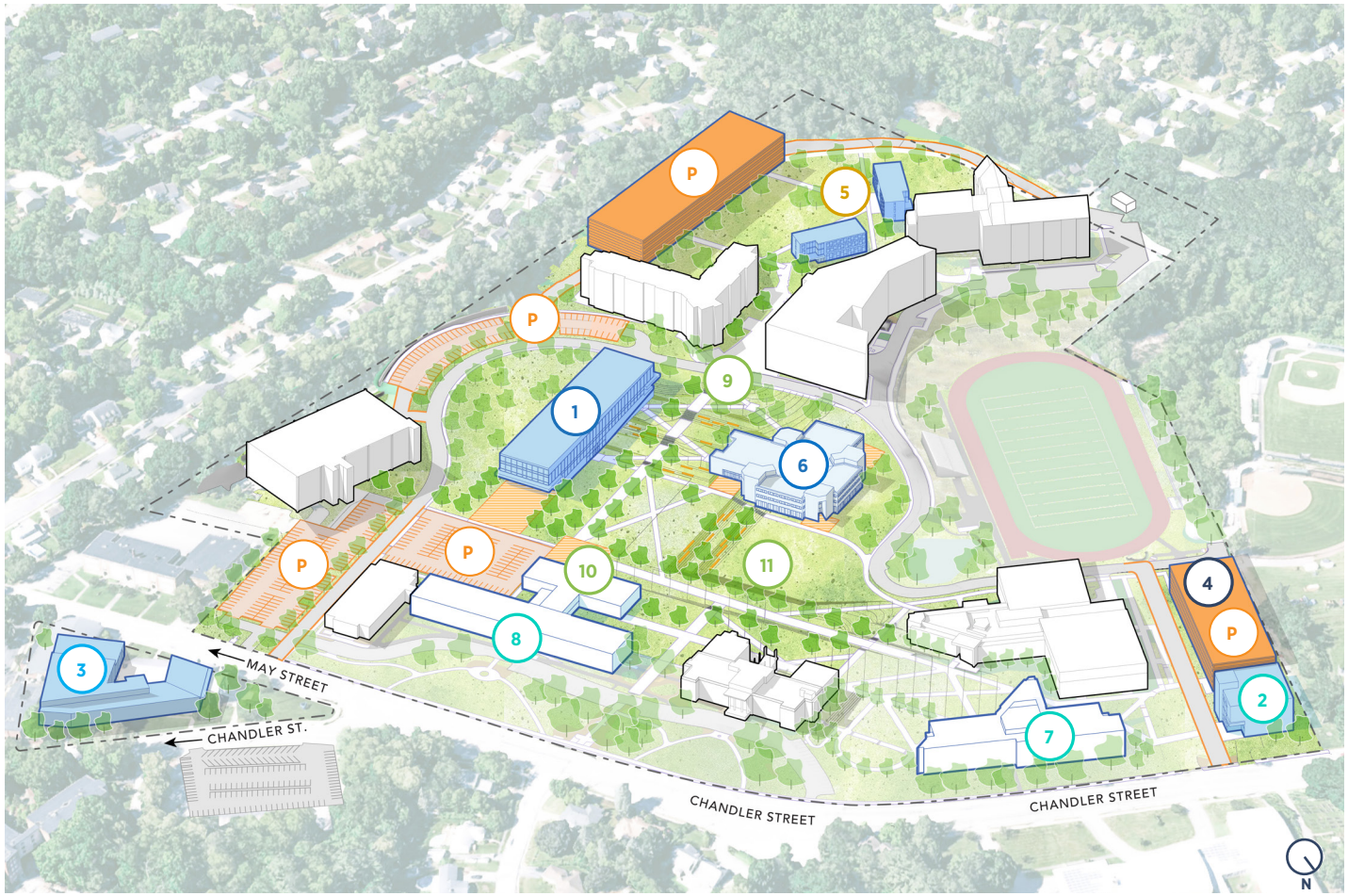
7. S&T RENOVATION
8. SULLIVAN RENOVATION

SITE AND LANDSCAPE

9. CENTRAL PATHWAY & AMPHITHEATER
10. SULLIVAN ENTRYWAY
11. EXPAND BINIENDA GREEN

PARKING

P. NEW PARKING



Appendix

01 02 03 04 05

A. **Ranking System**

B. **Impact Analysis**

RANKING SYSTEM

Points Earned

PROJECT GOALS *(1 Point Each, if applicable)*

Modernize the Student Center

Create a Learning Commons

Prioritize greening the Center of Campus

Create an accessible connection between Upper and Lower Campus

Optimize existing space and address space deficits

Deepen connections to the community

SWING SPACE OPPORTUNITY

Swing Space Needed *(-1 Point)*

Swing Space Offered *(+1 Point)*

FACILITIES CONDITIONS ASSESSMENT *(0-1, based on report)*

Building Condition Index - 10 Yr FCI

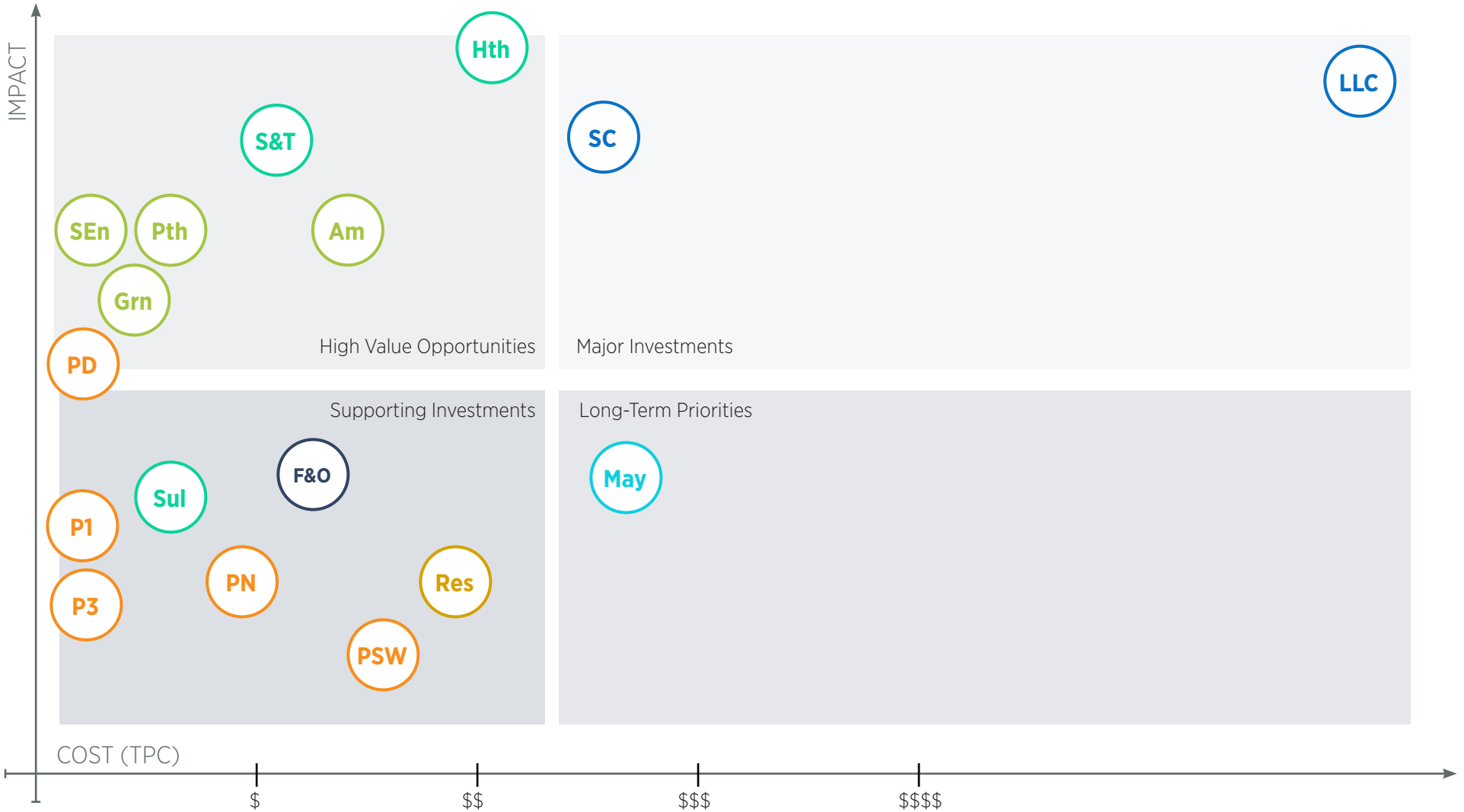
RANKING SYSTEM

Points Earned



IMPACT ANALYSIS

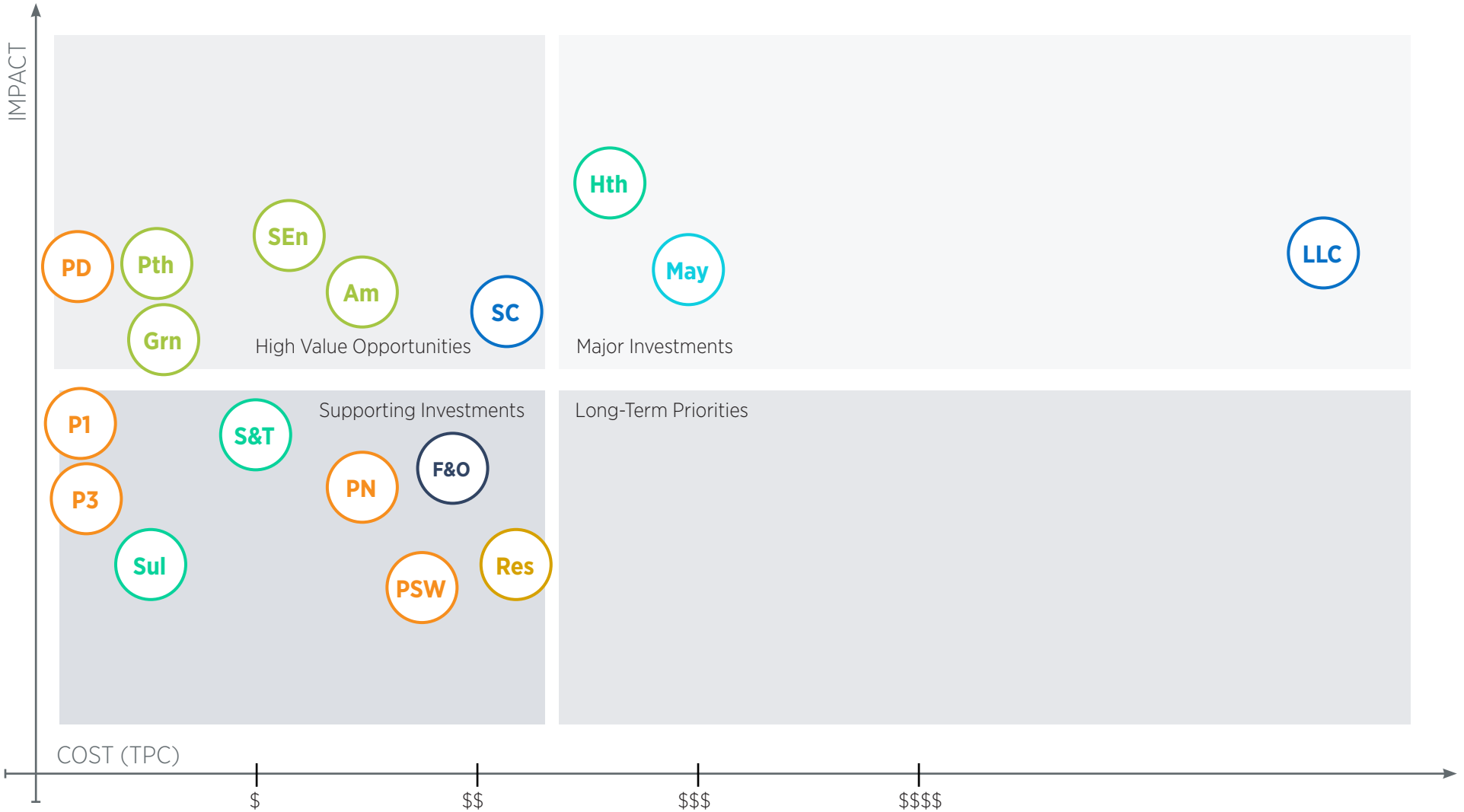
Relative Quadrants (Project Goals Only)



JONES ARCH

IMPACT ANALYSIS

Relative Quadrants (Swing Space & FCA Considered)



JONES ARCH

Worcester State University
Campus Master Plan



Mass. State Project No. WOR2501

Prepared For:
The Commonwealth of Massachusetts
The Division of Capital Asset Management
and Maintenance
One Ashburton Place
Boston, MA 02108

Worcester State University
486 Chandler Street
Worcester, MA 01602

Prepared By:
Jones Architecture
10 Derby Square
Salem, MA 01970



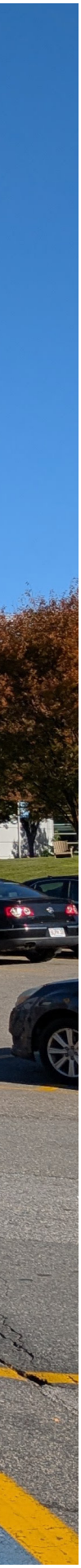


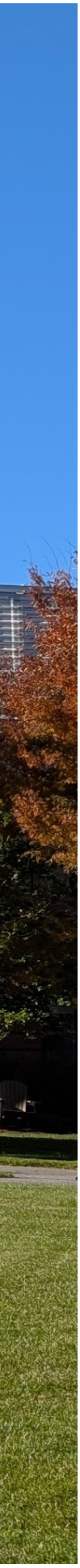
Table of Contents

Acknowledgments....5
1 Executive Summary....7
1.1 Introduction....9
1.2 Master Plan Intent....9
1.3 Goals and Design Drivers....11
1.4 Space Utilization....11
1.5 Preferred Alternate....13
1.6 Implementation Strategy....15
2. Project Context....17
2.1 Campus Location....19
2.2 Institutional Background....21
2.3 Enrollment Targets and Projections....23
2.4 Schedule Analysis....25
2.5 Space Needs....27
3. Existing Conditions....31
3.1 Campus Characteristics....33
3.2 Accessibility and Pedestrian Circulation....35
3.3 Lower Campus....37
3.4 Central Campus....39
3.5 Upper Campus....41
3.6 Auxiliary and Foundation Owned Buildings 43
4. Campus Engagement....45
5. Preferred Alternate....49
5.1 Master Plan Vision....49
5.2 Preferred Alternate....53
6. Impact Analysis....67
6.1 Methodology....69
6.2 Relative Impact....71
7. Implementation Plan....75
7.1 Approach....77
7.2 Timeline Options....79
8. Conclusion....81

Appendices

Task 1 Report
Task 2 Report
Task 3 Report
Presentations
Meeting Minutes





Acknowledgments

The preparation of this Master Plan has benefited from the involvement of many individuals and groups in the initial analysis, the discussion of issues, the development of plan recommendations and the drafting and review of the final recommendation.

Special thanks are extended to the Worcester State University faculty, staff, and students who participated in engagement sessions throughout the planning process. Their willingness to share their experiences, perspectives, and ideas provided valuable insight into the campus's existing conditions, challenges, and opportunities, helping to shape a Master Plan that reflects the needs and priorities of the University community.

Below are listed the key individuals and organizations that participated in the planning process. Any omission or errors are unintentional.

Division of Capital Asset Management

Sarah Felton, *Deputy Director for Planning*
Jennifer Burton, *Senior Project Manager*

Jones Architecture
Richard Jones, *President*
Sarah Tarbet, *Associate Principal and Project Manager*
Zara Silva-Landry, *Project Designer*

Crowley Cottrell Landscape Architecture
Naomi Cottrell, *Principal*
JP Charboneau, *Associate Principal*
Echo Chen, *Designer*

Rickes Associates
Monica Meyerhoff, *Principal*
Josh Barrett, *Data Analysis*

Worcester State University Campus Advisory Group
Barry Maloney, *President*
Kathleen Eichelroth, *VP of Administration & Finance, Executive Sponsor*
Jesilka Cortez, *Strategic Portfolio Officer, Planning Liason*

Dr. Ryan Forsythe, *VP of Enrollment Management*
Julie Kazarian, *VP of Student Affairs & Dean of Students*
Dr. Lois Wims, *Provost and VP of Academic Affairs*
Thomas McNamara, *VP of University Advancement*

Dr. Charlotte Haller, *Faculty member & MSCA Faculty Union Representative*
Deborah O'Neil, *AVP for Communications & Marketing*
Anisa Hoxha, *Director of Budget/Planning & Policy Development*

Worcester State University Facilities Team
Sandra Olson, *AVP for Facilities Operations & Planning*
Peter Fenuncio, *Director, Facilities Operations & Planning*

Worcester State University Foundation
Kevin Campbell, *Chair of Worcester State University Foundation Board*

Worcester State University Board of Trustees
Trustee David Tuttle
Trustee Darnell Dunn





Executive Summary


SULLIVAN ACADEMIC CENTER



1.1 Introduction

Worcester State University is a comprehensive public institution serving more than 5,200 undergraduate and graduate students from its 58-acre campus on the west side of Worcester. With approximately two-thirds of degree-seeking undergraduates commuting and many students and alumni living in Worcester County, the University is an important educational, cultural, and workforce resource for Central Massachusetts.

The compact campus contains strong academic programs, valued gathering spaces, and recognizable buildings, but its physical organization presents challenges. Significant grade changes divide the residential upper campus from the academic lower campus, while parking, service drives, and vehicular routes interrupt pedestrian movement. The Student Center and Learning Resource Center occupy a critical but constrained position at the campus center, while aging facilities, accessibility barriers, mismatched space inventories, and evolving teaching and student-support needs reinforce the need for long-term investment.

Developed through technical analysis, facilities assessment, campus engagement, and evaluation of planning alternatives, this Master Plan establishes a coordinated ten-year vision for addressing these conditions.

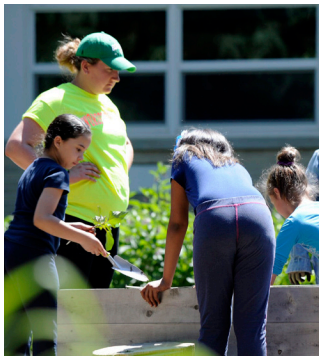
1.2 Master Plan Intent

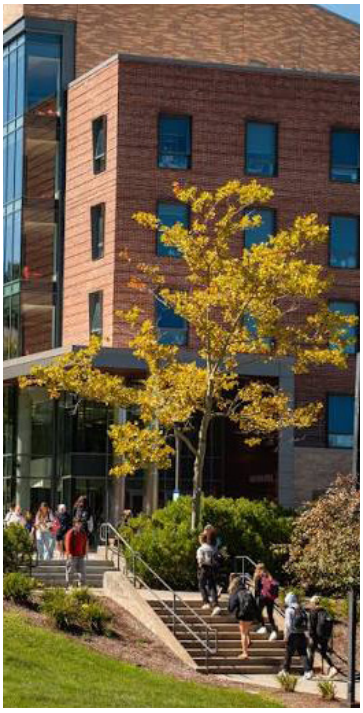
The Master Plan aligns Worcester State's physical campus with its academic mission, strategic priorities, and commitment to student success. It provides a framework for improving existing space, modernizing facilities, and directing new construction toward needs that cannot be met through renovation or reallocation. Rather than broad expansion, the plan emphasizes responsible stewardship through better scheduling, classroom right-sizing, strategic reuse, targeted investment, and coordination with accessibility, deferred maintenance, and decarbonization initiatives.

The plan provides a flexible framework that allows the University to respond to funding, enrollment, partnerships, program needs, and facility conditions while advancing a consistent long-term vision for buildings, landscape, circulation, parking, and operations.













Existing General Purpose Classrooms **66 Rooms**	Existing Classroom Square Footage **49,700 ASF**
Calculated Need at Current Enrollment **45 Rooms****	Calculated Square Footage Need **35,000 ASF**
Total Existing Campus Square Footage **469,216 ASF**	
Total Calculated Need* **451,000 ASF**	

*Non-residential assignable square footage

**Calculations are based on 70% occupancy, 70% hours of a 40-hour week, and current class enrollment numbers.

PHOTOS COURTESY OF WORCESTER STATE UNIVERSITY ARCHIVES FLICKR AND WORCESTER STATE UNIVERSITY FACEBOOK PAGES

1.3 Goals and Design Drivers

Seven project goals guided the development and evaluation of the Master Plan:

1. Strengthen community and belonging by creating a modern campus hub that supports connection, engagement, and student experience.
2. Advance student success by creating a Library Learning Commons aligned with contemporary teaching and learning models.
3. Enhance experiential learning through modern academic, clinical, research, and creative environments.
4. Create a student-focused green campus landscape that supports well-being, purposeful use, and safe connectivity.
5. Resolve circulation barriers between upper and lower campus to support safer and more accessible movement.
6. Address campus space needs by optimizing existing space and investing strategically where improvements provide the greatest value.
7. Deepen the University's connection to community, city, and state partners.

These goals reflect findings from the planning process and Worcester State's broader strategic direction. They also provided a consistent basis for comparing projects of different scales and types. Accessibility and pedestrian circulation emerged as especially significant design drivers. The campus's grade changes cannot be resolved through isolated ramps or small-scale improvements. Meaningful change requires coordinated landscape interventions, accessible pathways, and building entrances positioned at strategic elevations.

Campus engagement reinforced the importance of parking, food options, study and social space, accessible circulation, commuter support, and informal gathering. The process considered both widely shared priorities and less common responses affecting specific student groups, ensuring that the Preferred Alternate reflects the range of experiences present on campus.

1.4 Space Utilization

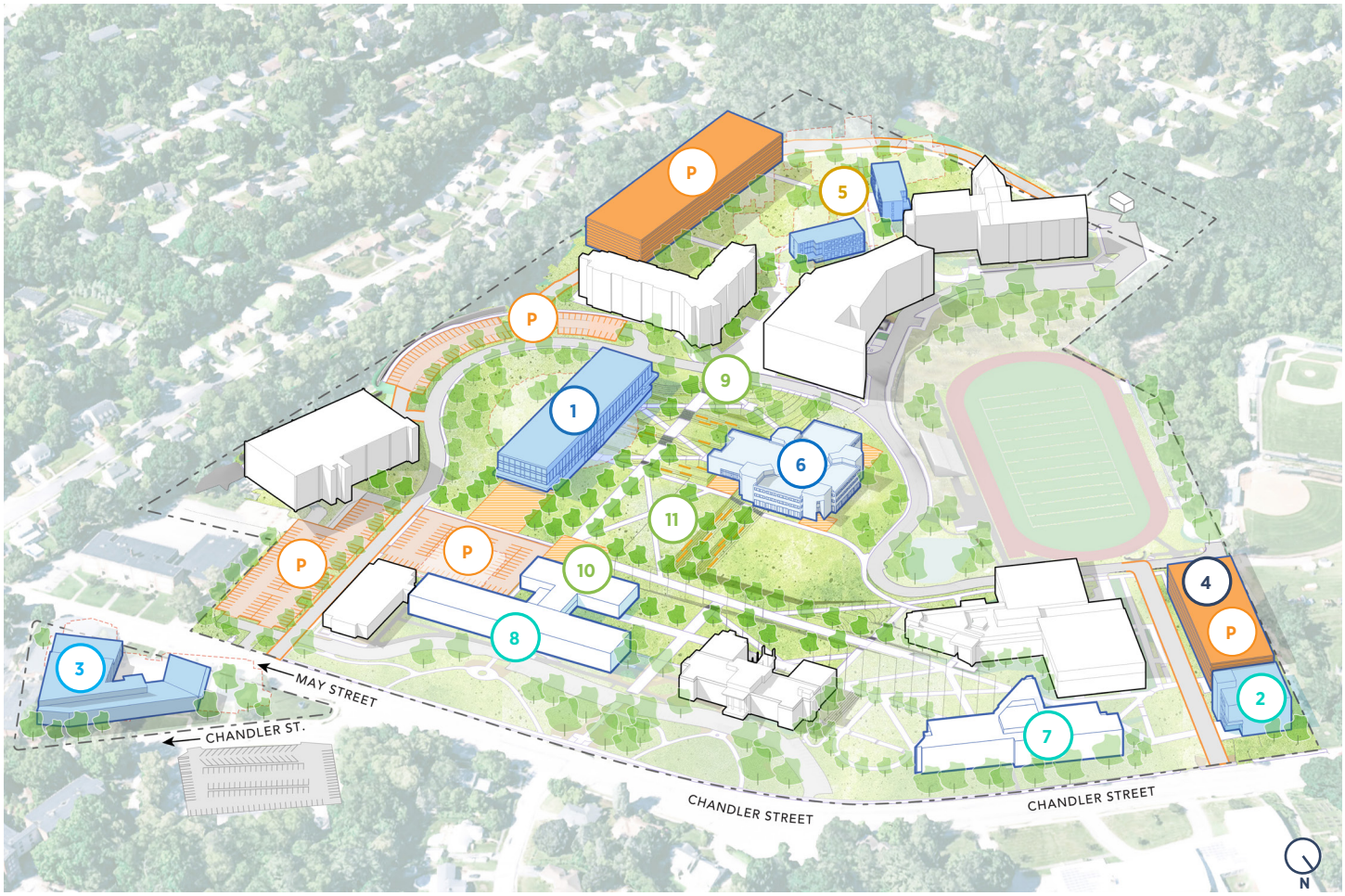
Overall, there is sufficient space on campus, but it must be reconfigured to meet current needs. At approximately 3,825 FTE, the University has about 469,000 assignable square feet of non-residential space, compared with a calculated need of 451,000. This close campus-wide alignment masks significant surpluses and deficits among individual space types.

General-purpose classrooms provide the clearest opportunity for realignment. The University has 66 classrooms totaling approximately 49,700 ASF, compared with a calculated need for 45 classrooms and 35,000 ASF. Seat occupancy and weekly utilization are below planning benchmarks. Distributing classes across a standard 40-hour instructional week, rather than the current compressed 24-hour window, would improve utilization, reduce peak congestion, and allow surplus classrooms to support higher-priority needs.

Office and administrative space presents another significant opportunity for realignment. The University currently has approximately 124,762 ASF compared with a calculated need of 89,010 ASF, a difference of nearly 35,750 ASF and the largest quantitative opportunity for optimization among the space categories analyzed. A detailed programming study is recommended to validate this opportunity, particularly within the Administration Building, and determine how space could be reconfigured to improve departmental adjacencies, expand shared meeting and hybrid-work environments, and advance the continued realignment of student-serving functions within the first-floor Academic Mall. The goal should be to use administrative space more efficiently while creating capacity to address needs elsewhere on campus.

Specialized instructional and campus support spaces present a different condition. Laboratories and supporting preparation, equipment, storage, and research areas are undersized, while facilities operations and storage are fragmented across temporary or inadequate locations. The Student Center and Learning Resource Center also require investment due to their physical conditions, configuration, and critical roles in student life and campus circulation. Collectively, these findings support redistribution and targeted investment rather than broad campus expansion.

PREFERRED ALTERNATE SITE AXONOMETRIC



LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

1. LIBRARY LEARNING COMMONS
2. HEALTH BUILDING
3. MAY STREET COMMUNITY HUB
4. OPERATIONS & FACILITIES IN NORTH GARAGE
5. RESIDENTIAL CORE

MAJOR RENOVATIONS

6. STUDENT CENTER

SUPPORTING RENOVATIONS

7. S&T RENOVATION
8. SULLIVAN RENOVATION

SITE AND LANDSCAPE

9. CENTRAL PATHWAY & AMPHITHEATER
10. SULLIVAN ENTRYWAY
11. EXPAND BINIENDA GREEN

PARKING

P. NEW PARKING

1.5 Preferred Alternate

The Preferred Alternate is organized around two complementary strategies: fortifying the center of campus and using that redefined center to connect the upper and lower campus. Investment is concentrated where it can improve student experience, accessibility, circulation, academic support, and campus identity simultaneously.

A fully renovated Student Center and new Library Learning Commons anchor the renewed campus core. The Student Center retains its established dining, event, student organization, and student-life functions while addressing accessibility and building-system deficiencies.

	Goal	Intervention
Student Success	Create library learning commons.	Library Learning Commons
	Modernize student hub.	Student Center
Support	Address Support Space deficit.	Facilities & Operations
Community	Deepen connection to community.	May Street
Academic	Expand experiential learning.	Health Building
	Right-size research and prep space.	S&T Renovation
	Right-size classroom space.	Sullivan Classroom Renovation
Student Life	Plan for future flexibility in bed types & quantities.	Residential Core.
Landscape	Resolving circulation barriers, supporting accessible movement.	Sullivan Entry
	Strengthen community & create a vibrant, modern campus hub.	Amphitheater
	Student-focused, green campus landscape.	Expand Campus Green
	Resolve circulation barriers, strengthen connection between Upper and Lower Campus.	Central Pathway
Parking	Create a student-focused, green campus, resolving circulation barriers, and supporting more accessible movement by removing parking in the campus core.	North Parking Garage
		Parking behind Residential Core
		Re-organizing Surface Lots

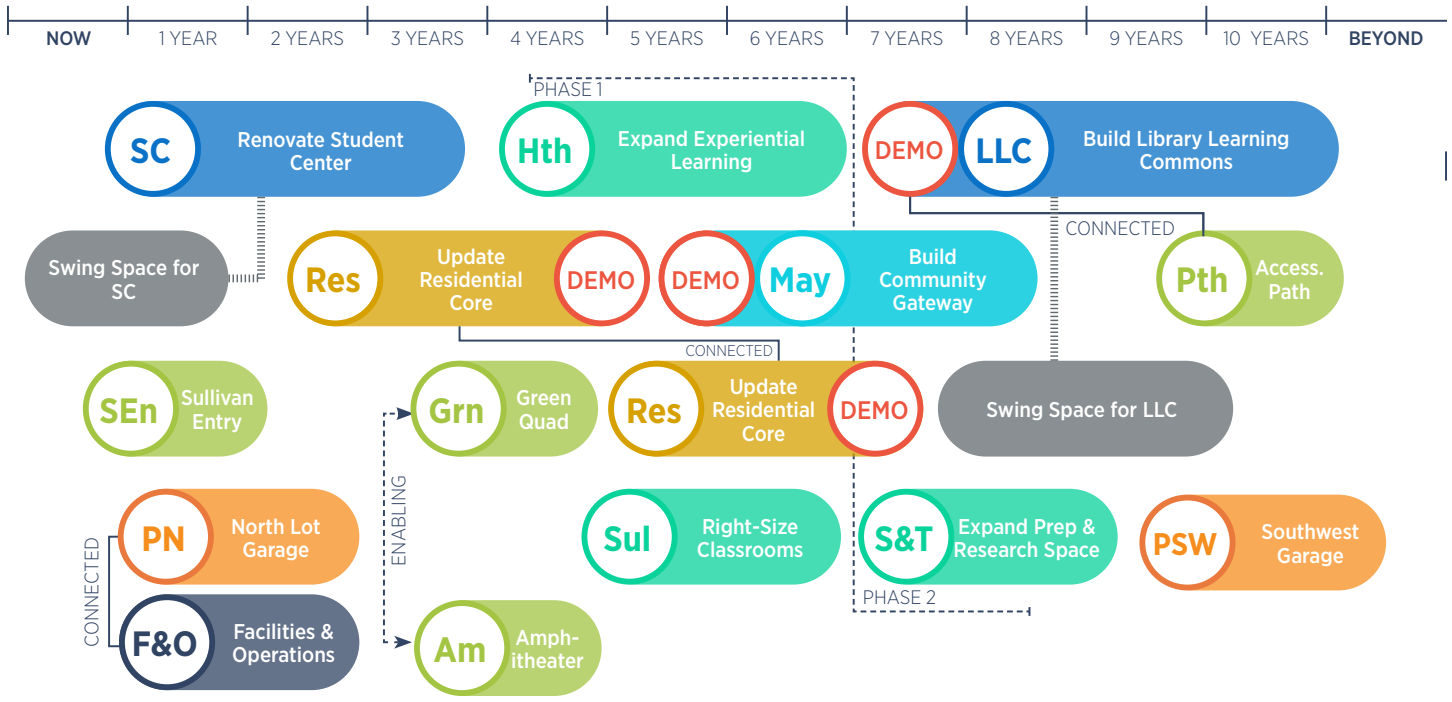
The Library Learning Commons replaces the existing Learning Resource Center with a flexible, linear building that accommodates contemporary library and study environments, academic and technology support, Communication and Media, Criminal Justice, and Visual and Performing Arts programs currently located at the remote Craft Center.

The buildings work together with an expanded campus green, central pathway, outdoor events space, and strategically located entrances to create an accessible connection across the campus's changing grades. These improvements replace vehicle-dominated areas with a clearer pedestrian network and establish a shared center for residential and commuter students.

Academic investment is focused on a new Health and Experiential Learning Building and a coordinated renovation of the Science and Technology Building. Together, these projects right-size health-science teaching and clinical spaces, expand research and laboratory support, and strengthen hands-on learning. Classroom right-sizing within Sullivan creates student and faculty collaboration space and capacity for offices displaced by future projects.

Supporting projects include a new Facilities and Operations Center integrated into the North Parking Garage, a community-facing hub at May Street, phased replacement of Chandler Village, and parking improvements that move vehicles away from the campus center. Final parking capacity should be confirm ed through a comprehensive demand study after academic scheduling changes are implemented.

IMPLEMENTATION PLAN A



1.6 Implementation Strategy

The implementation plan establishes a flexible ten-year framework informed by project cost benchmarks, the seven Master Plan goals, swing-space needs, and the 10-year Facility Condition Index. This analysis identifies High Value Opportunities, Major Investments, Supporting Investments, and Long-Term Priorities. Landscape and accessibility projects provide significant value at comparatively modest cost, while the Student Center, Library Learning Commons, and experiential-learning investments form the plan's major anchors. May Street also serves as an important enabling project because of its potential to provide swing space.

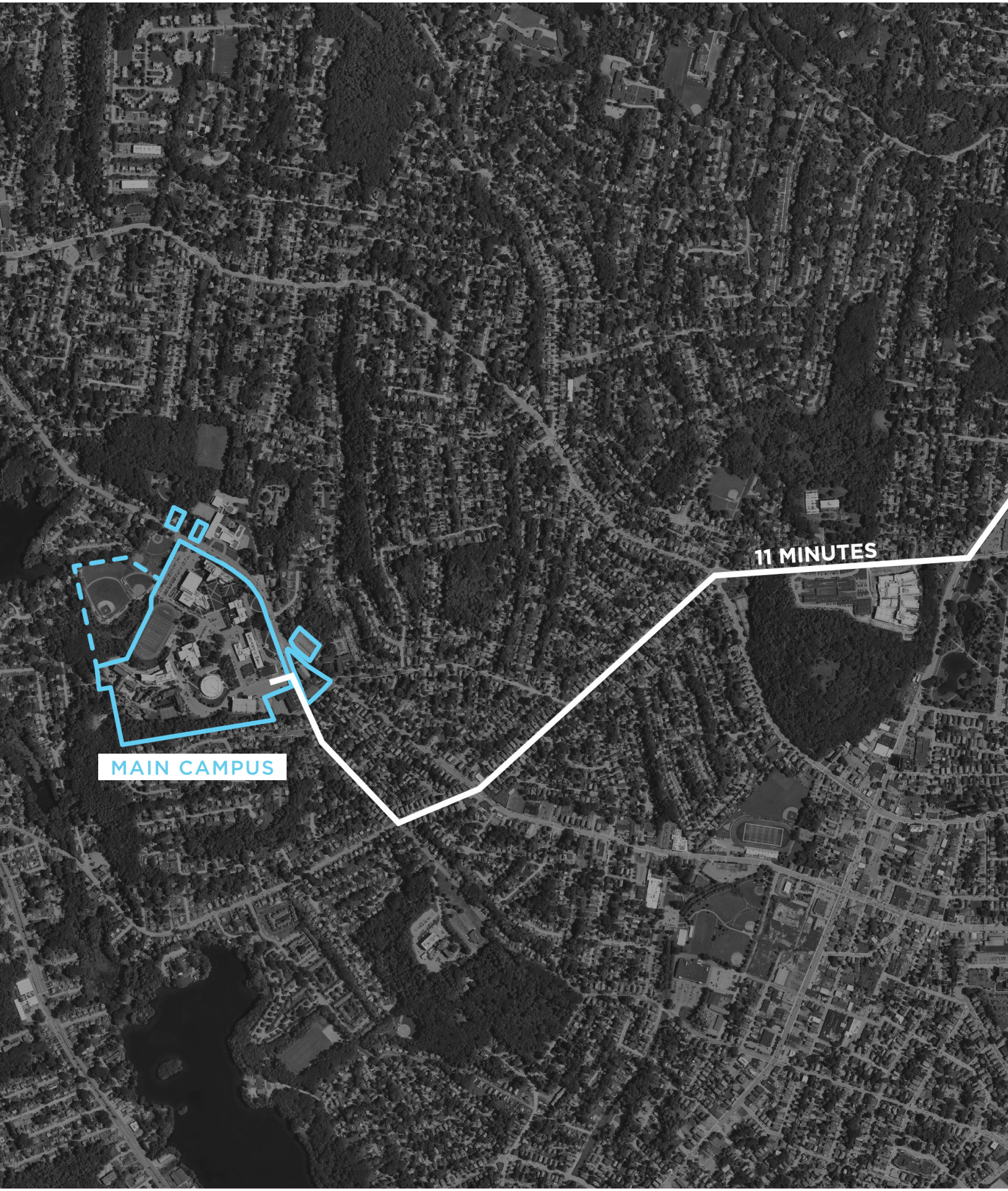
Three potential sequences demonstrate how implementation can begin with different priorities: Beginning at the Heart starts with the Student Center, Lead with Learning begins with the Health and Experiential Learning Building, and From Circle to Whole advances the Library Learning Commons first. Each carries different phasing, parking, and swing-space requirements but supports the same long-term vision.

Together, these conditions shaped a Master Plan focused on connecting the campus, aligning its physical resources with current needs, and establishing a flexible framework for future investment.





Project Context


11 MINUTES
MAIN CAMPUS



2.1 Campus Location

Worcester State University's 58-acre main campus is located on the residential west side of Worcester, west of downtown and northeast of Patch Reservoir. The compact campus is integrated into its surrounding neighborhood and is located near several municipal schools and recreational facilities, including Worcester Dual Language Magnet School, May Street School, Rockwood Field, and the Burkett Little League fields. The University also maintains access to a research property on Patch Reservoir through a long-term arrangement with the Greater Worcester Land Trust, supporting fieldwork in environmental science, biology, geography, and chemistry.

Chandler Street forms the northeastern edge of the main campus and serves as its primary public-facing corridor. Campus entrances are located along Chandler Street and near its intersections with May Street, which approaches the campus from the southeast. On-street parking is currently available along portions of both sides of Chandler Street.

The core campus is primarily owned by the Commonwealth of Massachusetts. The Worcester State Foundation owns or holds several strategic properties near the campus, including the former Temple Emanuel property at 280 May Street, the President's Residence, the Worcester State Teaching Garden at 531 Chandler Street, the Chandler Street house occupied by the Latino Education Institute, and the parking lot at 485 Chandler Street (Q-Lot). These properties extend the University's presence beyond the core campus and provide opportunities for community engagement, parking, future development, and institutional flexibility.

Worcester State also maintains an affiliation with the independently operated Worcester Center for Crafts at 25 Sagamore Road. Through this partnership, the Center provides studio space for Visual and Performing Arts courses, senior art students, and other University activities. The Sagamore Studios are approximately eleven minutes from the main campus, and Worcester State operates a dedicated student shuttle between the two locations.






LEARNING RESOURCE
CENTER








WELCOME


Learning
Resources
Center
Auditorium
MAY STREET

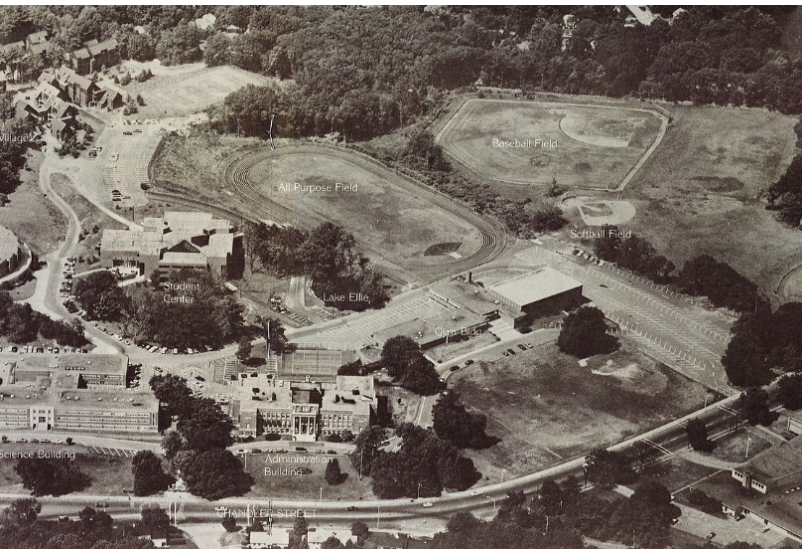












2.2 Institutional Background

Founded in 1874 as the Worcester Normal School, Worcester State University began as the fifth state-funded teacher-training school in Massachusetts. The institution moved to its present Chandler Street campus in 1932 and gradually expanded beyond teacher education, becoming a liberal arts and sciences college in 1963 and Worcester State University in 2010. Throughout this evolution, its public mission has remained centered on providing an accessible, high-quality education that prepares students to contribute to their professions and communities.

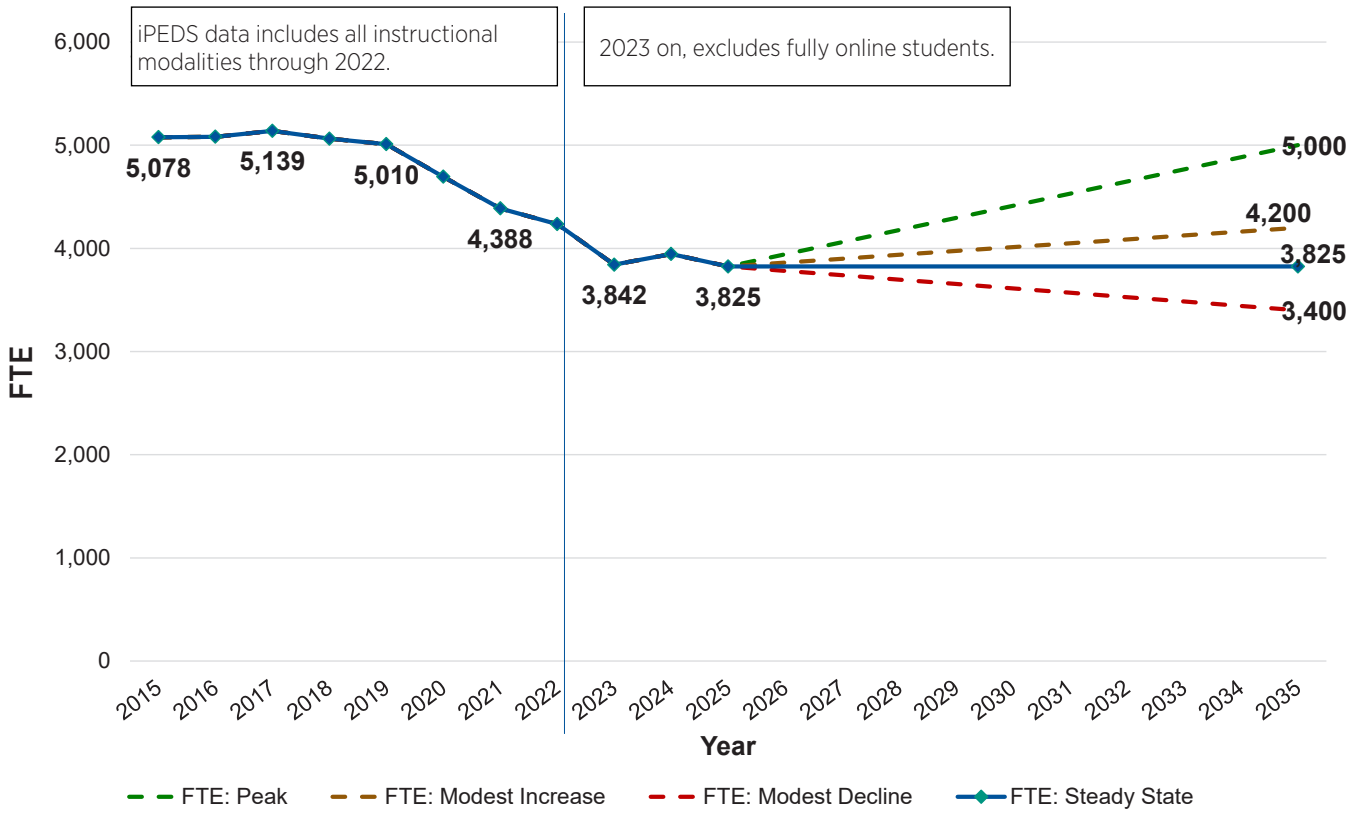
Today, Worcester State is a comprehensive public university serving 5,273 students, including 4,485 undergraduate and 788 graduate students. Its regional role is especially significant: 94 percent of degree-seeking undergraduates are Massachusetts residents, more than 3,600 students come from Worcester County, and nearly 23,000 alumni continue to live within the county. This deep regional presence positions the University as an important educational, cultural, and workforce resource for Worcester and Central Massachusetts.

Worcester State serves both residential and commuter populations, with approximately two-thirds of degree-seeking undergraduates commuting to campus. This pattern shapes the daily campus experience and reinforces the importance of convenient parking, accessible circulation, flexible study and gathering spaces, food options, and student services that support students throughout the day.

The University offers a broad academic portfolio rooted in the liberal arts and sciences and closely connected to regional workforce needs. Business Administration is its largest undergraduate major, followed by Psychology, Nursing, Criminal Justice, Biology, and Computer Science. Worcester State also maintains particular strength in the health professions through Nursing, Occupational Therapy, Public Health, and Speech-Language-Hearing Sciences, while Education remains an important part of its identity and historic mission. Together, these programs reinforce the University's role in preparing graduates for careers in health care, education, business, technology, human services, and public service throughout the region.

PHOTOS COURTESY OF WORCESTER STATE UNIVERSITY ARCHIVES
FLICKR AND WORCESTER STATE UNIVERSITY FACEBOOK PAGES

ENROLLMENT TRENDS AND PROJECTIONS

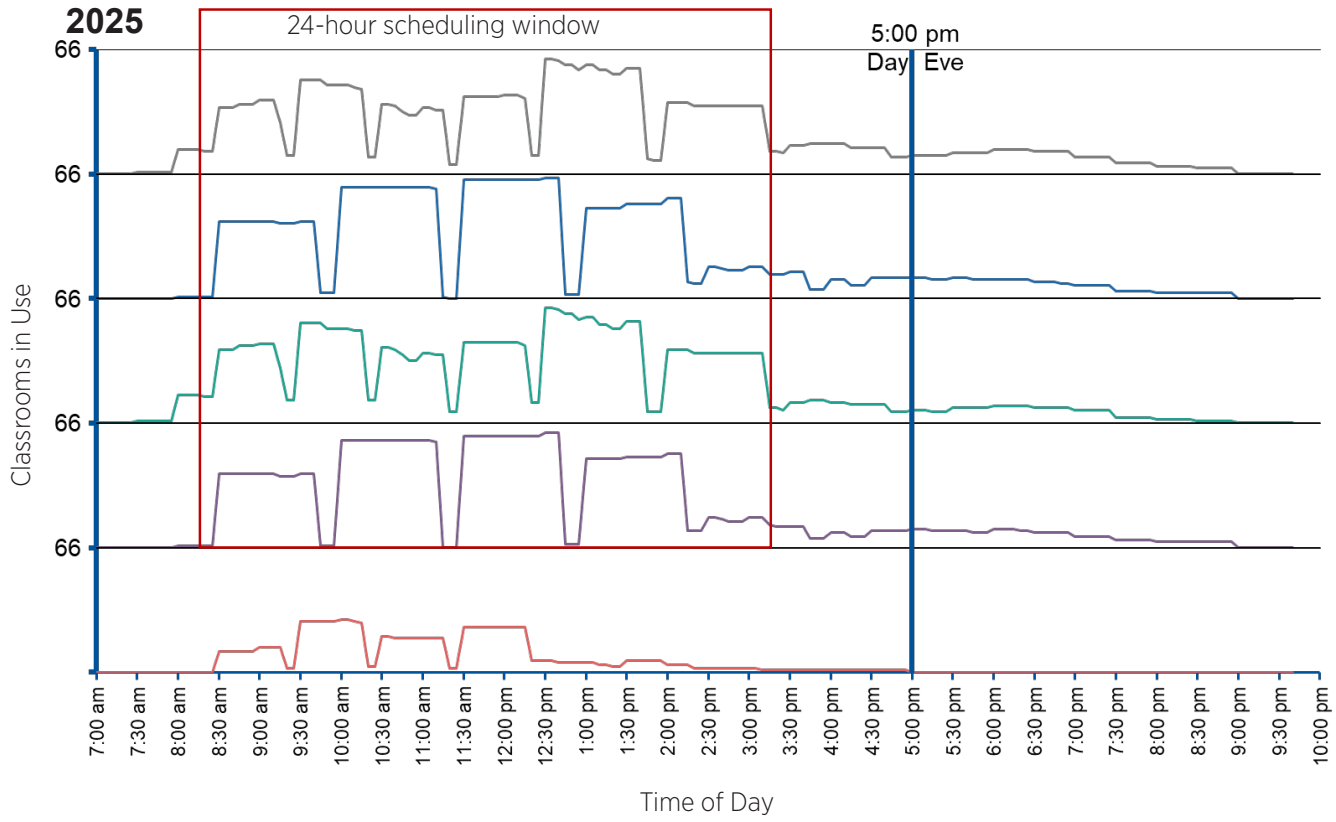


2.3 Enrollment Targets and Projections

On Campus enrollment peaked in 2016 at 6,100 headcount and 5,000 FTE and has steadily declined to 3,825 FTE in 2025. For purposes of the master plan, we studied space needs based on today's enrollment remaining steady. We did consider a few scenarios in concept, to make sure we are remaining flexible and not restricting growth if that were the scenario presented.

Another opportunity on campus with space implications is the formalization of hybrid administrative work practices that have been in place since the COVID-19 pandemic. At the time of this Master Plan, the University was developing formal workplace and space management policies to establish an institutional framework that balances existing hybrid practices with operational needs and the efficient use of space. These policies should be implemented in coordination so that work arrangements, onsite staffing needs, space utilization, workspace configuration, and shared meeting and collaboration space are considered together. Existing administrative office spaces lack sufficient shared meeting and collaboration areas to support successful hybrid work and should be studied prior to the rollout of the University's formal workplace framework.

NUMBER OF CLASSROOMS IN USE WEEKLY



2.4 Schedule Analysis

Classes are currently concentrated within a 24-hour weekly scheduling window, approximately six hours per day over four days, rather than distributed across a broader five-day instructional scheduling window (40-hour week). This compressed schedule creates intense peaks in classroom use, campus arrivals, and parking demand, even while classrooms and parking spaces may be available at other times. The result is an operational imbalance that makes both classroom and parking needs appear greater than they would under a more evenly distributed schedule.

The University should treat expansion to a fuller five-day instructional scheduling window (40-hour week) as a foundational recommendation of the master plan. Distributing classes more evenly across the day and week would provide the following benefits:

Student and Campus Access

- Support student retention and persistence efforts by reducing predictable parking and circulation barriers that may delay students in reaching class during peak periods.
- Improve campus access for employees by reducing peak-period competition for parking and congestion associated with concentrated class schedules.

Operational and Space Efficiency

- Reduce peak parking and circulation congestion during class changes.
- Improve weekly classroom utilization and seat occupancy.
- Allow underutilized classrooms to be consolidated or repurposed for other priorities.

Future Capacity

- Provide greater flexibility to accommodate future enrollment and program growth.

The master plan's classroom analysis and space recommendations are based on industry-standard utilization targets measured across a 40-hour week. The recommendations therefore assume that the University will actively pursue a broader and more balanced scheduling model. If the current 24-hour pattern continues, peak-time pressure will remain, and the University may not realize the space efficiencies identified in this plan. This assumption is critical when evaluating the plan's conclusions regarding classroom need, surplus space, and opportunities for reallocation.

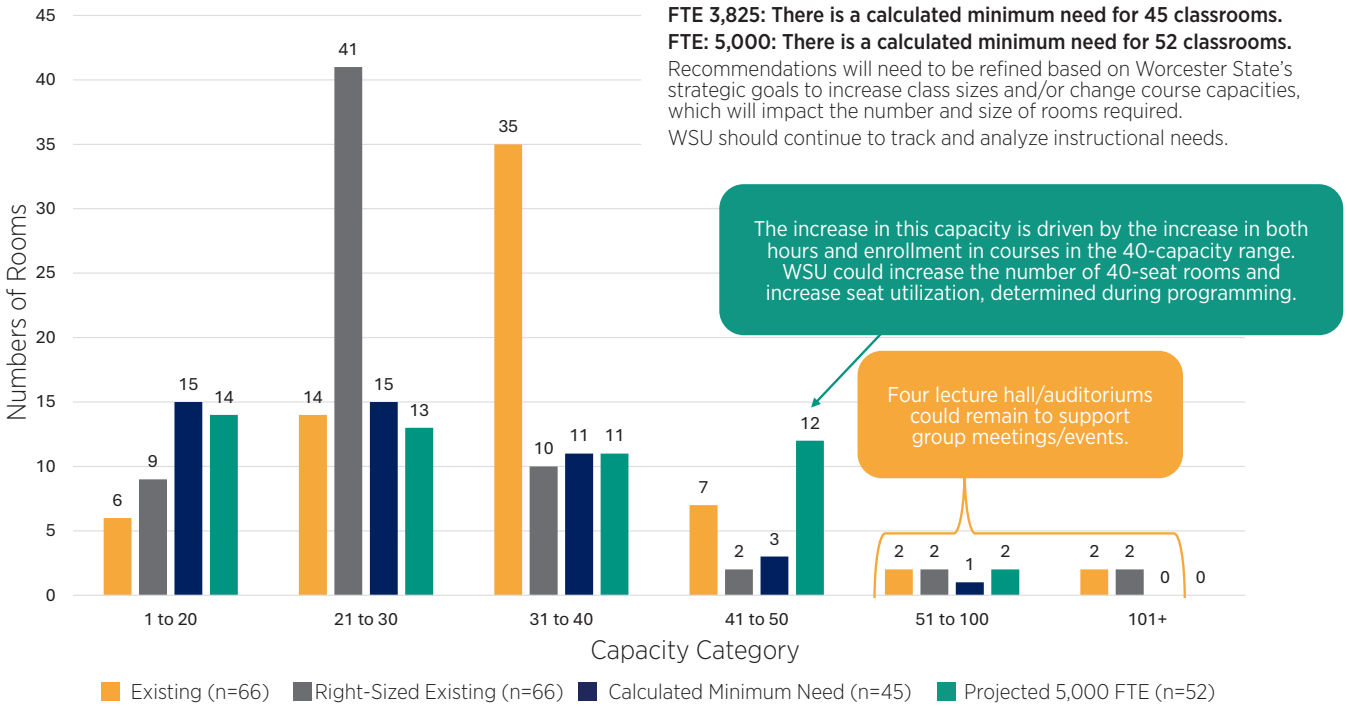
Parking constraints remain a significant concern, particularly around the Tuesday and Thursday 11:30 a.m. class change. While a comprehensive parking demand study was not included in the scope of this Master Plan, the University should address parking through a phased approach, beginning with implementing scheduling changes, monitoring their effect on peak parking occupancy, and then undertaking a holistic parking study to determine the appropriate long-term supply.

NUMBER OF STUDENTS ON CAMPUS PER WEEKLY SCHEDULE

Time	M	U	W	R	F
9:00 AM	1199	1132	1242	1029	424
9:15 AM	932	1154	951	1051	424
9:30 AM	1694	1204	1688	1101	895
9:45 AM	1694	287	1688	199	895
10:00 AM	1617	1706	1611	1603	910
10:15 AM	1570	1739	1566	1625	866
10:30 AM	1335	1719	1327	1625	639
10:45 AM	1232	1719	1224	1601	623
11:00 AM	1242	1693	1222	1567	609
11:15 AM	1191	172	1199	96	595
11:30 AM	1169	1735	1180	1676	664
11:45 AM	1139	1735	1150	1676	664
12:00 PM	1122	1735	1118	1676	664
12:15 PM	1078	1735	1074	1676	664
12:30 PM	1518	1757	1534	1684	186
12:45 PM	1431	78	1481	62	163
1:00 PM	1428	1292	1439	1226	197
1:15 PM	1367	1278	1356	1226	154
1:30 PM	1524	1358	1590	1360	309
1:45 PM	425	1373	423	1374	309
2:00 PM	1077	1399	1164	1377	264
2:15 PM	1077	262	1164	290	253
2:30 PM	1027	442	1096	482	219
2:45 PM	1027	416	1096	456	219
3:00 PM	1014	430	1096	470	219
3:15 PM	1014	430	1096	470	199
3:30 PM	533	343	543	383	168
3:45 PM	526	160	536	226	142
4:00 PM	506	160	536	221	142
4:15 PM	397	121	417	125	103
4:30 PM	244	164	229	163	27
4:45 PM	244	164	229	163	27
5:00 PM	165	140	144	151	0

The scheduling pattern demonstrates a significant concentration of classroom activity during mid-day periods, particularly on Tuesdays and Thursdays, with substantially lighter utilization during later afternoon and Friday periods. The 11:30 a.m. class change on Tuesdays and Thursdays creates the greatest pressure on general-use classrooms and parking. Redistributing some courses to lighter scheduling periods, including earlier morning periods, later afternoon periods, and Fridays, could reduce these peak demands and improve use of existing campus capacity.

CLASSROOM NEED - EXISTING, CALCULATED, RIGHT SIZED, AND PROJECTED



FTE 3,825: There is a calculated minimum need for 45 classrooms.
FTE: 5,000: There is a calculated minimum need for 52 classrooms.
Recommendations will need to be refined based on Worcester State's strategic goals to increase class sizes and/or change course capacities, which will impact the number and size of rooms required.
WSU should continue to track and analyze instructional needs.











2.5 Space Needs

The primary space challenge at Worcester State University is not the overall quantity of space, but how that space is configured, located, and performing. At the current enrollment of approximately 3,825 FTE, the University has approximately 469,000 assignable square feet of non-residential space, compared with a calculated need of approximately 451,000 assignable square feet. This relatively close alignment at the campus-wide level masks significant surpluses and deficits among individual space types. In many cases, existing space is not the right size, quality, configuration, or location to effectively support current programs, contemporary teaching practices, student needs, and campus operations.

General-purpose classrooms represent the clearest opportunity for realignment. The University currently has 66 classrooms totaling approximately 49,700 assignable square feet, compared with a calculated need of approximately 45 classrooms and 35,000 assignable square feet at current enrollment. Average seat occupancy is approximately 55 percent and weekly room utilization is approximately 47 percent, both below the 70 percent planning benchmark. Course enrollment patterns do not fully utilize existing classroom capacity, with nearly half of courses enrolling fewer than 20 students despite many classrooms accommodating 31 to 40 students. Increasing class sizes and adjusting course capacities would improve utilization and help determine future classroom needs.

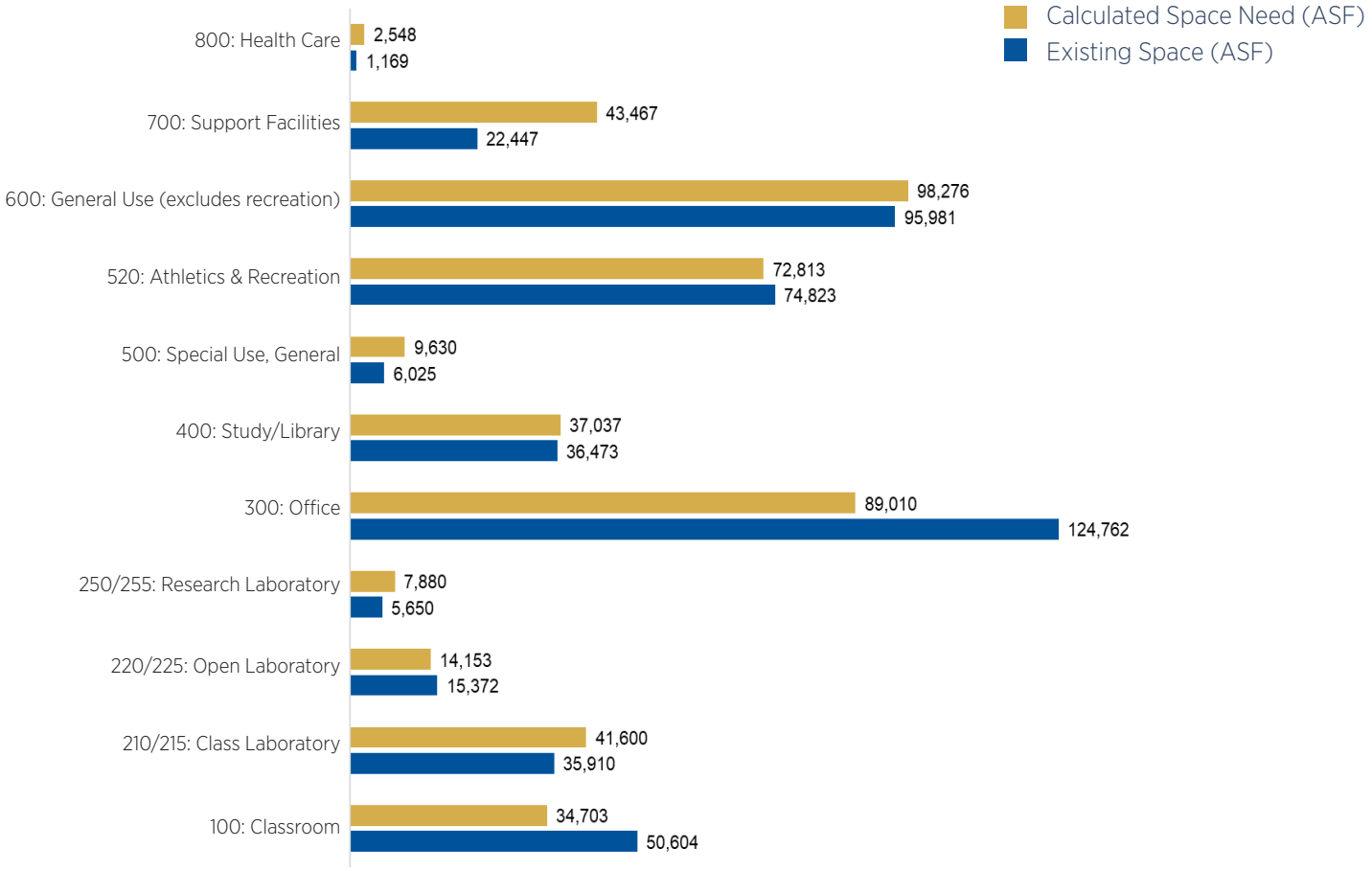
The ability to realize this classroom surplus depends in part on distributing courses more evenly across a 40-hour instructional week. With improved scheduling and a better alignment between room size and course enrollment, instructional activity can be consolidated into fewer, better-configured classrooms. This would allow under-performing rooms to be repurposed for student support, collaboration, specialized instruction, and other priority needs. Even at a future enrollment of approximately 5,000 FTE, the calculated need increases to only about 52 classrooms, which remains below the University's existing inventory.

Specialized instructional space presents a different condition. Although the University has 31 teaching laboratories compared with a calculated current need of 27, the existing labs and their support areas are undersized. Approximately 35,900 assignable square feet is currently available, compared with a calculated need of approximately 41,600 assignable square feet. Labs are generally well occupied when scheduled, but their functionality is constrained by inadequate layouts, equipment space, preparation areas, refrigeration, storage, and other specialized support functions. Targeted expansion and reconfiguration are particularly important for Nursing, Occupational Therapy, Speech-Language-Hearing, Microbiology, Earth, Environment and Physics, and research within Biology and Chemistry.

The Learning Resource Center and Student Center are especially critical to understanding the University's space needs. Located together at the heart of campus, these buildings are the workhorses of student support and student life. They also form the physical center of the University, connecting the upper and lower campus and shaping how students move between academic, residential, and recreational areas. Their future is therefore central not only to the distribution of program space, but also to accessibility, circulation, campus identity, and the overall student experience.

The limitations of these buildings are not fully reflected through space utilization data alone. The University's decarbonization analysis and facilities condition assessments identify building systems and physical conditions that are increasingly limiting their ability to support the modern student. Addressing these facilities requires consideration of adaptability, accessibility, and long-term building performance in addition to the amount of space they contain.

ORDER OF MAGNITUDE SPACE NEED - EXISTING AND CALCULATED













The Learning Resource Center is constrained by its circular footprint and central core, which limit efficient planning, wayfinding, renovation, and reuse. These characteristics make it difficult to introduce the group study rooms, collaboration areas, technology-enabled spaces, instructional support services, and other functions expected of a contemporary learning commons. Its future will require a careful assessment of whether comprehensive renovation can overcome these inherent limitations or whether replacement would provide greater long-term value.

The Student Center is less constrained by its geometry, but faces more significant mechanical, accessibility, and deferred maintenance challenges. These underlying conditions must be addressed as part of any future redevelopment rather than treating the project solely as an interior reprogramming effort. Renovation or replacement should create a modern and accessible center for student life with flexible meeting, lounge, dining, collaboration, and large-event spaces.

Office and administrative space presents the largest quantitative opportunity for optimization and reconfiguration. The University currently has approximately 124,762 assignable square feet of office space compared with a calculated need of approximately 89,010 assignable square feet, a difference of nearly 35,750 assignable square feet. This figure does not represent a single block of surplus space that is immediately available for reassignment. Rather, it reflects the cumulative effect of smaller inefficiencies across the campus, including office size and configuration, fragmented departmental locations, limited shared resources, and important storage, meeting, and support functions accommodated inefficiently.

Determining how much space could reasonably be recovered requires a detailed programming and occupancy study, which was beyond the scope of this Master Plan. A future study should focus particularly on the Administration Building and evaluate staffing, anticipated growth, hybrid-work practices, peak occupancy, departmental adjacencies, privacy, student-facing access, storage, and shared support needs. It should also test opportunities to consolidate departments, right-size offices, expand shared meeting and collaboration space, and create touchdown workspaces for hybrid and adjunct faculty. Reprogramming could improve the organization of administrative and student-facing services while creating capacity for departments displaced by future projects, and other priority functions. The objective is not simply to reduce office area, but to convert cumulative inefficiencies into better-functioning workplaces and flexible institutional capacity.

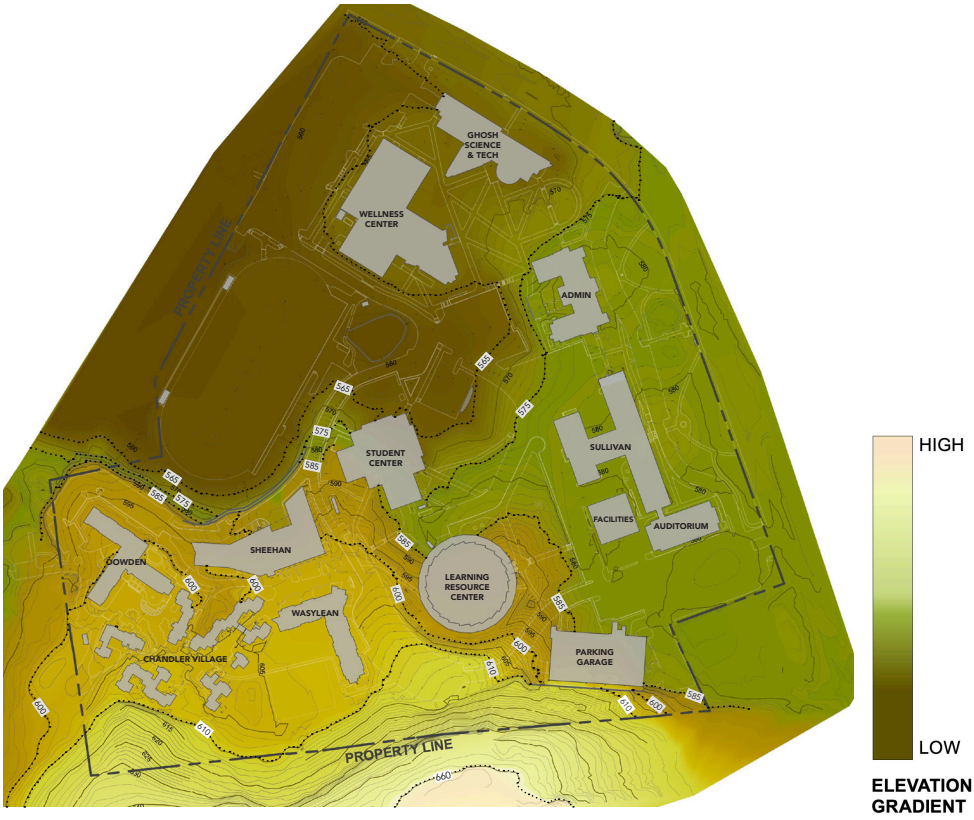
Campus operations and support functions present a different condition. Facilities, storage, mail, printing, non-student-facing Information Technology, University Police, and related services are fragmented across undersized, temporary, or poorly located spaces. Consolidating appropriate functions within a centralized Facilities and Operations building would address this deficit while releasing space in academic and student-facing facilities for higher-priority uses. This operational realignment should be coordinated with the Administration Building programming study and the broader implementation sequence.

Collectively, these findings support a strategy of redistribution and targeted investment rather than broad campus expansion. Surplus classrooms and inefficient office areas should be consolidated and repurposed, while investment is directed toward specialized academic environments, student support, learning commons functions, student life, and campus operations. New construction should focus on needs that cannot be effectively accommodated through renovation or reallocation.





Existing Conditions



Existing Site Elevation

The campus is organized across three primary elevations, with residential buildings at the upper level, academic buildings at the mid-campus level, and athletics and wellness functions at the lower level. The Student Center and Learning Resource Center span multiple grades and help connect these areas. Approximately 15 to 20 feet of elevation change between the upper and mid-campus levels significantly influences circulation, building access, and the accessibility of routes through the campus center.

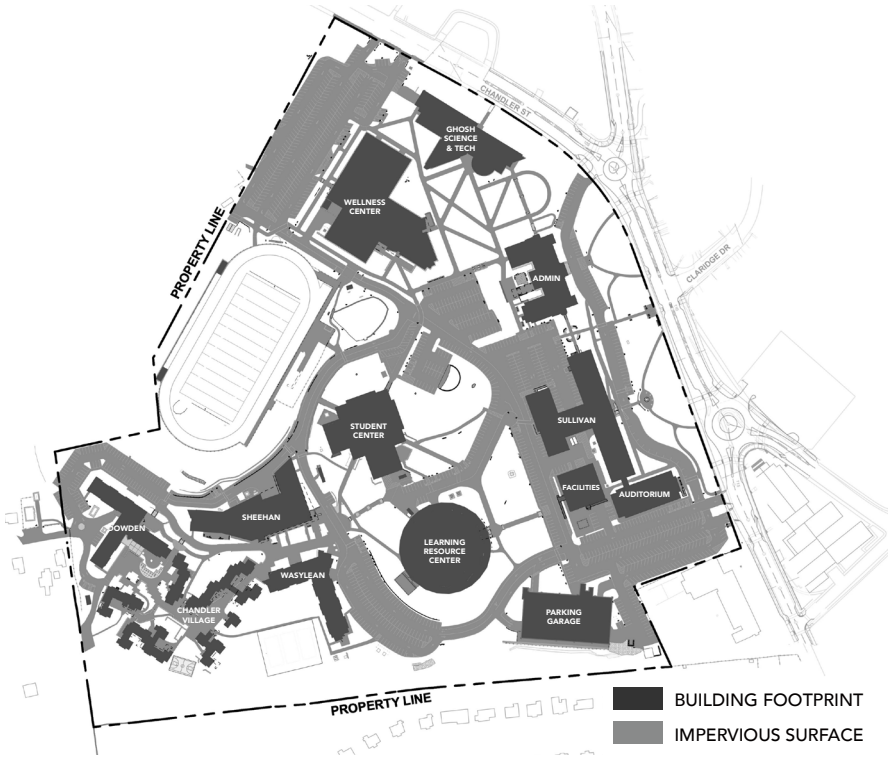


Existing Building Types

Campus uses are generally organized in clear programmatic bands. Academic and administrative buildings define the Chandler Street edge and establish the University's most visible public face. Student life and support functions occupy the central portion of campus, with residential uses clustered at the upper level and athletics and wellness uses located toward the lower campus. This organization gives each area a recognizable identity, while placing added importance on the central student-life zone as the primary connection among them.

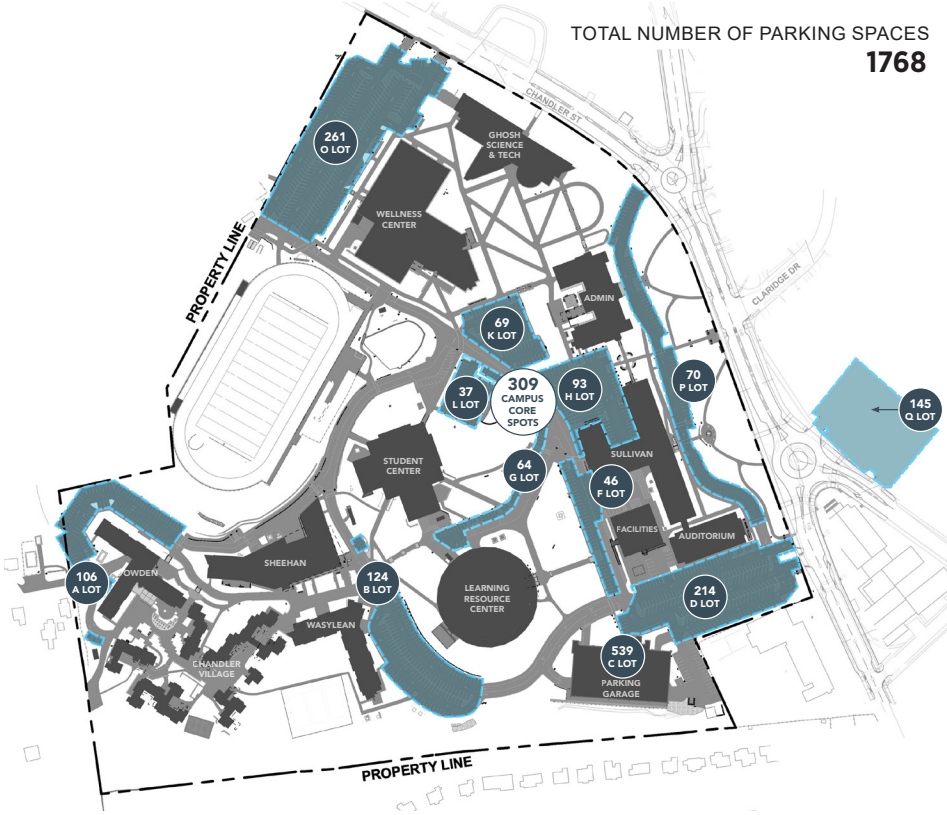
3.1 Campus Characteristics

Worcester State is a compact, layered campus shaped by its topography, program organization, and transportation infrastructure. The Learning Resource Center and Student Center sit at the seam between distinct campus zones, forming the functional and physical center of campus.



Existing Impervious Surfaces

Parking lots, roadways, service drives, and building footprints account for a substantial portion of the campus ground plane. Large parking areas surround many buildings and are particularly dominant on the lower campus. Roadways and paved areas frequently separate destinations, reinforcing a vehicle-oriented environment and limiting the continuity, comfort, and visual quality of the pedestrian experience.



Existing Parking

The campus contains approximately 1,770 parking spaces distributed among surface lots and the existing parking garage. Approximately 309 spaces are located within the campus core, where they are closely integrated with buildings, pedestrian routes, and service access. This distribution provides an important baseline for evaluating future projects, particularly improvements within the central campus that may displace parking or alter how vehicles move through the site.

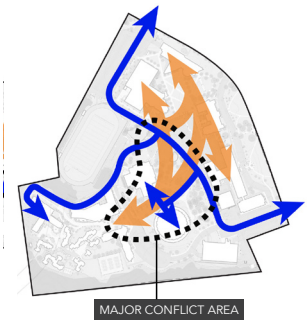


PEDESTRIAN

- HIGH-INTENSITY ROUTES
- MODERATE-INTENSITY ROUTES
- LOW-INTENSITY ROUTES
- ELEVATOR ACCESS

VEHICULAR

- CAR CIRCULATION
- SERVICE TRUCK CIRCULATION
- PARKING LOT
- LOADING / SERVICE DOCK





- ADA ROUTES
  (PEDESTRIAN PAVED PATH OR STRIPED CROSSINGS)
- ELEVATOR ACCESS
- BUILDING ADA ENTRANCE
- ACCESSIBLE PARKING SPACE CONNECTED TO ADA ROUTES
- ACCESSIBLE PARKING SPACE DISCONNECTED FROM ADA ROUTES

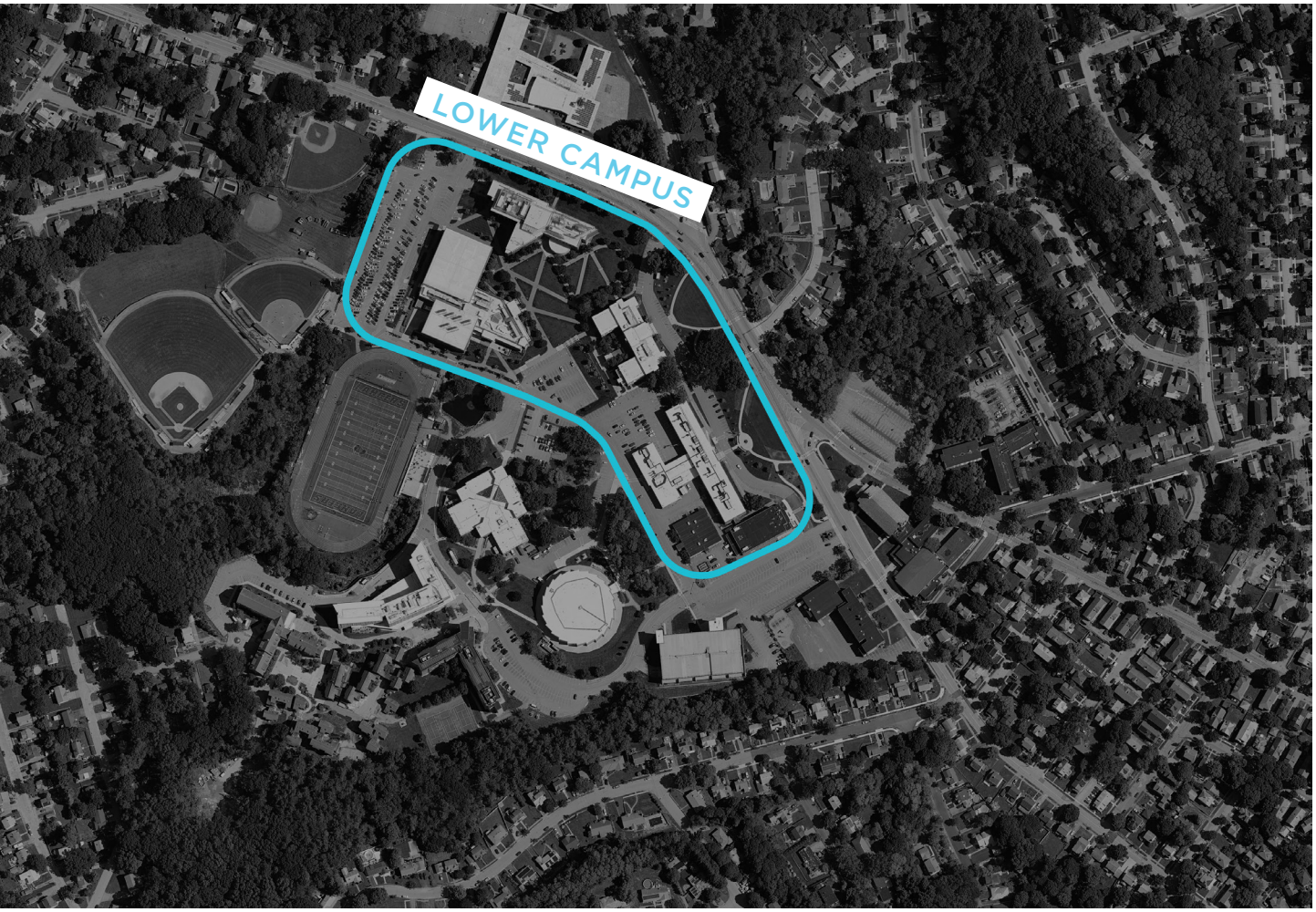
3.6 Accessibility and Pedestrian Circulation

Existing Circulation

Pedestrian, vehicular, and service routes converge within the area between the Learning Resource Center and Student Center, where loading areas, service drives, parking access, and high-volume pedestrian routes overlap. Student engagement revealed that the circulation challenge extends beyond simply moving from one destination to another. Students described having to walk through parking lots or in front of vehicles to reach classes, and some destinations were perceived as being farther away than their actual geographic distance would suggest. The discomfort and indirectness associated with these routes may contribute to this perception. Circulation also reinforces a broader division within the campus experience, with residential life concentrated on the upper campus and commuter arrivals and daily activity focused more heavily on the lower campus. Improving circulation therefore became a major driver of the master plan, with an emphasis on separating pedestrians from vehicles, relocating service and parking activity toward the campus perimeter, and creating clearer connections that bring residential and commuter students into a shared campus core.

Existing Accessibility

Changes in elevation of approximately 10 to 20 feet create fundamental accessibility barriers between the upper and lower campus. As the planning process advanced, the team determined that these conditions could not be resolved through isolated ramps, pathways, or other small-scale improvements. Any meaningful solution would require coordinated changes to the landscape, circulation network, and adjacent buildings. Major landscape enhancements must work together with strategically located building entrances, elevators, and internal circulation routes that meet the campus at different elevations. This realization became a defining driver of the master plan alternatives, each of which incorporated ways for existing or new buildings could help bridge the grade change or how a new landscaped route could establish an accessible exterior connection. Accessibility was therefore treated not as an individual compliance project, but as an organizing principle for reconnecting the campus and creating a more equitable experience for all users.





Helen G. Shaughnessy Administration Building

The Administration Building serves as the University's formal front door for prospective and new students. Its first-floor Academic Mall consolidates student-facing services, such as Financial Aid and the Registrar's Office. It also houses Graduate and Continuing Education, the President's Office, Communications and Marketing, Institutional Advancement, and other administrative departments. While the building plays an important institutional and welcoming role, its entrances and approaches are less directly connected to the campus's primary pedestrian routes.

3.2 Lower Campus

Lower campus forms Worcester State's most public-facing edge along Chandler Street, with a concentration of academic, administrative, athletic, and operational functions. Several major buildings frame Binienda Green, creating one of the campus's strongest relationships between buildings and open space. The area also receives many prospective students, visitors, and commuters, but parking, roadways, and dispersed entrances limit pedestrian continuity and weaken the sense of a unified campus gateway.



Sullivan Academic Center

Sullivan is the University's primary instructional center and most heavily used classroom building. It contains a large share of general-purpose classrooms, faculty and department offices, a small student commons, and two auditoriums supporting lectures, performances, ceremonies, conferences, and community events. Surrounded by parking on three sides, the building has a vehicle-dominated setting that limits pedestrian connections to the rest of campus. As a major academic anchor, Sullivan is central to daily campus life, but its classrooms, student spaces, and building systems require modernization to support contemporary teaching and learning.



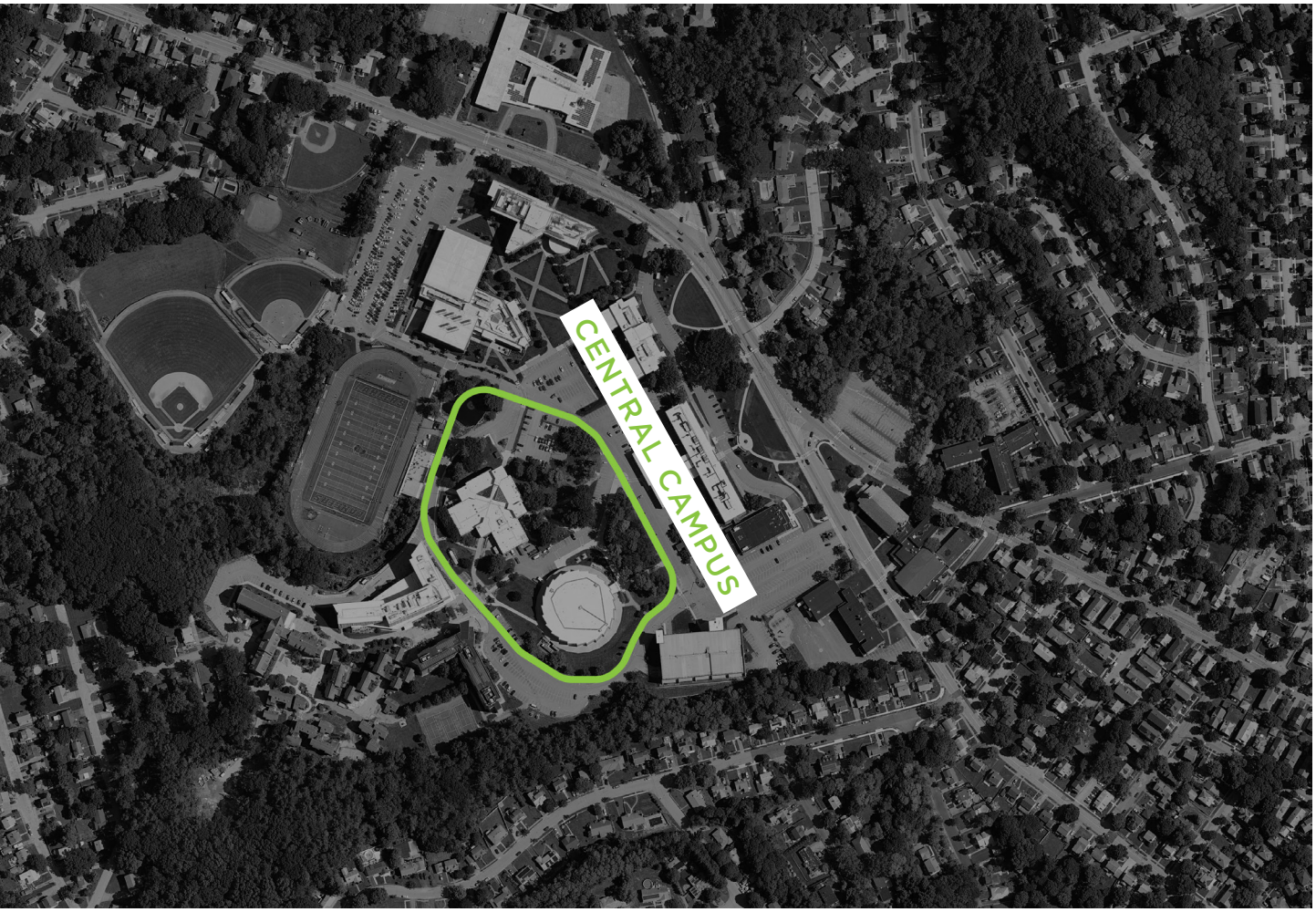
Ghosh Science and Technology Center

Opened in 2000, the Ghosh Science and Technology Center is the University's primary hub for science, health, technology, and experiential learning. It includes laboratories, faculty offices, seminar and discussion spaces, a multimedia classroom, the Aisiku STEM Center, and the Mary Cosgrove Dolphin Art Gallery. The concentration of related programs and informal student spaces creates a strong sense of identity, with engagement findings showing a particular "gravity" around Ghosh. Located at the northern academic edge near Chandler Street, the building also serves as an important campus gateway and helps frame Binienda Green.



Wellness Center

Opened in 2016, the Wellness Center is the newest major purpose-built facility on campus and serves as a hub for recreation, athletics, fitness, special events, and student-athlete activity. A café provides limited food service, while the outdoor terrace overlooking Binienda Green is heavily used in favorable weather. Located near the athletic fields, the building defines the northern edge of the green and connects indoor recreation with the campus landscape. Students consistently identified it as a valued destination for its natural light, amenities, and sense of community.





Student Center

Opened in 1978, the Student Center is the hub of student life for both resident and commuter students. It includes event and meeting spaces, lounges, student organization offices, Student Involvement and Leadership Development, Student Affairs and event-services offices, and two dining areas. Entrances at both upper and lower campus levels also make it an important connection through the campus core, serving as both a destination and circulation route.

The building's central role is increasingly challenged by its physical condition. The loading dock and service area conflict with a heavily traveled pedestrian route, while deferred maintenance, aging HVAC and building systems, and accessibility deficiencies create ongoing challenges. Any major renovation or redevelopment must therefore address building systems, universal accessibility, service access, pedestrian circulation, and the Student Center's role in connecting the upper and lower campus.

3.3 Central Campus

Central campus is anchored by the Student Center and Learning Resource Center, which form the physical and programmatic link between the lower academic and upper residential campus. Their entrances and internal circulation help navigate the grade change, but service areas, vehicular routes, and incomplete accessible connections create major circulation challenges. Despite containing only two buildings, this area has an out-sized impact on campus identity, accessibility, student life, and connections between resident and commuter students.

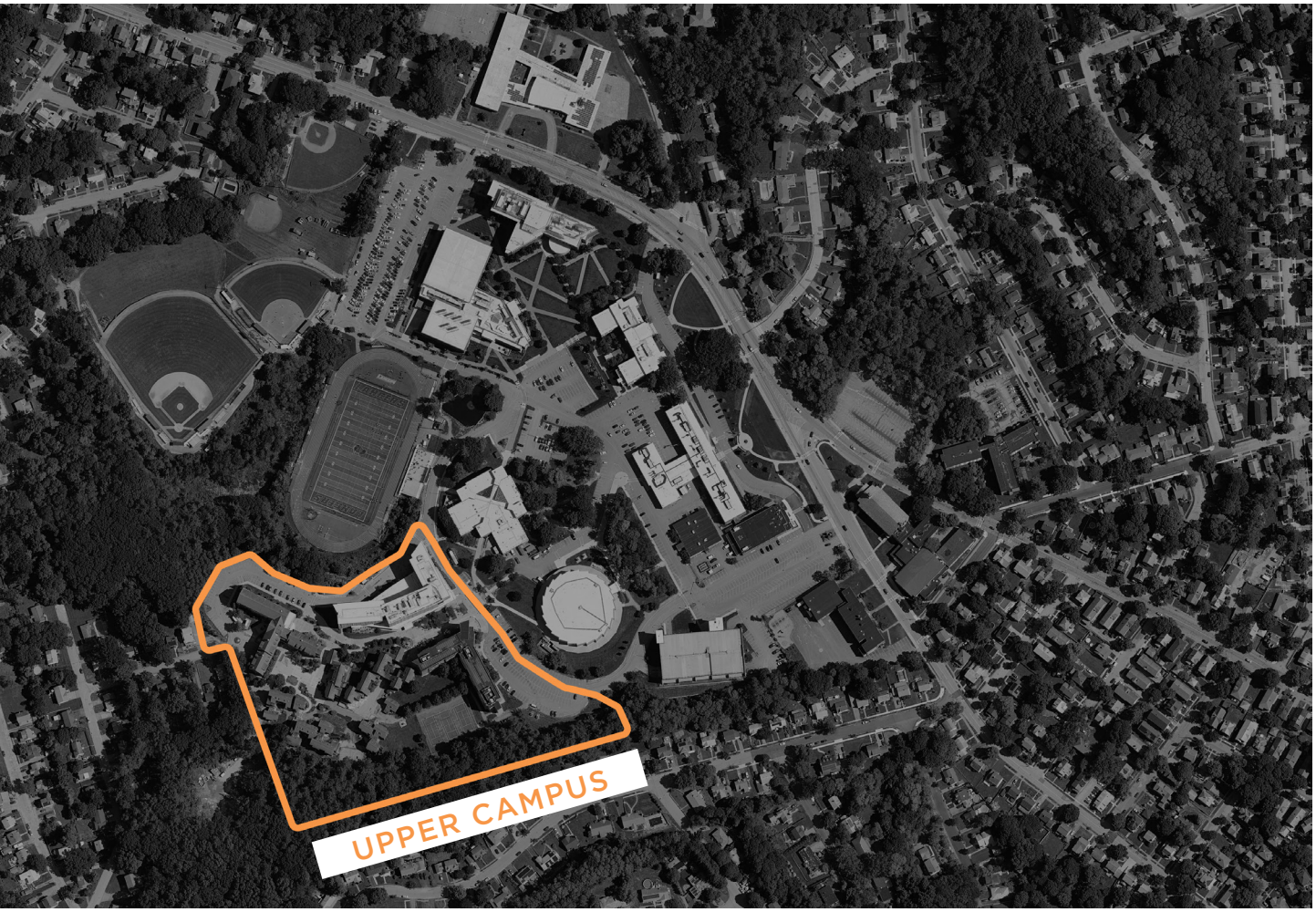


Learning Resource Center

Opened in 1971, the Learning Resource Center is one of the most recognizable and polarizing buildings on campus. Some students view its circular form as an iconic expression of Worcester State's identity, while others question how well it can support contemporary library and learning needs. This tension reflects both the building's importance and the limitations of its distinctive geometry.

The library consists primarily of quiet-study areas, individual carrels, collections, and limited collaborative seating. The LRC also contains more than twenty classrooms and music-practice rooms, including several with tiered floors and fixed seating that limit flexibility and accessibility. Beyond the library, the building houses Criminal Justice, Communication, Visual and Performing Arts, the Honors Program, the Office of Multicultural Affairs, Information Technology and Help Desk, television and multimedia production facilities, and the Binienda Center for Civic Engagement. Mail, central receiving, printing, storage, and other support functions occupy portions of the lower level.

The LRC's broad mix of uses has made it more of a campus catch-all than a clearly organized learning commons. Its circular footprint creates inefficient rooms, limited natural light, and wayfinding challenges, yet it remains a heavily used study destination and an important part of Worcester State's identity. Its future must balance that character with the need for greater accessibility, clearer circulation, improved technology, group study, and more flexible learning environments.





Chandler Village

Opened in 1973, Chandler Village is the oldest residential complex on campus and accommodates approximately 420 upper-class students. Its interconnected townhouse-style buildings contain apartments for groups ranging from four to eleven students. Apartments include kitchens and shared living areas, with a mix of single-, double-, and triple-occupancy bedrooms.

Chandler Village remains popular because its apartment-style units provide greater independence and more shared living space than a traditional residence hall.

At more than 50 years old, however, the complex is approaching the end of its useful life. Aging HVAC and building systems present maintenance, energy, and comfort challenges. Many units also contain internal stairs or changes in level that limit accessibility within the apartments.

3.4 Upper Campus

Upper campus is Worcester State's primary residential area. Four residence halls accommodate approximately 1,600 students and provide traditional, suite-style, and apartment-style housing. Sheehan Hall contains the main campus dining hall, while the plaza between Sheehan and Wasylean halls provides space for outdoor gathering and campus programming.



Sheehan Hall

Opened in 2014, Sheehan Hall accommodates approximately 400 first-year and upper-class students. Suites consist of either two double rooms or four single rooms organized around a shared bathroom. The building also contains the main campus dining hall, Student Health Services, the Office of Residence Life and Housing, a multifunctional room, a game room, a small fitness center, student lounges, and a communal kitchen.

The shared study rooms in Sheehan are among the most heavily used group-study spaces on campus. However, because access to the residential floors is restricted, these rooms are available only to residents and do not serve the broader campus population. The building's ground-floor uses open onto the adjacent plaza, which is used for informal gathering, outdoor dining, and campus events.



Wasylean Hall

Opened in 2004, Wasylean Hall accommodates approximately 348 upper-class students in apartment-style units for two, four, or six residents. Apartments include kitchens and shared living areas. The building also contains common and study rooms, and University Police is located on the first floor.

As in Sheehan, the shared study rooms in Wasylean are among the campus's most utilized spaces for group work. Access is limited to residents.



Dowden Hall

Opened in 1990, Dowden Hall is a traditional corridor-style residence hall serving primarily first-year students. Most bedrooms accommodate two residents, with a limited number of single and triple rooms. Residential wings are organized around shared bathrooms and common areas.





May Street Building

Although located across Chandler Street from the main campus, the May Street Building occupies a similar elevation and has a functional relationship to lower campus. The approximately 44,000-square-foot former temple contains learning, multipurpose, auditorium, and assembly spaces, but it is not currently available for occupancy. Significant building-system and accessibility improvements would be required before the facility could support University programs. While the property represents a valuable pressure-relief asset and an opportunity for a future community-facing hub, any use must be preceded by comprehensive renovation or replacement. The preferred alternative therefore treats redevelopment of the site as an enabling project rather than assuming the existing building can immediately provide usable or swing space.

3.6 Auxiliary and Foundation Owned Buildings



Latino Education Institute House

Located across Chandler Street from the main campus, the LEI House is a former residence converted to office, meeting, and educational space for the Latino Education Institute. It supports programs from elementary through college, including high school and Early College programming, college access, adult education, and family engagement.

The building's residential scale and converted layout limit capacity, flexibility, and future growth. Its separation from the main campus also reduces access to academic and student-support resources, particularly for high school and Early College students who must cross Chandler Street for classes and activities, complicating circulation, supervision, and coordination.



Worcester Center for Crafts

Worcester State leases space at the Worcester Center for Crafts' Sagamore Road Studios, about an 11-minute drive from the main campus. Used by Visual and Performing Arts, the facility includes computer labs and specialized studios for drawing, painting, printmaking, sculpture, design, and music composition.

These spaces provide resources not readily available on the main campus, but their distance separates students and faculty from other academic facilities, services, and campus life. Reliance on the University shuttle or personal transportation can complicate scheduling and reduce the visibility of the arts on campus.



Facilities Modular Building

The Facilities Modular Building is a temporary structure containing offices and meeting space for the Facilities Department. The building is undersized for existing operational needs and contributes to the fragmentation of facilities, storage, and campus support functions. The preferred alternative anticipates replacing it with a centralized, purpose-built Facilities and Operations facility and removing the modular structure. In the near term, however, the existing building may provide limited swing space to support project sequencing before its demolition.





Campus Engagement

2026

JAN 28TH
CAMPUS
ENGAGEMENT #1

FEB 10TH
TOWN HALL #1

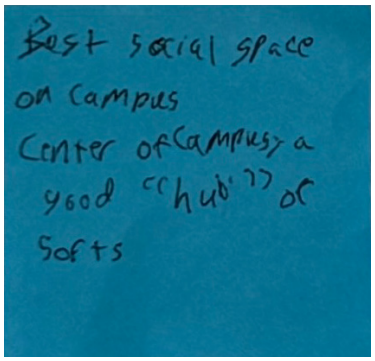
FEB 12TH
CAMPUS ENGAGEMENT #1
TOWN HALL #2

MAR 31ST
CAMPUS ENGAGEMENT #2
TOWN HALL #3

NOW

Student Engagement Round 1







Student Engagement Round 2

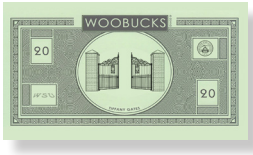












Town Hall #3



4. Campus Engagement

The student engagement process combined focused small-group discussions, broad campus outreach, Town Halls, and an online survey to capture both detailed firsthand insight and campus-wide trends.

During Round 1, the team met with six student groups representing campus leadership, residents, commuters, ambassadors, athletes, and student government. Two adaptable activities asked students to map their favorite and least favorite campus spaces and imagine ideal conditions for circulation, social space, and study. More than 750 comments were catalogued by activity, group, and location, revealing strong priorities around quiet study spaces, vibrant social areas, and improved accessibility.

Round 2 invited a broader cross-section of students to review preliminary planning concepts through open engagement events at Sullivan, the Student Center, and Sheehan Hall. Feedback reinforced concerns around parking and both vehicular and pedestrian circulation, while also expressing interest in organizing campus programs and buildings more efficiently and effectively. Combined with the online survey, these conversations provided qualitative and quantitative insight that helped the team evaluate options and refine priorities.

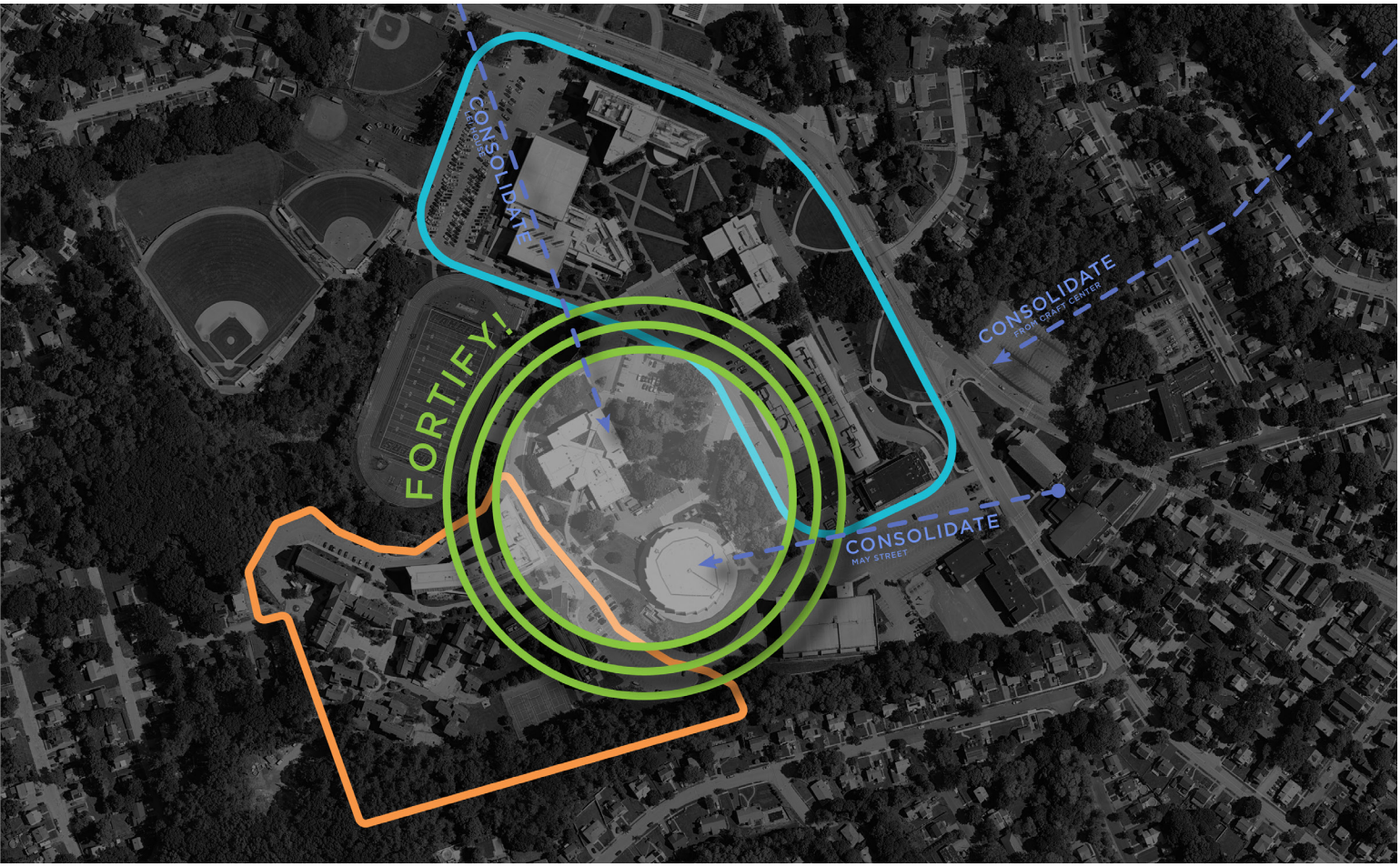
Town Hall discussions expanded these themes. Early sessions reflected strong interest in next steps, future space needs, and better use of underutilized assets such as May Street, alongside questions about enrollment, evolving teaching modalities, and the future Learning Commons. Later discussions focused on circulation, accessibility, student-centered spaces, the feasibility of renovating aging facilities, program distribution, and project phasing.

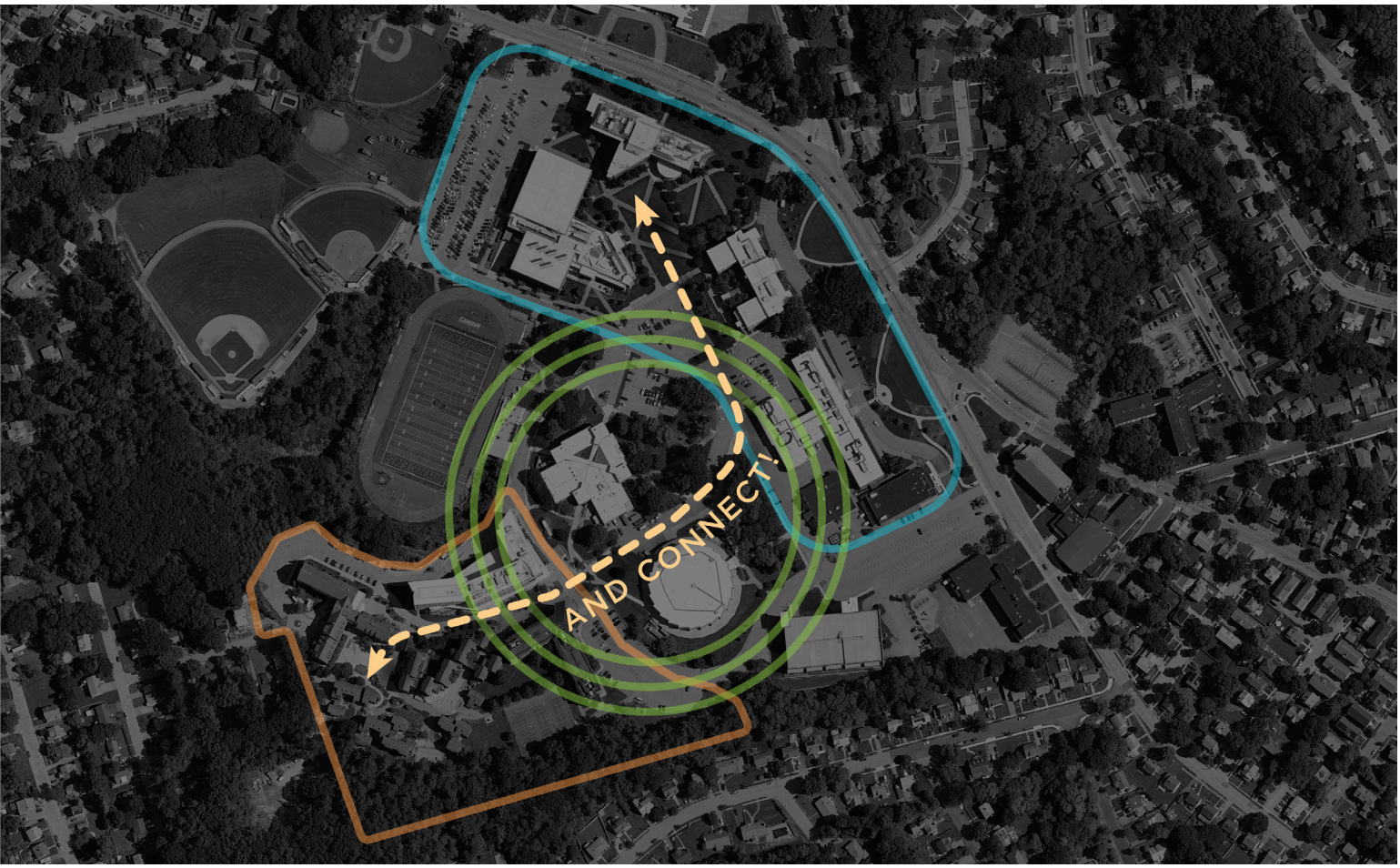
Across the process, the most consistent priorities included parking, food and beverage options, study and social spaces, accessible campus connections, and improved circulation. Less frequent but important responses addressed food access and basic needs, commuter support, informal social interaction, diverse learning environments, and recreation. Considering both common themes and outliers ensured the master plan reflected a broad range of student experiences rather than majority preferences alone. Combined with the technical analysis, this input shaped the preferred alternative and strengthened the case for moving it forward.





Preferred Alternate


CONSOLIDATE
CONSOLIDATE
FRONT CRAFT CENTER
FORTIFY!
CONSOLIDATE
MAY STREET


AND CONNECT!

5.1 Master Plan Vision

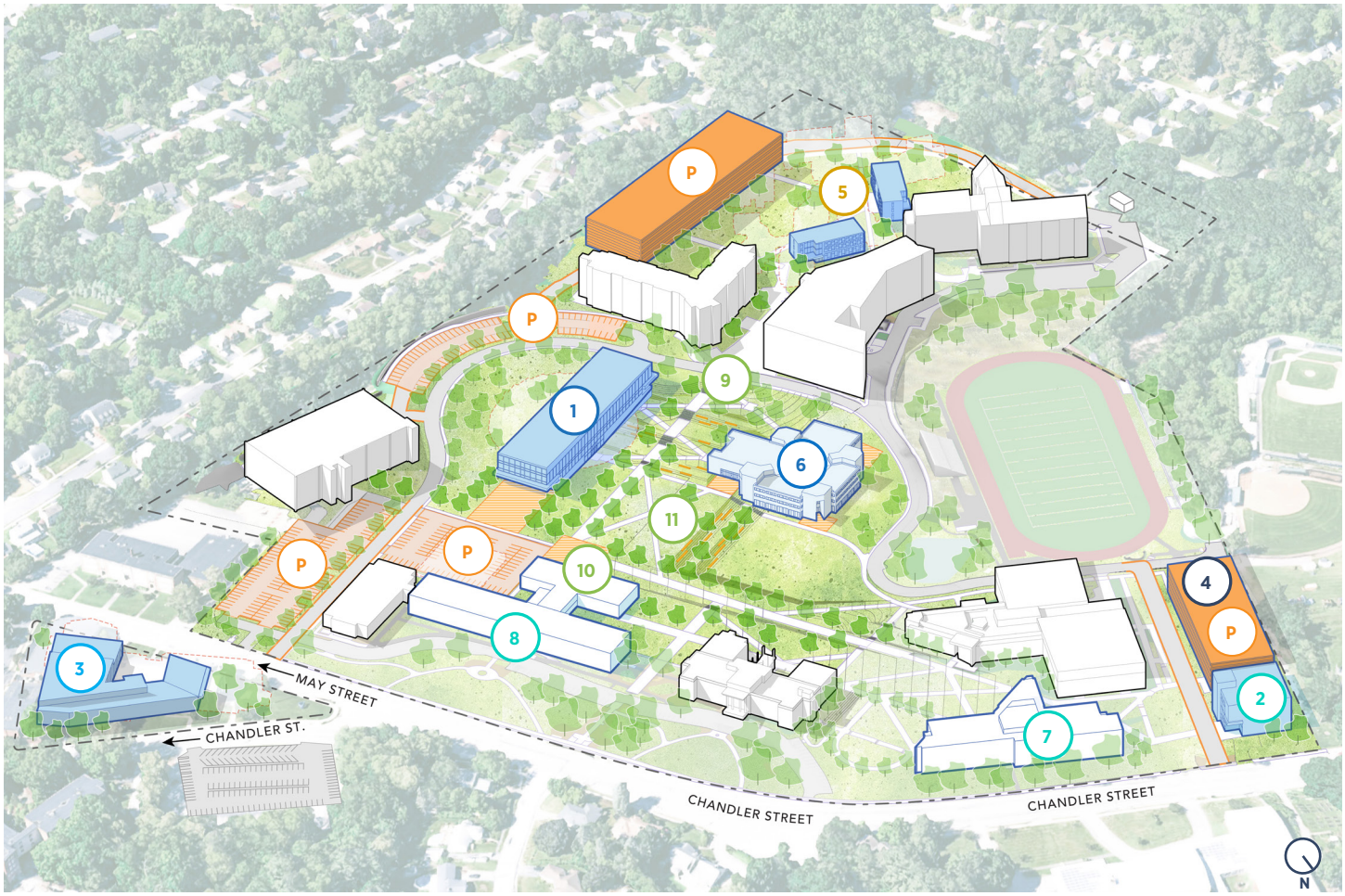
The Worcester State University Master Plan envisions a connected, inclusive, and student-centered campus that advances academic excellence, belonging, and long-term institutional resilience. Building on the University's Strategic Plan and the findings of the planning, analysis, and engagement process, the plan positions the physical campus as an active partner in student success. A renewed campus core will bring together student life, academic support, collaborative learning, and shared community spaces, creating a more welcoming and cohesive experience for commuter and residential students alike.

The vision prioritizes a modern campus hub and Learning Commons, safer and more accessible connections between upper and lower campus, and a greener network of useful outdoor spaces. It pairs these improvements with responsible stewardship of University resources by optimizing existing space, improving how facilities are scheduled and used, and directing investment toward the academic, student-facing, and operational needs that provide the greatest long-term value.

Expanded experiential learning environments will connect classroom instruction with research, creative practice, clinical education, community engagement, and career preparation. Bringing these activities into visible, flexible, and interdisciplinary settings will strengthen collaboration, support evolving academic programs, and make hands-on learning more accessible across disciplines.

Through improved gateways, community-facing spaces, and stronger connections to regional partners, the campus will reinforce Worcester State's role as an accessible public institution and a resource for the city and Commonwealth. Together, these investments will create a more connected, adaptable, and sustainable campus that prepares students for the future.

PREFERRED ALTERNATE SITE AXONOMETRIC



LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

1. LIBRARY LEARNING COMMONS
2. HEALTH BUILDING
3. MAY STREET COMMUNITY HUB
4. OPERATIONS & FACILITIES IN NORTH GARAGE
5. RESIDENTIAL CORE

MAJOR RENOVATIONS

6. STUDENT CENTER

SUPPORTING RENOVATIONS

7. S&T RENOVATION
8. SULLIVAN RENOVATION

SITE AND LANDSCAPE

9. CENTRAL PATHWAY & AMPHITHEATER
10. SULLIVAN ENTRYWAY
11. EXPAND BINIENDA GREEN

PARKING

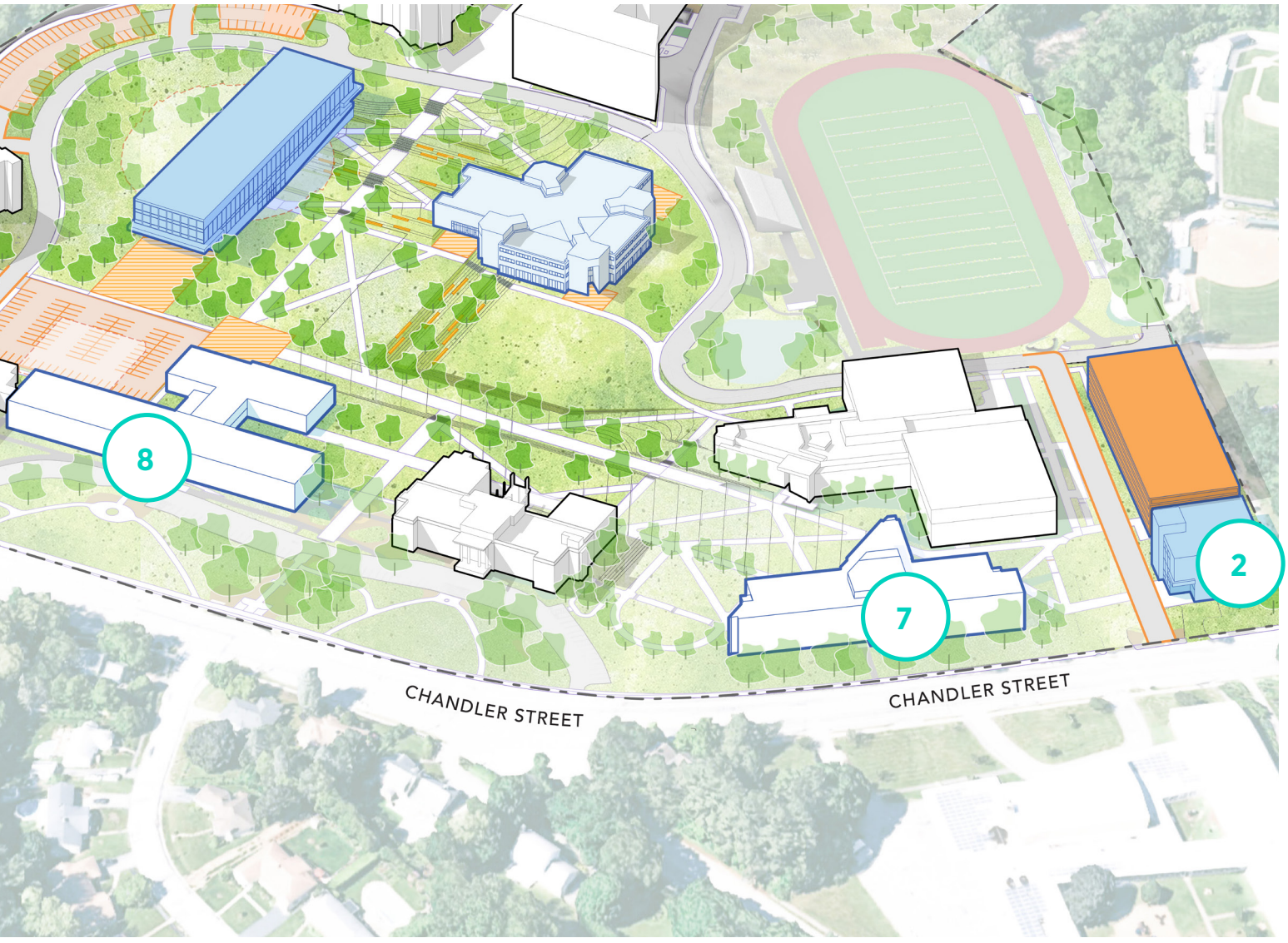
P. NEW PARKING

5.2 Preferred Alternate

The Preferred Alternate is organized around two complementary strategies: fortifying the center of campus and using that redefined center to connect the upper and lower campus. By coordinating building, landscape, circulation, and parking improvements, the plan concentrates investment where it can have the greatest campus-wide impact.

A modern Student Center and Library Learning Commons, together with an expanded campus green and improvements to surrounding academic buildings, establish a stronger campus heart. A central pathway, strategically located building entrances, and coordinated accessible routes bridge the grade change between the residential upper campus and the academic and commuter-focused lower campus. These improvements make movement safer, clearer, and more direct while reducing the perceived distance between destinations. The Preferred Option is implemented through a coordinated series of academic, support, community, student life, landscape, and parking projects. The accompanying project list identifies each intervention and its primary goal, with more detailed descriptions provided on the following pages.

ACADEMIC



LEGEND

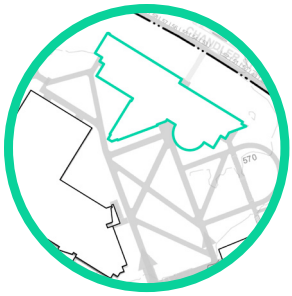
- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

- 2 HEALTH BUILDING

SUPPORTING RENOVATIONS

- 7 S&T RENOVATION
- 8 SULLIVAN RENOVATION



S&T

S&T Renovation

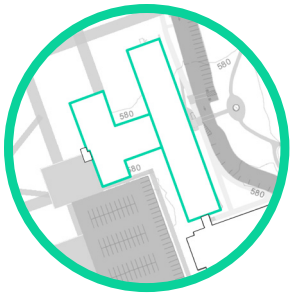
Relative Cost: **$**
Approx. SF: **26,000**

The Science and Technology renovation will reprogram space vacated when health-related programs move into the new Health and Experiential Learning Building. The Health Building is therefore an enabling project, with this renovation serving as the second phase of the campus's laboratory and experiential-learning investment.

Coordinating the projects closely will prevent vacated space from remaining underused.

S&T Renovation Proposed Program:

- Approximate Project Area: 15,545 ASF / 26,000 GSF
- Reprogram vacated areas for science programs.
- Create shared research laboratories serving multiple disciplines.
- Expand laboratory preparation, equipment, storage, and support space.
- Reconfigure adjacent teaching laboratories as needed.
- Upgrade laboratory infrastructure and building systems to support new uses.



Sul

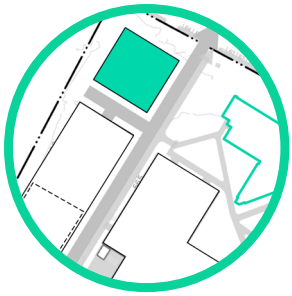
Sullivan Renovation

Relative Cost: **$**
Approx. SF: **12,000**

The Sullivan renovation will right-size the classroom inventory based on the utilization analysis and repurpose surplus instructional space for student and faculty use. The project could create capacity for offices displaced by future renovations or buildings coming offline, making Sullivan an important enabling project within the implementation plan. It also expands student lounge space, providing additional study and socializing space for students between classes, and moves faculty space to a more visible location near student space to allow for more organic collaboration.

Sullivan Proposed Program:

- Approximate Project Area: 8,405 ASF / 12,600 GSF
- Consolidate and right-size general-purpose classrooms.
- Convert surplus classroom space into faculty offices, meeting rooms, and collaborative workspace
- Add lounge and informal study space for faculty and students.



Hth

Health Building

Relative Cost: **$$**
Approx. SF: **52,500**

The new building will consolidate health-related academic, clinical, and student-service programs at the north campus gateway. It will right-size Nursing and Occupational Therapy labs, expand the Speech-Language-Hearing Clinic and graduate lab capacity, add Nursing research space, and address the identified FICM deficit for lab space. Its prominent location supports public access while strengthening experiential learning and connections to the Science and Technology Building.

Health Building Proposed Program:

- Approximate Project Area: 32,945 ASF / 52,500 GSF
- SLHS: Offices, expanded clinic, instructional labs, and dedicated graduate labs.
- Occupational Therapy: Offices and right-sized teaching and experiential labs.
- Nursing: Offices, simulation, skills, teaching, and research labs.
- Health Services: Offices, reception, and examination and treatment rooms.
- Shared/Site: Collaboration and support space, accessible campus connections, public-facing entry, and parking coordination.



May

May Street

Relative Cost: **$$$**

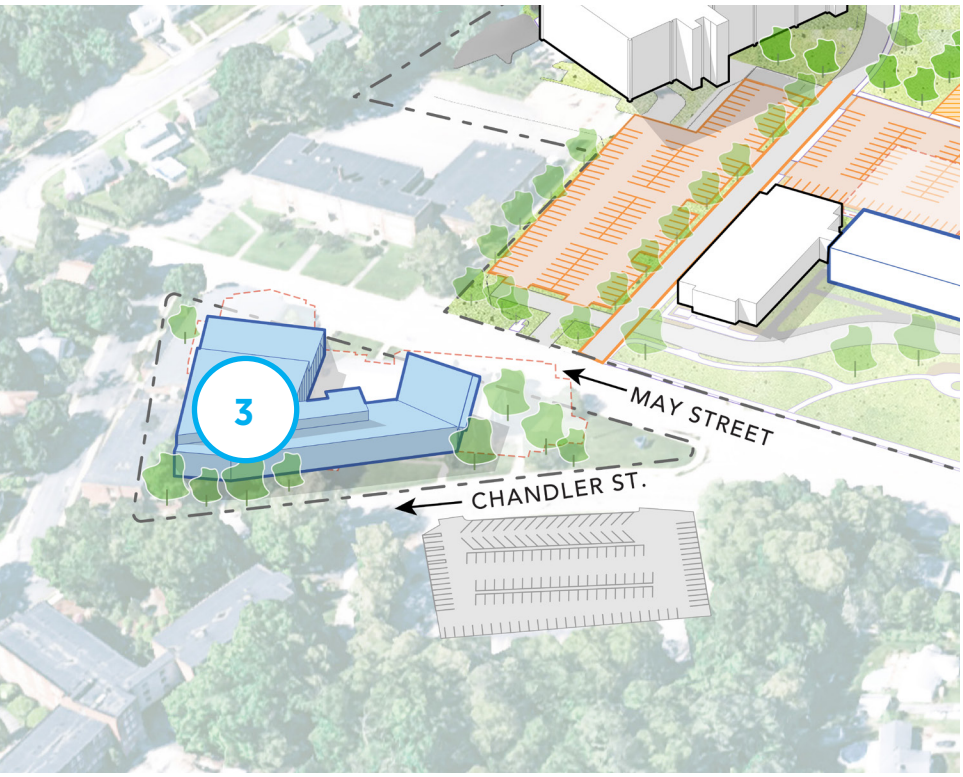
Approx. SF: **75,000**

The **May Street Community Hub** will replace the existing uninhabitable building with a new community-facing gateway at the prominent junction of May Street and Chandler Street. It will serve as a starting point for visitors and prospective students while supporting events, community programs, career and employer engagement, and industry partnerships. Flexible program space will also provide potential swing capacity for future campus projects.

May Street Proposed Program:

- Approximate Project Area: 44,000 ASF / 75,000 GSF
- Demolition of the existing building.
- Public lobby, reception, visitor information, and prospective student welcome space.
- Flexible multipurpose and assembly spaces for University and community events.
- Meeting rooms and offices for community-serving programs.
- Career and employer engagement offices, interview rooms, and meeting space.
- Industry partnership, workforce development, and training space.
- Flexible classrooms, offices, and multipurpose rooms capable of serving as swing space.
- Shared storage, event support, and building support areas.

COMMUNITY



LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

3 MAY STREET COMMUNITY HUB



Res

Residential Core

Relative Cost: **$$**
Approx. SF: **57,000**

The Master Plan proposes replacing Chandler Village through a series of phased residential projects while leaving the University's other three residence halls unchanged. Chandler Village currently provides approximately 420 beds in apartment-style units. Although this housing remains desirable for the independence it offers, the complex is approaching the end of its useful life and presents mechanical and accessibility limitations.

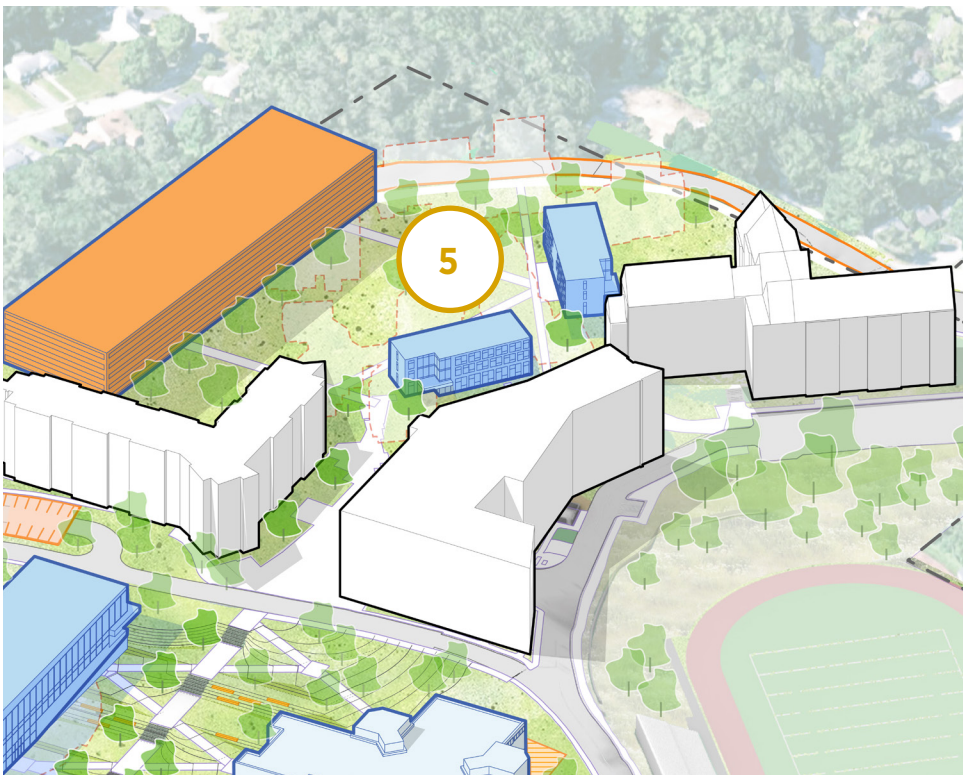
The first new residence could be constructed while Chandler Village remains operational, minimizing the temporary loss of beds. As replacement capacity becomes available, portions of the existing complex could be taken offline and removed. This phased approach would allow the University to adjust later projects in response to enrollment, housing demand, and affordability rather than replacing Chandler Village in kind.

Both the 2019 housing study and the current engagement process found that students value suite- and apartment-style living. Affordability is also an important consideration. Future residences should therefore provide a range of configurations and price points, balancing student independence with opportunities for greater density and lower-cost options.

The remainder of the residential inventory would remain unchanged under the Master Plan. Sheehan Hall provides 400 beds in suite-style configurations and contains the University's primary dining hall. Wasylean Hall provides 348 beds in apartment-style configurations for upper-class students. Dowden Hall provides approximately 400 beds in a traditional corridor-style setting serving primarily first-year students. Together, these buildings would continue to provide the foundation of campus housing while redevelopment is focused on Chandler Village.

The configuration of the new residential buildings creates an inward-facing residential landscape distinct from the central campus walkway. This more intimate green space would strengthen the residential community and provide opportunities for gathering, socializing, and informal recreation.

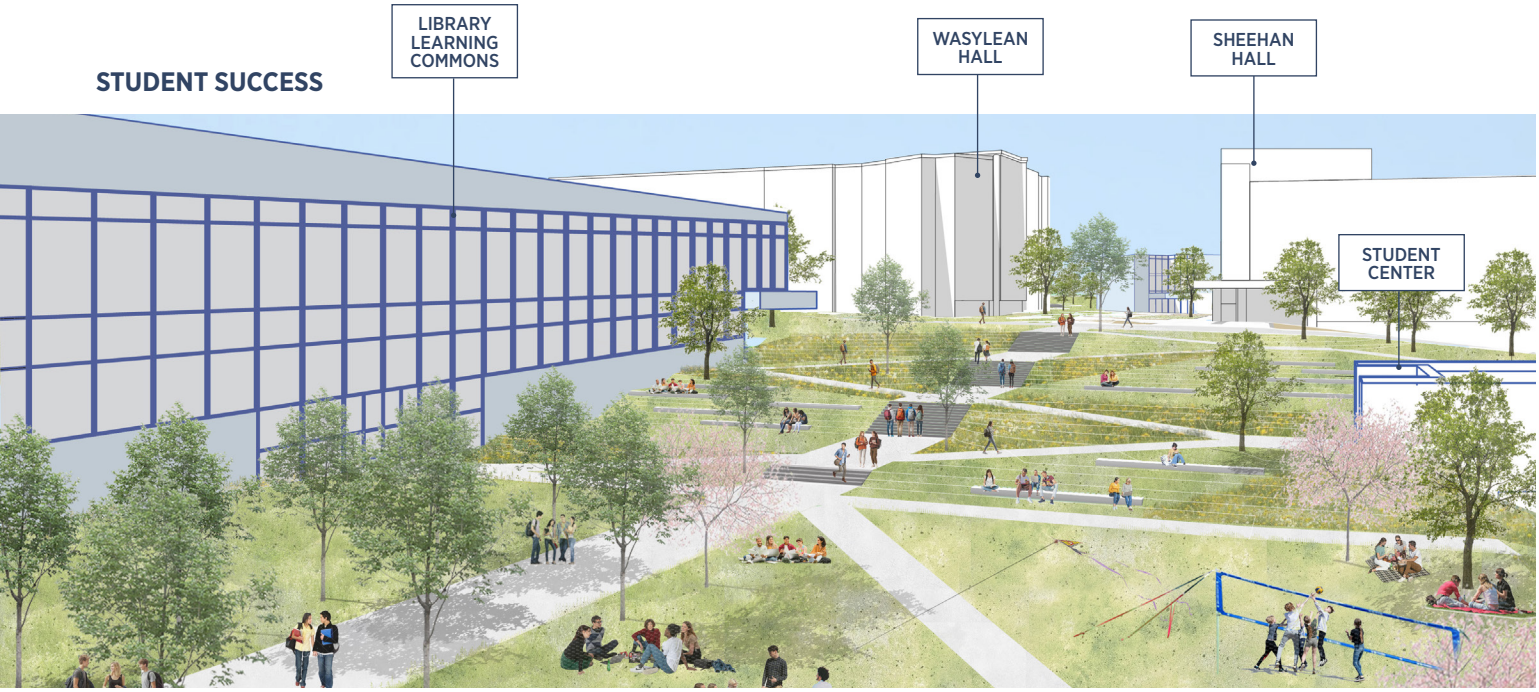
RESIDENTIAL

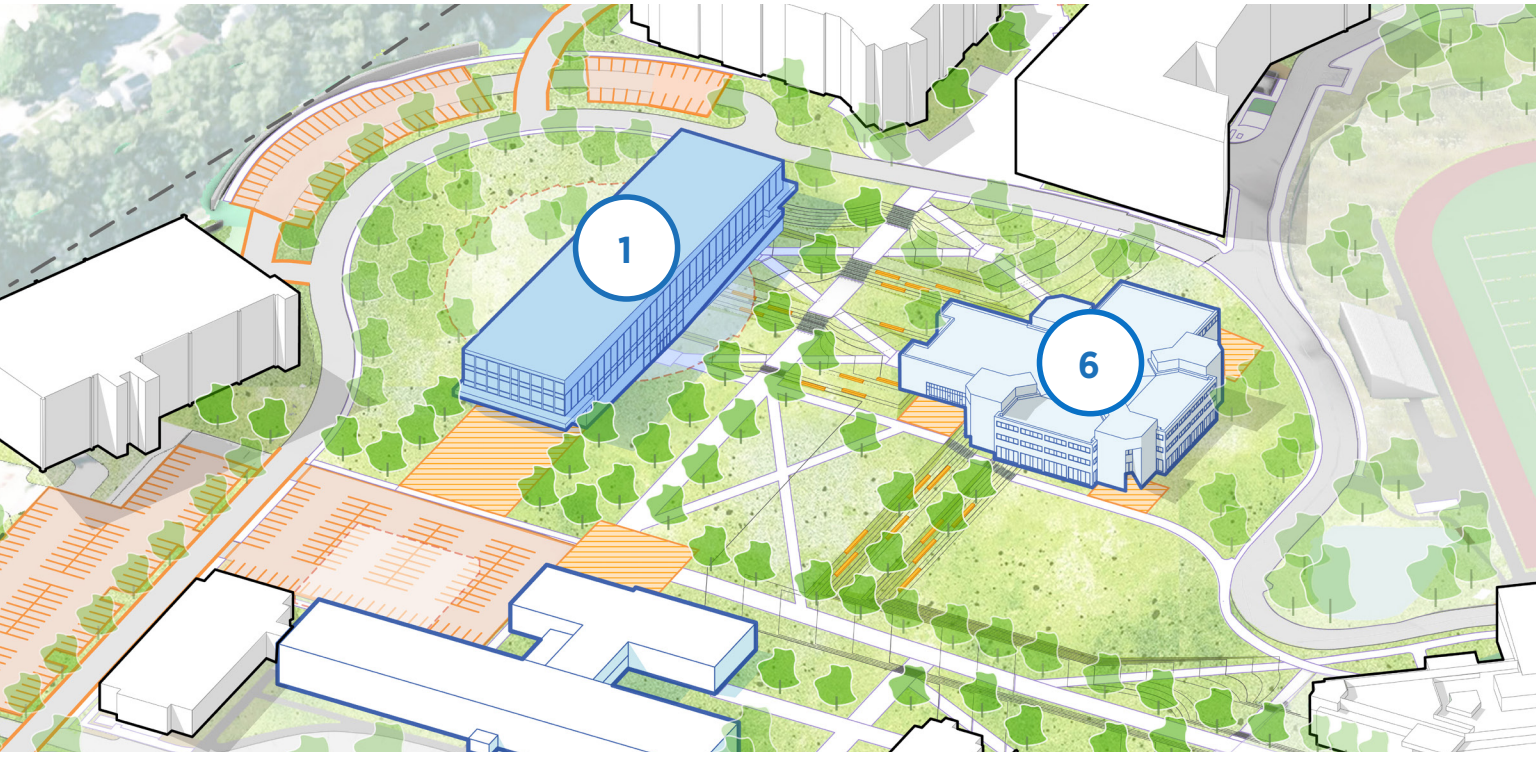


NEW BUILDINGS

5 RESIDENTIAL CORE

STUDENT SUCCESS





LEGEND

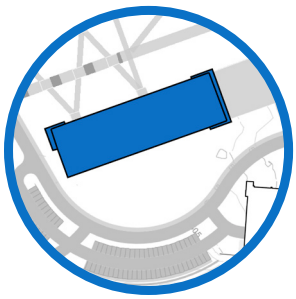
- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

(1) LIBRARY LEARNING COMMONS

MAJOR RENOVATIONS

(6) STUDENT CENTER



LLC

Library Learning Commons

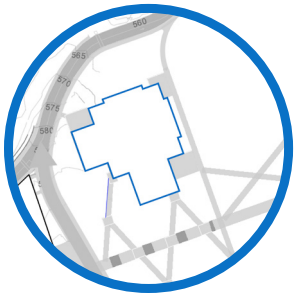
Relative Cost: **$$$$**

Approx. SF: **140,000**

The Library Learning Commons is the largest new building proposed in the Master Plan. Replacing the existing LRC, it will define the southern edge of the expanded campus green and connect lower, central, and upper campus through entrances at multiple grades. Its transparent, linear form will activate the central pathway and create visible academic and student activity. The building is positioned to avoid the major utility corridor beneath the roadway connecting the campus loop to the Student Center loading dock. It will consolidate library, academic, technology, student-support, and arts programs, including Visual and Performing Arts functions currently located at the Craft Center.

LLC Proposed Scope:

- Demolition of the existing LRC.
- Learning Commons: Library services and collections; quiet, individual, and flexible study; group study rooms; collaboration and project space; innovation and digital scholarship spaces; Center for Teaching Excellence; research consultation, training, and Zoom rooms; library administration and support.
- Communication and Media: Offices, computer labs, media suite, and media production and editing spaces.
- Visual and Performing Arts: Offices, visual arts studios, computer labs, music classrooms, and practice rooms.
- Academic Space: General-purpose classrooms
- Criminal Justice: Offices. (Consideration to move to Sullivan if office space was built-out).
- Student and Community Support: Office of Multicultural Affairs and Latino Education Institute. Testing center and Student Accessibility Services.
- Technology: IT Help Desk, computer labs, and associated support space.



SC

Student Center

Relative Cost: **$$**

Approx. SF: **73,500**

The Master Plan proposes a comprehensive renovation of the Student Center, preserving its role as the established heart of campus while improving how it supports residential and commuter students. Building upon the 2023 CambridgeSeven study, the proposed renovation would retain dining, events, student organizations, and student-life functions while regularizing floor levels to improve accessibility and navigation. Common spaces would be concentrated in the south wing along the central pathway, creating stronger indoor-outdoor connections, including direct second-floor access to a new plaza.

SC Proposed Program:

- Reconfigure interior floor to provide accessible circulation.
- Create commons, lounge, and gathering space visible to the exterior central pathway.
- Provide event spaces and flexible meeting rooms for students and clubs.
- Include OSILD offices and workspace for student organizations.
- Renovate food-service, dining, food-pantry, and bookstore spaces.
- Provide a dedicated e-sports space.
- Address major building-system deficiencies.

LANDSCAPE



SITE AND LANDSCAPE

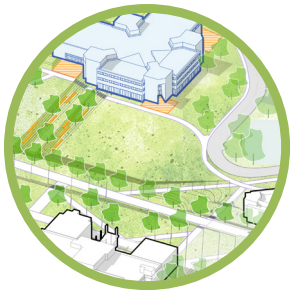
9 CENTRAL PATHWAY & AMPHITHEATER

10 SULLIVAN ENTRYWAY

11 EXPAND BINIENDA GREEN

Landscape

The proposed landscape projects are relatively low-cost, high-impact investments that form the connective framework of the Master Plan. Together, they improve accessibility, strengthen pedestrian circulation, and transform previously fragmented or vehicle-dominated areas into a more cohesive campus environment.



Grn

Expand Campus Green

Relative Cost: **$**
Approx. SF: **115,000**

The **Expanded Campus Green** replaces existing parking within the campus center and extends the character of the widely favored Binienda Green from the Wellness Center at the north to the new Library Learning Commons at the south. Visible from both the north and south entries to campus, this continuous green corridor would create an orienting view and a recognizable campus vista. Most importantly, it would provide accessible pedestrian routes through the center of campus without requiring students to cross vehicular paths.

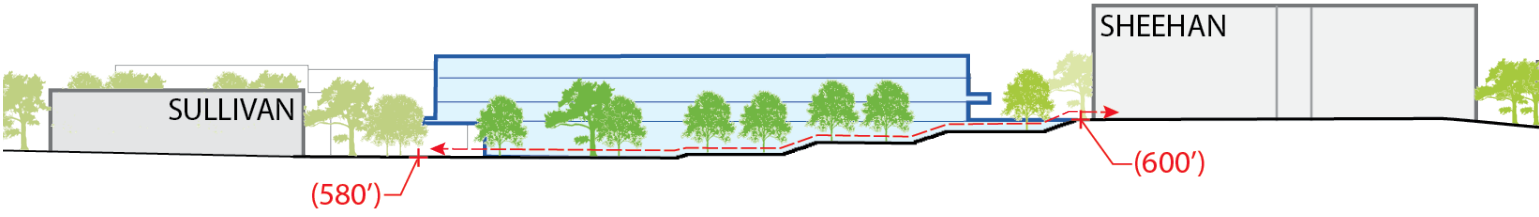


SEn

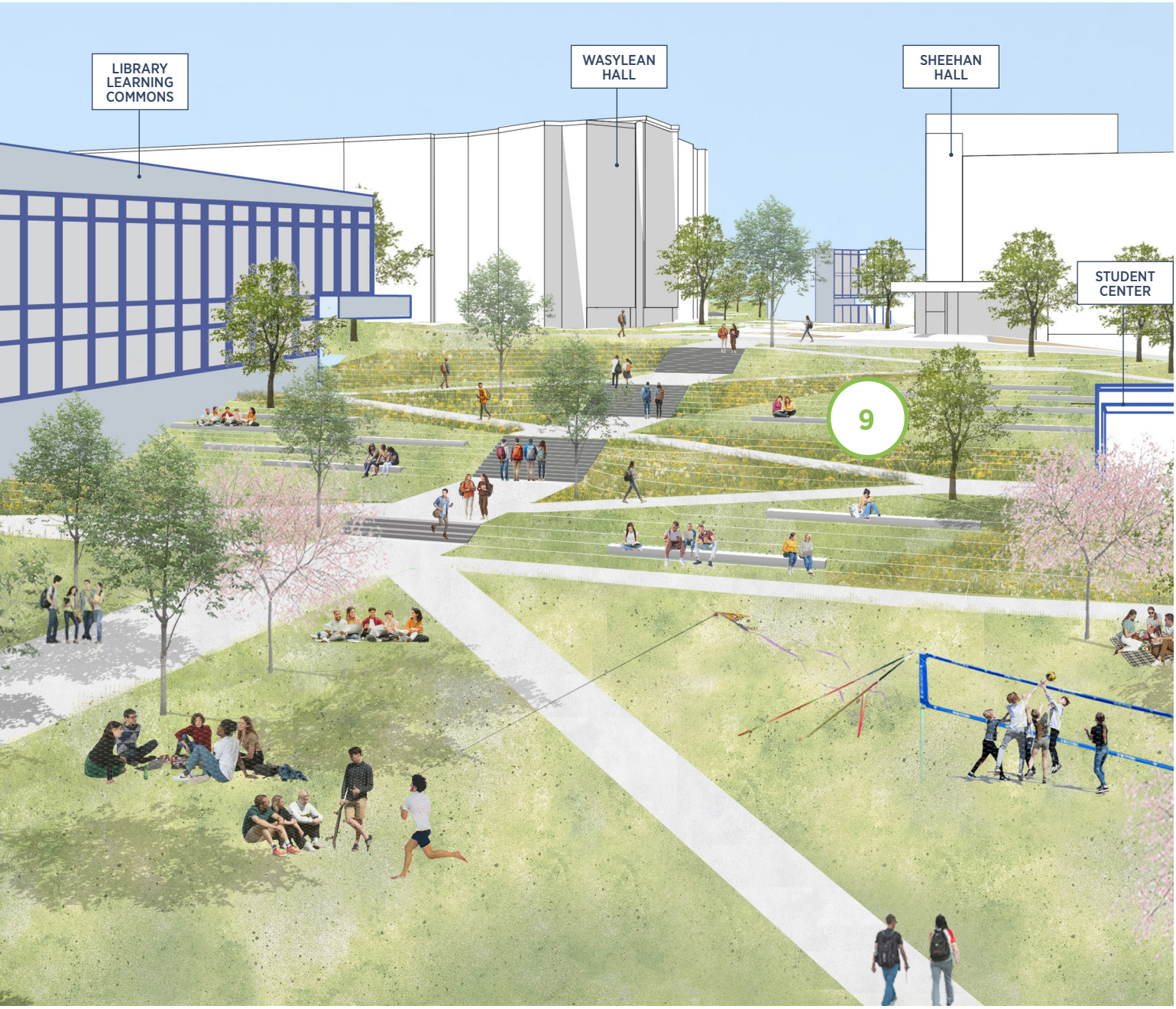
Sullivan Entry

Relative Cost: **$**
Approx. SF: **1,400**

The **Sullivan Entry** introduces a modest vestibule extension facing the central campus green. Students already use this location as the primary route into Sullivan, creating an informal “cow path,” but the existing entrance is not fully accessible. The project would formalize this circulation pattern, establish a more visible front door to Sullivan, and formally integrate the building into the hierarchy of campus pathways and open spaces.



LANDSCAPE

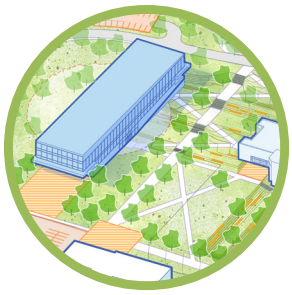


SITE AND LANDSCAPE

9 CENTRAL PATHWAY & AMPHITHEATER

10 SULLIVAN ENTRYWAY

11 EXPAND BINIENDA GREEN



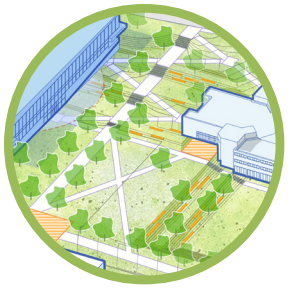
Pth

Central Pathway

Relative Cost: **$**

Approx. SF: **110,000**

The **Central Pathway** provides the essential accessible connection from upper campus, through the central campus, and down to the lower campus. By meeting building entrances at strategic elevations, the pathway stitches together destinations that are currently separated by grade changes and vehicular routes. It would also create an active pedestrian space where students can gather, socialize, and spend time between classes.



Am

Amphitheater

Relative Cost: **$**

Approx. SF: **75,000**

The **Outdoor Events Green and Amphitheater** transforms the level area outside the Student Center into flexible space for gatherings, programs, and informal recreation. Seating walls incorporated into the surrounding landscape would support everyday use while also providing seating for larger gatherings and campus events.

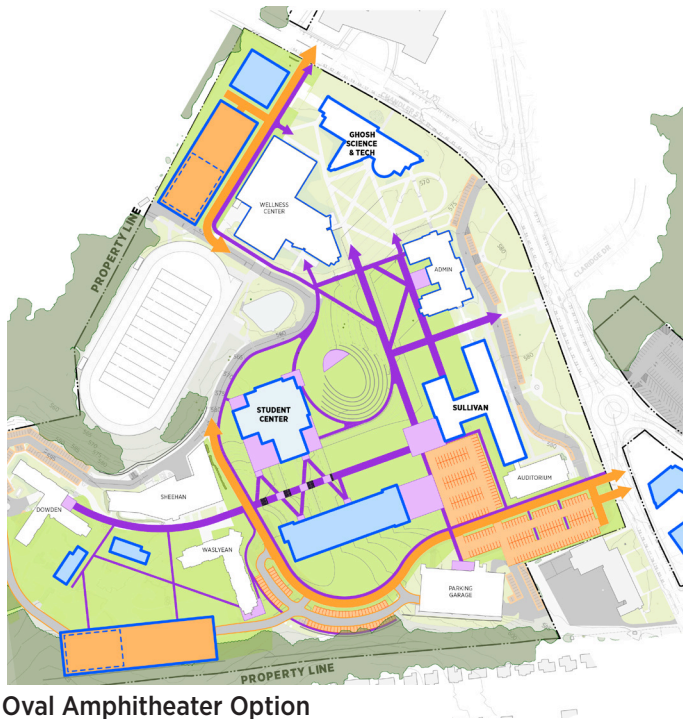
Two amphitheater concepts were evaluated. The preferred stepped option integrates orthogonal seating into the grade while preserving a large, level green for recreation and events. The oval concept is included for comparison but was found to use the landscape less efficiently and limit flexibility.

LEGEND

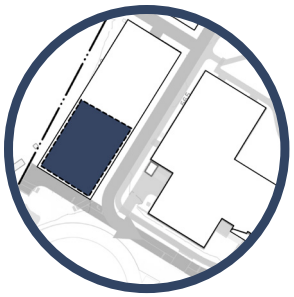
- VEHICULAR CIRCULATION
- NEW ROADWAY
- EXISTING ROADWAY
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- PEDESTRIAN CIRCULATION
- NEW PLAZA
- NEW BUILDING
- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION



Outdoor Events Green with Stepped Amphitheater



Oval Amphitheater Option



F&O

Facilities & Operations

Relative Cost: **$**

Approx. SF: **40,000**

Facilities support space represents the largest deficit identified in the utilization study, while the department currently operates from a temporary modular building beside Sullivan. A right-sized Facilities and Operations Center within the proposed North Lot parking garage would relocate these functions outside the campus core while maintaining convenient campus-wide access.

F&O Proposed Program:

- Approximate Project Area: 29,560 ASF / 40,000 GSF
- Facilities management offices, meeting rooms, and administrative support.
- Centralized campus storage and operational support space.
- Campus Printing and Mail services.
- Non-student-facing Information Technology functions.
- Service access and integration with the North Lot parking garage.

SUPPORT

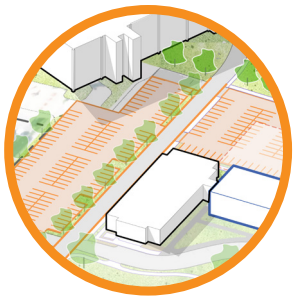


LEGEND

- EXISTING BUILDING
- MODERATE RENOVATION
- HEAVY RENOVATION
- NEW BUILDING
- NEW GARAGE
- EXISTING SURFACE PARKING
- NEW SURFACE PARKING
- NEW PLAZA
- PEDESTRIAN PATHWAY
- NEW ROADWAY
- EXISTING ROADWAY
- PROPERTY LINE
- DEMOLISHED BUILDINGS

NEW BUILDINGS

4 OPERATIONS & FACILITIES IN NORTH GARAGE



P

Parking Projects

Cost Range: **$-$$**

Total SF Impacted: **485,000**

The proposed parking improvements regularize existing surface lots and relocate parking away from areas prioritized for accessible campus green space. Parking remains important to Worcester State because of its primarily commuter population. At the same time, new parking should respond to demonstrated demand rather than existing congestion created in part by the compressed academic schedule. The final capacity of each garage should therefore be confirmed through a comprehensive parking-demand study after classes are distributed more evenly across a 40-hour instructional week.

The **North Parking Garage** is envisioned as a four-level structure accommodating approximately 372 vehicles, with the new Facilities and Operations space integrated into the building. This location replaces surface parking displaced by the proposed Health Building and provides additional capacity at the northern campus entrance.

The **Southwest Parking Garage** is envisioned as a five-level structure accommodating approximately 820 vehicles. Located along the southern edge of campus, the garage would be set into the existing grade to reduce its visibility from both the campus and the surrounding residential neighborhood. Its location near Sheehan Hall and the central pathway would allow it to serve both residential and commuter populations.

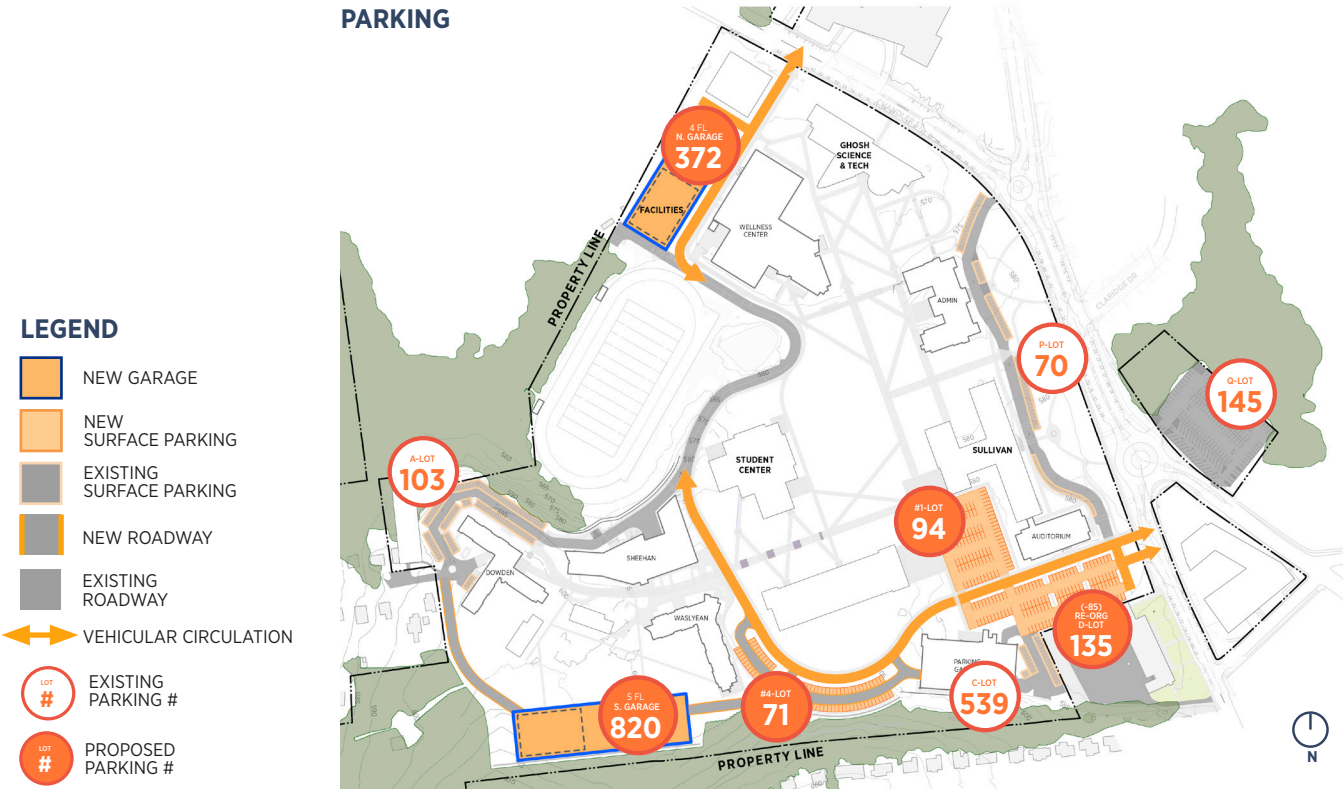
Lot P1 replaces the existing Facilities modular building and reorganizes the site to provide approximately 94 parking spaces.

Lot D is reconfigured to establish a clearer campus entrance and separate the primary circulation drive from parking aisles.

Lot P4 is similarly regularized to provide a clear drive aisle and approximately 71 parking spaces.

Worcester State currently has approximately 1,768 parking spaces. The proposed concept retains 992 existing spaces, provides 165 spaces within new or reconfigured surface lots, and adds 1,192 structured parking spaces. This results in a conceptual total of approximately 2,349 parking spaces, representing a net increase of 581 spaces. Final quantities should be refined through future parking-demand, transportation, and scheduling analyses.

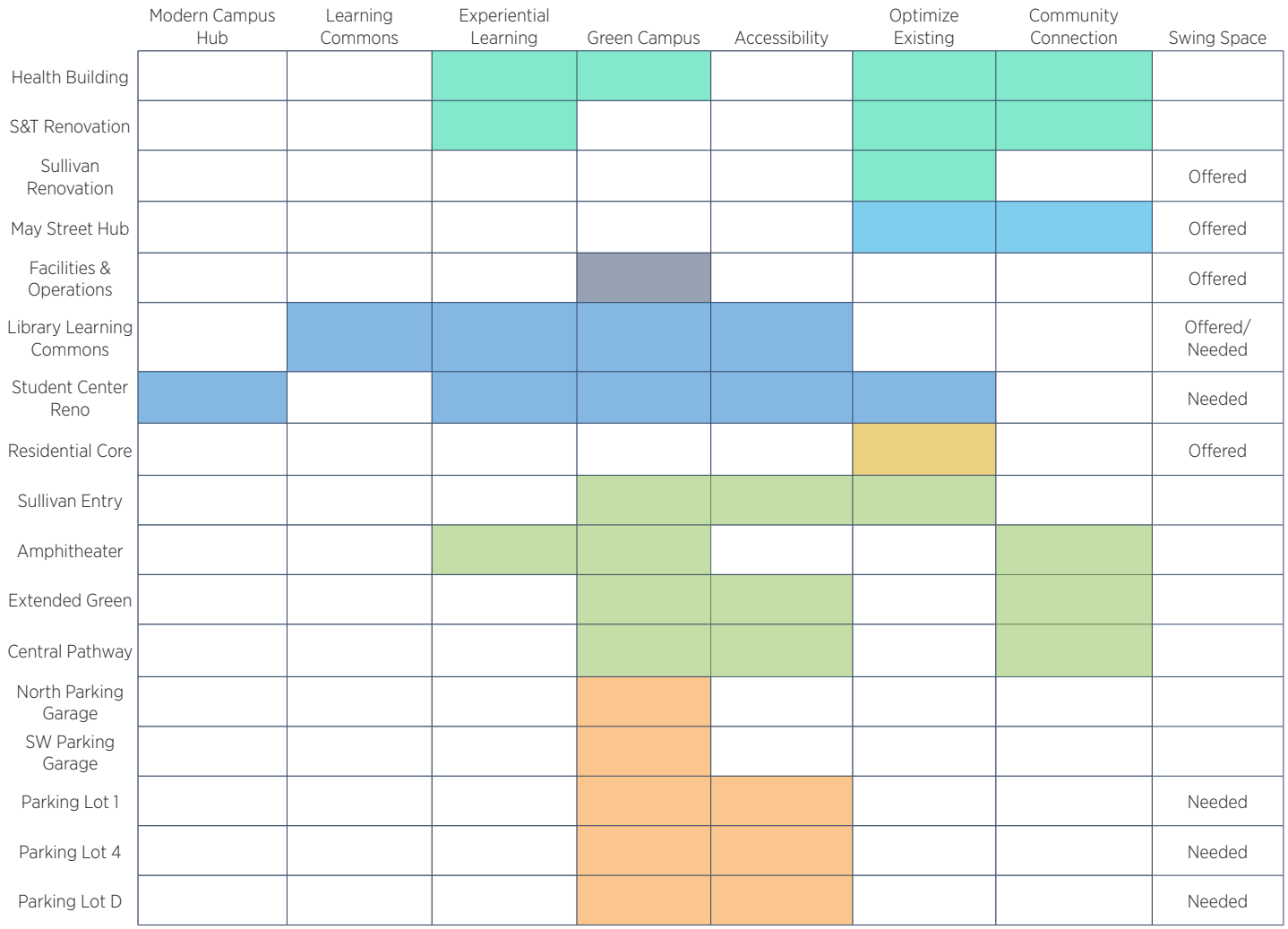
PARKING







Impact Analysis



LEGEND

ACADEMIC | COMMUNITY | SUPPORT | STUDENT SUCCESS | RESIDENTIAL | LANDSCAPE | PARKING

SCORING RUBRIC

PROJECT GOALS (1 PT EACH, IF APPLICABLE)

Modernize the Student Center
Create a Learning Commons
Prioritize greening the Center of Campus
Create an accessible connection between Upper and Lower Campus
Optimize existing space and address space deficits
Deepen connections to the community

SWING SPACE OPPORTUNITY

Swing Space NEEDED (-1 PT)
Swing Space OFFERED (+1 PT)

FACILITIES CONDITIONS ASSESSMENT (FCA) RANKED 0-1, BASED ON REPORTS

Building Condition Index - 10 YR FCI

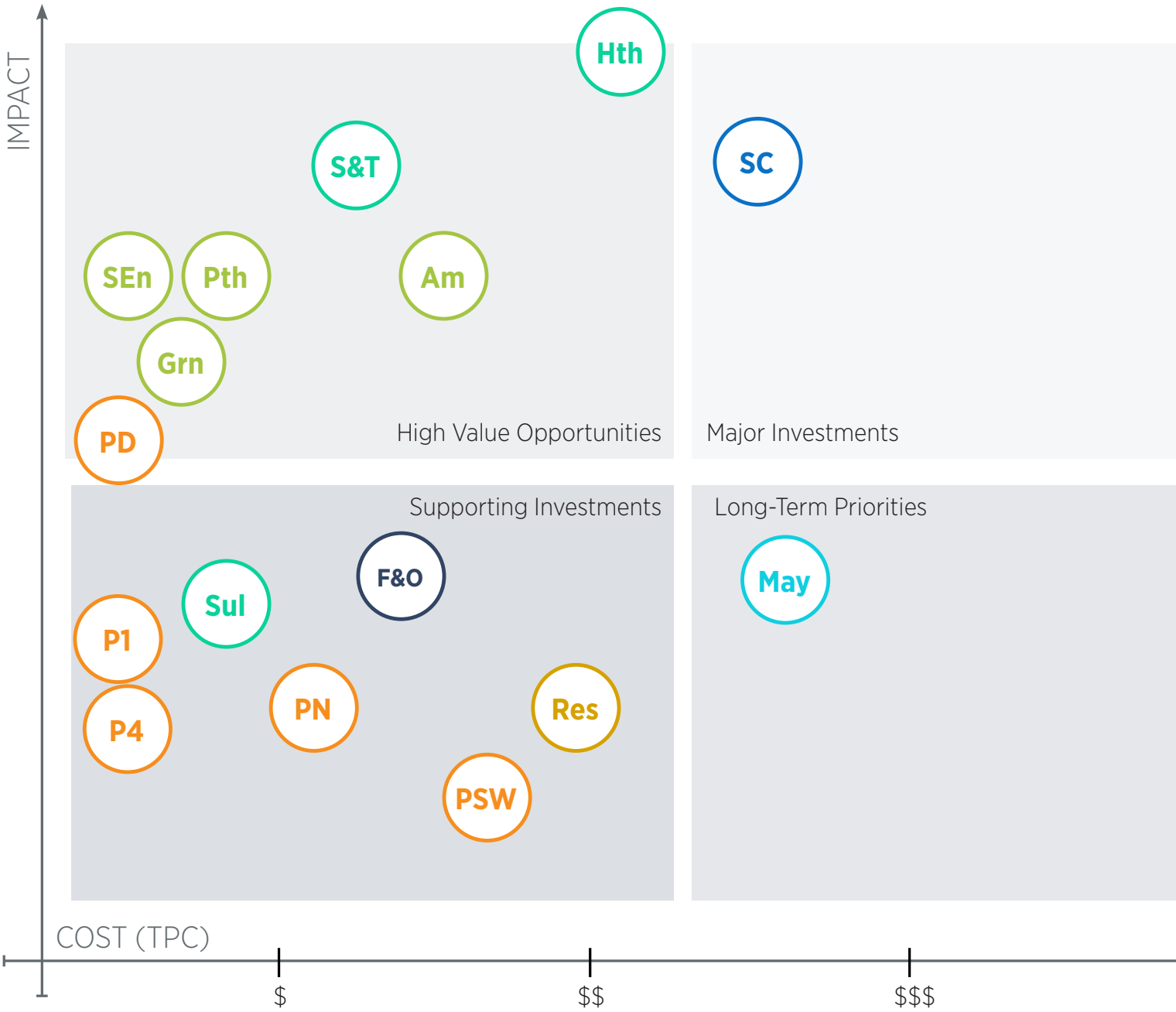
6.1 Methodology

To establish project priorities, each recommendation was evaluated using a consistent impact-scoring methodology and plotted against its anticipated cost. This allowed projects of different scales and types to be compared relative to one another and helped identify where investment could provide the greatest value.

The impact score began with the seven Master Plan goals. A project received one point for each goal it meaningfully advanced, allowing projects that addressed multiple campus needs to score more highly. Swing space was included as an additional measure because of its importance to project feasibility and sequencing. Projects that created usable swing space received one additional point, while projects requiring swing space lost one point.

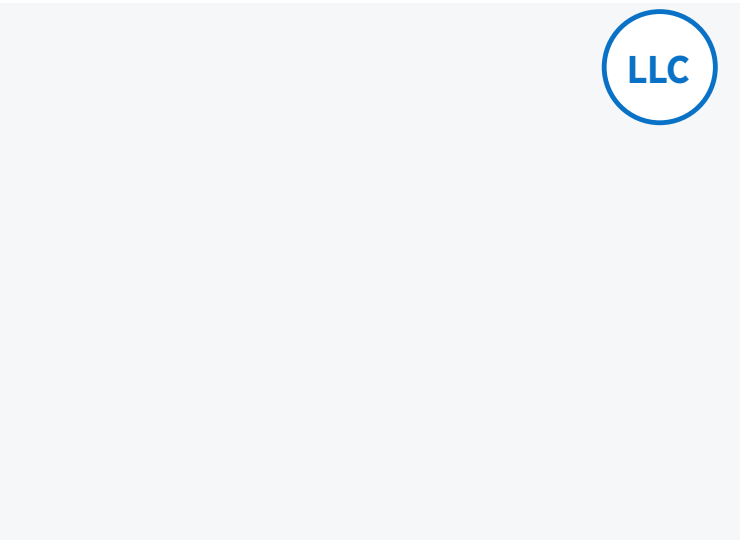
Building condition was also incorporated using the 10-year Facility Condition Index identified in the facilities condition assessments. Projects associated with buildings having greater projected renewal needs received a higher condition score, increasing their overall impact. This recognized that investment in aging or declining facilities may address both programmatic priorities and critical deferred maintenance.

The resulting impact scores were plotted against order-of-magnitude project costs. Projects were then grouped as **High Value Opportunities, Major Investments, Supporting Investments,** or **Long-Term Priorities.** High Value Opportunities combine strong impact with comparatively modest cost, while Major Investments offer substantial campus-wide benefits but require greater funding and coordination. Supporting Investments provide focused benefits and may advance independently or alongside larger projects. Long-Term Priorities remain important but may require additional planning, funding, or enabling work before implementation. The analysis provides a framework for prioritization and sequencing while allowing the University to respond to funding opportunities, project dependencies, and changing institutional needs.


IMPACT
Hth
S&T
SC
SEn
Pth
Am
Grn
PD
High Value Opportunities
Major Investments
Supporting Investments
Long-Term Priorities
F&O
May
Sul
P1
PN
Res
P4
PSW
COST (TPC)
$
$$
$$$

6.2 Relative Impact (Project Goals Only)

The initial impact analysis considers only how many of the seven Master Plan goals each project advances, without adjustments for swing space or building condition. This establishes a baseline for understanding each project's direct contribution to the Master Plan vision.



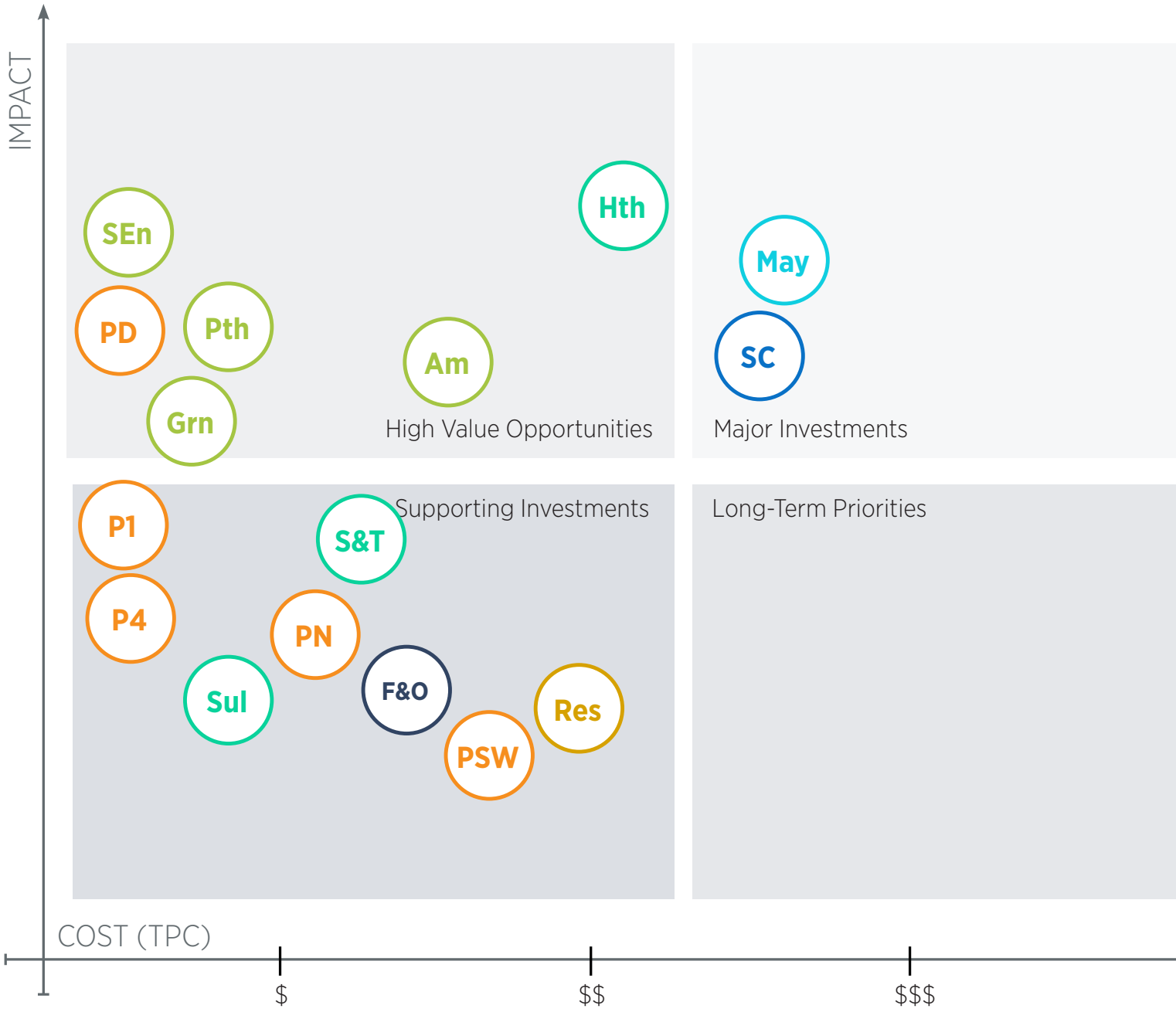


Many of the proposed landscape projects emerge as High Value Opportunities because they provide significant campus-wide benefits at comparatively low cost. This finding reflects the importance of accessibility, pedestrian circulation, and conflicts between people and vehicles as central campus issues. The Science and Technology renovation and proposed Health and Experiential Learning Building also fall within this category. Their relative value reflects the use of existing space for the renovation, the smaller footprint of the proposed building, and their shared role in expanding experiential learning.

The Student Center and Library Learning Commons are identified as Major Investments. Both carry substantial costs but advance multiple project goals, reinforcing the campus center as the primary focus of future investment.

May Street also represents a significant investment because its condition requires comprehensive renovation or replacement. When evaluated only against the project goals, however, it shows comparatively limited direct impact. Engagement and institutional priorities revealed a broader value not fully captured by the scoring: its potential to strengthen Worcester State's identity as a regional anchor and community resource. For this reason, the project was elevated within the Master Plan.

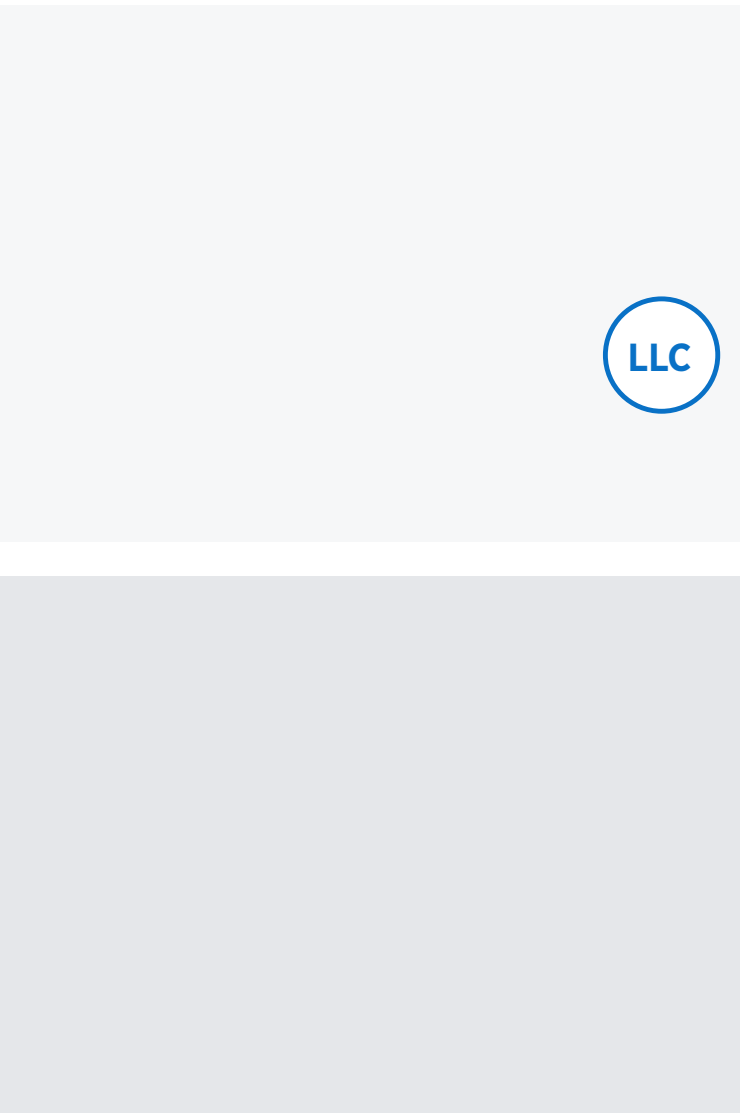
The Facilities and Operations Building and Sullivan classroom right-sizing are critical to establishing more effective campus operations and space allocation. Although their impacts may be less visible, they provide the foundation for a well-functioning campus. Parking and residential projects similarly serve as Supporting Investments by enabling other improvements and supporting the University's daily operations. These findings demonstrate why the goal-based score is an important starting point, but not the sole measure of project priority.


IMPACT
SEn
PD
Pth
Grn
Am
Hth
May
SC
High Value Opportunities
Major Investments
P1
P4
Sul
S&T
PN
F&O
PSW
Res
Supporting Investments
Long-Term Priorities
COST (TPC)
$
$$
$$$

6.2 Relative Impact (With Swing and FCI)

When swing space and the 10-year Facility Condition Index are incorporated, the relative impact of the May Street project and the Library Learning Commons moves closer together. May Street gains impact because it can provide swing space that supports the implementation of other campus projects. In contrast, the Library Learning Commons requires swing space because the existing Learning Resource Center must be demolished before construction of the new building can begin.

The two projects would align even more closely if swing space were the only additional consideration. However, the significant deferred maintenance needs of the existing Learning Resource Center increase the relative impact of the Library Learning Commons project. The adjusted analysis therefore identifies May Street as an important enabling project while reinforcing the Library Learning Commons as a high-impact investment addressing both programmatic and building-condition needs.

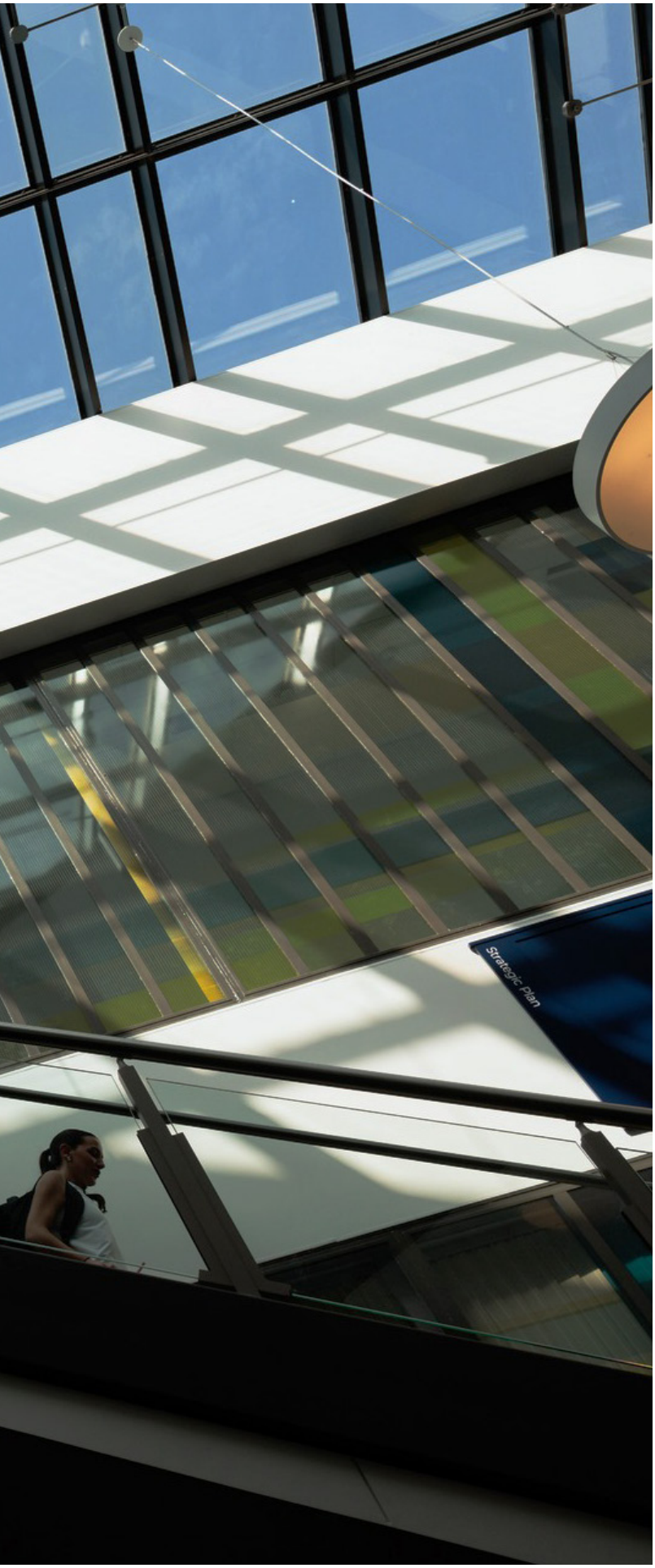






Implementation Plan





7.1 Approach

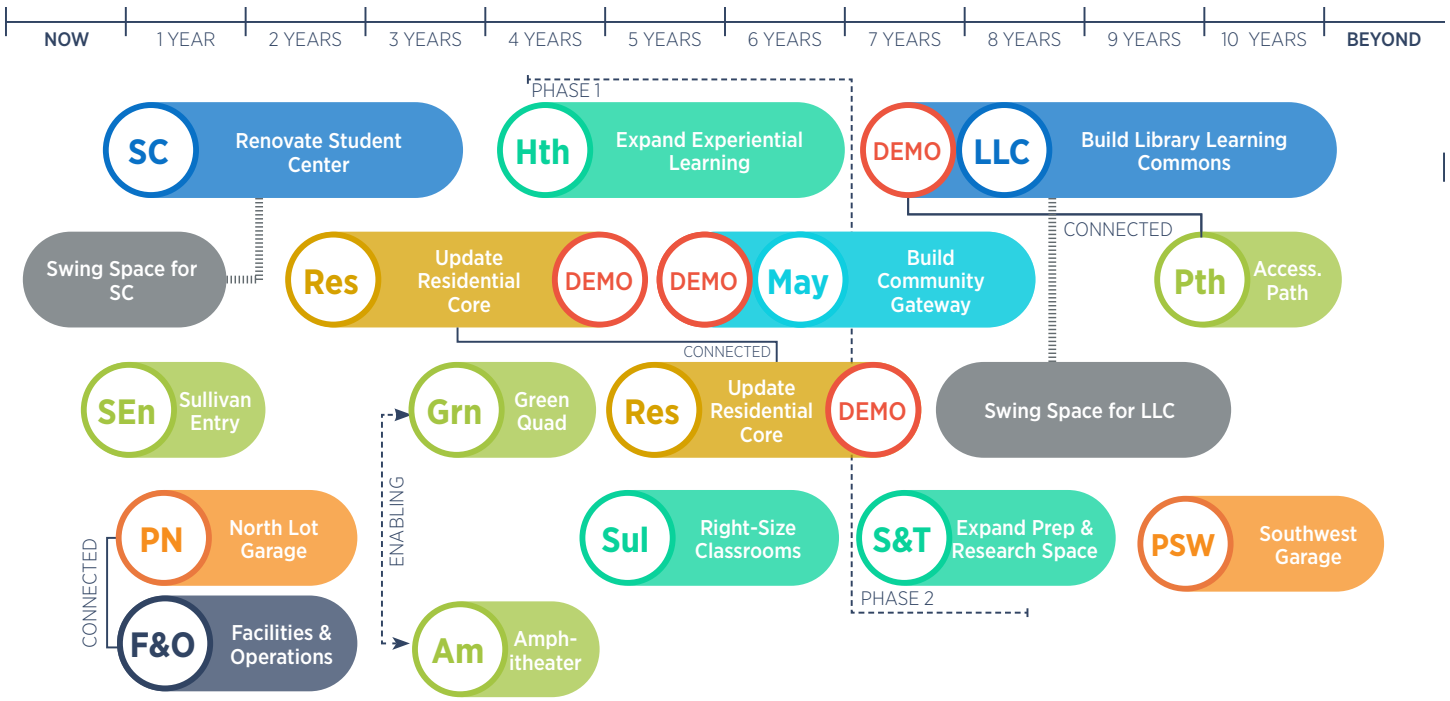
The implementation plan translates the Preferred Option into a flexible ten-year framework for completing the recommended projects. Rather than establishing a single fixed schedule, it illustrates potential sequencing strategies based on project impact, cost, dependencies, funding, and the University's ability to maintain operations throughout construction.

High-impact Major Investments form the framework of the plan, including the Student Center, Health and Experiential Learning Building, and Library Learning Commons. These projects are positioned as the primary anchors of campus transformation. Long-Term Priorities are staggered around these major investments to distribute capital needs and avoid placing excessive demands on University resources at any one time.

Supporting Investments are introduced where they enable subsequent work, improve campus operations, or accommodate program growth. These include the parking garage with integrated Facilities and Operations space, Sullivan classroom right-sizing, and the Science and Technology Building renovation. Lower-cost, high-impact projects are advanced earlier where possible, allowing the University to address accessibility, circulation, and landscape priorities while making visible progress toward the broader vision.

Phasing and swing-space requirements are incorporated throughout the timeline. These considerations help identify which projects must precede others and where temporary or permanent relocation space is necessary, creating an implementation strategy that is ambitious but operationally achievable.

IMPLEMENTATION PLAN A



Beginning at the Heart: This implementation sequence begins with the Student Center, a project identified as a priority in the previous campus master plan and studied through subsequent planning efforts. Its needs are well understood, and engagement throughout this process confirmed broad campus support for renovation. Advancing the Student Center first would provide a visible early investment in student life while beginning the larger transformation of the campus center.

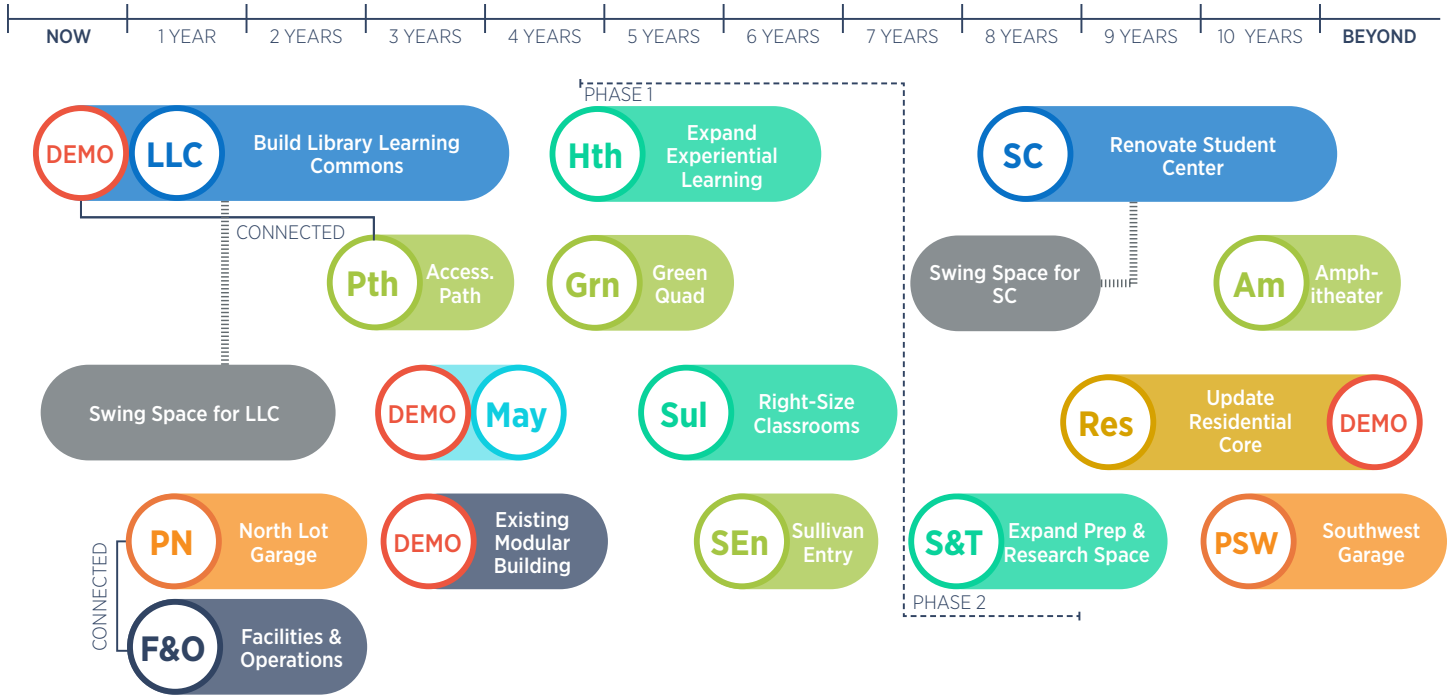
Because the building's entrances and circulation are closely connected to the surrounding grades, the project would accelerate related landscape and accessibility improvements. The expanded campus green, central pathway, and connections between upper and lower campus would need to be coordinated with the renovation rather than treated as separate future projects. These changes would also affect existing surface parking in the campus core, requiring additional parking capacity to be provided before or alongside the work through a new garage or another replacement-parking strategy.

7.2 Timeline Options

Option A represents the preferred implementation sequence based on current priorities, project dependencies, and campus needs. However, implementation may be influenced by funding availability, operational requirements, partnership opportunities, and other conditions that cannot be fully anticipated within the Master Plan.

To test the plan's flexibility, the team developed alternative sequences B&C by changing the order of the major high-impact projects while maintaining the same Preferred Alternate and long-term vision. The following pages illustrate these possibilities and their effects on enabling projects, swing space, parking, landscape improvements, and the overall project timeline.

IMPLEMENTATION PLAN B

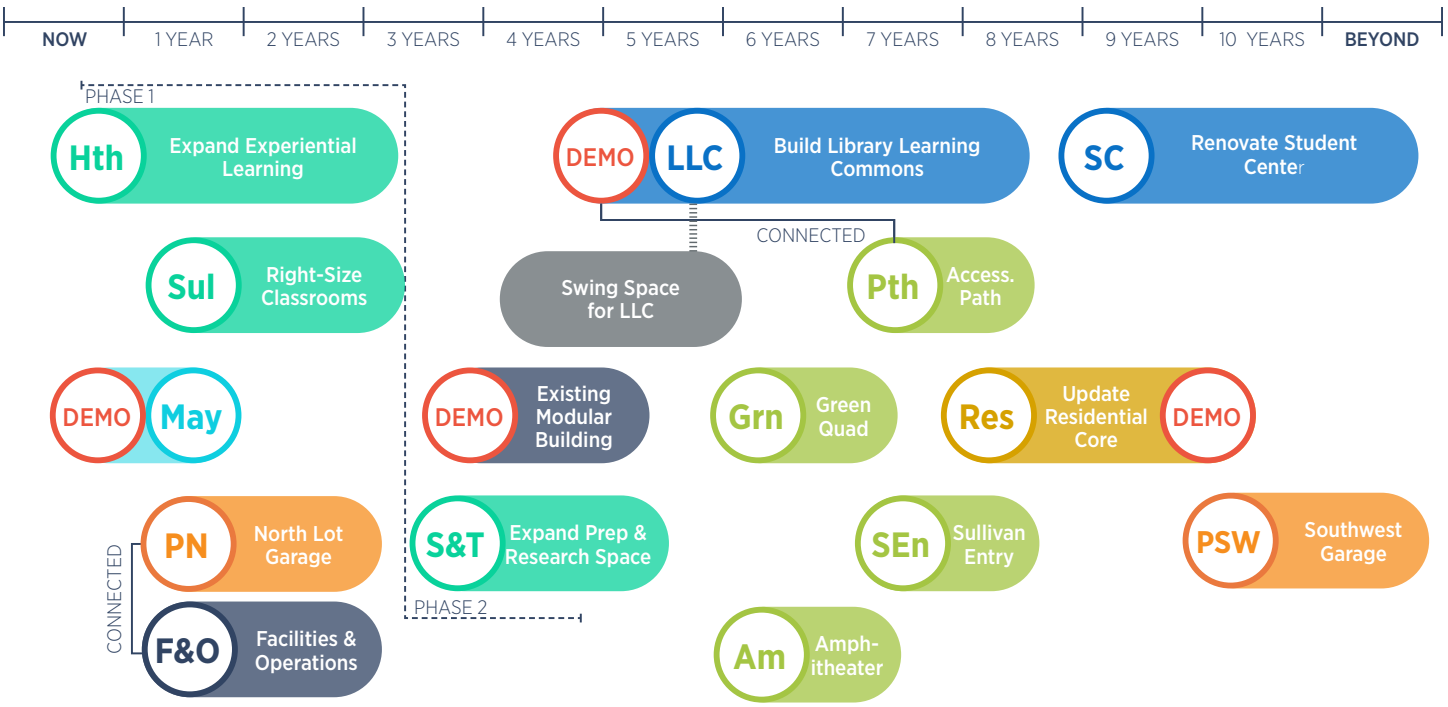


From Circle to Whole: This implementation sequence begins with the most complex major investment: replacing the existing Learning Resource Center with a new Library Learning Commons. Advancing the most difficult project first addresses the limitations of the LRC's circular form, its deferred maintenance needs, and its central role in campus circulation. Because the existing building must be demolished before construction can begin, swing space for the library, classrooms, offices, and other programs would be required almost immediately.

The new building would also provide a permanent campus home for Visual and Performing Arts functions currently located at the Craft Center. Bringing these programs back to the main campus would increase their visibility, strengthen connections to other academic programs, and allow the University to discontinue its reliance on a remote facility.

The building's entrances, accessible routes, and relationship to surrounding grades would accelerate the central campus landscape projects. Coordinating the Learning Commons with the expanded green and central pathway would replace the constrained circular building with a more open and connected campus center, helping make the campus whole.

IMPLEMENTATION PLAN C



Lead with Learning: This implementation sequence begins with the new Health and Experiential Learning Building, advancing one of the Master Plan's primary academic priorities. Because the proposed building occupies a portion of the North Lot, its construction would require additional parking capacity to be provided before or alongside the project through a new garage or another replacement-parking strategy.

The new building and Science and Technology Building renovation would be treated as a connected, phased effort. As programs relocate into the new facility, the spaces they vacate within Science and Technology can be renovated and reassigned to address research, laboratory support, and other academic needs. Advancing these projects in close succession avoids leaving space underutilized and allows the University to realize the full benefit of its investment in experiential learning.

8 Conclusion

The Worcester State University Master Plan establishes a practical, adaptable framework for shaping the campus over the next ten years. Grounded in space-utilization data, facilities assessments, campus analysis, and community engagement, the plan responds to both shared priorities and the needs of individual campus populations. Its central finding is that the University's challenge is not an overall shortage of space, but the configuration, condition, location, and performance of that space. Existing facilities must be used and scheduled more effectively, while targeted investment addresses needs that cannot be met through reallocation or renovation alone.

The Preferred Alternate focuses investment at the campus center, strengthening the Student Center and Library Learning Commons while creating an accessible connection between the residential upper campus and academic lower campus. The expanded campus green and central pathway establish a more cohesive pedestrian environment, while academic, operational, community, residential, and parking projects support the University's broader mission. Together, these recommendations enhance experiential learning, modernize student support, improve operations, and reinforce Worcester State's role as a regional educational and community resource.

Implementation will require coordination among capital investment, scheduling reform, swing space, parking, building renewal, accessibility, and decarbonization initiatives. Proposed sequencing options allow the plan to advance from different starting points while maintaining a consistent long-term direction. Lower-cost, high-impact improvements can provide early progress, while enabling projects prepare the campus for larger investments. The impact analysis provides a basis for evaluating future decisions as funding, partnerships, enrollment, and institutional priorities evolve.

This Master Plan is not a fixed set of projects or prescribed timeline, but a decision-making framework that allows Worcester State to respond to opportunity while advancing a shared vision. By aligning its physical resources with its academic mission and student needs, the University can transform a compact but divided campus into a connected, inclusive, and resilient whole.

WORCESTER STATE UNIVERSITY

BOARD OF TRUSTEES
FINANCE & FACILITIES MEETING
Thursday, October 22, 2026
3:00 P.M.
Wellness Center, Room 204

Meeting Called By: Lawrence Sasso (Chair) **Minutes**: Nikki Kapurch

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

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

---

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

AGENDA

ITEM	RESPONSIBLE	ACTION
1. *Administrative Business* A. Call to Order B. Approval of the Minutes: I. Finance and Facilities Committee - June 4, 2026*	Dr. Lawrence Sasso	I. **vote required**
2. *Finance & Facilities Committee Report* A. FY2026 Draft Financial Statements Audit*	Dr. Lawrence Sasso Kathy Eichelroth	A. Informational and **vote required**
3. *Administrative Updates* A. Other Business	Dr. Lawrence Sasso	
4. *Adjournment*	Dr. Lawrence Sasso	4. **vote required**

*Attachments

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

CHAIR:	Dr. Lawrence Sasso (Chair)	DATE:	June 4, 2026
LOCATION:	President's Conference Room with remote option	MINUTES BY:	Barry Maloney
TIME:	11:00 AM		
COMMITTEE MEMBERS PRESENT:	Lawrence Sasso (remotely); Darnell Dunn; Amy Peterson (remotely); Monica Aryitey; Jake Sanders		
BOARD MEMBERS PRESENT:	Dr. Lisa Colombo		
WSU STAFF:	Ashlynn Allain; Kathy Eichelroth; Carl Herrin; Kathy Eichelroth; Barry Maloney		

The provisions of General Laws, Chapter 30A, having been complied with and a quorum present, a meeting of the Finance and Facilities Committee was held on Thursday, June 4, 2026, in room 250 of the Administration Building, with a remote option. Chair Colombo called the meeting to order at 11:01 a.m.

Administrative Business

APPROVAL OF THE MINUTES - April 9, 2026

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

VOTED: **to approve the April 9, 2026, minutes of the Finance and Facilities Committee meeting as presented.**

ROLL CALL VOTE: **4 approved:** Lawrence Sasso (remotely); Darnell Dunn; Amy Peterson (remotely); Jake Sanders

FINANCE & FACILITIES COMMITTEE REPORT

FY 2027 Comprehensive University Budget

- Trustee Sasso mentioned that at the April 9th Finance and Facilities committee meeting, the committee members spent a lot of time discussing the budget.
- Trustee Sasso asked VP Kathy Eichelroth to walk the trustees through the FY 2027 Comprehensive University Budget memo included in the packet.
- VP Eichelroth gave the Fiscal Year 2027 Budget Overview.
- Some key points regarding the FY2027 budget:
    - The university has identified a $3,955,505 budget shortfall between revenue and expenses in FY 2027.
    - **Addressing the Budget Deficit:** To bridge the $3,955,505 structural shortfall between revenue and expenses for FY 2027, the university is implementing a multi-pronged financial strategy.
    - **Fee Adjustment:** The FY 2027 budget introduces a 4% ($450) increase to the general fee, adjusting the total cost of attendance for commuter students to $11,824.
    - **Strategic Reserve Utilization:** University reserves will be strategically drawn down to mitigate immediate costs and directly subsidize a new fundraising campaign designed to bolster student

recruitment.
    - Moody's has affirmed an A2 credit rating for the university, citing healthy student retention, robust state support, and strong overall financial management.
- State formula funding was excluded from the FY27 budget, which limits Worcester State's ability to close its base appropriation gap relative to peer institutions. However, the Healy Administration remains supportive of public higher education.
- If the BRIGHT Act is passed, it would direct $2.4B to public higher education, funded through the Fair Share Amendment.
    - Timeline: $125M is earmarked for annual debt service, but campus-level dollars are not anticipated to arrive until approximately FY29.
    - The conversations the board has been privy to regarding the master plan work are tethered to the BRIGHT Act. All campuses must have an updated master plan to draw down those dollars.

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

VOTED: **to recommend to the full board the approval of the WSU FY 2027 Comprehensive University Budget as presented.**

ROLL CALL VOTE: **5 approved.** Monica Aryitey; Darnell Dunn; Amy Peterson (remotely); Dr. Lawrence Sasso (Vice Chair); Jake Sanders

Other items up for discussion and a vote were Deferred Maintenance and the Indirect Cost Recovery Trust Fund. Information on both topics is included in the packet. Board members voted unanimously to approve deferred maintenance repairs at 535 Chandler Street and the Indirect Cost Recovery Trust Fund. This new trust fund formalizes the tracking and reinvestment of retained grant overhead dollars.

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

VOTED: **to recommend to the full board the approval of the deferred maintenance repairs at 535 Chandler Street, as described in the memo dated May 14, 2026.**

ROLL CALL VOTE: **5 approved.** Monica Aryitey; Darnell Dunn; Amy Peterson (remotely); Dr. Lawrence Sasso (Vice Chair); Jake Sanders

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

VOTED: **to recommend to the full board the approval of the creation of the Indirect Cost Recovery Trust Fund.**

ROLL CALL VOTE: **5 approved.** Monica Aryitey; Darnell Dunn; Amy Peterson (remotely); Dr. Lawrence Sasso (Vice Chair); Jake Sanders

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

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

VOTED: **to adjourn the meeting at 11:55 a.m.**

ROLL CALL VOTE: **5 approved.** Monica Aryitey; Darnell Dunn; Amy Peterson (remotely); Dr. Lawrence Sasso (Vice Chair); Jake Sanders

Respectfully submitted,

Barry M. Maloney, Secretary, Board of Trustees

WORCESTER STATE UNIVERSITY

(AN AGENCY OF THE COMMONWEALTH OF MASSACHUSETTS)

FINANCIAL STATEMENTS
AND MANAGEMENT'S DISCUSSION AND ANALYSIS
WITH SUPPLEMENTARY INFORMATION, STATISTICAL INFORMATION AND OTHER REPORTS

YEARS ENDED JUNE 30, 2026 AND 2025

AND

INDEPENDENT AUDITOR'S REPORT

DISCUSSION DRAFT 10/13/26

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

FINANCIAL STATEMENTS
AND MANAGEMENT'S DISCUSSION AND ANALYSIS WITH SUPPLEMENTARY
INFORMATION, STATISTICAL INFORMATION AND OTHER REPORTS

YEARS ENDED JUNE 30, 2026 AND 2025

TABLE OF CONTENTS

DISCUSSION DRAFT 10/13/26

	Page
Independent Auditor's Report	1 - 3
Management's Discussion and Analysis	4 - 11
Basic Financial Statements:	
Statements of Net Position	12 - 13
Statements of Revenues, Expenses and Changes in Net Position	14 - 15
Statements of Cash Flows	16 - 17
Notes to Financial Statements	18 - 45
Supplementary Information:	
Schedule 1 - Schedule of the University's Proportionate Share of the Net Pension Liability	46
Schedule 2 - Schedule of University Pension Contributions	47
Notes to Schedule of the University's Proportionate Share of the Net Pension Liability and Schedule of University Pension Contributions	48 - 49
Schedule 3 - Schedule of the University's Proportionate Share of the Net OPEB Liability	50
Schedule 4 - Schedule of University OPEB Contributions	51
Notes to Schedule of the University's Proportionate Share of the Net OPEB Liability and Schedule of University OPEB Contributions	52 - 55
Schedule 5 - University Net Position Analysis	56
Schedule 6 - Functional Expenses	57
Schedule 7 - Residence Life and Housing Statements of Net Position	58
Schedule 8 - Residence Life and Housing Statements of Revenues, Expenses, and Changes in Net Position	59
Schedule 9 - Health Services Statements of Revenues, Expenses, and Changes in Net Position	60
Statistical Information	61 - 66
Other Reports:	
Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*	67 - 68

BOLLUS LYNCH
CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS

INDEPENDENT AUDITOR'S REPORT

Board of Trustees
Worcester State University

DISCUSSION DRAFT 10/13/26

Report on the Audit of the Financial Statements

Opinions

We have audited the financial statements of the business-type activities and the discretely presented component unit of Worcester State University (an agency of the Commonwealth of Massachusetts) (the "University"), as of and for the years ended June 30, 2026 and 2025, and the related notes to the financial statements, which collectively comprise the University's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the respective financial position of the business-type activities and discretely presented component unit of Worcester State University, as of June 30, 2026 and 2025, and the respective changes in financial position, and, where applicable, cash flows thereof for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the University and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the University's ability to continue as a going concern for 12 months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the University's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the University's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis on pages 4 through 11 and certain information pertaining to liabilities recorded in accordance with Government Accounting Standards Board (GASB) Statement No. 68, *Accounting and Financial Reporting for Pensions* and GASB Statement No. 75, *Accounting and Financial Reporting for Postemployment Benefits Other than Pensions* on pages 46 through 55 be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with GAAS, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

DISCUSSION DRAFT 10/13/26

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the University's basic financial statements. The supplementary information on pages 56 through 60 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with GAAS. In our opinion, the supplementary information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information

Management is responsible for the statistical information on pages 61 through 66. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated _____, 2026, on our consideration of the University's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the University's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the University's internal control over financial reporting and compliance.

Worcester, Massachusetts
_____, 2026

DISCUSSION DRAFT 10/15/26

MANAGEMENT'S DISCUSSION AND ANALYSIS
(UNAUDITED)

DISCUSSION DRAFT 10/13/26

Overview of the Financial Statements

As management of Worcester State University, we offer readers of Worcester State University's financial statements this narrative overview and analysis of the financial activities of Worcester State University for the fiscal year ended June 30, 2026. This discussion is provided by management and should be read in conjunction with the financial statements and notes thereto.

Worcester State University was founded in 1871 and is one of nine comprehensive public colleges/universities in the Commonwealth of Massachusetts. The University affirms the principles of liberal learning as the foundation for all advanced programs of study and offers programs in the traditional liberal arts and science disciplines, while maintaining its historical focus on teacher education. The University offers 102 undergraduate majors and minors, 29 graduate programs, 82 study abroad programs, and a student-to-faculty ratio of 14:1. During FY 2026 the University had 4,471 full and part-time undergraduate students and 788 full and part-time graduate and professional students.

The financial report consists of three basic financial statements designed to provide an objective, easily readable summary of State University's financial activities. These statements present the financial position and activities of the university as the primary institution, alongside its discretely presented component unit, the State University Foundation (the Foundation).

Although the Foundation is a legally separate entity, it is included in the reporting entity because of the significance of its operational and financial relationship with the university. The basic financial statements include:

Statement of Net Position: Presents the assets, deferred outflows of resources, liabilities, and deferred inflows of resources for both the university and the Foundation, with the residual balance reported as net position. Over time, increases or decreases in net position serve as a useful indicator of whether the financial health of the institution or its component unit is improving or deteriorating.

Statement of Revenues, Expenses, and Net Position: Reports the operating results and changes in net position. This statement distinctly categorizes activities into operating revenues and expenses, noncapital subsidies (such as state operational appropriations and federal Pell grants), and other nonoperating activities to clearly illustrate how the university's core mission is funded. The Foundation's activities, which primarily center on fundraising and investment management to support the university, are displayed in a separate column to maintain distinction from the primary institution.

Statement of Cash Flows: Details the cash inflows and outflows during the fiscal year for the university. These flows are categorized by operating activities, noncapital financing activities, capital and related financing activities, and investing activities, providing a direct look at the primary institution's liquidity and sources of cash. (Note: In accordance with GASB standards, a statement of cash flows is not required or presented for the discretely presented component unit).

DISCUSSION DRAFT 10/13/26

Financial Summary: Comparison of Current Fiscal Year to Prior Fiscal Year

Financial Category	FY 2026	FY 2025	Change	Change (%)
Current and other assets	$111,153,144	$102,837,738	$8,315,406	8.0%
Capital assets, net	$152,686,186	$164,077,712	($11,391,526)	-7.0%
Total Assets	**$263,839,330**	**$266,915,450**	**($3,076,120)**	**-1.0%**
Deferred outflow of resources	$2,199,667	$3,673,068	($1,473,401)	-40.0%
Total Assets and Deferred Outflows	**$266,038,997**	**$270,588,518**	**($4,549,521)**	**-2.0%**
Current Liabilities	$27,490,013	$24,571,396	$2,918,617	12.0%
Long-term liabilities	$124,080,087	$134,733,359	($10,653,272)	-8.0%
Total Liabilities	**$151,570,100**	**$159,304,755**	**($7,734,655)**	**-5.0%**
Deferred inflow of resources	$14,417,116	$18,237,357	($3,820,241)	-21.0%
Total Liabilities and Deferred Inflows	**$165,987,216**	**$177,542,112**	**($11,554,896)**	**-7.0%**
Net investment in capital assets	$44,474,687	$48,751,029	($4,276,342)	-9.0%
Restricted net position	$1,376,205	$2,008,062	$2,869,914	143.0%
Unrestricted net position	$54,200,889	$42,287,317	$8,411,801	20.0%
Total Net Position	**$100,051,781**	**$93,046,408**	**$7,005,373**	**8.0%**
Operating revenues	$74,891,835	$74,309,065	$582,770	1.0%
Operating expenses	$128,601,542	$125,109,539	$3,492,003	3.0%
Net Operating Loss	**$53,709,706**	**$50,800,474**	**$2,909,232**	**6.0%**
Noncapital state subsidies	$57,448,977	$58,195,227	($746,250)	-1.0%
Other nonoperating revenue/expense	$3,266,103	$7,217,178	($3,951,075)	-55.0%
Increase in Net Position	**$7,005,373**	**$14,611,931**	**($7,606,558)**	**-52.0%**

The University's total net position increased by $7,005,373. Pension and insurance expense decreased by $5,813,335, as a result of recording the University's portion of the Commonwealth's postretirement obligations. When the Commonwealth's postretirement obligation adjustments are removed from the University's operating expenses, "Pension and insurance" costs as reported on Schedule 6 of the accompanying supplementary information, increases to $18,581,066 in FY 2026, and $21,627,281 in FY 2025. In addition, the University's total change in net position at June 30, 2026 is reduced to $1,575,303, and at June 30, 2025 is reduced to $6,697,268.

The University's Net Position as June 30, 2026 was $100,051,781, as detailed in the table below. Unrestricted Net Position from Operations as of June 30, 2025 was $82,212,813. The healthy operational reserves is offset by the University's allocation of the Commonwealth's accumulated Net Retirement Obligations of $10,697,736 related to Pensions and $17,314,188 related to OPEB, resulting in Net Unrestricted Reserves of $54,200,889.

DISCUSSION DRAFT 10/13/26

Residence Life and Housing experienced a $1,707,402 reduction in Net Position in FY 2026. The adoption of GASB Statement No. 87, Leases (GASB 87), requires the reclassification of remitted MSCBA annual assessments to interest expense and a reduction of the accumulated outstanding lease liability for contracted use of the facilities. In addition, the value of the leased facilities are reported as assets on the Statement of Net Position and require an annual posting to amortize those assets. The value of the assets at June 30, 2026 is $65,421,766 and the outstanding lease obligations related to the assets as of June 30, 2025 is $81,865,121, as reported on Schedule 7.

Residence Life and Housing Net position as of June 30, 2026 was ($14,825,658). Further analysis of Net Position identifies the value of designated net future lease payments of ($16,527,355) and accumulated operating reserves of $1,701,697, at June 30, 2026, as reported on Schedule 8.

The following schedule presents an analysis of Worcester State University's net position as of June 30, 2026 and 2025, respectively:

Analysis of Net Position	2026	2025
Invested in capital assets, net	$44,474,687	$48,751,029
Restricted reserves, expendable for:		
Other	$1,376,205	$2,008,062
Total restricted reserves, expendable	**$1,376,205**	**$2,008,062**
Unrestricted net position		
Unrestricted reserves from operations	$82,212,813	$76,112,578
Accumulated Massachusetts Pension Obligations	($10,697,736)	($12,192,620)
Accumulated Massachusetts OPEB Obligations	($17,314,188)	($21,632,641)
Total net unrestricted reserves	**$54,200,889**	**$42,287,317**

A portion of the Worcester State University's net position (1.38%) as of June 30, 2026, represent funds that are subject to external restrictions on how they must be used. Unrestricted net reserves from operations of $82,212,813 at June 30, 2026 may be used to meet the University's ongoing obligations to its stakeholders. At the end of the current fiscal year, Worcester State University reports a positive balance in restricted reserves, a positive balance in unrestricted reserves from operations and accumulated net negative obligations for the allocated share of the Commonwealth of Massachusetts pension and OPEB plans.

The University's primary reserve ratio, calculated as expendable net position divided by total expenses, is 65.0% and 62.44%, respectively, for the years ended June 30, 2026 and June 30, 2025. This ratio provides a snapshot of financial strength and flexibility by indicating the percent of operating expenses that could be funded by expendable reserves without relying on additional net position generated by operations.

The primary reserve ratio is impacted annually by the year end accrual of the University's allocation of the Commonwealth's Net Pension & OPEB liability. The University had a reduction of $5,813,335 in accrual of pension and insurance expense in FY 2026 and a reduction of $7,914,663 in FY 2025 to reflect the University's allocation of the Commonwealth's accrued obligation of Pension and OPEB liabilities. Removing the pension/OPEB accruals impact on operating expenses results in an adjusted primary reserve ratio of 62% in FY 2026 and 59% in FY 25.

DISCUSSION DRAFT 10/15/26

The application of GASB 68 and GASB 75 requires certain reporting and disclosures with regard to the Massachusetts State Employees' Retirement System (MSERS) and the Commonwealth of Massachusetts Other Post-Employment Benefit (OPEB) Plan. The authority for establishing and amending these provisions rests with the Massachusetts Legislature, Chapter 32A of the General Laws of the Commonwealth of Massachusetts. The allocation provided to the University from the Commonwealth of Massachusetts Comptroller's Office reflects the University's proportionate share of the net pension and OPEB liability related to its participation in MSERS and OPEB. The University's participation in MSERS and OPEB is directly related to the share of annual payroll subject to retirement assessment that is funded from campus-based resources in contrast to payroll expended from annual operating appropriations allocated to the University from Commonwealth resources. In FY 2026 annual payroll subject to retirement assessment that was funded from campus-based resources was $7,984,715, total payroll costs subject to retirement assessment for FY 2025 was $49,630,423.

The University's return on net position ratio, calculated as the change in total net position divided by total net position - beginning of the year, is 7.53% and 18.63%, respectively, for the years ended June 30, 2026 and June 30, 2025. This ratio measures total economic return including capital investment and positive operating results. An improving trend indicates increasing net position which provides for increased financial flexibility. Annual fluctuations in the Commonwealth's pension and OPEB accruals can significantly impact the return on net position ratio. In FY 2026, the pension and OPEB accruals decreased operating expenses by $5,813,335. Excluding this non-operational adjustment, the core operational increase in net position was $1,192,038. Consequently, the adjusted calculation of the return on net position ratio reflects a rate of 1.28% for FY 2026 and 8.54% for FY 2025.

Capital appropriations in FY 2026 included funding for the third year of the second five-year allotment of critical repair funds from the Commonwealth. FY 2026 projects included the Learning Resource Center data Center AC replacement and the Sullivan Building air handling units. The nature of the majority of the work was for repair and rehabilitation of existing infrastructure and did not increase the value of those assets.

State appropriations are reported net of the amount of in-state day school tuition collected by the University on behalf of the Commonwealth. The in-state day tuition collected is remitted back to the Commonwealth as dictated by Massachusetts General Law. Included in State appropriations are the fringe benefit costs for University employees paid by the Commonwealth. Capital appropriations are funded by Massachusetts General Obligation Bonds which are issued to fund Commonwealth infrastructure improvements. The funds are provided to the campus in the form of a capital grant and as such the University is not responsible for repayment of the funds.

DISCUSSION DRAFT 10/13/26

The following schedule details the noncapital state subsidies received by the University for the years ending June 30, 2026 and 2025, respectively. State appropriations increased by $1,392,419 to fund collective bargaining costs related to contracts that had been ratified prior to the start of the new budget cycle. There is a significant decrease of $2,110,107 in fringe benefit funding in FY 2026 due to the Office of the Comptroller implementing a federally approved back charge rate of 35.60% of direct labor costs, compared to a rate of 43.44% in FY 2025.

Noncapital State Subsidies Summary	2026	2025
State Appropriations	$42,575,987	$41,183,568
Appropriations to cover fringe benefits	$15,313,831	$17,423,938
Tuition remitted back to the State	($440,842)	($412,279)
Total Noncapital State Subsidies	**$57,448,977**	**$58,195,227**

The following schedule presents Worcester State University's change in net position for the fiscal years ended June 30, 2026 and 2025, respectively.

Net Change Matrix	2026	2025	Change
Net Tuition and Fee Revenue	$48,698,646	$46,257,756	$2,440,890
Other Revenue, net of Financial Aid	$26,193,189	$28,051,309	($1,858,120)
Operational Expenses	($128,601,542)	($125,109,539)	($3,492,003)
Net Operating Loss	**($53,709,706)**	**($50,800,474)**	**($2,909,232)**
Noncapital state subsidies	$57,448,977	$58,195,227	($746,250)
Investment and non-operating income	$1,377,343	$2,591,025	($1,213,682)
Capital appropriations	$1,888,759	$4,626,153	($2,737,394)
Change in Net Position	**$7,005,373**	**$14,611,931**	**($7,606,558)**

Net tuition and fees increased over FY 2025 for several reasons including an increase in the General Fee by $450 a year for a full undergraduate course load. Resident housing occupancy also increased over the prior year, in addition to an increase in room rents. Other Revenue, net of student financial aid, decreased by $1,858,120 in FY 26 over the prior year. In FY26 the university experienced a decline in nongovernment grants for community outreach programs, a decrease in state funds for student financial aid, and a decrease in state grants for academic programs and student support services.

FY 2026 operating expenses, inclusive of OPEB and Pension accrual adjustments, increased $3,492,003 over the prior year. Removing the pension accrual adjustments for both years adjusts operating expenses to $134,414,877 in FY 2026 and $133,024,202 in FY 2025, reflecting a $1,390,675 increase year to year. Fluctuations in expense categories in FY 2026 include an increase in total payroll and benefits costs from the prior year due to increased collective bargaining costs partially offset by a decrease in the fringe benefit charge back rate assessed by the Commonwealth of Massachusetts. Professional services expenses increased in FY 2026 as more deferred maintenance resources were directed towards project study and planning during the year while spending shifted down in the construction and building improvement category during the same period. This shift was intentional and reflects the allocation of funds to the project planning phase of deferred maintenance projects.

DISCUSSION DRAFT 10/13/26

Noncapital state subsidies experienced a net reduction of $746,250 in FY 2026 from the prior year. Tuition remitted back to the Commonwealth was relatively stable at $440,842 compared to $412,279 in the prior year. State operating appropriations increased approximately $4.1M ensuring collective bargaining commitments were funded, while the costs of fringe benefits funded by the Commonwealth on behalf of WSU employees decreased by $2.1M due to a decrease in the Commonwealth's Federally approved back charge rate.

Investment income trended down in FY 2026 mainly due to timing differences in the fixed income portfolio resulting in a net unrealized loss on investments of $577,017 on June 30, 2026 compared to an unrealized gain on June 30, 2025. It is university practice to hold all fixed income investments to maturity at which time the full coupon is earned and a gain or loss is not realized on the investment.

In FY 2026 the university completed three of the five years of critical repair projects for which we received funding commitment from the Commonwealth of Massachusetts through capital appropriations. The more extensive deferred maintenance projects were scheduled in the early years of funding. In FY 2026 two significant projects began in the spring and carried over onto the next fiscal year. There is one more project that will be accomplished in two phases that will span FY 2027 and FY 2028.

Significant Capital Asset & Long-Term Financial Activity

Capital Assets

During FY 2026 $3,468,380 was invested in the maintenance and repair of several building on campus including the Sullivan Academic Building where the air handling units and the roof were replaced. During the same period of time the Student Center received some much-needed improvements to better adapt space and make repairs to address current demands on the student affairs team. Also during the year, the Commonwealth of MA completed its investment in the underground electrical infrastructure relocation and repairs on campus. This project has been ongoing for years in an effort to stabilize the electrical service to campus to ensure isolation of outages in a way that there would be a continuity of service in buildings not directly experiencing an outage. The total cost of this project is $11,173,266 and has been move from construction in progress to a fixed asset addition in FY 2026. Other additions to fixed assets during the year include $970,918 in equipment of which $475,000 was for security systems, $68,000 for teaching equipment and $737,537 in capital leases related to IT and printing equipment.

Long-Term Financing

As of June 30, 2025 the outstanding capital lease liability on MSCBA right-to-use assets was $89,415,029. The balance decreased in FY 2026 due to the annual lease payment of $3,800,787, in addition to an MSCBA bond refunding that reduced the right-to-use liability an additional $1,089,460.

Currently Known Facts, Decisions or Conditions

Operating Budget

The FY 2027 budget was approved by the Board of Trustees on June 10, 2026. The resources provided by the Commonwealth of Massachusetts included level funded state operating appropriations, funding of FY 2027 collective bargaining commitments, and student retention focused SUCCESS grants.

DISCUSSION DRAFT 10/13/26

Items of concern continue to be the fact that funding has not been provided for the SU Funding Formula line item, and Massachusetts grant funding being undercapitalized compared to recent years. The State University Council of Presidents continues to advocate for increased funding and has filed multiple amendments for the state university system requesting funding of the Formula Funding line and substantial increases in state scholarship funding.

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

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

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

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

Campus Infrastructure

In June of 2022 the Commonwealth announced a second, five year-round of critical repair funds for the Massachusetts Higher Education Campuses. Critical repairs projects are smaller scale, building-specific, and involve renewal, repair and replacement of equipment and systems. Critical repairs projects are managed directly by the individual campuses. The five-year allocation is coming to an end in FY 2028 with one project to be accomplished in phases over a two year period from Worcester State University's allocation.

Future infrastructure funding is tied to the BRIGHT Act. "The BRIGHT Act (An Act to build resilient infrastructure to generate higher-ed transformation) is a multi-billion-dollar bond bill in Massachusetts designed to modernize public higher education facilities, reduce carbon emissions, and address deferred maintenance", per the legislation that was first filed in January 2025. The BRIGHT Act has already passed both the Massachusetts House of Representatives (in late 2025) and the Massachusetts Senate (in February 2026), with the legislation is in its final stages. The remaining steps to officially pass the BRIGHT Act into law includes consideration by the House and Senate Conference Committees where the committees will come to consensus on funding, and other provisions, leading to the issuance of a conference report. At that point it will be sent to the Governor to be signed into law.

DISCUSSION DRAFT 10/13/26

The BRIGHT Act as written requires an institution to have an updated campus master plan. During FY 2026 the university has been involved in a master planning process led by the Division of Capital Asset Management and Maintenance (DCAMM). The master planning process has been extensive and inclusive of the entire campus community. The planning process is nearing completion with the final master plan expected to be approved by the university board of trustees at their October board meeting.

DISCUSSION DRAFT 10/13/26

FINANCIAL STATEMENTS

DISCUSSION DRAFT 10/13/26

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF NET POSITION

JUNE 30, 2026 AND 2025

	Worcester State University		Component Unit Worcester State Foundation	
	2026	2025	2026	2025
ASSETS				
Current assets:				
Cash and cash equivalents	$ 45,446,138	$ 40,103,488	$ 6,899,612	$ 6,241,637
Cash held by State Treasurer	6,676,062	4,385,266	-	-
Accounts receivable, net	2,231,187	3,014,222	831	-
Current portion of loans receivable	-	2,350	-	-
Current portion of contributions receivable	-	-	2,344,008	927,304
Inventories	208,615	161,173	132,837	114,987
Prepaid expenses and other current assets	510,030	320,774	32,769	31,831
Total current assets	55,072,032	47,987,273	9,410,057	7,315,759
Non-current assets:				
Investments	50,028,584	48,542,767	58,640,403	49,426,759
Loans receivable, less current portion	219,550	258,911	-	-
Contributions receivable, less current portion	-	-	3,677,822	3,695,677
Other non-current assets	5,832,978	6,048,788	150,331	150,533
Capital assets, net of accumulated depreciation	152,686,186	164,077,712	3,603,099	3,772,475
Total non-current assets	208,767,298	218,928,178	66,071,655	57,045,444
Total assets	263,839,330	266,915,451	75,481,712	64,361,203
DEFERRED OUTFLOWS OF RESOURCES				
Resources related to pension and OPEB obligations	1,924,496	3,372,530	-	-
Loss on refunding of bonds payable	275,171	300,538	-	-
Total deferred outflows of resources	2,199,667	3,673,068	-	-

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to financial statements.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF NET POSITION

JUNE 30, 2026 AND 2025
(Continued)

DISCUSSION DRAFT 10/13/26

	Worcester State University		Component Unit Worcester State Foundation	
	2026	2025	2026	2025
LIABILITIES				
Current liabilities:				
Current portion of bonds payable	$ 1,117,432	$ 1,080,221	$ 24,575	$ 23,564
Current portion of lease obligations	4,573,752	4,659,152	-	-
Current portion of subscription-based IT arrangements	801,669	887,390	-	-
Accounts payable	5,019,978	3,508,954	229,380	277,589
Accrued payroll and fringe benefits	5,344,160	7,413,503	-	-
Accrued interest and other liabilities	77,098	75,333	150,997	126,433
Funds held for others	-	-	5,509	5,509
Student deposits and unearned revenue	6,031,694	2,804,872	203,635	156,305
Current portion of split-interest agreements	-	-	2,796	2,380
Current portion of accrued workers' compensation	-	220,455	-	-
Current portion of accrued compensated absences	4,524,230	3,921,515	-	-
Total current liabilities	27,490,013	24,571,395	616,892	591,780
Long-term liabilities:				
Bonds payable, less current portion	15,499,256	16,791,222	335,381	360,049
Lease obligations, less current portion	85,690,286	90,808,376	-	-
Subscription-based IT arrangements, less current portion	416,058	978,311	-	-
Split-interest agreements, less current portion	-	-	10,739	10,373
Accrued workers' compensation, less current portion	1,643,184	1,466,118	-	-
Accrued compensated absences, less current portion	2,800,134	2,703,691	-	-
Accrued pension and OPEB obligations	17,788,466	21,677,468	-	-
Refundable grant - federal financial assistance program	242,703	308,173	-	-
Total liabilities	151,570,100	159,304,754	963,012	962,202
DEFERRED INFLOWS OF RESOURCES				
Resources related to pension and OPEB obligations	12,147,954	15,520,323	-	-
Deferred service concession arrangements	1,958,043	2,369,818	-	-
Gain on refunding of bonds payable	311,119	347,216	-	-
Total deferred inflows of resources	14,417,116	18,237,357	-	-
NET POSITION				
Invested in capital assets, net	44,474,687	48,751,029	-	-
Restricted - non-expendable	-	-	28,836,310	27,824,386
Restricted - expendable	1,376,205	2,008,062	35,680,794	26,394,138
Unrestricted	54,200,889	42,287,317	10,001,596	9,180,477
Total net position	$ 100,051,781	$ 93,046,408	$ 74,518,700	$ 63,399,001

See accompanying independent auditor's report and notes to financial statements.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF REVENUES, EXPENSES AND CHANGES IN NET POSITION

YEARS ENDED JUNE 30, 2026 AND 2025

	Worcester State University		Component Unit Worcester State Foundation	
	2026	2025	2026	2025
REVENUES				
Operating revenues:				
Student tuition and fees	$ 50,755,544	$ 49,271,832	$ 817,676	$ 661,528
Auxiliary enterprises, student housing	13,594,890	12,826,905	-	-
Less: Scholarship discounts and allowance	15,651,788	15,840,981	-	-
Net student tuition and fees	48,698,646	46,257,756	817,676	661,528
Contributions	-	-	4,173,913	4,220,555
Federal grants and contracts	10,712,546	10,902,010	-	-
State and local grants and contracts	9,341,193	10,452,329	-	-
Nongovernmental grants and contracts	4,644,191	5,075,221	-	-
Auxiliary enterprises, other	185,585	171,046	246,630	223,576
Other operating revenues	1,309,675	1,450,703	251,411	250,315
Total operating revenues	74,891,836	74,309,065	5,489,630	5,355,974
EXPENSES				
Operating expenses:				
Instruction	45,800,512	45,823,935	-	-
Public service	816,995	746,210	-	-
Academic support	6,887,047	6,328,625	-	-
Student services	14,337,918	12,872,499	-	-
Institutional support	17,002,238	15,792,638	1,491,168	1,467,659
Operation and maintenance of plant	16,384,400	15,681,762	79,782	72,747
Scholarship	4,310,889	5,000,095	1,262,834	1,022,182
Depreciation	7,220,717	7,618,507	197,793	191,625
Auxiliary enterprises	15,118,832	14,469,410	-	-
Total operating expenses	127,879,548	124,333,681	3,031,577	2,754,213
Operating income (loss)	(52,987,712)	(50,024,616)	2,458,053	2,601,761
NONCAPITAL SUBSIDIES				
State appropriations	57,448,977	58,195,227	-	-
Operating income (loss) and noncapital subsidies	4,461,265	8,170,611	2,458,053	2,601,761

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to financial statements.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF REVENUES, EXPENSES AND CHANGES IN NET POSITION

YEARS ENDED JUNE 30, 2026 AND 2025
(Continued)

	Worcester State University		Component Unit Worcester State Foundation	
	2026	2025	2026	2025
OTHER NONOPERATING REVENUES (EXPENSES)				
Interest and investment income	1,377,343	2,591,025	9,340,390	4,907,253
Debt service expense	(721,994)	(775,858)	(47,349)	(44,757)
Capital appropriations	1,888,759	4,626,153	-	-
Other payments to Worcester State University	-	-	(1,553,055)	(1,938,154)
Additions to permanent endowments	-	-	921,660	2,115,055
Net other nonoperating revenues	2,544,108	6,441,320	8,661,646	5,039,397
Change in net position	7,005,373	14,611,931	11,119,699	7,641,158
NET POSITION				
Beginning of year	93,046,408	78,434,477	63,399,001	55,757,843
End of year	$ 100,051,781	$ 93,046,408	$ 74,518,700	$ 63,399,001

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to financial statements.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2026 AND 2025

DISCUSSION DRAFT 10/13/26

	Primary Government	
	2026	2025
Cash flows from operating activities:		
Student tuition, fees and charges	$ 47,817,280	$ 40,887,723
Federal grants and contracts	10,712,546	10,902,010
State and local grants and contracts	9,341,193	10,452,329
Nongovernmental grants and contracts	4,644,191	5,075,221
Auxiliary enterprise charges	185,585	171,046
Employee compensation and fringe benefit payments	(66,855,797)	(59,246,069)
Payments to suppliers	(35,583,859)	(34,998,090)
Loans repaid by students	41,711	9,564
Other receipts (payments)	1,503,165	2,531,884
Net cash used in operating activities	(28,193,985)	(24,214,382)
Cash flows from noncapital financing activities:		
State appropriations	42,135,146	40,771,288
Net deposits	(24,931)	(84,596)
Net cash provided by noncapital financing activities	42,110,215	40,686,692
Cash flows from capital and related financing activities:		
Capital appropriations	1,888,759	4,626,153
Purchases of capital assets	(250,099)	(3,687,396)
Principal payments of bonds payable	(1,080,221)	(1,037,496)
Principal payments on lease obligations	(4,679,620)	(4,641,976)
Principal payments on subscription-based IT arrangements	(959,100)	(1,136,925)
Perkins loan program, net funds paid	(65,470)	1,528
Interest paid on capital debt	(905,493)	(982,806)
Net cash used in capital and related financing activities	(6,051,244)	(6,858,918)
Cash flows from investing activities:		
Proceeds from sales and maturities of investments	56,583,939	62,053,831
Purchases of investments	(58,648,080)	(72,690,641)
Interest and investment income	1,832,601	1,562,455
Net cash used in investing activities	(231,540)	(9,074,355)
Net change in cash and cash equivalents	7,633,446	539,037
Cash and cash equivalents, beginning of year	44,488,754	43,949,717
Cash and cash equivalents, end of year	$ 52,122,200	$ 44,488,754

See accompanying independent auditor's report and notes to financial statements.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2026 AND 2025
(Continued)

DISCUSSION DRAFT 10/13/26

	Primary Government	
	2026	2025
Reconciliation of operating loss to net cash used in operating activities:		
Operating loss	$ (52,987,712)	$ (50,024,616)
Adjustments to reconcile operating loss to net cash used in operating activities:		
Depreciation expense	5,871,720	5,800,600
Amortization of leased assets	4,606,210	4,338,828
Amortization on subscription-based IT arrangements	950,951	1,073,317
Amortization of other assets	215,810	215,810
Accretion of deferred service concession arrangements	(411,775)	(411,776)
Fringe benefits paid by the Commonwealth of Massachusetts	15,313,831	17,423,939
(Increase) decrease in operating assets and deferred outflows:		
Accounts receivable, net	783,035	1,472,388
Loans receivable	41,711	9,564
Inventories	(47,442)	8,471
Prepaid expenses and other current assets	(66,190)	-
Resources related to pension and OPEB obligations	1,448,034	496,175
Increase (decrease) in operating liabilities and deferred inflows:		
Accounts payable	1,511,024	1,365,609
Accrued payroll and fringe benefits	(2,069,343)	2,606,401
Accrued workers' compensation	(43,389)	7,346
Student deposits and unearned revenue	3,251,753	(349,372)
Accrued compensated absences	699,158	163,772
Accrued pension and OPEB obligations	(3,889,002)	(622,725)
Resources related to pension and OPEB obligations	(3,372,369)	(7,788,113)
Net cash used in operating activities	$ (28,193,985)	$ (24,214,382)

See accompanying independent auditor's report and notes to financial statements.

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization

Worcester State University (the "University") is a public, state-supported University, located in Worcester, Massachusetts. The University is governed by a local Board of Trustees under the discretion of the Massachusetts Department of Higher Education. As one of nine four-year, state-supported colleges and universities, the University is empowered to award baccalaureate and masters' degrees in education and in the arts and sciences, as well as programs of continuing education.

The University is an agency of the Commonwealth of Massachusetts (the "State", the "Commonwealth"). Accordingly, the accompanying financial statements may not necessarily be indicative of the conditions that would have existed if the University had been operated as an independent institution.

Component units

Worcester State Foundation, Inc. (the "Foundation") is a legally separate, tax-exempt component unit of the University. The Foundation's primary role is to prudently manage and steward privately contributed resources meant to supplement the resources that are available to the University in support of its programs. The board of the Foundation is self-perpetuating and consists of graduates and friends of the University. Although the University does not control the timing or amount of receipts from the Foundation, the majority of resources, or income thereon, that the Foundation holds and invests are restricted to the activities of the University by the donors. Because these restricted resources held by the Foundation can only be used by, or for the benefit of, the University, the Foundation is considered a component unit of the University and is discretely presented in the University's financial statements.

During the years ended June 30, 2026 and 2025, the Foundation distributed $2,815,889 and $2,960,336, respectively, to the University for both restricted and unrestricted purposes. Complete financial statements for the Foundation can be obtained from the Worcester State University Business Office at 486 Chandler Street, Worcester, MA 01602.

Basis of presentation

The accompanying financial statements have been prepared using the economic resources measurement focus and the accrual basis of accounting in accordance with U.S. generally accepted accounting principles (U.S. GAAP). The Governmental Accounting Standards Board (GASB) is responsible for establishing U.S. GAAP for state and local governments through its pronouncements (Statements and Interpretations).

The University has determined that it functions as a business-type activity, as defined by GASB. The effect of interfund activity has been eliminated from these financial statements. The basic financial statements for general purpose governments consist of management's discussion and analysis, basic financial statements including the University's discretely presented component unit, and required supplementary information. The University presents statements of net position, revenues, expenses, and changes in net position and cash flows on a University-wide basis.

DISCUSSION DRAFT 10/13/26

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Basis of presentation (continued)

Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of the related cash flows. Grants and similar items are recognized as revenue as soon as all eligibility requirements have been met. The accompanying statement of revenues, expenses, and changes in net position demonstrates the degree to which the direct expenses of a given function are offset by program revenues. Direct expenses are those that are clearly identifiable within a specific function. Program revenues primarily include charges to students or others who enroll or directly benefit from services that are provided by a particular function. Items not meeting the definition of program revenues are instead reported as general revenue.

The University's policies for defining operating activities in the Statement of Revenues, Expenses and Changes in Net Position are those that generally result from exchange transactions such as the payment received for services and payment made for the purchase of goods and services. Certain other transactions are reported as non-operating activities in accordance with GASB accounting standards. These non-operating activities include the University's operating and capital appropriations from the Commonwealth of Massachusetts, debt service expense related to capital activities, and net investment income.

Net position

GASB establishes accounting and financial reporting standards for public colleges and universities. These standards require that, for accounting and reporting purposes, resources be classified into four net position categories, described as follows:

Invested in capital assets, net of related debt - Includes all capital assets, net of accumulated depreciation and the principal balances of any outstanding debt or other obligations used to construct, acquire or improve the assets.

Restricted net position - These resources are further differentiated between those that are nonexpendable and expendable.

Nonexpendable resources are those that are subject to externally imposed constraints that they be maintained permanently.

Expendable resources are those whose use is subject to externally imposed constraints that can be satisfied by specific actions or by the passage of time.

Unrestricted - These resources are not subject to any externally imposed constraints. Such net position may be designated for specific purposes by action of the governing Board.

Accounting estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses. Actual results could differ from those estimates.

DISCUSSION DRAFT 10/15/26

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Subsequent events

The University has evaluated the financial statement impact of subsequent events occurring through _____, 2026, the date that the financial statements were available to be issued.

Cash, temporary investments, and investments

The University considers its cash on hand, cash held by both the State Treasurer and Worcester State Foundation, Inc. for the benefit of the University and all debt securities with a maturity of three months or less to be cash equivalents.

The University's investments are recorded at fair value. Realized and unrealized gains and losses are included in non-operating revenues. Realized gains and losses are determined based on the specific identification of the securities sold. Investment income is recognized when earned. The method of allocated interest earned on pooled cash and investments among fund types provides that, unless otherwise restricted, all interest is recorded in the unrestricted current fund. All gains and losses arising from the sale, maturity, or other disposition of investments are accounted for in the trust fund which owns the related asset. Ordinary income derived from investments is accounted for in the trust fund owning such assets.

The Governmental Accounting Standards Board requires government entities to categorize investments to give an indication of the level of credit risk assumed by the University at year end. Category 1 includes investments that are insured or registered, or for which securities are held by the University or its agent in the name of the University. Category 2 includes uninsured and unregistered investments for which securities are held by a trust department in the name of the University. Category 3 includes uninsured and unregistered investments for which the securities are held by a trust department but not in the University's name.

Fair value measurements

The University follows the provisions of GASB Statement No. 72, *Fair Value Measurement and Application* (GASB 72). This Statement defines fair value, establishes a framework for measuring fair value in accordance with generally accepted accounting principles, and expands disclosures about fair value measurements.

The University uses fair value measurements to record fair value adjustments to certain assets and liabilities and to determine fair value disclosures. In accordance with GASB 72, the fair value of a financial instrument is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Fair value is best determined based on quoted market prices. However, in many instances, there may be no quoted market prices for the University's various financial instruments. In cases where quoted market prices are not available, fair values are based on estimates using present value or other valuation techniques. Those techniques are significantly affected by the assumptions used, including the discount rate and estimates of future cash flows. Accordingly, the fair value estimates may not be realized in an immediate settlement of the instrument.

In accordance with GASB 72, the University groups its financial assets and financial liabilities generally measured at fair value in three levels, based on the markets in which the assets and liabilities are traded and the reliability of the assumptions used to determine fair value.

DISCUSSION DRAFT 10/13/26

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Fair value measurements (continued)

Level 1: Valuation is based on quoted prices in active markets for identical assets or liabilities that the reporting entity has the ability to access at the measurement date.

Level 2: Valuation is based on observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities; quoted prices in markets that are not active; or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities.

Level 3: Valuation is based on unobservable inputs that are supported by little or no market activity and that are significant to the fair value of the assets or liabilities. Level 3 assets and liabilities include financial instruments whose value is determined using pricing models, discounted cash flow methodologies, or similar techniques, as well as instruments for which the determination of fair value requires significant management judgment or estimation.

The asset's or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs. The University's component unit utilizes a similar market approach which uses prices and other relevant information generated by market transactions involving identical or comparable assets, liabilities or a group of assets and liabilities.

Allowance for doubtful accounts

Accounts receivable are reported at the amount management expects to collect in the future on balances outstanding at year end. Management estimates allowances for losses based on the history of collections and the knowledge acquired about specific items. Adjustments to the allowance are charged to bad debt expense. Interest is not charged on accounts receivable. Uncollectible amounts are written off against the reserve when deemed uncollectible; recoveries are recorded when received. An amount is considered uncollectible when reasonable efforts to collect the account have been exhausted.

Inventories

The University's inventories consist primarily of operating supplies which are valued at the lower of cost or market. Cost is determined by the first-in, first-out (FIFO) method.

Loans receivable and payable

Loans receivable consist of the Federal Perkins Loan Program ("Perkins"). The federal government provides 90% of the funds to support this program. The 90% portion of the Perkins Loan Program provided by the federal government is refundable back to the federal government upon the termination of the University's participation in the program.

The prescribed practices for the Perkins program do not provide for accrual of interest on student loans receivable or for the provision of an allowance for doubtful loans. Accordingly, interest on loans is recorded as received and loan balances are reduced subsequent to the determination of their uncollectibility and have been accepted (assigned) by the Department of Education.

DISCUSSION DRAFT 10/13/96

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Capital assets

Capital assets are controlled, but not owned by the University. The University is not able to sell or otherwise encumber these assets since they are owned by the Commonwealth. All capital assets acquired prior to June 30, 1990 are stated at cost or estimated historical cost. Capital assets acquired subsequent to June 30, 1990 are stated at cost. All additions of individual capital assets greater than or equal to $50,000 are capitalized, in accordance with the Commonwealth's capitalization policy. Donated capital assets are recorded at the estimated fair value at the date of the donation.

Capital assets, with the exception of land, are depreciated using the straight-line method over the estimated useful life of the asset, which range from 3 to 40 years.

Student deposits and unearned revenue

Deposits and advance payments received for tuition and fees related to the University's Summer Session II program are deferred and are recorded as unrestricted current funds unearned revenue.

Bond premiums

Bond premiums are being amortized on a straight-line basis, which approximates the effective interest method, over the terms of the related debt agreements.

Funds held for others

Funds held for others are agency funds consisting of resources held by the University as custodian or fiscal agent of student organizations, the State Treasurer and others. Transactions are recorded to assets and liability accounts.

State appropriations

The University's unrestricted State appropriations amounted to $57,889,819 and $58,607,506 for the years ended June 30, 2026 and 2025, respectively. State supported tuition, in the amounts of $440,842 and $412,279 for the years ended June 30, 2026 and 2025, respectively, were remitted to the State and have been offset against these appropriations. State supported tuition receipts and transfers have been recorded in an agency fund during the year with a net amount due from the Commonwealth of $23,530 and $1,496 as of June 30, 2026 and 2025, respectively.

Pension plan

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Massachusetts State Employee's Retirement System (MSERS) and additions to/deductions from MSERS's fiduciary net position have been determined on the same basis as they are reported by MSERS. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

DISCUSSION DRAFT 10/13/26

1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Other postemployment benefits plan (OPEB)

For purposes of measuring the net OPEB liability, deferred outflows of resources and deferred inflows of resources related to OPEB, and OPEB expense, information about the fiduciary net position of the Commonwealth of Massachusetts Postemployment Benefits Other Than Pensions Plan and additions to/deductions from this plan's fiduciary net position have been determined on the same basis as they are reported by the Commonwealth of Massachusetts. For this purpose, benefit payments are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

Compensated absences

Employees earn the right to be compensated during absences for vacation leave and sick leave. Accrued vacation leave is the amount earned by all eligible employees through June 30, 2026. Pursuant to statewide experience on sick pay buy-back agreements applicable to state employees, the University accrues sick leave to a level representing 20% of amounts earned by those University employees with ten or more years of State service at the end of the fiscal year. Upon retirement, these employees are entitled to receive payment for this accrued balance.

Fringe benefits

The University participates in the Commonwealth's fringe benefit programs, including health insurance, pension and workers' compensation benefits. Health insurance, pension and administrative costs are billed through a fringe benefit rate charged to the University. The University's workers' compensation program is administered by the Commonwealth's Division of Public Employee Retirement Administration. Workers' compensation costs are assessed separately based on the University's actual experience.

Trust funds

The University's operations are accounted for in different trust funds. All of these trust funds have been consolidated and are included in these financial statements.

Tax status

The University is an agency of the Commonwealth of Massachusetts and is therefore exempt from federal and state income taxes under Code Section 115 of the Internal Revenue Code. The Foundation is exempt from income taxes under the provisions of section 501(c)(3) of the Internal Revenue Code.

New government accounting pronouncements

GASB Statement No. 105, *Subsequent Events* is effective for reporting periods beginning after June 15, 2026. The objective of this Statement is to improve the financial reporting requirements for subsequent events, thereby enhancing consistency in their application and better meeting the information needs of financial statement users. Management has not completed its review of the requirements of this Standard and its applicability.

DISCUSSION DRAFT 10/13/26

2 - CASH AND CASH EQUIVALENTS

The University's cash and temporary investments are as follows as of June 30, 2026 and 2025:

	2026	2025
Carrying amount	$ 45,446,138	$ 40,103,488
Bank balance	$ 46,373,791	$ 42,525,342
Less amounts		
Covered by depository insurance	1,016,564	819,850
Collateralized repurchase agreements	37,025,224	34,869,401
Remaining bank balance	$ 8,332,003	$ 6,836,091

The differences between the carrying amounts and the bank balances are attributable to deposits-in-transit and outstanding checks. While the remaining bank balance is uninsured and uncollateralized, the University has lowered its risk of loss by maintaining these funds in high quality financial institutions. Further, as of June 30, 2026 and 2025, the University held $549,59 and $953,669, respectively, in money market funds maintained by its investment custodian.

As of June 30, 2026 and 2025, the University was party to a repurchase agreement with a bank. The value of this agreement was $37,025,224 and $34,869,401 as of June 30, 2026 and 2025, respectively.

The money market mutual funds constitute a Category 2 investment and the repurchase agreements constitute a Category 3 investment, as defined under GASB accounting standards.

3 - CASH HELD BY STATE TREASURER

The University has recorded cash held for the benefit of the University by the State Treasurer in the amounts of $5,524,982 and $2,102,478 as of June 30, 2026 and 2025, respectively. In addition, the State Treasurer held cash for certain University trust funds in the amounts of $1,151,080 and $2,282,788 as of June 30, 2026 and 2025, respectively. None of these cash balances are insured or collateralized.

4 - INVESTMENTS

The University maintains pooled investments in long-term U.S. Treasury and Agency Securities. The fair value of these investments as of June 30, 2026 are as follows:

		Investment Maturities (in years)		
June 30, 2026	Fair Value	Less Than 1	1 to 5	Greater than 5
Investment type				
U.S. Treasuries	$ 44,452,607	$ -	$ 32,892,207	$ 11,560,400
U.S. Agencies	5,575,977	-	5,575,977	-
Total	$ 50,028,584	$ -	$ 38,468,184	$ 11,560,400

DISCUSSION DRAFT 10/13/26

4 - INVESTMENTS (Continued)

The fair value of these investments as of June 30, 2025 are as follows:

		Investment Maturities (in years)		
June 30, 2025	Fair Value	Less Than 1	1 to 5	Greater than 5
Investment type				
U.S. Treasuries	$ 43,472,682	$ 21,749,723	$ 12,953,093	$ 8,769,866
U.S. Agencies	5,070,085	-	5,070,085	-
Total	$ 48,542,767	$ 21,749,723	$ 18,023,178	$ 8,769,866

Interest Rate Risk

The University does not have a formal investment policy that limits investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates. The weighted average life of the maturities is evaluated regularly with the weighted average life of the portfolio being limited to five years or less, whenever possible. The weighted average life of the portfolio as of June 30, 2026 was 4.1 years.

Credit Risk

The University manages its exposure to credit risk by investing solely in U.S. Treasury and U.S. Agency securities.

Concentration of Credit Risk

The University places no limit on the amount that may be invested in one issuer, maintaining its cash in bank deposit accounts which, at times, may exceed federally insured limits.

Custodial Credit Risk

For an investment, custodial credit risk is the risk that, in the event of the failure of the counterparty, the University will not be able to recover the value of its investments or collateral securities that are in the possession of an outside party. The University controls this risk by placing its securities in a trust account with a safekeeping agent other than the counterparty.

The components of investment income are as follows:

	2026	2025
Interest	$ 1,955,667	$ 1,721,710
Realized loss on investments	(41,092)	(90,163)
Unrealized gain (loss) on investments	(537,232)	959,478
	$ 1,377,343	$ 2,591,025

DISCUSSION DRAFT 10/13/26

4 - INVESTMENTS (Continued)

Component Unit

Investments of the component unit are stated at fair value and are composed of the following:

	2026		2025	
	Carrying Value	Fair Value	Carrying Value	Fair Value
Money market funds	$ 10,763	$ 10,763	$ 492,769	$ 492,769
Mutual funds	46,857,467	56,868,740	44,305,789	47,304,083
Limited partnership interest	1,629,513	1,760,900	1,105,500	1,629,907
	$ 48,497,743	$ 58,640,403	$ 45,904,058	$ 49,426,759

5 - FAIR VALUE MEASUREMENTS

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used as of June 30, 2026 and 2025.

U.S. treasury securities and U.S. agency securities: Valued at the closing price reported in the market in which the individual securities are traded. Fair value hierarchy for each is based on the level of active trading within the respective markets for each asset or liability.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the University believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The University's financial assets that are measured at fair value on a recurring basis were recorded using the fair value hierarchy as of June 30, 2026 as follows:

	Level 1	Level 2	Level 3	Total
Investments				
U.S. Treasuries	$ -	$ 44,452,607	$ -	$ 44,452,607
U.S. Agencies	-	5,575,977	-	5,575,977
Total investments, at fair value	$ -	$ 50,028,584	$ -	$ 50,028,584

The University's financial assets that are measured at fair value on a recurring basis were recorded using the fair value hierarchy as of June 30, 2025 as follows:

	Level 1	Level 2	Level 3	Total
Investments				
U.S. Treasuries	$ -	$ 43,472,682	$ -	$ 43,472,682
U.S. Agencies	-	5,070,085	-	5,070,085
Total investments, at fair value	$ -	$ 48,542,767	$ -	$ 48,542,767

The University does not measure any liabilities at fair value on a recurring or non-recurring basis on the statement of net position.

DISCUSSION DRAFT 10/13/26

6 - ACCOUNTS RECEIVABLE

Accounts receivable consist of the following as of June 30, 2026 and 2025:

	2026	2025
Students	$ 1,414,660	$ 1,774,450
Other	1,250,421	1,859,209
	2,665,081	3,633,659
Less: Allowance for uncollectible accounts	433,894	619,437
	$ 2,231,187	$ 3,014,222

7 - CONTRIBUTIONS RECEIVABLE - COMPONENT UNIT

Contributions receivable are unconditional promises to give that are recognized as contributions when the promise is received. Contributions receivable that are expected to be collected in less than one year are reported at net realizable value. Contributions receivable that are expected to be collected in more than one year are recorded at fair value at the date of promise. That fair value is computed using a present value technique applied to anticipated cash flows. Amortization of the resulting discount is recognized as additional contribution revenue.

Payments of contributions receivable as of June 30, 2026 are expected to be received as follows:

2027	$ 2,344,008
2028	901,250
2029	879,000
2030	855,500
2031	802,500
Thereafter	804,000
	6,586,258
Less: Discount on contributions receivable	564,428
	$ 6,021,830

8 - LOANS RECEIVABLE

The University participates in the Federal Perkins Loan Program. This program is funded through a combination of Federal and institutional resources. The portion of this program that has been funded with Federal funds is ultimately refundable to the U.S. government upon the termination of the University's participation in the program. The loans receivable balance of $219,550 and $261,261 as of June 30, 2026 and 2025, respectively, represents student loans issued through the Perkins Loans program and consists of the following:

	2026	2025
Repayment on schedule	$ 1,500	$ 2,350
In default	218,050	258,911
	$ 219,550	$ 261,261

DISCUSSION DRAFT 10/13/26

9 - CAPITAL ASSETS

Capital assets activity for the year ended June 30, 2026 was as follows:

	Beginning Balance	Increases	Decreases	Ending Balance
Capital assets not being depreciated:				
Land	$ 188,650	$ -	$ -	$ 188,650
Construction in process	11,211,067	16,321	11,173,266	54,122
Total capital assets not being depreciated	11,399,717	16,321	11,173,266	242,772
Capital assets being depreciated:				
Land improvements	10,656,377	-	-	10,656,377
Buildings, including improvements	155,173,706	11,173,266	-	166,346,972
Furnishings and equipment	15,309,509	233,381	-	15,542,890
Leased assets:				
Buildings	105,648,491	-	1,089,460	104,559,031
Furnishings and equipment	4,821,892	737,537	728,628	4,830,801
Subscription-based IT arrangements	4,676,346	533,989	829,249	4,381,086
Total capital assets being depreciated	296,286,321	12,678,173	2,647,337	306,317,157
Less accumulated depreciation and amortization for:				
Land improvements	7,578,495	599,180	-	8,177,675
Buildings, including improvements	86,316,214	4,426,768	-	90,742,982
Furnishings and equipment	14,298,817	198,589	-	14,497,406
Leased assets				
Buildings	29,092,554	4,606,210	-	33,698,764
Furnishings and equipment	3,484,228	647,183	554,843	3,576,568
Subscription-based IT arrangements	2,838,018	950,951	608,621	3,180,348
Total accumulated depreciation and amortization	143,608,326	11,428,881	1,163,464	153,873,743
Capital assets, net	$ 164,077,712	$ 1,265,613	$ 12,657,139	$ 152,686,186

DISCUSSION DRAFT 10/13/26

9 - CAPITAL ASSETS (Continued)

Capital assets activity for the year ended June 30, 2025 was as follows:

	Beginning Balance	Increases	Decreases	Ending Balance
Capital assets not being depreciated:				
Land	$ 188,650	$ -	$ -	$ 188,650
Construction in process	8,495,842	2,715,225	-	11,211,067
Total capital assets not being depreciated	8,684,492	2,715,225	-	11,399,717
Capital assets being depreciated:				
Land improvements	9,965,277	691,100	-	10,656,377
Buildings, including improvements	155,173,706	-	-	155,173,706
Furnishings and equipment	14,951,447	358,062	-	15,309,509
Leased assets:				
Buildings	105,648,491	-	-	105,648,491
Furnishings and equipment	3,865,393	956,499	-	4,821,892
Subscription-based IT arrangements	4,722,518	69,314	115,486	4,676,346
Total capital assets being depreciated	294,326,832	2,074,975	115,486	296,286,321
Less accumulated depreciation and amortization for:				
Land improvements	7,011,094	567,401	-	7,578,495
Buildings, including improvements	82,147,770	4,168,444	-	86,316,214
Furnishings and equipment	14,140,959	157,858	-	14,298,817
Leased assets				
Buildings	24,753,727	4,338,827	-	29,092,554
Furnishings and equipment	2,577,330	906,898	-	3,484,228
Subscription-based IT arrangements	1,803,196	1,073,317	38,495	2,838,018
Total accumulated depreciation and amortization	132,434,076	11,212,745	38,495	143,608,326
Capital assets, net	$ 170,577,248	$ (6,422,545)	$ 76,991	$ 164,077,712

DISCUSSION DRAFT 10/13/26

10 - MASSACHUSETTS STATE COLLEGE BUILDING AUTHORITY

The land on which the dormitory residence halls are located is leased by the Massachusetts State College Building Authority (MSCBA) from the Commonwealth of Massachusetts. The Commonwealth of Massachusetts also executed a lease with MSCBA for land on which a parking garage is located. MSCBA owns the residence halls and parking garage and has entered into long-term lease agreements with the University to occupy and operate the facilities.

The University, under the terms of a management and service agreement between MSCBA and the Commonwealth, is charged a semi-annual revenue assessment which is based on the certified occupancy report, the current rent schedule, and the design capacity for each of the residence halls. This revenue assessment is used by MSCBA to pay principal and interest due on its long-term debt obligations. These obligations are guaranteed by the Commonwealth. The assessments charged for the years ended June 30, 2026 and 2025, in the amounts of $1,795,374 and $1,913,572, respectively, and have been recorded as auxiliary enterprise expenditures.

11 - DEFERRED SERVICE CONCESSION ARRANGEMENTS

Deferred service concession arrangements as of June 30, 2026 and 2025 in the amounts of $1,958,043 and $2,369,818, respectively, consist of the unamortized balances of multiple food service agreements with an outside party. This outside party contributed multiple payments since 2004 totaling $8,788,017, to upgrade the food service facilities. The contributions are being amortized over various periods ranging from 12 to 18 years. Amortization of these contributions was $411,775 and $411,776 for the years ended June 30, 2026 and 2025, respectively.

12 - LONG-TERM LIABILITIES

Long-term liabilities of the University as of June 30, 2026 were as follows:

	Beginning Balance	Additions	Reductions	Ending Balance	Current Portion
Bond payable	$ 17,871,443	$ -	$ 1,254,755	$ 16,616,688	$ 1,117,432
Lease obligations	95,467,528	737,537	5,941,027	90,264,038	4,573,752
Subscription-based IT arrangements	1,865,701	533,989	1,181,963	1,217,727	801,669
Accrued workers' compensation	1,686,573	-	43,389	1,643,184	-
Accrued compensated absences	6,625,206	699,158	-	7,324,364	4,524,230
Accrued pension and OPEB obligations	21,677,468	-	3,889,002	17,788,466	-
Refundable grant	308,173	-	65,470	242,703	-
	$ 145,502,092	$ 1,970,684	$ 12,375,606	$ 135,097,170	$ 11,017,083

DISCUSSION DRAFT 10/13/26

12 - LONG-TERM DEBT (Continued)

Long-term liabilities of the University as of June 30, 2025 were as follows:

	Beginning Balance	Additions	Reductions	Ending Balance	Current Portion
Bond payable	$ 19,090,080	$ -	$ 1,218,637	$ 17,871,443	$ 1,080,221
Lease obligations	99,153,005	956,499	4,641,976	95,467,528	4,659,152
Subscription-based IT arrangements	2,933,312	69,314	1,136,925	1,865,701	887,390
Accrued workers' compensation	1,679,227	7,346	-	1,686,573	220,455
Accrued compensated absences	6,461,434	163,772	-	6,625,206	3,921,515
Accrued pension and OPEB obligations	22,300,193	-	622,725	21,677,468	-
Refundable grant	306,645	1,528	-	308,173	-
	$ 151,923,896	$ 1,198,459	$ 7,620,263	$ 145,502,092	$ 10,768,733

13 - BONDS PAYABLE

(A) On December 4, 2002, the University signed a financing agreement used for the renovation of the Sullivan and Administration Buildings, which was completed in 2009. A call provision became available on this bond issue and the issue was refunded on December 18, 2012, with $10,585,000 of Massachusetts Development Financing Agency (MDFA) Revenue Bonds. The obligation is being repaid solely by the University through revenues. Interest on the MDFA bonds is due in semi-annual installments at varying rates ranging from 2.00% to 4.00%. Annual principal installments ranging from $255,000 to $875,000 are due through November 2032. The refunding of the MHEFA bonds resulted in a loss, which is included in deferred outflows of resources and will be amortized over the term of the bond. Amortization of this loss for the year ended June 30, 2026, was $5,847. The remaining loss to be amortized as June 30, 2026 is $40,932.

(B) On July 1, 2020, the University signed a financing agreement to receive $681,052 from the MSCBA 2020 Series revenue bond in a partial refunding of the 2012 Series revenue bond. Interest on the bonds is due in semi-annual installments at varying rates ranging from 1.044% to 3.072%. Annual principal installments ranging from $69,460 to $117,000 are due May 2032 through May 2039. The refunding of the MSCBA 2012 Series bonds resulted in a loss, which is included in deferred outflows of resources and will be amortized over the term of the bond. Amortization of this loss for the year ended June 30, 2026, was $19,520. The remaining loss to be amortized as June 30, 2026 is $234,239.

(C) On February 15, 2022, the University signed a financing agreement to receive $9,509,327 from the MSCBA 2022 Series revenue bond in a partial refunding of the 2012 Series revenue bond. Interest on the bonds is due in semi-annual installments at varying rates ranging from 4.00% to 5.00%. Annual principal installments ranging from $342,496 to $742,778 are due May 2025 through May 2042. The refunding of the MSCBA 2012 Series bonds resulted in a gain, which is included in deferred inflows of resources and will be amortized over the term of the bond. Amortization of this gain for the year ended June 30, 2026, was $36,097. The remaining gain to be amortized as June 30, 2026 is $311,119.

DISCUSSION DRAFT 10/13/26

13 - BONDS PAYABLE (Continued)

The composition of the University's Bonds payable as of June 30, 2026 and 2025 is as follows:

	2026	2025
(A) Bond payable, MDFA 2012 Series	$ 5,759,360	$ 6,494,983
(B) Bond payable, MSCBA 2020 Series	681,052	681,052
(C) Bond payable, MSCBA 2022 Series	10,176,276	10,695,408
	16,616,688	17,871,443
Less: Current maturities	1,117,432	1,080,221
	$ 15,499,256	$ 16,791,222

Debt service requirements as of June 30, 2026 are as follows:

Year Ended June 30	Principal	Interest
2027	$ 1,117,432	$ 566,458
2028	1,161,604	526,892
2029	1,196,284	484,843
2030	1,241,498	440,254
2031	1,292,273	393,904
2032 - 2036	4,796,566	1,309,488
2037 - 2041	3,589,227	571,316
2042	742,778	29,711
	15,137,662	4,322,866
Unamortized premium	1,479,026	-
	$ 16,616,688	$ 4,322,866

14 - LEASE OBLIGATIONS

The University leases its residence halls and parking garage from MSCBA, as well as other furnishings and equipment under various lease agreements.

Future minimum lease payments as of June 30, 2026 are as follows:

Year Ended June 30	Principal	Interest
2027	$ 4,573,752	$ 3,759,873
2028	4,285,638	3,763,061
2029	4,509,979	3,026,223
2030	4,795,829	2,849,670
2031	5,206,033	2,627,180
2032 - 2036	29,523,753	10,228,189
2037 - 2041	28,790,421	4,616,003
2042 - 2043	8,578,633	452,777
	$ 90,264,038	$ 31,322,976

DISCUSSION DRAFT 10/13/26

15 - SUBSCRIPTION-BASED IT ARRANGEMENTS

The University licenses various software under various subscription-based IT agreements.

Future minimum payments on these arrangements as of June 30, 2026 are as follows:

Year Ended June 30	Principal	Interest
2027	$ 801,669	$ 21,905
2028	293,810	15,167
2029	59,932	7,095
2030	62,316	2,368
	$ 1,217,727	$ 46,535

16 - NET POSITION

Unrestricted net position from operations is not subject to externally imposed stipulations; however, it may be subject to internal restrictions. For example, unrestricted net position from operations may be designated for specific purposes by action of management or the Board of Trustees or may otherwise be limited by contractual agreements with outside parties. As of June 30, 2026 and 2025, unrestricted net position from operations of $34,924,725 and $33,737,496, respectively, has been internally designated by the University for future capital investments. The remaining undesignated unrestricted net position from operations was $47,288,088 and $42,375,082 as of June 30, 2026 and 2025, respectively.

The University is the recipient of funds that are subject to various external constraints upon their use, either as to purpose or time. These funds are comprised of the following as of June 30:

	2026	2025
Restricted - expendable		
Scholarships and other grants	$ 1,376,205	$ 2,008,062

The component unit's restricted - expendable net position consists of funds whose income is mainly used for scholarships and grants. The component unit's restricted - nonexpendable net position consists of investments to be held in perpetuity and the income is restricted for the purpose of providing scholarships and other activities that benefit the University.

17 - FACULTY COMPENSATION

Contracts for full-time faculty begin on September 1, and end May 31 of any given academic year. The Commonwealth of Massachusetts and the University pay all faculty members over the twelve-month period of September 1 through August 31. Consequently, on June 30 of each year there is a balance due on each faculty contract which is to be paid from the subsequent year's appropriation. The balance due as of June 30, 2026 and 2025 of $3,092,303 and $2,951,834, respectively, has been included in accrued payroll and fringe benefits in the statement of net position.

DISCUSSION DRAFT 10/13/26

18 - ACCRUED WORKERS' COMPENSATION

Independent actuarial reviews of the outstanding loss reserve requirements for the Commonwealth of Massachusetts' self-insured Workers' Compensation program were conducted as of June 30, 2026 and 2025. Based upon the Commonwealth's analyses, accrued workers' compensation in the amount of $_____ and $1,686,573 as of June 30, 2026 and 2025, respectively, have been recorded in the unrestricted current fund. Workers' compensation expense charged to operations was $_____ and $367,338 in 2026 and 2025, respectively. The actual workers' compensation paid by the University was $_____ and $359,992 in 2026 and 2025, respectively.

19 - ACCRUED COMPENSATED ABSENCES

Included in accrued compensated absences are $3,567,009 for accrued vacation time and $3,757,355 for accrued sick time as of June 30, 2026 and $3,235,320 for accrued vacation time and $3,389,886 for accrued sick time as of June 30, 2025. Of these balances, $1,644,427 and $898,484 for June 30, 2026 and 2025, respectively, represent obligations due to employees funded through sources other than State appropriations, and $5,679,937 and $5,726,722 as of June 30, 2026 and 2025, respectively, represent obligations to employees funded through State appropriations. The University anticipates that the obligations due to employees funded by State appropriations will be discharged through future State appropriations.

20 - FRINGE BENEFIT CHARGES

Certain fringe benefit costs associated with University staff, compensated through State appropriations, are paid out of non-University State budget line items. The University is required to reimburse the State for such costs for employees funded from other than State appropriations, based on a percentage of payroll. For 2026, the University reimbursed the State a total of $2,788,400 ($1,378,585 for pensions and $1,409,815 for health care premiums). For 2025, the University reimbursed the State a total of $1,909,882 ($819,148 for pensions and $1,090,734 for health care premiums).

21 - RETIREMENT PLAN

The University reports a liability, deferred outflows and inflows of resources, and expense as a result of its statutory requirement to contribute to the Massachusetts State Employee's Retirement System (MSERS). The following information is about MSERS:

Plan Description

The Massachusetts State Employees' Retirement System (MSERS) is a public employee retirement system (PERS), covering substantially all of the University's non-student full-time employees. It is a cost-sharing multiple-employer defined benefit pension plan administered by the Massachusetts State Retirement Board. Under the cost-sharing plan, pension obligations for employees of all employers are pooled and plan assets are available to pay the benefits through the plan, regardless of the status of the employers' payment of its pension obligations to the plan.

DISCUSSION DRAFT 1/13/26

21 - RETIREMENT PLAN (Continued)

Benefit Provisions

MSERS provides retirement, disability, survivor and death benefits to plan members and their beneficiaries. Massachusetts General Laws (MGL) establishes uniform benefit and contribution requirements for all contributory PERS. These requirements provide for superannuation retirement allowance benefits up to a maximum of 80% of a member's highest three-year average annual rate of regular compensation. For employees hired after April 1, 2012, retirement allowances are calculated on the basis of the last five years or any five consecutive years, whichever is greater in terms of compensation. Benefit payments are based upon a member's age, length of creditable service, group creditable service and group classification. The authority for establishing and amending these provisions rests with the Massachusetts Legislature, Chapter 32A of the General Laws of the Commonwealth of Massachusetts.

Members become vested after ten years of creditable service. A superannuation retirement allowance may be received upon the completion of twenty years of credible service or upon reaching the age of 55 with ten years of service. Normal retirement for most employees occurs at age 65; for certain hazardous duty and public safety positions, normal retirement is at age 55. Most employees who joined the system after April 1, 2012 are not eligible for retirement prior to age 60.

Contributions

The MSERS's funding policies have been established by Chapter 32 of the MGL. The Legislature has the authority to amend these policies. The annuity portion of the MSERS retirement allowance is funded by employees, who contribute a percentage of their regular compensation. Costs of administering the plan are funded out of plan assets.

Member contributions for MSERS vary depending on the most recent date of membership:

Hire Date	Percentage of Compensation
Prior to 1975	5% of regular compensation
1975 to 1983	7% of regular compensation
1984 to June 30, 1996	8% of regular compensation
July 1, 1996 to present	9% of regular compensation
July 1, 2001 to present	11% of regular compensation (for teacher hired after July 1, 2001 and those accepting provisions of Chapter 114 of the Acts of 2000)
1979 to present	An additional 2% of regular compensation in excess of $30,000 except for teachers subject to Chapter 114 of the Acts of 2000

In addition, members of Group 1 who join the system after April 2, 2012 will have their withholding rate reduced to 6% after achieving 30 years of creditable service.

The University is not required to contribute from its appropriation allocation or other University funds to MSERS for employees compensated from State appropriations. For University employees covered by MSERS but compensated from a trust fund or other source, the University is required to contribute an amount determined as a percentage of compensation in accordance with a fringe benefit rate determined by the State. The rate was 17.60% and 18.63% of annual covered payroll for the fiscal years ended June 30, 2026 and June 30, 2025, respectively. The University contributed $_____ and $1,101,403 for the fiscal years ended June 30, 2026 and June 30, 2025, equal to 100% of the required contributions for the year.

DISCUSSION DRAFT 10/15/26

21 - RETIREMENT PLAN (Continued)

Pension Liabilities, Pension Expense, and Deferred Outflows and Inflows of Resources

As of June 30, 2026 and 2025, the University reported a net pension liability of $8,786,247 and $10,190,978, respectively, for its proportionate share of the net pension liability related to its participation in MSERS. The net pension liability was measured as of June 30, 2025, the measurement date, as determined by an actuarial valuation. The University's proportion of the net pension liability was based on its share of the Commonwealth of Massachusetts' collective pension amounts allocated on the basis of actual fringe benefit charges assessed the University for the fiscal years 2025 and 2024. The Commonwealth's proportionate share was based on actual employer contributions to the MSERS for fiscal years 2025 and 2024 relative to total contributions of all participating employers for each respective fiscal year. As of June 30, 2025 and 2024, the University's proportion was 0.08%. For the years ended June 30, 2026 and 2025, the University recognized pension benefit of $1,494,882 and $892,691, respectively.

As of June 30, 2026 and 2025, the University reported in the statement of net position deferred outflows and deferred inflows of resources related to pensions from the following sources:

	2026	2025
Deferred outflows of resources:		
Change in plan actuarial assumptions	$ 28,245	$ 73,134
Differences between expected and actual experience	348,561	510,767
Changes in proportion from Commonwealth due to internal allocation	55,792	13,740
Contributions subsequent to the measurement date		1,101,402
	$ 432,598	$ 1,699,043
Deferred inflows of resources:		
Differences between expected and actual experience	$ -	$ 130,565
Differences between projected and actual earnings on plan investments	264,941	132,508
Changes in proportion from Commonwealth due to internal allocation	2,079,146	3,437,612
	$ 2,344,087	$ 3,700,685

Contributions of $_____ and $1,101,402, respectively, are reported as deferred outflows of resources related to pensions resulting from the University contributions in fiscal years 2026 and 2025 subsequent to the measurement date, which will be recognized as a reduction of the net pension liability for the years ended June 30, 2027 and 2026. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized as an addition to (reduction in) pension expense as follows:

2027	$ (375,278)
2028	(857,655)
2029	(387,077)
2030	(291,479)
	$ (1,911,489)

DISCUSSION DRAFT 10/15/26

21 - RETIREMENT PLAN (Continued)

Actuarial Assumptions

The total pension liability at the measurement dates was determined using the following actuarial assumptions, applied to all periods included in the measurement:

	2025	2024
Cost of living increases (on the first $13,000 per year for 2025 and 2024)	3.00%	3.00%
Salary increases	4.00 to 9.00%	4.00 to 9.00%
Investment rate of return	7.00%	7.00%
Interest rate credit to the annuity savings fund	5.44%	4.76%
Inflation rate	2.50%	2.50%

Pre-retirement mortality rates reflect the RP-2014 Blue Collar Employees Table, projected generationally with Scale MP-2021 and set forward one year for females. Post-retirement mortality rates reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2021 and set forward one year for females. Mortality rates for disability reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2021 and set forward one year.

Experience studies were performed as of February 27, 2014, encompassing the period January 1, 2006 to December 31, 2011, updated to reflect actual experience from 2012 through 2020 for post-retirement mortality.

Investment assets of MSERS are with the Pension Reserves Investment Trust (PRIT) Fund. The long-term expected rate of return on pension plan investments was determined using a building-block method in which best-estimate ranges of expected future rates of return are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future rates of return by the target asset allocation percentage. Best estimates of geometric rates of return for each major asset class included in the PRIT Fund's target assets allocation as of June 30, 2025 and 2024 are summarized in the following table:

	Target Allocation		Long-Term Expected Real Rate of Return	
Asset Class	2025	2024	2025	2024
Global equity	36%	36%	4.90%	4.60%
Core fixed income	15%	15%	2.60%	2.10%
Private equity	16%	16%	7.70%	7.40%
Real estate	10%	10%	4.10%	3.90%
Value added fixed income	9%	9%	5.30%	5.10%
Portfolio completion strategies	10%	10%	4.10%	3.70%
Timber/natural resources	4%	4%	4.10%	4.40%
Total	100%	100%		

DISCUSSION DRAFT 10/13/26

21 - RETIREMENT PLAN (Continued)

Discount Rate

The discount rate used to measure the total pension liability was 7.00% for 2025 and 2024. The projection of cash flows used to determine the discount rate assumed that plan member contributions will be made at the current contribution rates and the Commonwealth's contributions will be made at rates equal to the difference between actuarially determined contribution rates and the member rates. Based on those assumptions, the net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity Analysis

The following illustrates the sensitivity of the net pension liability to changes in the discount rate as of June 30, 2025 and 2024. In particular, the table presents the MSERS collective net pension liability assuming it was calculated using a single discount rate that is one-percentage-point lower or one percentage-point higher than the current discount rate:

	2025	2024
1% decrease to 6.00% for 2025 and 2024	$ 12,845,412	$ 14,317,006
Current discount rate 7.00% for 2025 and 2024	8,786,247	10,190,978
1% increase to 8.00% for 2025 and 2024	5,354,537	6,700,365

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSIONS

The University reports a liability, deferred outflows and inflows of resources, and expense as a result of its statutory requirement to contribute to the Commonwealth of Massachusetts Postemployment Benefits Other than Pensions (OPEB) Plan. The following information is about the OPEB Plan:

Plan Description

The Commonwealth of Massachusetts Postemployment Benefits Other than Pensions (OPEB) Plan covers substantially all of the University's non-student full-time employees. It's a single-employer defined benefit pension plan administered by the Commonwealth of Massachusetts. Under the cost-sharing plan, certain benefits for retired employees of all employers are pooled and plan assets are available to pay the benefits through the plan, regardless of the status of the employers' payment of its obligations to the plan. The plan provides health care and life insurance to plan members and beneficiaries.

Benefit Provisions

Chapter 32A of the General Laws of the Commonwealth (MGL), requires the Commonwealth of Massachusetts to provide certain health care and life insurance benefits for retired employees. Substantially all of the Commonwealth's employees may become eligible for these benefits if they reach retirement age while working for the Commonwealth. Eligible retirees are required to contribute a specified percentage of the health care/benefit costs, which are compatible to contributions required from employees.

DISCUSSION DRAFT 10/15/26

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSION (Continued)

Contributions

Employer and employee contribution rates are set in MGL. The Commonwealth recognizes its share of the costs on an actuarial basis. As of June 30, 2025 and 2024 and as of the valuation date (January 1, 2025), Commonwealth participants contributed 10% to 20% of premium costs, depending on the date of hire and whether the participant is active, retiree, or survivor status.

OPEB Liabilities, OPEB Expense, and Deferred Outflows and Inflows of Resources

As of June 30, 2026 and 2025, the University reported a net OPEB liability of $9,002,219 and $11,486,490, respectively, for its proportionate share of the net OPEB liability related to its participation in the OPEB Plan. The net OPEB liability was measured as of June 30, 2025, the measurement date, as determined by an actuarial valuation. The University's proportion of the net OPEB liability was based on its share of the Commonwealth of Massachusetts' collective OPEB amounts allocated on the basis of actual fringe benefit charges assessed the University for the fiscal years 2025 and 2024. The Commonwealth's proportionate share was based on actual employer contributions to the OPEB Plan for fiscal year 2025 relative to total contributions of all participating employers for each respective fiscal year. As of June 30, 2025 and 2024, the University's proportion was 0.08% and 0.09%, respectively. For the years ended June 30, 2026 and 2025, the University recognized OPEB benefit of $4,296,824 and $5,443,858, respectively.

As of June 30, 2026 and 2025, the University reported in the statement of net position deferred outflows and deferred inflows of resources related to postemployment benefits other than pensions from the following sources:

	2026	2025
Deferred outflows of resources:		
Changes in proportion from Commonwealth due to internal allocation	$ 559,243	$ 687,388
Changes in plan actuarial assumption	-	223,940
Differences between expected and actual experience	932,655	319,276
Contributions subsequent to the measurement date		442,883
	$ 1,491,898	$ 1,673,487
Deferred inflows of resources:		
Changes in proportion from Commonwealth due to internal allocation	$ 6,526,660	$ 8,364,969
Change in plan actuarial assumptions	2,933,746	2,562,792
Differences between expected and actual experience	320,529	887,310
Differences between projected and actual earnings on plan investments	22,932	4,567
	$ 9,803,867	$ 11,819,638

DISCUSSION DRAFT 10/13/26

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSION (Continued)

OPEB Liabilities, OPEB Expense, and Deferred Outflows and Inflows of Resources (continued)

Contributions of $_____ and $442,883, respectively are reported as deferred outflows of resources related to OPEB resulting from the University contributions in fiscal years 2026 and 2025 subsequent to the measurement date, which will be recognized as a reduction of the net OPEB liability for the years ended June 30, 2027 and 2026. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized as a reduction in OPEB expense as follows:

2027	$ (3,784,119)
2028	(2,250,401)
2029	(1,319,319)
2030	(605,861)
2031	(352,269)
	$ (8,311,969)

Actuarial Assumptions

The total OPEB liability for the June 30, 2025 measurement date was determined by an actuarial valuation as of January 1, 2025 rolled forward to June 30, 2025. The total OPEB liability for the June 30, 2024 measurement date was determined by an actuarial valuation as of January 1, 2024 rolled forward to June 30, 2024. This valuation used the following assumptions:

1. For 2025, the annual healthcare cost trend rates were developed based on the SOA-Getzen trend rate model, version 2025_1b. The healthcare cost trend rate changed from 5.35% in 2024 to 7.50% for Medicare benefits and from 7.42% to 9.60% for non-Medicare benefits, then decreasing in 2026, 2027, 2028 and 2029 to a blended rate of 4.87% in 2034 and additional decrease in 2044, 2054, 2064, 2074, and 2075.

2. For 2024, the annual healthcare cost trend rates were developed based on the SOA-Getzen trend rate model, version 2024_1b. The healthcare cost trend rate changed from 5.79% in 2023 to 5.35% for Medicare benefits and from 7.50% to 7.42% for non-Medicare benefits, then increasing in 2025 before decreasing in 2026, 2027 and 2028 to a blended rate of 4.87% in 2033 and additional decrease in 2043, 2053, 2063, 2073, and 2075.

3. For 2025 and 2024, the mortality rate was in accordance with RP 2014 Blue Collar Mortality Table projected with scale MP-2021, with females set forward one year.

4. Participation rates, for 2025 and 2024:

   a. 100% of employees currently electing health care coverage are assumed to elect coverage at retirement.

   b. 35% of employees currently opting out of active employee health coverage are assumed to elect to enroll in retiree coverage.

DISCUSSION DRAFT 10/13/26

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSION (Continued)

Actuarial Assumptions (continued)

c. For 2025, 15% of current and future vested terminated participants will elect health care benefits at age 55, or if later, the participant's current age. For 2024, 85% of current and future vested terminated participants will elect health care benefits at age 55, or if later, the participant's current age.

d. Retirees who currently elect to waive their coverage are assumed to remain uncovered in the future.

e. 100% of spouses are assumed to elect to continue coverage after the retiree's death.

5. Participation rates, for 2025 and 2024:

a. 100% of employees currently electing health care coverage are assumed to elect coverage at retirement.

b. 35% of employees currently opting out of active employee health coverage are assumed to elect to enroll in retiree coverage.

c. For 2025, 15% of current and future vested terminated participants will elect health care benefits at age 55, or if later, the participant's current age. For 2024, 85% of current and future vested terminated participants will elect health care benefits at age 55, or if later, the participant's current age.

d. Retirees who currently elect to waive their coverage are assumed to remain uncovered in the future.

e. 100% of spouses are assumed to elect to continue coverage after the retiree's death.

f. Current non-Medicare eligible retirees and spouses (if covered) under age 65 who are in a POS/PPO plan are assumed to move to a Medicare Supplement plan if they are Medicare eligible at 65. All others are assumed to remain in their currently elected product type.

g. Future retirees are assumed to enroll in the existing plans in the same proportion as the current retiree mix, as shown in the table below. These proportions are established separately for non-Medicare and Medicare coverage for each product type and reflect the migration of members to new plans.

	2025		2024	
	Retirement Age		Retirement Age	
	Under 65	Age 65+	Under 65	Age 65+
Indemnity	18%	0%	18%	0%
POS/PPO	72%	0%	72%	0%
HMO	10%	0%	10%	0%
Medicare Supplement	0%	96%	0%	96%
Medicare Advantage	0%	4%	0%	4%

DISCUSSION DRAFT 10/13/26

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSION (Continued)

Actuarial Assumptions (continued)

Investment assets of the Plan are with the Pension Reserves Investment Trust (PRIT) Fund. The long-term expected rate of return on OPEB plan investments was determined using a building-block method in which best-estimate ranges of expected future rates of return are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future rates of return by the target asset allocation percentage. Best estimates of geometric rates of return for each major asset class included in the PRIT Fund's target asset allocation as of June 30, 2025 and 2024 are summarized in the following table:

	Target Allocation		Long-Term Expected Real Rate of Return	
Asset Class	2025	2024	2025	2024
Global equity	36%	36%	4.90%	4.60%
Portfolio completion strategies	10%	10%	4.10%	3.90%
Core fixed income	15%	15%	2.60%	2.10%
Private equity	16%	16%	7.70%	7.40%
Value added fixed income	9%	9%	5.30%	5.10%
Real estate	10%	10%	4.10%	3.70%
Timber/natural resources	4%	4%	4.10%	4.40%
Total	100%	100%		

Discount Rate

The discount rates used to measure the OPEB liability as of June 30, 2025 and 2024 was 5.94% and 4.61%, respectively. This rate was based on a blend of the Bond Buyer Index rates of 5.20% and 3.93% as of the measurement date of June 30, 2025 and 2024, respectively, and the expected rates of return. The plan's fiduciary net position was not projected to be available to make all projected future benefit payments for current plan members. Therefore, the long-term expected rate of return on plan investments of 7.00% per annum was not applied to all periods of projected benefit payments to determine the total OPEB liability as of June 30, 2025 and 2024, respectively.

Sensitivity Analysis

The following presents the net OPEB liability of the University, as well as what the net OPEB liability would be if it were calculated using a discount rate that is one-percentage-point lower or one percentage-point higher than the current discount rate:

	2025	2024
1% decrease to 4.94% for 2025 and 3.61% for 2024	$ 10,423,530	$ 13,378,026
Current discount rate 5.94% for 2025 and 4.61% for 2024	9,002,219	11,486,490
1% increase to 6.94% for 2025 and 5.61% for 2024	7,820,514	9,925,346

DISCUSSION DRAFT 10/13/26

22 - POSTEMPLOYMENT BENEFITS OTHER THAN PENSIONS (Continued)

Sensitivity Analysis (continued)

The following presents the net OPEB liability of the University, as well as what the net OPEB liability would be if it were calculated using a healthcare cost trend rate that is one-percentage-point lower or one-percentage-point higher than the current healthcare cost trend rate:

	2025	2024
1% decrease for Medical and EGWP and Administrative costs	$ 7,672,506	$ 9,642,710
Current cost trend rate as described on page 40	9,002,219	11,486,490
1% increase for Medical and EGWP and Administrative costs	10,639,336	13,805,743

23 - STATE CONTROLLED ACCOUNTS

Certain significant costs and benefits associated with the operations of the University are appropriated, expended, controlled and reported by the State through non-University line items in the State's budget. Under accounting principles generally accepted in the United States of America such transactions must be recorded in the financial statements of the University. These transactions include payments by the State for the employer's share of funding the Massachusetts State Employee's Retirement System and for the employer's share of health care premiums. The estimated amounts of funding attributable for the State retirement system contribution and the employer's share of health care premiums for 2026 were $7,571,158 and $7,742,673, respectively. The estimated amounts of funding attributable for the State retirement system contribution and the employer's share of health care premiums for 2025 were $7,473,127 and $9,950,812, respectively.

24 - MANAGEMENT ACCOUNTING AND REPORTING SYSTEM - (UNAUDITED)

Section 15C of Chapter 15A of the Massachusetts General Law requires Commonwealth colleges and universities report activity of campus-based funds to the Comptroller of the Commonwealth's Statewide Accounting System, Massachusetts Management Accounting and Reporting System (MMARS) using the statutory basis of accounting. The statutory basis of accounting is a modified accrual basis of accounting and differs from the information included in these financial statements. The amounts reported on MMARS meet the guidelines of the Comptroller's Guide for Higher Education Audited Financial Statements.

The University's State appropriations are composed of the following for the years ended June 30:

	2026	2025
Direct unrestricted appropriations	$ 42,575,987	$ 41,183,568
Fringe benefits for benefitted employees on state payroll	15,313,831	17,423,938
Tuition remitted	(440,842)	(412,279)
Total appropriations	$ 57,448,976	$ 58,195,227

A reconciliation between the University and MMARS fund 901 activity as of June 30, 2026 is as follows:

Revenue per MMARS	$ 91,537,947
Revenue per University	91,529,988
Net reporting classification and differences	$ 7,959

DISCUSSION DRAFT 10/13/26

25 - RELATED PARTY TRANSACTIONS

The University provided, at no cost, office space and certain personnel services to the Worcester State Foundation, Inc. (the "Foundation"). The value of this support is estimated to be $237,107 and $291,031 for the years ended June 30, 2026 and 2025, respectively.

Worcester State Foundation, Inc. acts as an agent for the University by periodically accepting grants on its behalf. The proceeds of the grants are recorded as an asset of the Foundation until remitted to the University.

The University and the Foundation have entered into an affiliation agreement with the Worcester Center for Crafts, Inc. to collaboratively offer venues for teaching and learning in the arts, exhibition space, safe, well-equipped studios for community-based programs as well as undergraduate visual and performing art classes. As part of the agreement, the University provides various forms of support to the Crafts Center including annual service fees for allowing the University to use the facilities. Service agreement fees were $250,000 for the years ended June 30, 2026 and 2025.

The University provides certain operating costs for WSF Real Estate, Inc. in exchange for the use property adjacent to the University campus for various purposes. WSF Real Estate, Inc. is under the control and holds property on behalf of the Foundation. Operating costs provided by the University were $9,711 and $10,697 during the years ended June 30, 2026 and 2025, respectively.

26 - AUXILIARY ENTERPRISES

The University's auxiliary enterprises consist of residence life and housing and health services. The related revenues and expenses for the years ended June 30, 2026 and 2025 are as follows:

	2026		2025	
	Residence Life and Housing	Health Services	Residence Life and Housing	Health Services
Total revenue	$ 12,798,879	$ 981,596	$ 12,019,176	$ 978,775
Total expenses	14,506,281	612,551	13,846,567	622,843
Increase (decrease) in net position before transfers	$ (1,707,402)	$ 369,045	$ (1,827,391)	$ 355,932

27 - COMMITMENTS AND CONTINGENCIES

Litigation

Pending or threatened lawsuits against governmental agencies arise in the ordinary course of operations. In the opinion of the University's administration, the ultimate resolution of any pending legal actions involving the University will not have a material adverse effect on the financial position of the University.

DISCUSSION DRAFT 10/13/26

27 -COMMITMENTS AND CONTINGENCIES (Continued)

Grants and entitlements

The University receives financial assistance from federal and state agencies in the form of grants and entitlements. Expenditures of funds under these programs require compliance with the grant agreements and are subject to audit by the granting agency. Any disallowed expenditures resulting from such audits become a liability of the University. In the opinion of the University's administration, the outcome of any findings with respect to disallowed expenditures will not have a material adverse effect on the financial position of the University.

28 - ADOPTION OF ACCOUNTING PRINCIPLES

In April 2024, the GASB issued GASB Statement No. 103, *Financial Reporting Model Improvements*. The objective of this Statement is to improve key components of the GASB financial reporting model to enhance its effectiveness in providing information that is essential for decision making and assessing accountability. GASB Statement No. 103 is effective for financial statements for periods beginning after June 15, 2025. The adoption of this statement requires the University to make updates to the content and format of the Management's Discussion and Analysis, which is presented as required supplementary information. The statement also defines nonoperating activities, including subsidies, and requires noncapital subsidies to be presented separately below operating activities on the Statement of Revenues, Expenses, and Changes in Net Position. Other requirements as defined by this standard did not have a material impact on the financial statements of the University. The adoption of GASB Statement No. 103 did not result in a change in the University's net position as previously reported.

In September 2024, the GASB issued GASB Statement No. 104, *Disclosure of Certain Capital Assets*. The objective of this Statement is to provide users of government financial statements with essential information about certain types of capital assets. GASB Statement No. 104 is effective for financial statements for periods beginning after June 15, 2025. The adoption of this statement requires lease assets recognized in accordance with GASB Statement No. 87, *Leases*, to be disclosed by major class of underlying assets in capital assets note disclosures. The statement also requires subscription assets recognized in accordance with GASB Statement No. 96, *Subscription-Based Information Technology Arrangements*, to be separately disclosed. Other requirements as defined by this standard did not have a material impact on the financial statements of the University. The adoption of GASB Statement No. 104 did not result in a change in the University's net position as previously reported.

29 - RECLASSIFICATIONS

Certain amounts in the 2025 financial statements have been reclassified to conform with the 2026 presentation. Such reclassifications had no effect on the change in net position as previously reported.

DISCUSSION DRAFT 10/13/26

SUPPLEMENTARY INFORMATION

DISCUSSION DRAFT 10/13/26

Schedule 1

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

SCHEDULE OF THE UNIVERSITY'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY
Massachusetts State Employees' Retirement Plan

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2017 through 2025)

	2026	2025	2024	2023	2022
University's proportion of the net pension liability	0.07%	0.08%	0.08%	0.11%	0.15%
University's proportion of the net pension liability	$ 8,786,247	$ 10,190,978	$ 10,806,543	$ 13,421,011	$ 11,319,876
University's covered-employee payroll	$ 7,984,715	$ 5,900,631	$ 6,936,263	$ 8,039,088	$ 9,176,617
University's proportionate share of the net pension liability as a percentage of its covered employee payroll	110.04%	172.71%	155.80%	166.95%	123.36%
Plan fiduciary net position as a percentage of the total pension liability	76.10%	72.90%	70.71%	71.05%	77.54%

	2021	2020	2019	2018	2017
University's proportion of the net pension liability	0.15%	0.14%	0.17%	0.15%	0.15%
University's proportion of the net pension liability	$ 23,033,837	$ 19,332,813	$ 20,564,468	$ 18,014,320	$ 18,674,184
University's covered-employee payroll	$ 10,458,847	$ 12,561,991	$ 12,922,066	$ 11,336,488	$ 11,331,835
University's proportionate share of the net pension liability as a percentage of its covered employee payroll	220.23%	153.90%	159.14%	158.91%	164.79%
Plan fiduciary net position as a percentage of the total pension liability	62.48%	66.28%	67.91%	67.21%	63.48%

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to schedule.

Schedule 2

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

SCHEDULE OF UNIVERSITY PENSION CONTRIBUTIONS
Massachusetts State Employees' Retirement Plan

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2017 through 2025)

	2026	2025	2024	2023	2022
Statutorily required contribution*	$ 1,101,402	$ 1,090,146	$ 1,087,817	$ 1,290,957	$ 1,290,289
Contributions in relation to the statutorily required contribution*	1,101,402	1,090,146	1,087,817	1,290,957	1,290,289
Annual contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
University's covered-employee payroll	$ 7,984,715	$ 5,900,631	$ 6,936,263	$ 8,039,088	$ 9,176,617
Contributions as a percentage of covered-employee payroll	13.79%	18.48%	15.68%	16.06%	14.06%

	2021	2020	2019	2018	2017
Statutorily required contribution*	$ 1,450,748	$ 1,315,547	$ 1,421,424	$ 1,098,173	$ 972,477
Contributions in relation to the statutorily required contribution*	1,450,748	1,315,547	1,421,424	1,098,173	972,477
Annual contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
University's covered-employee payroll	$ 10,458,847	$ 12,561,991	$ 12,922,066	$ 11,336,488	$ 11,331,835
Contributions as a percentage of covered-employee payroll	13.87%	10.47%	11.00%	9.69%	8.58%

*Annual contributions are reported one year in arrears as required by GASB 68

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to schedule.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

NOTES TO SCHEDULE OF THE UNIVERSITY'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY AND SCHEDULE OF UNIVERSITY CONTRIBUTIONS

JUNE 30, 2017 THROUGH 2026

DISCUSSION DRAFT 10/13/26

1 - CHANGES IN ACTUARIAL ASSUMPTIONS

The actuarial assumptions used as of the June 30, 2025 measurement date included a change in the interest rate credit to the annuity savings fund from 4.76% in 2024 to 5.44% for 2025.

The actuarial assumptions used as of the June 30, 2024 measurement date included a change in the interest rate credit to the annuity savings fund from 3.50% in 2023 to 4.76% for 2024.

The actuarial assumptions used as of the June 30, 2023 measurement date included a change in mortality rates. As of this date, pre-retirement mortality rates reflect the RP-2014 Blue Collar Employees Table, projected generationally with Scale MP-2021 and set forward one year for females. Post-retirement mortality rates reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2021 and set forward one year for females. Mortality rates for disability reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2021 and set forward one year.

The actuarial assumptions used as of the June 30, 2022 measurement date included a change in the inflation rate from 0.00% in 2021 to 2.50% for 2022.

The actuarial assumptions used as of the June 30, 2021 measurement date included a change in mortality rates. As of this date, pre-retirement mortality rates reflect the RP-2014 Blue Collar Employees Table, projected generationally with Scale MP-2020 and set forward one year for females. Post-retirement mortality rates reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2020 and set forward one year for females. Mortality rates for disability reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2020 and set forward one year.

The actuarial assumptions used as of the June 30, 2021 measurement date included a change in the investment rate of return from 7.15% in 2020 to 7.00% for 2021.

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in the investment rate of return from 7.25% in 2019 to 7.15% for 2020.

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in the investment rate of return from 7.35% in 2018 to 7.25% for 2019.

The actuarial assumptions used as of the June 30, 2018 measurement date included a change in mortality rates for disability. As of this date, mortality rates for disability reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2016 and set forward one year.

The actuarial assumptions used as of the June 30, 2017 measurement date included a change cost of living increases whereby such increases are on only the first $13,000 per year.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

NOTES TO SCHEDULE OF THE UNIVERSITY'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY AND SCHEDULE OF UNIVERSITY CONTRIBUTIONS

JUNE 30, 2017 THROUGH 2026
(Continued)

1 - CHANGES IN ACTUARIAL ASSUMPTIONS (Continued)

The actuarial assumptions used as of the June 30, 2017 measurement date included a change in mortality rates. As of this date, pre-retirement mortality rates reflect the RP-2014 Blue Collar Employees Table, projected generationally with Scale MP-2016 and set forward one year for females. Post-retirement mortality rates reflect the RP-2014 Blue Collar Healthy Annuitant Table projected generationally with Scale MP-2016 and set forward one year for females. Mortality rates for disability were assumed to be in accordance with the RP-2000 Healthy Annuitant Table projected generationally with Scale BB and a base year of 2015 (gender distinct).

The actuarial assumptions used as of the June 30, 2016 measurement date included a change in the range of assumed salary increases from 3.5% to 9.0% in 2015 to 4.0% to 9.0% in 2016.

DISCUSSION DRAFT 10/15/26

Schedule 3

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

SCHEDULE OF THE UNIVERSITY'S PROPORTIONATE SHARE OF THE NET OPEB LIABILITY
Commonwealth of Massachusetts Postemployment Benefits Other Than Pensions (OPEB) Plan

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2017 through 2025)

	2026	2025	2024	2023	2022
University's proportion of the net OPEB liability	0.07%	0.09%	0.09%	0.13%	0.13%
University's proportion of the net OPEB liability	$ 9,002,219	$ 11,486,490	$ 11,493,650	$ 16,890,216	$ 19,875,075
University's covered-employee payroll	$ 7,984,715	$ 5,900,631	$ 6,936,263	$ 8,039,088	$ 9,176,617
University's proportionate share of the net OPEB liability as a percentage of its covered employee payroll	112.74%	194.67%	165.70%	210.10%	216.58%
Plan fiduciary net position as a percentage of the total OPEB liability	18.10%	15.60%	13.80%	13.00%	10.70%

	2021	2020	2019	2018	2017
University's proportion of the net OPEB liability	0.15%	0.21%	0.25%	0.21%	0.18%
University's proportion of the net OPEB liability	$ 29,639,150	$ 36,445,632	$ 44,998,975	$ 35,037,942	$ 33,225,679
University's covered-employee payroll	$ 10,458,847	$ 12,561,991	$ 12,922,066	$ 11,336,488	$ 11,331,835
University's proportionate share of the net OPEB liability as a percentage of its covered employee payroll	283.39%	290.13%	348.23%	309.07%	293.21%
Plan fiduciary net position as a percentage of the total OPEB liability	6.40%	6.96%	7.38%	5.39%	4.37%

See accompanying independent auditor's report and notes to schedule.

DISCUSSION DRAFT 10/13/26

Schedule 4

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

SCHEDULE OF UNIVERSITY OPEB CONTRIBUTIONS
Commonwealth of Massachusetts Postemployment Benefits Other Than Pensions (OPEB) Plan

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2017 through 2025)

	2026	2025	2024	2023	2022
Statutorily required contribution*	$ 442,883	$ 511,401	$ 474,061	$ 644,941	$ 677,546
Contributions in relation to the statutorily required contribution*	442,883	511,401	474,061	644,941	677,546
Annual contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
University's covered-employee payroll	$ 7,984,715	$ 5,900,631	$ 6,936,263	$ 8,039,088	$ 9,176,617
Contributions as a percentage of covered-employee payroll	5.55%	8.67%	6.83%	8.02%	7.38%

	2021	2020	2019	2018	2017
Statutorily required contribution*	$ 751,524	$ 959,290	$ 1,076,188	$ 882,031	$ 745,202
Contributions in relation to the statutorily required contribution*	751,524	959,290	1,076,188	882,031	745,202
Annual contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
University's covered-employee payroll	$ 10,458,847	$ 12,561,991	$ 12,922,066	$ 11,336,488	$ 11,331,835
Contributions as a percentage of covered-employee payroll	7.19%	7.64%	8.33%	7.78%	6.58%

*Annual contributions are reported one year in arrears as required by GASB 75

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report and notes to schedule.

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

NOTES TO SCHEDULE OF THE UNIVERSITY'S PROPORTIONATE SHARE OF THE NET OPEB LIABILITY AND SCHEDULE OF UNIVERSITY OPEB CONTRIBUTIONS

JUNE 30, 2017 THROUGH 2026

DISCUSSION DRAFT 10/13/26

1 - CHANGES IN ACTUARIAL ASSUMPTIONS

The actuarial assumptions used as of the June 30, 2025 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the SOA-Getzen trend rate model, version 2025_1b. The healthcare cost trend rate changed from 5.35% in 2024 to 7.50% for Medicare benefits and from 7.42% to 9.60% for non-Medicare benefits, then decreasing in 2026, 2027, 2028 and 2029 to a blended rate of 4.87% in 2034 and additional decrease in 2044, 2054, 2064, 2074, and 2075

The actuarial assumptions used as of the June 30, 2025 measurement date included a change in participant rates whereby in 2024 85% of current and future vested terminated participants will elect health care benefits at age 55, or if later, the participant's current age has been adjusted to 15%.

The actuarial assumptions used as of the June 30, 2025 measurement date included a change in discount rate used to measure the OPEB liability. The discount rates used to measure the OPEB liability as of June 30, 2025 and 2024 was 5.94% and 4.61%, respectively. This rate was based on a blend of the Bond Buyer Index rates of 5.20% and 3.90% as of the measurement date of June 30, 2025 and 2024, respectively and the expected rates of return.

The actuarial assumptions used as of the June 30, 2024 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the SOA-Getzen trend rate model, version 2024_1b. The healthcare cost trend rate changed from 5.79% in 2023 to 5.35% for Medicare benefits and from 7.50% to 7.42% for non-Medicare benefits, then increasing in 2025 before decreasing in 2026, 2027 and 2028 to a blended rate of 4.87% in 2033 and additional decrease in 2043, 2053, 2063, 2073, and 2075.

The actuarial assumptions used as of the June 30, 2024 measurement date included a change in participant rates whereby in 2023 actives under age 65 taking coverage were assumed to have indemnity (27%), POS/PPO (63%) or HMO (10%) have been adjusted in 2024 to indemnity (18%), POS/PPO (72%) or HMO (10%).

The actuarial assumptions used as of the June 30, 2024 measurement date included a change in discount rate used to measure the OPEB liability. The discount rates used to measure the OPEB liability as of June 30, 2024 and 2023 was 4.61% and 4.34%, respectively.

The actuarial assumptions used as of the June 30, 2023 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the Getzen trend rate model, version 2023_1f. The healthcare cost trend rate changed from 5.00% in 2022 to 5.79% in 2023 for Medicare benefits and from 7.60% in 2022 to 7.50% in 2023 for non-Medicare benefits, then increasing in 2024 before decreasing in 2025, 2026 and 2027 to a blended rate of 4.77% in 2032 and additional decrease in 2042, 2052, 2062, 2072, and 2075.

The actuarial assumptions used as of the June 30, 2023 measurement date included a change in mortality rates. As of this date, mortality rates reflect the RP-2014 Blue Collar Employees Table, projected generationally with Scale MP-2021 and set forward one year for females.

DISCUSSION DRAFT 10/15/26

1 - CHANGES IN ACTUARIAL ASSUMPTIONS (Continued)

The actuarial assumptions used as of the June 30, 2023 measurement date included a change in participant rates whereby in 2022 actives under age 65 taking coverage were assumed to have indemnity (28%), POS/PPO (62%) or HMO (10%) have been adjusted in 2023 to indemnity (27%), POS/PPO (63%) or HMO (10%).

The actuarial assumptions used as of the June 30, 2023 measurement date included a change in participant rates whereby in 2022 actives over age 65 taking coverage were assumed to have indemnity (96%) or HMO (4%) have been adjusted in 2023 to Medicare Supplement (96%) or Medicare Advantage (4%).

The actuarial assumptions used as of the June 30, 2022 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the Getzen trend rate model, version 2022_f4. The healthcare cost trend rate changed from 4.40% in 2021 to 5.00% in 2022 for Medicare benefits and from 7.3% in 2021 to 7.60% in 2022 for non-Medicare benefits, then increasing in 2023 and 2024 before decreasing in 2025 and 2026 to a blended rate of 4.97% in 2031 and additional decrease in 2041, 2051, 2061, 2071, and 2075. The Getzen trend rate model also assumes inflation of 2.5%, real GDP growth of 1.4% and excess medical growth of 1.1%.

The actuarial assumptions used as of the June 30, 2022 measurement date included a change in participant rates whereby in 2021 actives under age 65 taking coverage were assumed to have indemnity (28%), POS/PPO (60%) or HMO (12%) have been adjusted in 2022 to indemnity (28%), POS/PPO (62%) or HMO (10%).

The actuarial assumptions used as of the June 30, 2021 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the Getzen trend rate model, version 2021_b. The healthcare cost trend rate changed from 4.9% in 2020 to 4.4% for Medicare benefits and from 6.7% in 2020 to 7.3% in 2021 for non-Medicare benefits, then decreasing 0.24% each year to a blended rate of 5.18% in 2030 and additional decrease in 2060, 2070, and 2075. The Getzen trend rate model also assumes inflation of 2.5%, real GDP growth of 1.5% and excess medical growth of 1.1%.

The actuarial assumptions used as of the June 30, 2021 measurement date included a change in discount rate used to measure the OPEB liability. The discount rates used to measure the OPEB liability as of June 30, 2021 and 2020 was 2.77% and 2.28%, respectively. This rate was based on a blend of the Bond Buyer Index rates of 2.16% and 2.21% as of the measurement date of June 30, 2021 and 2020, respectively and the expected rates of return.

The actuarial assumptions used as of the June 30, 2021 measurement date included a change in the long-term expected rate of return on plan investments from 7.15% to 7.00%.

DISCUSSION DRAFT 10/15/26

1 - CHANGES IN ACTUARIAL ASSUMPTIONS (Continued)

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability, developing such rates based on the Getzen trend rate model, version 2021_b. The healthcare cost trend rate changed from 7.5% in 2019 to 4.9% for Medicare benefits and 6.7% for non-Medicare benefits, then decreasing 0.1% each year to a blended rate of 5.18% in 2030 and additional decrease in 2060, 2070, and 2075. The Getzen trend rate model also assumes inflation of 2.5%, real GDP growth of 1.5% and excess medical growth of 1.1%.

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in participant rates whereby 35% of employees currently opting out of active employee health coverage are assumed to enroll in retiree coverage. Also, 100% of spouses are assumed to elect to continue coverage after the retiree's death.

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in participant rates whereby in 2019 actives under age 65 taking coverage were assumed to have indemnity (25%), POS/PPO (60%) or HMO (15%) have been adjusted in 2020 to indemnity (28%), POS/PPO (60%) or HMO (12%).

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in participant rates whereby in 2019 actives over age 65 taking coverage were assumed to have indemnity (85%), POS/PPO (0%) or HMO (15%) have been adjusted in 2020 to indemnity (96%), POS/PPO (0%) or HMO (4%).

The actuarial assumptions used as of the June 30, 2020 measurement date included a change in the long-term expected rate of return on plan investments from 7.35% to 7.15%.

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in the annual healthcare cost trend rates used to measure the OPEB liability decreasing from 8.0% in 2018 to 7.5% in 2019, then decreasing 0.5% each year to an ultimate rate of 4.5% in 2026 for medical and (2) 4.5% for administration costs. Healthcare costs are offset by reimbursements for Employer Group Waiver Plans (EGWP), which are assumed to increase 5.0% per year until 2025, then decrease to 4.5% in 2026.

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in participant rates whereby 80% of current and future contingent eligible participants will elect health care benefits at age 65, or current age if later was increased to 85% in 2019.

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in participant rates whereby in 2018 actives under age 65 taking coverage were assumed to have indemnity (40%), POS/PPO (50%) or HMO (10%) have been adjusted in 2019 to indemnity (25%), POS/PPO (60%) or HMO (15%).

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in the long-term expected rate of return on plan investments from 7.35% to 7.25%.

DISCUSSION DRAFT - 10/15/26

1 - CHANGES IN ACTUARIAL ASSUMPTIONS (Continued)

The actuarial assumptions used as of the June 30, 2019 measurement date included a change in the discount rates used to measure the OPEB liability from 3.92% to 3.63%. This rate was based on a blend of the Bond Buyer Index rates of 3.51% and 3.87% as of the measurement date of June 30, 2019 and 2018, respectively and the expected rates of return.

The actuarial assumptions used as of the June 30, 2018 measurement date included a change in the discount rates used to measure the OPEB liability from 3.65% to 3.92%. This rate was based on a blend of the Bond Buyer Index rates of 3.87% and 3.58% as of the measurement date of June 30, 2019 and 2018, respectively and the expected rates of return.

The actuarial assumptions used as of the June 30, 2018 measurement date included a change in the long-term expected rate of return on plan investments from 7.50% to 7.35%.

Schedule 5

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

UNIVERSITY NET POSITION ANALYSIS

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2022 through 2025)

	2026	2025	2024	2023	2022
Invested in Capital Assets, Net	$ 44,474,687	$ 48,751,029	$ 49,253,033	$ 55,204,772	$ 60,685,415
Restricted - Expendable for					
Other	1,376,205	2,008,062	1,662,590	1,481,912	1,866,205
Capital Projects	-	-	(88,910)	(95,564)	(99,953)
Total expendable	1,376,205	2,008,062	1,573,680	1,386,348	1,766,252
Unrestricted					
Unrestricted from operations	82,212,813	76,112,578	69,347,687	62,136,574	54,812,359
Accumulated Commonwealth pension obligations	(10,697,736)	(12,192,620)	(14,186,711)	(16,306,274)	(17,673,734)
Accumulated Commonwealth OPEB obligations	(17,314,188)	(21,632,641)	(27,553,212)	(32,868,853)	(36,325,782)
Total unrestricted	54,200,889	42,287,317	27,607,764	12,961,447	812,843
Total Net Position	$ 100,051,781	$ 93,046,408	$ 78,434,477	$ 69,552,567	$ 63,264,510

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report.

Schedule 6

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2026
(With Comparative Totals for 2025)

	Instruction	Public Service	Academic Support	Student Services	Institutional Support	Operation and Maintenance of Plant	Totals 2026	Totals 2025
Regular employee compensation	$ 25,250,600	$ 107,084	$ 4,265,798	$ 6,412,512	$ 9,612,458	$ 4,545,209	$ 50,193,661	$ 46,035,334
Special employee contracted services	9,486,385	144,676	124,261	1,545,289	669,504	11,210	11,981,325	11,784,911
Pension and insurance	5,662,534	139,712	905,550	1,841,332	2,149,743	2,068,860	12,767,731	13,712,618
Total payroll and employee benefits	40,399,519	391,472	5,295,609	9,799,133	12,431,705	6,625,279	74,942,717	71,532,863
Regular employee related expenses	212,115	18,654	130,661	86,640	325,793	52,779	826,642	702,070
Administrative	1,129,323	116,114	967,213	888,744	1,839,482	354,676	5,295,552	5,488,959
Facility operations support and related expenses	485,369	64,577	217,271	1,180,304	427,931	49,970	2,425,422	2,603,823
Energy and space rental	26,438	472	3,975	8,276	9,814	2,276,359	2,325,334	1,879,838
Professional services	2,074,019	192,504	143,697	940,456	1,045,435	1,210,216	5,606,327	4,700,916
Operational services	912,856	17,861	51,988	742,716	524,905	236,924	2,487,250	2,250,620
Equipment purchases	364,345	1,840	27,945	262,274	120,823	127,604	904,831	821,036
Equipment lease and maintenance	196,528	13,501	48,688	429,375	276,350	318,055	1,282,497	1,070,929
Construction and building improvements	-	-	-	-	-	5,132,538	5,132,538	6,194,615
Total operating expenses	5,400,993	425,523	1,591,438	4,538,785	4,570,533	9,759,121	26,286,393	25,712,806
Total educational and general expenses	$ 45,800,512	$ 816,995	$ 6,887,047	$ 14,337,918	$ 17,002,238	$ 16,384,400	$ 101,229,110	$ 97,245,669

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report.

Schedule 7

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

RESIDENCE LIFE AND HOUSING

STATEMENTS OF NET POSITION

JUNE 30, 2026 AND 2025

	2026	2025
ASSETS		
Cash	$ 1,887,926	$ 2,735,650
Accounts receivable, net	195,945	228,469
Right-of-use assets	65,337,766	70,635,390
Total assets	67,421,637	73,599,509
LIABILITIES		
Unearned rental income	75,375	79,126
Accrued and other liabilities	306,799	408,189
Lease obligations	81,865,121	86,230,450
Total liabilities	82,247,295	86,717,765
NET POSITION		
Unrestricted	$ (14,825,658)	$ (13,118,256)

DISCUSSION DRAFT 10/13/26

See accompanying independent auditor's report.

Schedule 8

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

RESIDENCE LIFE AND HOUSING

STATEMENTS OF REVENUES, EXPENSES, AND CHANGES IN NET POSITION

YEARS ENDED JUNE 30, 2026 AND 2025

DISCUSSION DRAFT 10/13/26

	2026	2025
REVENUES		
Fees	$ 12,613,294	$ 11,848,130
Other income	185,585	171,046
Total revenues	12,798,879	12,019,176
EXPENSES		
Regular employee compensation	1,694,966	1,566,168
Special employees/contracted services	324,963	279,883
Pension and insurance	601,293	666,057
Regular employee related expenses	9,050	5,964
Administrative	61,850	128,290
Building assessments	1,529,922	1,434,190
Facility operations support and related expenses	189,700	204,316
Energy and space rental	892,010	804,185
Professional services	18,350	61,613
Equipment purchases	10,043	40,929
Equipment lease and maintenance	47,110	12,760
Building improvements	814,034	750,571
Benefits programs	686,417	697,604
Right-to-use asset amortization	4,208,164	3,594,237
Interest expense	3,418,409	3,599,800
Total expenses	14,506,281	13,846,567
Change in net position	(1,707,402)	(1,827,391)
NET POSITION		
Beginning of year	(13,118,256)	(11,290,865)
End of year	$ (14,825,658)	$ (13,118,256)

See accompanying independent auditor's report.

Schedule 9

WORCESTER STATE UNIVERSITY
(An Agency of the Commonwealth of Massachusetts)

HEALTH SERVICES

STATEMENTS OF REVENUES, EXPENSES, AND CHANGES IN NET POSITION

YEARS ENDED JUNE 30, 2026 AND 2025

DISCUSSION DRAFT 10/13/26

	2026	2025
REVENUES		
Fees	$ 981,596	$ 978,775
EXPENSES		
Administrative	940	2,118
Facility operations support and related expenses	8,798	8,357
Professional services	595,988	612,000
Operational services	6,500	-
Equipment maintenance	325	325
Benefit programs	-	43
Total expenses	612,551	622,843
Change in net position	$ 369,045	$ 355,932

See accompanying independent auditor's report.

STATISTICAL INFORMATION
(UNAUDITED)

DISCUSSION DRAFT 10/13/26

Worcester State University
Schedule of Net Position by Component
June 30, 2021 through 2026

Exhibit E-1

	2021	2022	2023	2024	2025	2026
Invested in capital assets, net of related debt	$ 64,602,986	$ 60,685,415	$ 55,204,772	$ 49,253,033	$ 48,751,029	$ 44,474,687
Restricted-expendable	1,046,341	1,766,252	1,386,348	1,573,680	2,008,062	1,376,205
Restricted-nonexpendable	-	-	-	-	-	-
Unrestricted	(9,729,983)	812,843	12,961,447	27,607,764	42,287,317	54,200,889
Total primary government net position	**$ 55,919,344**	**$ 63,264,510**	**$ 69,552,567**	**$ 78,434,477**	**$ 93,046,408**	**$ 100,051,781**

DISCUSSION DRAFT 10/13/26

Worcester State University
Tuition & Mandatory Fees

Exhibit E-2

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Resident Undergraduate										
Tuition	$ 970	$ 970	$ 970	$ 970	$ 970	$ 970	$ 970	$ 970	$ 970	$ 970
Mandatory Fees	8,232	8,562	8,562	8,562	9,616	9,616	9,816	10,316	10,816	11,374
Total Annual	***$ 9,202***	***$ 9,532***	***$ 9,532***	***$ 9,532***	***$ 10,586***	***$ 10,586***	***$ 10,786***	***$ 11,286***	***$ 11,786***	***$ 12,344***
Non Resident Undergraduate										
Tuition	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050	$ 7,050
Mandatory Fees	8,232	8,562	8,562	8,562	9,616	9,616	9,816	10,316	10,816	11,374
Total Annual	***$ 15,282***	***$ 15,612***	***$ 15,612***	***$ 15,612***	***$ 16,666***	***$ 16,666***	***$ 16,866***	***$ 17,366***	***$ 17,866***	***$ 18,424***
Resident Graduate										
Tuition	$ 150	$ 169	$ 169	$ 169	$ 169	$ 169	$ 169	$ 169	$ 189	$ 189
Mandatory Fees	148	153	153	153	153	153	153	170	190	190
Total per Credit Hours	***$ 298***	***$ 322***	***$ 322***	***$ 322***	***$ 322***	***$ 322***	***$ 322***	***$ 339***	***$ 379***	***$ 379***

DISCUSSION DRAFT 10/13/26

Worcester State University **Exhibit E-3**
Schedule of Employment
2021-2025

	2021	2022	2023	2024	2025
Faculty - Primary Instruction /1	**440**	**481**	**547**	**558**	**473**
Part-time	232	275	345	362	279
Full-time	208	206	202	196	194
Staff and Administrators	**351**	**352**	**359**	**359**	**359**
Part-time	9	10	10	8	9
Full-time	342	342	349	351	350
Total Faculty & Staff Employees	**791**	**833**	**906**	**917**	**832**
Part-time	241	285	355	370	288
Full-time	550	548	551	547	544
Non-Benefitted Employees /2	**485**	**572**	**566**	**466**	**487**
Contract Workers	156	195	218	152	128
Student Workers	329	377	348	314	359
Total All Employees	**1,276**	**1,405**	**1,472**	**1,383**	**1,319**

/1 Includes Instruction, Research & Public Service

Notes: 1) This schedule reflects personnel as of November 1 and includes both state appropriation and local trust funds.
2) Beginning 2009 all benefitted and non-benefitted personnel are of funding source.

DISCUSSION DRAFT 10/13/26

Worcester State University **Exhibit E-4**
Admissions, Enrollment, and Degree Statistics
Last Five Years

	Fall Term				
Admissions-Freshman /1	**2021**	**2022**	**2023**	**2024**	**2025**
Applications	4,262	5,380	5,335	5,741	5,625
Applications accepted	3,801	4,732	4,868	5,068	4,945
Accepted as a percentage of applications	89.18%	87.96%	91.25%	88.28%	87.91%
Students enrolled /2	1,177	1,168	1,311	1,095	1,096
Enrolled as a percentage of accepted	30.97%	24.68%	26.93%	21.61%	22.16%

/1 Includes all undergraduate admissions including transfer students.
/2 Includes only students who were accepted and enrolled. Enrolled alone would include students who were not accepted but enrolled as non-degree seeking students.

	Annual				
Enrollment	**FY22**	**FY23**	**FY24**	**FY25**	**FY26**
Full-time equivalent	4,506.4	4,418.2	4,476.0	4,598.5	4,477.8
Unduplicated credit headcount	7,284	7,397	7,759	7,767	7,072
Percent undergraduate /3	85.66%	84.32%	84.37%	84.76%	85.06%
Percent graduate	14.34%	15.68%	15.63%	15.20%	14.94%

/3 Percent undergraduate/graduate based on Fall semester registration, unduplicated headcount.

	Fall Term				
Student Population Demographics /4	**2021**	**2022**	**2023**	**2024**	**2025**
Percentage of men	35.46%	36.04%	36.71%	37.58%	35.75%
Percentage of women	64.54%	63.96%	63.29%	62.42%	64.25%
Percentage of African-American	7.48%	7.72%	8.78%	9.00%	10.30%
Percentage of White	64.85%	63.40%	64.17%	57.50%	59.49%
Percentage of Latino	13.01%	14.76%	17.71%	18.50%	20.90%
Percentage of Other /5	7.97%	7.91%	8.08%	7.60%	9.31%
< 20	29.61%	30.98%	37.96%	29.40%	34.21%
20 to 30	58.02%	55.05%	49.59%	57.30%	53.97%
31 to 40	6.53%	6.82%	5.94%	6.50%	5.58%
41 & Over	5.83%	7.16%	6.51%	6.80%	624.00%

/4 Percents within category are based on population of students who reported this information (gender, race/ethnicity, and age).
/5 Other includes American Indian/Alaskan Native, Asian, Native Hawaiian or Other Pacific Islander, Cape Verdean and Two or more races.

Degrees Granted	**FY22**	**FY23**	**FY24**	**FY25**	**FY26**
Bachelor's	1,029	924	848	789	842
Master's	286	258	268	370	367

DISCUSSION DRAFT 10/13/26

Worcester State University **Exhibit E-5**
Schedule of Capital Asset Information

	Academic Year	
	2025	**2026**
Land (acreage)	57	57
Buildings (square feet)		
100 Instruction/classroom	50,604	50,604
200 Labs	57,168	60,919
300 Administrative	114,927	112,813
400 Study facilities	28,975	28,975
52x Athletic	66,174	66,049
5xx Other Special Use	7,250	6,025
600 General Use	61,420	60,805
700 Support facilities	175,297	175,337
000 Unclassified	-	-
Unassigned/unassignable	377,100	377,388
Total Sq Ft	**938,915**	**938,915**
Residence Halls	462,553	462,553
Rental space	-	-
Dormitories - # of residents	1,577	1,577

Note: Classification of facilities space is consistent with Facilities Inventory & Classification Code guide.

DISCUSSION DRAFT 10/13/26

Worcester State University **Exhibit E-6**
Sources and Uses of Funds

	Fiscal Year 2022	2023	2024	2025	2026
Source of Revenue					
Student charges (net of scholarships)	$ 48,724,511	$ 48,160,282	$ 45,774,418	$ 46,257,756	$ 48,698,646
Grants & contracts	13,230,956	16,022,348	24,074,328	26,429,560	24,697,930
Auxiliary enterprises	1,882,287	1,022,708	608,397	171,046	185,585
Other operating revenue	1,344,471	840,664	1,295,644	1,450,703	1,309,675
Total operating revenue	**65,182,225**	**66,046,002**	**71,752,787**	**74,309,065**	**74,891,836**
State and Federal support	66,879,909	60,165,456	61,636,532	62,821,380	59,337,736
Other non-operating revenue	(1,353,973)	(156,190)	1,630,187	2,591,025	1,377,343
Total non-operating revenue	**65,525,936**	**60,009,266**	**63,266,719**	**65,412,405**	**60,715,079**
Total revenue	**$ 130,708,161**	**$ 126,055,268**	**$ 135,019,506**	**$ 139,721,470**	**$ 135,606,915**
Functional Expense					
Instruction	$ 44,439,331	$ 40,587,936	$ 44,244,040	$ 45,823,935	$ 45,800,512
Academic support	6,110,093	7,073,963	6,622,501	6,328,625	6,887,047
Student services	11,403,400	10,885,870	11,459,354	12,872,499	14,337,918
Institutional support	13,241,102	13,788,705	14,858,730	15,792,638	17,002,238
Plant operations & maintenance	16,756,036	21,764,889	19,566,291	15,681,762	16,384,400
Research	-	-	-	-	-
Public service	-	-	-	746,210	816,995
Scholarships	9,813,443	2,824,887	5,417,650	5,000,095	4,310,889
Sub-total	**101,763,405**	**96,926,250**	**102,168,566**	**102,245,764**	**105,539,999**
Auxiliary enterprises	14,330,551	15,360,035	15,475,270	14,469,410	15,118,832
Independent operations	-	-	-	-	-
All other	1,540,052	1,889,568	587,539	775,858	721,994
Total operating expense	**$ 117,634,008**	**$ 114,175,853**	**$ 118,231,375**	**$ 117,491,032**	**$ 121,380,825**
Memo: Depreciation	$ 5,723,887	$ 5,591,358	$ 7,906,221	$ 7,618,507	$ 7,220,717

Note: This schedule does not include component units, such as foundations. Total operating expense does not include depreciation.

DISCUSSION DRAFT 10/13/26

OTHER REPORTS

DISCUSSION DRAFT 10/13/26

INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

Board of Trustees
Worcester State University

DISCUSSION DRAFT 10/13/26

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*), the financial statements of the business-type activities and discretely presented component unit of Worcester State University (the "University"), as of and for the year ended June 30, 2026, and the related notes to the financial statements, which collectively comprise the University's basic financial statements, and have issued our report thereon dated _____, 2026.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the University's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the University's internal control. Accordingly, we do not express an opinion on the effectiveness of the University's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the University's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Worcester, Massachusetts
_____, 2026

DISCUSSION DRAFT 10/13/26

Updated on 10/14/2026

2026- 2027 BOARD OF TRUSTEES COMMITTEES

Dr. Lisa Colombo, Chair of the Board is an ex-officio voting member of all committees
President Maloney is a non-voting member of all committees
Staff Support to all committees is Nikki Kapurch - w: 508-929-8201 | c: 508-294-6136 | nkapurch@worcester.edu
All trustees are welcome at any meeting

HUMAN RESOURCES COMMITTEE Monica Aryitey, Esq. (Chair) Maureen Power (Vice Chair) Amy Peterson Kristen Garvey ***President's Liaisons***: Kathy Eichelroth - 508-929-8098 keichelroth@worcester.edu	*The Committee on Human Resources shall have the following powers and duties: 1. To consider all matters related to personnel. 2. To consider general policies relating to the formulation of budgets and appropriate compensation policies for the University and to make recommendations to the Board of Trustees with respect thereto. 3. To consider policies on personnel staffing patterns and to make recommendations to the Board of Trustees with respect thereto. 4. To consider recommendations from the President on the appointment, change in status or termination of college personnel and to make recommendations to the Board of Trustees with respect thereto. 5. To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.
PLANNING AND DEVELOPMENT COMMITTEE Darnell Dunn (Chair) Jacob Sanders (Vice Chair) Kelly Brissette Mary Foley Dr. Lawrence Sasso ***President's Liaisons***: Tom McNamara - 508-929- 8033 tmcnamara@worcester.edu Ryan Forsythe- 508-929-8498 rforsythe@worcester.edu	*The Committee shall consist of the following members: The two trustees elected by the Board to serve on the Board of the Worcester State Foundation and one other named by the Chair of the Board. The Committee on Planning and Development shall have the following powers and duties: 1. Consider matters relating to long-range development quality enhancement and growth off the University. 2. Consider strategic plans to achieve key mission initiatives including but not limited to: a. academic programs b. student life development c. support services d. financial, human, physical and capital resource development e. external community relations f. alumni relations g. governmental relations 3. Consider such joint projects which may be appropriate with the Worcester State Foundation. 4. To review plans and programs to raise private funds for the University through special gifts, endowment bequests, and other means, and to make recommendations to the Board of Trustees with respect thereto. 5. To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

***Language was taken from the Bylaws**

Updated on 10/14/2026

FINANCE AND FACILITIES COMMITTEE

Dr. Lawrence Sasso (Chair)
Mary Foley (Vice Chair)
Monica Aryitey, Esq.
Darnell Dunn
Amy Peterson
Jacob Sanders

President's Liaison:
Kathy Eichelroth-508-929-8098
keichelroth@worcester.edu

*The Committee on Finance and Facilities shall have the following powers and duties:

1. To consider all matters related to administration and finance.
2. To consider and act upon operating budget requests and capital outlay budget requests submitted by the University and to make recommendations to the Board of Trustees with respect thereto.
3. To review proposals for the transfer of funds between subsidiary accounts, and to make recommendations to the Board of Trustees with respect thereto.
4. To consider policies and other matters pertaining to the investment of endowment funds and other funds of the University that may from time to time be invested and reinvested, and to make recommendations to the Board of Trustees with respect thereto.
5. To review the financial records and controls of the University; to review and develop policies respecting the receipt, management, and disbursement of funds of the University from whatever source received, the purchase of services, supplies, and materials and internal controls over the same; to review proposals for fees, rents, and charges; to consider policies and other matters pertaining to the leasing of private property by the University, to review audits of financial activities of the University and to report thereon; and to make recommendations with respect thereto to the Board of Trustees.
6. To consider the fidelity and performance bonding of the University personnel and to report thereon, and to make recommendations with respect thereto to the Board of Trustees.
7. To consider policies and other matters pertaining to the physical properties of the University, including all buildings, land acquisition, and transfer, landscape plans, and developments and construction thereon, and to make recommendations to the Board of Trustees with respect thereto.
8. To consider plans and policies governing campus master planning and capital outlay budgets, and to make recommendations to the Board of Trustees with respect thereto.
9. To consider and make recommendations to the Board of Trustees with respect to design plans, bid taking and other building project matters, contracts, and nominations for architects and engineers on all buildings, structures, and facilities to be built on University property, prior to any final action thereon by the Board of Trustees.
10. To inspect University lands and buildings as required; to consider the acceptance of completed construction, and to make a recommendation to the Board of Trustees with respect thereto.
11. To consider plans for lots, roads, streets, paths, and ways, and regulations for pedestrian and vehicular use thereof on the property of the University and to make recommendations to the Board of Trustees with respect thereto.
12. To consider names for buildings, streets, ways and other properties of the University and to make recommendations to the Board of Trustees with respect thereto.
13. To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

***Language was taken from the Bylaws**

Updated on 10/14/2026

ACADEMIC AND STUDENT DEVELOPMENT COMMITTEE Maureen Power, Chair Kelly Brissette, Vice Chair Kristen Garvey Vacant (Student Trustee) ***President's Liaisons*** Lois Wims - 508-929-8038 lwims@worcester.edu Julie Kazarian - 508-929-8077 jkazarian@worcester.edu	*The Committee on Academic and Student Development shall have the following powers and duties: 1. To consider all matters related to academic affairs. 2. To consider policies regarding the quality, character, and extent of instruction and research at the university, including policies governing admission requirements, programs of instruction, curriculum, academic personnel, new degree programs, and changes to existing degree programs, public service activities and research, and to make recommendations to the Board of Trustees with respect thereto. 3. To consider policies related to the educational purposes and responsibilities of the University and evaluate the same on a long-range basis, and to make recommendations to the Board of Trustees with respect thereto. 4. To consider all matters related to student development. 5. To consider policy matters pertaining to student life and activity, student government and other recognized student organizations and groups, and to make recommendations to the Board of Trustees with respect thereto. 6. To consider policies relating to the health and well-being of the student body, including advisement and counseling, and to make recommendations to the Board of Trustees with respect thereto. 7. To advise the President on any matter within the scope of the Committee's duties. 8. To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

Updated on 10/14/2026

THE EXECUTIVE COMMITTEE	*The Executive Committee shall be composed of the Chair and Vice-Chairs of the Board of Trustees, the President of the University, and one additional Board member elected to this committee by the Trustees at the annual meeting. The Trustees will also elect an alternate to serve in the event that the elected Board member is unable to serve or be present at a meeting of the committee. This Committee shall have the following powers and duties:
Dr. Lisa Colombo, **Chair** Darnell Dunn, Vice-Chair Dr. Lawrence Sasso, Vice-Chair Barry Maloney, President Maureen Power Monica Aryitey, Esq., Alternate	1. The Executive Committee of the Board will meet, upon due notification by the Chair and the President, to transact business between regular board meetings and to act with the full power and authority of the Board. 2. To consider and act upon proposals by the President for action which the Board may have generally or specifically authorized the President to take with the concurrence of the Executive Committee. 3. To recommend honorary degree candidates for approval by the Board of Trustees. 4. To assign to an officer of the University any matter for which a hearing by the Board of Trustees or any committee thereof is deemed necessary by the Executive Committee, or is required under the laws of the Commonwealth or the rules and regulations for said Board. 5. To consider, propose and recommend to the Board of Trustees the adoption, amendment or revisions of rules and regulations for the governance of the Board of Trustees and the University, its administration, faculty, staff, students, and activities. 6. To report to the Board of Trustees all actions taken or concurred in by said Committee at the next regular meeting of the Board of Trustees or as soon thereafter as possible. 7. To consider the furtherance of governance, legislative and public relations policy interests of the Board of Trustees and of the University and to make recommendations to the Board of Trustees with respect thereto. 8. To consider recommendations regarding relationships between the University and its alumni bodies and other groups having or desiring a special relationship to the University, and to make a recommendation to the Board of Trustees with respect thereto. 9. To consider recommendations of the President of the University with respect to programs concerning the various constituencies of the University and to make recommendations to the Board of Trustees with respect thereto. 10. To consider the furtherance of diversity, equity, and inclusion and make recommendations to the Board of Trustees with respect thereto.

***Language was taken from the Bylaws**

President's Update

October 2026

President's Message



Eleven years ago, we convened our first Academic Convocation, welcoming new students. Even as fashions and hairstyles have changed, what they seek from us has not: a future enriched by a Worcester State University education. And we, the faculty and staff, remain committed to helping them realize that dream.

We are meeting some stiff headwinds in Massachusetts.

Private college closures are mounting amid demographic decline. Young people are opting into trades or free community college amid concerns about AI's impact, rather than investing in four-year degrees. Our robust Class of 2030, and stable enrollment, are bucking the trends.

Housing occupancy is higher than it's been in recent history, at 88%. We have A/Stable bond ratings at a time when other institutions see theirs being downgraded. We've narrowed our COVID era budget gap through operational excellence-related efficiencies, prudent fee increases, and sound fiscal management. Our endowment market value growth was fourth among 54 New England higher education institutions last year.

In August, Governor Maura Healy and Lt. Gov. Kim Driscoll toured our nursing labs, and we touted our best-in-the-Commonwealth nursing program. Education Secretary Stephen Zrike, Ph.D., was the keynote speaker at our Academic Year Kickoff meeting in early September. He heard how state SUCCESS dollars are taking us to the next level in providing holistic support for students who need services of any kind.

State funds, while foundational, are not enough. We require significant private support. This month, we launched the three-year, $30-million-dollar Believe in Beyond fundraising campaign. Its aim is to meet the region's growing demand for talented, purpose-driven graduates – those with the knowledge and skills necessary to navigate the technological changes that are upon us and around the bend, including co-op experiences. The campaign will strengthen faculty programs as well as those that support students and prepare them to lead.

WORCESTER STATE UNIVERSITY

Contents

Believe in Beyond: Investing in Worcester State's Future 3

Faculty Excellence and Student Opportunity 4

Enrollment and Student Success 5

Academic Programs and Partnerships 6

Campus and Community Engagement 8

Grants, Alumni Engagement, and Community Partnerships ... 9

Appendix 10

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

WORCESTER STATE UNIVERSITY

We will raise millions, too, in direct student aid via scholarships. Leading the way is the recently announced $1 million Cotter-Lemoine gift. The funding not only honors our history as an education innovator, it will further the careers of adults already in classrooms who seek advancement. It will also help fill a critical need for public school teachers – a need Worcester State has been meeting for 150 years.

I'm looking forward to working with the Trustees and all of our boards, alumni, and external partners as we embark on this ambitious campaign!



Believe in Beyond: Investing in Worcester State's Future

On October 5, Worcester State publicly launched Believe in Beyond, a $30 million, three-year fundraising campaign, the largest in University history. The campaign supports student opportunity, educational innovation, and transformative learning. Its launch included a $1 million leadership gift from Mary Cotter-Lemoine '96 and David Lemoine to establish the Mary Cotter-Lemoine Teacher Education Support Fund for Adult Learners, helping working adults pursue teaching degrees and licensure.

As of September 30, the campaign had raised $6,819,471, or 22.7% of its goal, including qualifying gifts from earlier fiscal years. Progress toward the campaign's priorities includes Opportunity Gateway for Every Student ($4,808,702 toward $16 million, or 30.1%); Education Innovator for Central Massachusetts ($772,731 toward $6 million, or 12.9%); and Region's Model for Transformative Learning ($1,238,038 toward $8 million, or 15.5%).

Fiscal year 2027 giving stood at $3,506,737 toward a $10 million annual goal (35.1%). The campaign recorded 415 donors toward a goal of 2,500. Of these, 121 were alumni donors, toward a goal of 1,500. Campaign training is scheduled for University Advancement and the Communications and Marketing staff on October 14 and campus-wide on October 30. Board training is envisioned, and the Board of Trustees will be informed at an upcoming meeting about the campaign. Campaign information can be found here.

The October 8 Foundation Board annual meeting addressed support for University scholarships and awards, board leadership and committee appointments, and the Believe in Beyond campaign. The I. Robert Freelander Award was scheduled to recognize Dr. Mary K. Alexander and Dr. Lillian R. Goodman posthumously.

Alumni Engagement and External Partnerships

University Advancement hosted alumni activities at Polar Park, Homecoming, and the Athletic Hall of Fame in September. West Coast alumni events and donor visits are scheduled for October 15–16, followed by the GOLD+ relaunch with Music Bingo on October 23. These gatherings help maintain relationships with alumni and supporters as the Believe in Beyond campaign gets underway.

Advancement is working with the Career Development Center to recognize nine employer partners at the October 21 Internship Fair, strengthening relationships that create opportunities for students.



Faculty Excellence and Student Opportunity

The Chemistry Department illustrates how faculty scholarship and professional development can create opportunities for students. Faculty members are pursuing research and specialized training while helping students gain experience in laboratories and workplaces beyond campus.

Dr. Jeremy Andreatta completed Yale School of the Environment's nine-month Green Chemistry for Climate and Sustainability certificate program as a member of its inaugural cohort of 29 participants from 16 countries. His capstone proposed more sustainable methods for producing diesel fuel additives, an area he hopes to investigate with undergraduate researchers at Worcester State.

Dr. Brian Xu coauthored research published in the Journal of the American Chemical Society, "Breaking the Sensitization-Passivation Trade-Off in Dye-Sensitized Upconversion Nanoparticles through LiLuF4-Enabled Directional Energy Transfer." The publication reflects a collaboration among researchers.

Chemistry students are also gaining experience in industry and biomedical research. Sophia Westort completed a summer internship at Flexcon in Spencer, studying the relationship between adhesive strength and material properties; her work led to a Co-Op Lite opportunity this fall. Emmanuel Afful and Xin Xiong conducted summer research at UMass Chan Medical School, with projects involving nanoparticle analysis and biomedical materials. Sean Furlong described coursework and professional connections in drug discovery, including a presentation project on AI in the field. Lina Tran completed a summer internship at PraNa Biosciences.

These examples illustrate how faculty expertise and student research contribute to career preparation across Worcester State's academic programs.



Enrollment and Student Success

Fall Enrollment Shows Growth

Early Fall 2026 figures submitted to the Department of Higher Education as of September 22 show undergraduate headcount increasing by 149 students, from 4,560 to 4,709. Undergraduate full-time equivalent enrollment rose from 3,755.6 to 3,793.9. New undergraduate enrollment, including first-time and transfer students, increased by 62, from 1,093 to 1,155. These preliminary figures remain subject to change during the semester.

Welcoming Students from Anna Maria College

Following the closure of Anna Maria College, Worcester State enrolled 60 new transfer students from the institution. These students brought an average of 58 transfer credits and enrolled across 10 academic programs. Approximately 52% are first-generation college students, 62% identify as ALANA/BIPOC (African, Latine, Asian, Native American, and/or Black, Indigenous, People of Color), and 42% live in campus housing.

A Case Management Approach to Student Support

Supported by the State University SUCCESS Grant through at least September 2027, Worcester State has begun implementing a case management approach to academic advising and student support. Coordinated largely through the Academic Success Center, the effort focuses on students facing barriers to academic progress and groups with documented achievement gaps, including Pell Grant-eligible and first-generation students. The approach connects academic advising with community services and financial assistance to provide coordinated support.



Academic Programs and Partnerships

Ten New Faculty Join Worcester State

Worcester State welcomed ten new faculty members this fall across Education, Earth, Environment, and Physics, Biology, Business Administration and Economics, Chemistry, Speech-Language-Hearing Sciences, and Nursing. Among them, Dr. Jennifer Lingle brings experience in teacher preparation and school partnerships; Dr. Alberto Correa and Dr. Emma Wear contribute expertise in microbiology and aquatic microbial ecology; and Dr. Benjamin Sturtz is developing undergraduate research projects in synthetic inorganic chemistry. The new faculty bring experience in research and professional practice to their teaching at Worcester State.

New Engineering Pathways with WPI

Worcester State and Worcester Polytechnic Institute established a new academic pathway that gives eligible Worcester State students guaranteed transfer admission to WPI after completing Worcester State's pre-engineering curriculum with a minimum 3.3 grade point average. Developed by faculty in the School of Science, Technology & Health, the curriculum includes 18 courses and two science electives. Students who complete the pathway can pursue engineering degrees at WPI, including civil and environmental engineering, as well as aerospace engineering. President Barry Maloney and WPI President Grace Wang formally signed the agreement on August 18.

Biology Receives Life Sciences Equipment Grant

Worcester State's Biology Department received a $212,997 Massachusetts Life Sciences Center Education and Workforce Development grant for its "I Can See Clearly Now" proposal. The award will help purchase a fluorescence microscope and related equipment, bringing advanced cell imaging into undergraduate and master's-level learning and preparing students for careers in the life sciences.

CTL Faculty and Students Collaborate on Ethical AI Pedagogy

In June 2026, CTL: The Faculty Development Center launched "Unrolling Roles" in AI Pedagogy: Cultivating Student-Faculty Partnerships to Co-Create Ethical AI Pedagogy, a two-year project supported by a $192,984 grant from the Davis Educational Foundation. During the summer, 27 faculty members and eight students representing 15 departments participated in the project's programs. Their work included examining student AI competencies across disciplines and developing courses connected to ethical AI and Worcester State's new general education program. They also designed a student survey on generative AI to inform teaching and policy. Participants collaborated on research and writing about ethical AI pedagogy. They also completed a virtual course and discussion group on teaching in environments shaped by generative AI. The foundation was established by Stanton and Elisabeth Davis following Mr. Davis's retirement as chairman of Shaw's Supermarkets, Inc.

Worcester State Scholars' Article Accepted by Metropolitan Universities

Metropolitan Universities, the peer-reviewed, open-access journal of the Coalition of Urban and Metropolitan Universities (CUMU), has accepted an article by Biology Professor Dr. Daron Barnard, Chemistry Professor Dr. Eihab Jaber, Dean Dr. Linda Larrivee, and Associate Provost Dr. Henry Theriault. Their article, "Beyond Good Intentions: Examining the Interplay of Strategic Hiring and Comprehensive Mentorship in Advancing Urban University Mission," grew out of a presentation the authors delivered at CUMU's October 2025 conference, "The Power of Place."



Campus and Community Engagement

Academic Year Kickoff Highlights Worcester State's Regional Role

Massachusetts Secretary of Education Dr. Stephen Zrike addressed Worcester State faculty and staff at the September 4 Academic Year Kickoff, emphasizing the University's role in the educational and economic life of Central Massachusetts. He praised Worcester State's investment in student success and noted the recovery of first-year retention to 77 percent in fiscal year 2025. President Barry Maloney highlighted enrollment, residence hall occupancy, and the University's work to expand support for students. Secretary Zrike also discussed the Commonwealth's plans to strengthen connections between secondary education and college and to expand early college opportunities. Read more here.

Supporting the Commonwealth's Healthcare Workforce

Governor Maura Healey and Lt. Gov. Kim Driscoll visited Worcester State in August to tour the nursing simulation center and Speech-Language-Hearing Center and speak with students and faculty about healthcare workforce preparation. During the visit, President Barry Maloney highlighted the Dr. Lillian R. Goodman Department of Nursing's 100 percent pass rate on the NCLEX licensure examination this year, as well as the program's role in preparing nurses for Massachusetts communities. The Governor discussed recommendations to expand the nursing workforce, including increased support for nursing faculty, and recognized Worcester State's efforts to help nursing students displaced by the closures of Anna Maria College and Becker College continue their education.

Community Connections

A recent College of the Holy Cross magazine feature, "Knowing Your Community Matters," highlights Megan Moran '11, director of Worcester State's John J. Binienda Center for Civic Engagement, and her work connecting students with the Worcester community. The article describes Worcester State's new Worcester Civic Leaders Program, through which five students are matched with local nonprofit boards.



Grants, Alumni Engagement, and Community Partnerships

New Grants Support Student Learning and Access

From June through September 2026, the Office of Grants and Sponsored Research reported several awards.

- A $575,000 anonymous foundation grant supports planning for a career-integrated cooperative education model and enrollment and retention work with EAB.
- A $180,000 Massachusetts Inclusive Postsecondary Enrollment award supports college access and transitions for high school students with disabilities.
- A $3,423 Campus Compact mini-grant supports fall voter engagement programming.
- The Latino Education Institute received
    - $200,000 from the Barr Foundation for two years of family engagement programming
    - $14,000 from United Way of Central Massachusetts for Club E English-language instruction
    - $45,000 annually for two years from the United Way Women's Initiative for LASOS, which supports Latina girls and their mothers.



Appendix

Believe in Beyond Campaign Dashboard

