WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Tuesday, April 13, 2021
5:30 PM
REMOTE PARTICIPATION
Join Zoom Meeting
https://worcester.zoom.us/j/75 40181608
Meeting ID: 754 018 1608

Meeting Called By: Stephen Madaus (Chair)   **Minutes**: Nikki Kapurch

Board Members: Lisa Colombo; Aleta Fazzone; Maryanne Hammond (Vice-Chair); Anna Johnson; Karen Lafond;

Lawrence   Stephen Madaus (Chair); William Mosley; Dina Nichols; Marina Taylor (Vice-Chair); David Tuttle;

             Sasso

WSU Staff: Barry Maloney; Carl Herrin; Kathy Eichelroth; Julie Kazarian; Stacey Luster; Mike McKenna; Lois Wims
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All documents considered to be **drafts** until discussed and/or approved by the Board

AGENDA		
ITEM	**RESPONSIBLE**	**ACTION**

1. *Administrative Business*
    A. Call to Order
    B. Minutes: Full Board - March 16, 2021*
	Stephen Madaus, Chair	
		
		B. Vote required

2. Renz Consulting, LLC Presentation A. Lorenzo M. Boyd, Ph.D, Founder & President	Julie Kazarian	 A. Informational

3. *Equity, Diversity and Inclusion Presentation - 20 minutes / Q&A*
    A. Office of Multicultural Affairs (OMA)* and
       Latino Education Institute (LEI)*
	Stacey Luster
	Marcela Uribe-Jennings
	Laxmi Bissoondial
	MaryJo Marion
		A. Informational

4. *Finance & Facilities Committee Report*	Marina Taylor	4. Informational and **(2**) **votes required**
5. *Academic & Student Development Committee Report*	Karen LaFond	5. Informational and **(4) votes required**

6. *Administrative Updates*
    A. Report of the Chairman
       I. Appointment of the Nominating Committee
      II. Next meeting: June 15, 2021 (remotely)
    B. Report of the Student Trustee
    C. Report of the President
       I. President's Update*
      II. Commencement Update
	Stephen Madaus
	
	Anna Johnson
	Barry Maloney
	
	Mike McKenna
		
		I. Informational

7. *Adjournment*	Stephen Madaus	**7. Vote required**

*Attachments

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES MEETING
Meeting Minutes - March 16, 2021

CHAIR: Mr. Stephen Madaus (Chair)   DATE: March 16, 2021

LOCATION: Remote Participation   MINUTES BY: Nikki Kapurch

TIME: 5:30 PM

MEMBERS PRESENT: Lisa Colombo; Aleta Fazzone; Maryanne Hammond (Vice-Chair); Anna Johnson; Karen Lafond; Stephen Madaus (Chair); Dina Nichols; Marina Taylor (Vice-Chair); David Tuttle; Lawrence Sasso.

ABSENT MEMBERS: William Mosley

WSU STAFF: Barry Maloney; Nikki Kapurch; Kathy Eichelroth; Carl Herrin; Ryan Forsythe; Julie Kazarian; Tom McNamara; Lois Wims; Stacey Luster

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The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Board of Trustees was held on Tuesday, March 16, 2021, through a Zoom remote call. Chair Madaus called the meeting to order at 5:30 p.m. Trustee Madaus reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business:

APPROVAL OF THE MINUTES - Finance & Facilities Committee Meeting - January 19, 2021

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

VOTED: **to approve the January 19, 2021, minutes of the Finance & Facilities Committee meeting as presented.**

ROLL CALL VOTE: **4 approved. Lisa Colombo; Stephen Madaus; Dina Nichols; Marina Taylor.**
                           1 abstained. Aleta Fazzone

APPROVAL OF THE MINUTES - Full Board Meeting - January 19, 2021

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

VOTED: **to approve the January 19, 2021, minutes of the Full Board meeting as presented.**

ROLL CALL VOTE: **10 approved. Lisa Colombo; Aleta Fazzone; Maryanne Hammond; Anna Johnson; Karen LaFond; Stephen Madaus; Dina Nichols; Marina Taylor; David Tuttle; Lawrence Sasso.**

APPROVAL OF THE MINUTES - Human Resources Committee meeting - February 26, 2021

WSU Board of Trustees
March 16, 2021

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

VOTED: **to approve the February 26, 2021, minutes of the Human Resources Committee meeting as presented.**

ROLL CALL VOTE: **4 approved. Maryanne Hammond; Karen LaFond; Dina Nichols; Marina Taylor**

PRESENTATION
NECHE Presentation
- Provost Wims introduced Dr. Patricia O'Brien, Sr. Vice President, New England Commission of Higher Education (NECHE), who went through the NECHE self-study accreditation process.
- Our once-a-decade self-study is an integral part of the University's reaccreditation process with the New England Commission of Higher Education (NECHE).
- Trustee Nichols has been appointed to our NECHE Self-Study Steering Committee for the forthcoming 18-month process as part of our decennial regional accreditation process as the board liaison, and Dr. Emily Soltano and Dr. Noah Dion are serving as our Self-Study Steering Committee co-chairs.
- Broad campus participation in our self-study, with the formation of a steering committee, organized around NECHE's nine standards: mission and purposes; planning and evaluation; organization and governance; the academic program; students; teaching, learning, and scholarship; institutional resources; educational effectiveness; and integrity, transparency, and public disclosure.
- The self-study will set the stage for NECHE's Fall 2022 Comprehensive Visit.
- The Board of Trustees will review the final self-study 100-page document.
- The Commission will take action the semester following the site visit.

Legal Updates Presentation
- President Maloney introduced the University Counsel, Attorney Jim Cox from the law offices of Rubin & Rudman, who went through some general information and provided a PowerPoint presentation on Trusteeship and Public Higher Education in Massachusetts.
- Went through the Powers and Duties of the Board of Trustees and how to be a good Trustee.
- Fiduciary duties owed to the University by Board members:
  - Loyalty: exercise your power in good faith and in the best interests of the University, not for personal or individual gain and
  - Care: act in a reasonable and informed manner when engaging in Board decisions.
- Provided a brief reminder regarding Indemnification.
- Went through the Conflict of Interest Law, Open Meeting Law, and the Public Records Law.
- Is the attorney available to the trustees?
  - Attorney Cox requested that Trustees go through the President's Office.

WSU Board of Trustees
March 16, 2021

Statewide Updates Presentation - Executive Director, Council of Presidents, Vincent Pedone
- Vincent Pedone joins us to talk about some of the developments that are currently going on at the state level and to go through his role and position as the Executive Director to the Council of Presidents.
- Vincent's role as the Council of Presidents Executive Director is to work with the nine state university presidents as a system advocate, coordinator, communicator, advisor, and liaison for you, the board, and the campuses.
- As a public-facing representative, Vincent's actions and advocacy reflect directly on the state university system.
- His mission is to get all the campuses on the same message and work as one system.
- Working on strengthening the position of our great state universities in the changing higher education landscape.

Human Resources Committee Report
- Trustee Hammond reported out that the committee met on February 26 at 3 p.m. to discuss the Early Retirement Incentive Plan (ERIP).
- The University will make a $25,000 lump sum payment to MSCA, APA, and AFSCME participants with 20 or more years of state university service.
- Trustee Hammond recommends that the Board of Trustees approve Worcester State University's participation in this early Retirement/Separation Incentive Program.

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

VOTED: **to accept the recommendation of the Human Resources committee and approve WSU participation in the "2021 Voluntary Retirement/Separation Program" agreed to by the Council of Presidents of the State Universities, the Department of Higher Education (DHE), and the Massachusetts State College Association (MSCA).**

ROLL CALL VOTE: **10 approved. Lisa Colombo; Aleta Fazzone; Maryanne Hammond; Anna Johnson; Karen LaFond; Stephen Madaus; Dina Nichols; Marina Taylor; David Tuttle; Lawrence Sasso.**

REPORT OF THE CHAIRMAN
Honoring Ron Valerio
- The Chairman called upon VP McNamara to discuss the one-pager that was included in the packet. This was put together to be used as a "call to support" for honoring Ron Valerio.
- There will be two endowed funds to honor Ron. The proposed Ronald R. Valerio '75 Memorial Scholarship and Academic Award will honor the memory of Ron.
- This scholarship and academic award will annually award $1,000 to one qualified student who meets the criteria, and $500 to the highest-ranking senior student majoring in either History or Political Science.
- These endowments will provide funding for eligible students in perpetuity.
- The goal is to award the Academic Award scholarship at this year's Academic Achievement Awards

Ceremony.
- It was suggested that the Board of Trustees take the lead on this award. Open it up to all trustees, past and present to participate in funding the award.
- To make a gift online, visit: https://alumni.worcester.edu/ValerioMemorial.

Report of the Student Trustee
- Chairman Madaus informed the board that Trustee Johnson reached out proposing a section during the Board of Trustees regular meeting time for a Student Trustee report.
- Trustee Johnson recently learned from her fellow student trustees at other universities and community colleges in the Commonwealth that they give a student trustee report during their board meetings to keep their board informed of students' issues and concerns.
- She feels that this will be an important addition to our board meetings to hear from students through the student trustee.
- If the student trustee doesn't have a report for every board meeting, it will be important to have the section and the platform available for a student voice on the board.
- This provision has also been implemented in the student trustee handbook that was recently created by the student advisory council to the Board of Higher Education.
- The Board members expressed support for providing a placeholder on all future BOT agendas to allow for a report of the Student Trustee.
- A placeholder will be carried into future meetings.

Next meeting: April 13, 2021 (via Zoom)

PRESIDENT'S REPORT
President Maloney mentioned that Attorney Cox and Vincent Pedone's presentations were part of his President's Update.

Mass Vaccination Site update
- The President provided an update on the Mass Vaccination Clinic Site. The process has been remarkable.
  o Vaccinated over 25,000 individuals.
  o Trustee Colombo provided an update on the collaboration between St.Vincent, UMass, and WSU, and the desire to put this pandemic to an end. The partnership has been amazing.
  o 5,600 volunteers in the portal.
  o Our Nursing students have been able to work at the site and administer the vaccine.

WSU COVID-19 Vaccine Survey
- President Maloney introduced Dr. Sarah Strout who provided an executive summary of the COVID-19 Vaccine Survey and went through the survey results that were included in the packet.
  o We will be having a "campus conversation" to go through the survey results with the campus community.

University Advancement Dashboard
- University Advancement Dashboard that has been included in the packet as informational only.

WSU Board of Trustees
March 16, 2021

OTHER BUSINESS:

- We are planning the FY22 budget and at the April meeting, we will share the plan for the budget.
- President Maloney received a memo from Worcester State University Student Senate Executive Board, SGA President, and Vice President regarding a fees freeze for the next academic year.
- The Worcester State University Student Senate Executive Board, SGA President, and Vice President support a fees freeze for the 2021-2022 academic year.
- Trustee Johnson talked about the importance of freezing fees. The student body has been experiencing additional stressors given the current circumstances, which have greatly impacted students financially.
- With the constantly increasing cost of acquiring a higher education, freezing the fees for the 2021-2022 academic year will alleviate some of the financial stress and burden on the student body.
- Supporting the student body during this difficult time is imperative to the academic success of Worcester State University students.
- Looking for the consideration and support from the Trustees to not increase fees.
- All trustees agree and support President Maloney's recommendation that we do not increase our fees and freeze the fees for the 2021 - 2022 academic year.

Upon a motion made by Trustee Johnson and seconded by Trustee Hammond, it was passed unanimously

VOTED: **to accept President Maloney's recommendation to freeze fees for the 2021-2022 academic year.**

ROLL CALL VOTE: **10 approved. Lisa Colombo; Aleta Fazzone; Maryanne Hammond; Anna Johnson; Karen LaFond; Stephen Madaus; Dina Nichols; Marina Taylor; David Tuttle; Lawrence Sasso**

One final update, President Maloney has been asked by UMass Medical School to host their medical school graduation on the athletic field.

- Due to construction, UMass is not able to host their medical school graduation.
- The medical school will pay all costs and comply with all state social distancing rules and regulations.
- There are just over 200 graduating medical students.
- The graduation date is June 6.
- Asked the board to support UMass Medical School's graduation, as WSU has a trusted partnership with the school. All Board members supported the event.

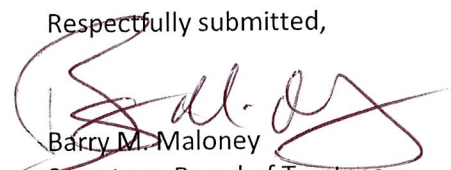With there being no further business, the WSU Board of Trustees meeting was adjourned.

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

VOTED: **to adjourn the meeting at 7:50 p.m.**

WSU Board of Trustees
March 16, 2021

ROLL CALL VOTE: **10 approved. Lisa Colombo; Aleta Fazzone; Maryanne Hammond; Anna Johnson; Karen LaFond; Stephen Madaus; Dina Nichols; Marina Taylor; David Tuttle; Lawrence Sasso**

Respectfully submitted,

Barry M. Maloney
Secretary, Board of Trustees

WORCESTER
STATE
UNIVERSITY

MULTICULTURAL AFFAIRS
Contributions to Diversity, Equity & Inclusion

Content

"Know your history, build on your legacy, and dream for the future"

MISSION

to increase access to higher education and academic success for underrepresented students, among who are:

- Low income

- First generation

- A.L.A.N.A./B.I.P.O.C. students

*ALANA- African American, Latinx, Asian, & Native American

*BIPOC- Black, Indigenous, and People of Color

WORCESTER STATE UNIVERSITY's <u>HISTORICAL JOURNEY</u> WITH DIVERSITY, EQUITY AND INCLUSION
led by the Office of Multicultural Affairs

- 1973- Established the 1st Office of Affirmative Action/ Equal Opportunity Office……………………….....Dr. Louise Stow
- 1975- Established Minority Affairs Office **– outreach, support and retention services for ALANA/BIPOC students.**
……………………….… Sidney Buxton Jr.
- 1975 – Established 1st Black Student Union and Minority Student Organization ………Dr. Lloyd Wheaton & Bill Coleman

- 1977- Established 1st WSU and WPS Community Pipeline Program - Upward Bound Program……….……… Sidney Buxton Jr.

- 1978 – WSU 1st BSU transitions to a more inclusive student organization and launches to established Third World Alliance(TWA)
- 1980 – Established the First Center for underrepresented students- Minority Affairs- 1st generation, ALANA/BIPOC, low income and students inclusive of Disability Services (known today as SAS) with the support of TRIO program such as S.S.S (Student Support Services)

- 1980 – Established the 1st STEM Pipeline program
- 1980 – TWA established the celebration of Heritage Months and WSU signature events including(BHM, LHM, NAM, AM and WM)
- 1980 - MAO – changes name to Office of Multicultural Affairs
- 1997- Established the "Multicultural Affairs Alumni Council" (MAAC) and established the Sidney Buxton Scholarship (AID).
- 2006- MAAC- established the Upward Bound Scholarship

CURRENT PRACTICES ORIGINATED AND LED BY OFFICE MULTICULTURAL AFFAIRS

DIVERSITY

EQUITY

INCLUSION

Enrollment Diversity

- OMA-ALANA recruitment since 1980- -
- Focus on Latinx, AA, & Asian students.
- Urban area outreach- METCO & - - - - -
- Churches.

Hiring of an ALANA recruiter in Admissions (2002)

Diversity in Student Support Services

- OMA secured TRIO funding and stablished at WSU the Learning Assistant center,(ASC) tutoring Services, and disabilities services (SAS).

OMA SSS grant led to the creation of : -Academic Success Center, -Tutoring Center, -Student Accessibility Services.

Diversity in Teaching & Learning

- Learning Communities (1978)
- Freshmen Seminar (1978)
- Student Holistic Assessment (1977)
- Sophomore Seminar (2015)
- X- credit Models for Developmental Support Instruction
- Faculty Exchange and Fellowship (CSHR/OMA/TWA) hosted renowned Professor Dennis Brutus
- Library Center- dedicated space for Multicultural/ALANA academic resources, books, films, and videos, etc..

- Learning Communities
- Freshmen Seminars- (2012)
- Sophomore Seminars (2017)

Dissertations & Tenure Faculty Portfolios

WSU CURRENT PRACTICES ORIGINATED AND LED BY OFFICE MULTICULTURAL AFFAIRS

DIVERSITY

EQUITY

INCLUSION

Alumni Diversity & Philanthropy → MAAC- Multicultural Affairs Alumni Council established 1997 to include ALANA in outreach and climate. → - Endowed Sidney Buxton Jr. Scholarship (1997)
- Established UB Scholarship (2006)
- Multicultural Tent Experience (2018) with the Diversity Office

A Reflection of Our Community → Since 1982-Multilingual Presentations in Spanish, Portuguese, Creole, and Vietnamese → **Importance of Representation**

-Supportive Climate for our students to see themselves reflected. 'Feel at Home.'

ALANA Student Leadership → Establishment of BSU-TWA (1978)
TWA Leadership Training (Yearly)
WSU Heritage Celebrations and Signature Events
Peer Mentor Programs (1979)
Skills- Budgets, Coordinating, Programming, etc... →
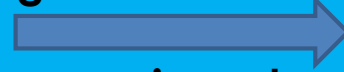
-Identity Based training- ALANA & BIPOC

-Student Activities adopted the Budget Proposal process from TWA and has made it a requirement for all Student Orgs.

-Established Black/Brown Philanthropy- TWA fundraised establish - the Student Emergency Fund, - -
-Supports UB scholarship
-funds, Eastern Connecticut University Scholarship for underrepresented students.

The Office of Multicultural Affairs (O.M.A.)

ALTERNATIVES FOR INDIVIDUAL DEVELOPMENTPROGRAM (A.I.D)

UPWARD BOUND PROGRAM (U.B.)

- WSU SUMMER BRIDGE PROGRAM
- WOMEN'S CIRCLE
- YOUNG MEN'S GROUP (YMC)

Worcester 100 Males to College &Early College Program- WSU, WPS, & QCC

- THIRD WORLD ALLIANCE (T.W.A.)
(MULTICULTURAL STUDENT ORGANIZATION)

- WSU MULTICULTURAL PROGRAMMING COMMITTEE (Faculty, Staff, Students)

Multicultural Alumni Council (MAC) Homecoming-Multicultural Tent

WSU Overall ALANA/BIPOC	32%
ALANA/BIPOC enrolled in 2019	31% (62% are First Gen also)

OMA No Students Served: 338	Multicultural Programming Touched: 535 Students. Faculty, & Staff

OMA Demographic	ALTERNATIVE FOR INDIVIDUAL DEVELOPMENT PROGRAM (A.I.D.)	UPWARD BOUND PROGRAM (UB)	100 MALES TO COLLEGE PROGRAM (100MTC)	Multicultural Programming Committee	THIRD WORLD ALLIANCE (T.W.A.) Leadership	MAAC- ALANA Alumni Council
Population Served	132 University Students F-26%, So- 28%, J-27%, Se-19% Commuters-75% Dorms-24.4% Males- 39% Females- 61% AA-47% Asian-8% Caucasian- 5% Latinx- 35% Middle Eastern- 3%	91 High School Students So-33%, J-38.5%, Se- 28% AKFCS- 17% BHS- 14% DHS- 17.6% Math/Sci.- 1.1% North- 8.8% South-13.2% UPCS- 13.2% UPCS- 13.2% Wor. Tech- 14.3% AA-39% African-15% Asian-12.1% Bi-racial- 2.2% Caucasian- 5.5% Latinx- 25.3	115 High School Students So-8%, J-43%, Se-49% BHS-13% DHS- 13% Claremont-9% North- 28% South-17% UPCS- 5% Wor. Tech- 5% AA-22% African-20% Asian-12.1% Bi-racial- 2.2% Caucasian- 5.5% Latinx- 25.3 Middle Eastern- 2%	Committee comprised of 24 faculty, staff, & students Faculty-15 Staff- 4 Students- 5	8- Executive Leadership Team 48-TWA members AA-33% African-2%1 Asian-4% Caucasian- 7% Latinx- 35%	Growing Last event- it generated 70 members attendees; reactivation of meetings.

OMA Student Retention & Persistence Data- Diversity, Equity & Inclusion

Data provided by Sara Strout, Assistant Vice-President/Assessment & Planning- 2021

	AVG HS GPA	AVG First Term GPA	Persistence FA-SP	AVG Second Term GPA	AVG First Year Overall GPA	Retention FA-FA	Graduated in 4 Years	Graduated in 6 years
AID Students	2.75	2.28	92%	2.08	2.37	70%	27%	45%
WSU Matched Cohort	2.74	2.21	85%	2.11	2.33	66%	20%	45%

Results Summary

- **Students in A.I.D. group had a higher first term GPA and overall first year GPA, but lower second term(spring) GPA than comparison group.**
- **Students in A.I.D group were more likely to persist from FA-SP than comparison group (92% vs 85%)**

- **Students in A.I.D. group were more likely to be retained from FA-FA than comparison group (70% vs 66%)**

- **Students in A.I.D. group were more likely to graduate in 4 years (27% vs 20%), and equally likely to graduate in 6 years compared to comparison group (45%)**

Relationship & Data

In recent review by University Advancement and The Office of Multicultural Affairs

BIPOC/ALANA Alums (self-reported) who have graduated between 1954-2019 =   2,146
(a span of 65 years)

33% (712 Alums) were recruited, supported by retention services and assisted in their post university transition by the Office of Multicultural Affairs.

Academic retention efforts include:

▶ **Freshmen Seminars**

▶ **Sophomore seminars**

▶ **Ethnic Studies**

▶ **WSU Multicultural Committee - Co-Curricular events and programming**

▶ **TWA- Student Affairs**

▶ **Residence Life & Housing – Learning Communities**

▶ **WSU signature event:**

- Latin Heritage Month
- Native American Celebration
- Worcester Martin Luther King Jr. Youth Breakfast
- ALANA Preview/African American Read In Day
- Black History Month
- WSU Courageous Conversations
- Women's History Month Co-Sponsor programing
- Asian American & Pacific Islander Heritage Month

▶ **Participation and representation in most all campus wide committees including:**

BIRT, Campus Climate, Enrollment Management , Diversity and Inclusion Committee, Search Committees, Student Intervention Team, COVID Mental Health Committee, Counseling Services Committee, First Year Experience, Center for the Study of Human Rights, and many more.

FALL 2019
SUNDAY, SEPTEMBER 29

The Harlem Renaissance-Fuller Theatre, Administration Building - 3 p.m. Featuring a musical production with a gospel flavor.

TUESDAY, OCTOBER 1

WSU Latin Heritage Month
Opening Concert with Carlos Odria Trio Exhibit Area (Student Center) - 11:30 a.m. Also featuring Latin Inspired Food Sampling

TUESDAY, OCTOBER 1

Latin Heritage Faculty Cultural Coffee Talk House Lancer Loft (3rd Floor Student Center) - 2:30 p.m.
Talk with Dr. Aldo Garcia-Guevara, History & Political Science Department on "Immigration & Issues Facing Current Refugees."

THURSDAY, OCTOBER 10

Latin Heritage Lecture with President Luis Pedraja, QCC WSU Blue Lounge (Student Center) - 11:30 a.m.

WEDNESDAY, OCTOBER 16

Latin Heritage Month Film Screening: Las Sandinistas North & South Auditorium (Student Center) - 5 p.m. Untold stories of Nicaraguan women warriors and revolutionaries.

TUESDAY, OCTOBER 22

Latin Heritage Faculty Cultural Coffee Talk House Lancer Loft (3rd Floor Student Center) - 2:30 p.m. Talk with Dr. Naida Saavedra, World Languages Department on "Belonging in Academia: My Life as a Latina Writer."

TUESDAY, NOVEMBER 5

Native American Heritage Lecture with Patricia Gualinga Blue Lounge (Student Center) - 10 a.m. Social environmentalist advocating for indigenous rights and land.

WEDNESDAY, NOVEMBER 20

1 p.m. Ghanaian Studies Association Papers Presentation 2 p.m. Ghana Studies in the US and Ghana May Street Auditorium with Dr. Nana Akua-Anyidoho University of Ghana-Legon, Dr. Joseph Oduro-Frimpong, Ashesi University-Accra, and Dr. Kwame Essien, Lehigh University

SPRING 2020

WORCESTER STATE UNIVERSITY

TUESDAY, FEBRUARY 4

Black History Month Lecture & African American
Read In Day with Dr. Joy DeGruy
May Street Building Auditorium - 10 a.m. Clinical Psychologist whose
research focuses on the intersection of racism, trauma, and American chattel slavery.

THURSDAY, FEBRUARY 6

Black History Month Faculty Cultural Coffee Talk House
Foster Room (3rd Floor Student Center) - 2:30 p.m.
Talk with Dr.Tanya Mears, History & Political Science Department
on "The Legislation of Black Hair."

TUESDAY, MARCH 31

Lecture: Colonial Lagos: Geographic Information System
Sheehan Hall, Room 109 - 1 p.m.
with Dr. Adelusi-Adeluyi, University of California-Riverside

WEDNESDAY, APRIL 1

Faculty Cultural Coffee Talk House
Lancer Loft (3rd Floor Student Center) - 10 a.m.
Talk with Dr. Martin Fromm, History & Political Science Department, Dr. Adam Saltsman, Urban Education Department, and
Dr. Johnathan Flowers, Philosophy Department, on "Survival, Resistance, and Control in Asia's Borderlands."

TUESDAY, APRIL 7

Asian & Pacific Islander Heritage Lecture with Dr. Rian Thum
Blue Lounge (Student Center) 10 a.m.
Research and teachings focus on the overlap of China
and the Muslim world.

MONDAY, APRIL 27

Courageous Conversation with Dr. Robin DiAngelo-Blue Lounge (Student Center) - 2 p.m. Her area of research is in Whiteness Studies and its critical discourse
analysis.

The Students' Voice-
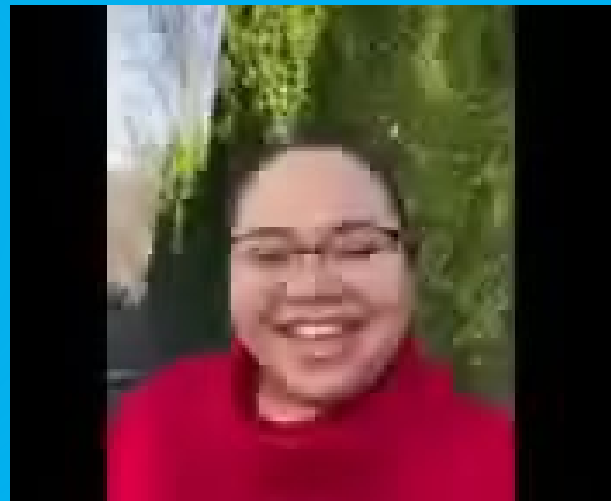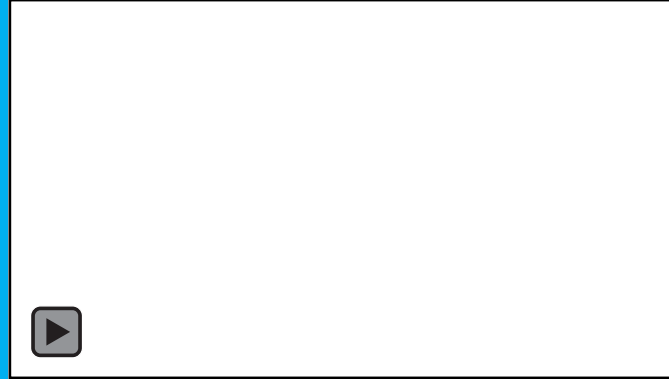
Latino Education Institute
Program Overview

- The Latino Education Institute (LEI), established in 2000 exists to improve the academic opportunities and wellbeing of Latino students (K-16) and their families by: (1) delivering culturally and developmentally responsive programs in education, early college, literacy, leadership, civic engagement,Covid-19 relief, and health (2) conducting applied research on urban education issues, and (3) family and community engagement around college and career success.

- We work in partnership with three urban school districts -- Worcester, Springfield, and 25 schools serving over 1000 families each year.

Inputs

Youth
Families
Postsecondary Education
Primary & Secondary Schools
Communities
Civic Engagement Actors
Researchers & Policy Makers
LEI Staff

Activities

- Relationship building
- Celebrating cultural strengths
- Transformative experiences

Outputs

- Transformative experiences that are culturally responsive and celebrate the unique cultural assets of Latinos to build deep relationships.
- Capacity building for Latino youth, adults, & families around education, health and wellness, college and workforce readiness, and civic engagement

Mission
To improve the academic achievement and well-being of Latino students (grades K-16) and their families from the City of Worcester.

Outcome
1. Positive Education and Career Outcomes.
   - Improve Educational Experiences.
   - Improve Educational Outcomes.
   - Facilitate Access to Higher Education.
   - Prepare Students for 21st Century Career Opportunities

2. Thriving and Vibrant Communities
   - Improve Health & Wellbeing
   - Illuminate the Conditions of Latinos

Overall Impact

- Latino youth will gain the skills necessary to have success in life as adults.

- The Latino community will be a strong and thriving force that is empowered and engaged in their own development and economic advancement.

Theory of Change

Early College Highlights

Early College Worcester received designation from the state in Summer of 2018

Students in all WPS High Schools are able to participate in the program

1st Year 2018-2019 - 260 Students

2nd Year 2019-2020 -747 Students

3rd Year 2020 -2021 - 814 Students

- Goal: students graduate high school with at least 12 college credits
- Students have graduated with 21, 27 and even 30 college credits
- Our Early College graduates have gone on to college at schools such as QCC, WSU, Columbia, Boston College, University of North Carolina Chapel Hill, Penn State, UMass Lowell, Boston and Amherst to name a few

2020 -2021 Student Profile

High School	Total High School Population	Total EC Population	% of Population in EC
Burncoat	1114	104	9%
Claremont	314	47	15%
Doherty	1330	189	14%
North	1186	113	10%
South	1319	109	8%
UPCS	152	58	38%
WTHS	1467	165	11%
NCC YA	20	20	100%
GCC	138	8	6%
Total	7040	814	

Other Enrollment Highlights

Special Populations	Students in Program	Percentage of EC Students
Homeless	71	9%
Students of Color	605	73%
Low-Income	500	61%
Female	561	69%
Male	238	31%

- The LEI is needed now more ever to address persistent systemic equity gaps and to address the Covid-19 learning slide endangering a generation of Latinx youth and families. Latinx families earning less than $75K a year are the least likely group in the Commonwealth to have access to in-person education, 80% only have access to remote learning.

- In Worcester, the second largest city in New England, only 50% of Latinos had access to broadband at the start of the pandemic. This interrupted education is accompanied by high rates of infection, Latinos ages 0 to 19 have tested positive for the virus at rates up to seven (7) times higher than white children and double to triple the rate for Black children.

Innovative Services

for Latino Achievers

96% November Attendance

"I love Fridays because I get to come here"
- ISLA Participant

Health

Ambassadors
Between Oct. - Dec.

56,880 Masks Distributed

8,278 Sanitizers Distribut[ed]

39,354 Literature Distribut[ed]

Available In
- English
- Spanish
- Portuguese

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
FINANCE & FACILITIES MEETING
Tuesday, April 13, 2021
4:00 PM
REMOTE PARTICIPATION
Join Zoom Meeting
https://worcester.zoom.us/j/75
40181608
Meeting ID: 754 018 1608

<u>**Meeting Called By**</u>: Marina Taylor (Chair)   <u>**Minutes**</u>: Nikki Kapurch

<u>**Board Members**</u>:   Lisa Colombo; Aleta Fazzone; Stephen Madaus; Dina Nichols; Marina Taylor

<u>**WSU Staff**</u>:   Barry Maloney; Carl Herrin; Kathy Eichelroth; Mike McKenna

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

AGENDA		
ITEM	**RESPONSIBLE**	**ACTION**
1. *Administrative Business* A. Call to Order	Marina Taylor	

2. *Finance & Facilities Committee Report*
    A. Amendment #4 to the FY 2021 Comprehensive University Budget*
    B. FY 2022 Comprehensive University Budget*
    C. S&P Rating Action and Agency Rating Reference Chart*
	Marina Taylor
	Kathy Eichelroth
		A. **Vote required**
		
		B. **Vote required**
		C. Informational

3. *Administrative Updates* A. Other Business	Marina Taylor	
4. *Adjournment*	Marina Taylor	4. **Vote required**

*Attachments
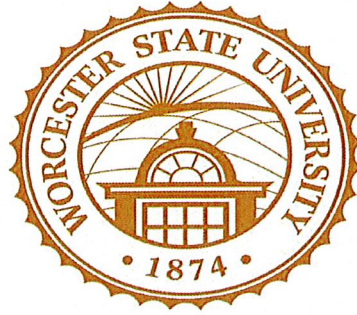
Worcester State University

FY 2021
Operating Budget
Amendment #4

Memorandum

DATE: March 30, 2021

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: **FY 2021 BUDGET #4**

The University continues to be eligible to drawdown Federal COVID relief funds. To date we have access to $7,698,598 to offset institutional costs incurred in response to the pandemic. The Safe Return to Campus Budget already includes resources that passed through the Commonwealth of Massachusetts as a COVID-19 Response Grant in the amount of $303,800, in addition to CARES Higher Education Emergency Relief Fund (HEERF) I institutional funds of $2,111,416.

In December 2020 the federal government provided additional supplemental COVID relief funds through HEERF II. The funds available to the University through HEERF II amount to $5,283,382. The allocation of the institutional HEERF II funds provides enough resources to completely fund the FY 2021 Safe Return to Campus Budget. Amendment #4 provides for an increase in federal funds to underwrite the budget eliminating the need to draw on reserves, or direct current year operating funds to the Safe Return to Campus Budget.

After rebalancing the Safe Return to Campus Budget to reflect full funding through federal relief resources there remains a balance of HEERF II funds of $2,043,240. Institutions may use the supplemental grant funds to defray expenses associated with coronavirus, carry out student support activities that address needs related to the coronavirus, and make additional financial grants to students. On March 19th additional guidance was released that addresses the parameters around recovery of incurred costs and lost revenue. The additional guidance makes it possible to recover costs incurred back to March of 2020, in addition to revenue declines due to drops in enrollment since the inception of the pandemic. Costs incurred for which we have yet to seek recovery and enrollment declines and decreases in program demand since March of 2020 are being quantified and documented. Our estimates to date indicate that the reimbursement for these items will exceed the remaining HEERF II funds of $2,043,240. We will continue to update the budget as we are able to drawdown on additional federal relief funds.

A third round of funding to higher education has been approved by the federal government through the American Rescue Plan (ARP) HEERF III. Approximately $13.1M of funds will be made available for the University. Half of the allotment must be administered as direct payments to students, with an estimated $6.5M available to the University to defray expenses associated with the coronavirus. A significant portion of the institutional funds will be used to cover anticipated declines in enrollment for fall 2021. We anticipate being able to draw down from this third round of resources through March of 2022.

Worcester State University
Summary of Sources and Uses of Funds
General Operating Budget (111 & 400)
FY 2021 Budget - Amendment #4
Increase (decrease) in Sources and Uses

Sources of Funds:

	Federal Grant- CARES ACT 2	3,240,142
	Transfer In-Reserves	(1,398,461)
	Total Sources	$ 1,841,681

Uses of Funds:

AA	Regular Employees	-
CC	Temporary Part-Time Employees	1,841,681
DD	Staff Benefit Expenses	-
EE	Administrative Expenses	-
FF	Facility Operation Supplies	-
HH	Professional Services	-
JJ	Operational Services	-
KK	Equipment Purchase	-
LL	Equipment Lease, Maintenance, Repair	-
NN	Infrastructure & Building Improvements	-
UU	Information Technology	-
	Transfer to Reserves	-
	Total Uses	$ 1,841,681

Worcester State University
Summary of Sources
FY 2021 - All Sources and Trust Funds - Amendment #4

State Sources

Annual State Maintenance Appropriation		30,471,800
State Supported Fringe Benefits	11,676,794	
Student Aid Program (Cash Grant & PT Student)	1,017,277	
Total Other State Sources		12,694,071
Total State Sources		43,165,871

Federal Sources

Federal Grant - CARES ACT 1	2,111,416	
COVID 19 Response Grant	303,800	
Federal Grant - CARES ACT 2	3,240,142	
SEOG Program	225,853	
College Work Study Program	113,447	
Pell Grants	7,522,901	
Local match (Transfer from General Trust Fund Reserve)	113,355	
Total Federal Sources		13,630,914

Institutional Sources

Revenue

General Fund	41,334,742	
Parking Fines Fund	96,896	
Health Services Fund	445,573	
Residence Halls Fund	9,515,384	
Student Activities Fund	295,913	
Residence Hall Technology and Equip. Fund	327,580	
Capital Improvement Fund	3,014,525	
Wellness Center Trust Fund	125,000	

Transfers In

Transfer from Health Services Fund Reserve	104,188	
Transfer from Student Activities Trust Fund Reserve	134,087	
Transfer from Capital Improvement Trust Fund to PGTF	547,322	
Transfer from Reserves other trust funds	524,831	
Transfer from Reserves	-	
Total Institutional Sources		56,466,041
Total Sources	$	113,262,826

Worcester State University
Trust Fund Summary
FY 2021 Budget - Amendment #4

	Budget FY 2021		
	Sources	Uses	
General Fund (400)	41,334,742	41,334,742	73.2%
Parking Fines (439)	96,896	96,896	0.2%
Health Services (442)	549,761	549,761	1.0%
Residence Hall (445)	9,515,384	9,515,384	16.9%
Student Activities (446)	430,000	430,000	0.8%
Residence Hall Technology and Equip. Fund (448)	327,580	327,580	0.6%
Capital Improvement Fund (405)	3,014,525	3,014,525	5.3%
Parking Garage Operating Fund (408)	547,322	547,322	1.0%
Wellness Center (429)	125,000	125,000	0.2%
Strategic Plan (410)	524,831	524,831	0.9%
Total Trust Fund Budget	$56,466,041	$ 56,466,041	

Worcester State University

General Trust Fund (400)

FY 2021 Budget - Amendment #4

		FY2021 Approved Budget including Amendment #4	FY2021 Approved Budget including Amendment #3	FY2021 Approved Budget including Amendment #2	FY2021 Approved Budget including Amendment #1	FY2021 Approved Budget
Sources of Funds:						
	Revenues	$ 41,334,742	$ 41,334,742	$ 41,334,742	$ 41,334,742	$ 47,965,057
	Transfer In - CITF	-	-	1,978,260	1,978,260	
	Federal Grant - CARES ACT 1	2,111,416	2,111,416	2,111,416		
	COVID-19 Response Grant	303,800	303,800			
	Federal Grant- CARES ACT 2	3,240,142				
	Transfer In Reserves		1,398,461	3,543,942	-	
	Total Sources	$ 46,990,100	$ 45,148,419	$ 48,968,360	$ 43,313,002	$ 47,965,057
Uses of Funds:						
AA	Regular Employees	11,946,840	11,946,840	$ 15,180,180	$ 14,764,293	$ 12,091,170
BB	Employee Related Expenses	348,907	348,907	348,907	348,907	733,162
CC	Temporary Part-Time Employees	7,756,461	5,914,780	5,798,780	5,613,780	8,612,145
DD	Staff Benefit Expenses	4,926,393	4,926,393	6,013,994	5,937,601	4,769,539
EE	Administrative Expenses	2,986,707	2,986,707	2,986,707	2,480,547	2,629,549
FF	Facility Operation Supplies	1,496,899	1,496,899	1,411,899	1,335,399	1,891,406
GG	Energy/Space Rental	2,370,519	2,370,519	2,370,519	2,370,519	2,389,498
HH	Professional Services	859,022	859,022	859,022	624,022	1,001,188
JJ	Operational Services	3,497,140	3,497,140	3,497,140	726,140	915,383
KK	Equipment Purchase	235,861	235,861	235,861		71,412
LL	Equipment Lease, Maintenance, Repair	1,076,540	1,076,540	1,076,540	1,071,540	1,253,157
NN	Infrastructure & Building Improvements	3,289,847	3,289,847	3,289,847	3,157,869	5,207,619
RR	Educational Assistance	2,490,961	2,490,961	2,490,961	2,490,961	2,490,961
SS	Debt Service	-	-	-	-	307,013
UU	Technology Expenses	3,708,003	3,708,003	3,408,003	2,391,424	2,391,424
	Transfer to - Capital Improvement Trust Fund					1,210,431
	Total Uses	$ 46,990,100	$ 45,148,419	$ 48,968,360	$ 43,313,002	$ 47,965,057
	Net Sources / (Uses)	$ -	$ -	$ -	$ -	$ -

3/30/2021

Worcester State University
State Maintenance Appropriation (111)
FY 2021 Budget - Amendment #4

		FY2021 Approved Budget including Amendment #4	FY2021 Approved Budget including Amendment #3	FY2021 Approved Budget including Amendment #1	FY2021 Approved Budget
Sources of Funds:					
	State Appropriation	30,471,800	30,471,800	27,038,460	$30,042,733
	State Funded Fringe Benefits	11,676,794	11,676,794	10,512,553	11,680,615
	Total Sources	$ 42,148,594	42,148,594	$37,551,013	$41,723,348
Uses of Funds:					
AA	Regular Employees	30,471,800	30,471,800	27,038,460	$30,042,733
BB	Employee Related Expenses	-	-	-	-
CC	Temporary Part-Time Employees	-	-	-	-
DD	Staff Benefit Expenses	11,676,794	11,676,794	10,512,553	11,680,615
EE	Administrative Expenses	-	-	-	-
FF	Facility Operation Supplies	-	-	-	-
GG	Energy/Space Rental	-	-	-	-
HH	Professional Services	-	-	-	-
JJ	Operational Services	-	-	-	-
KK	Equipment Purchase	-	-	-	-
NN	Infrastructure & Building Improvements	-	-	-	-
	Total Uses	$ 42,148,594	$ 42,148,594	$37,551,013	$41,723,348
	Net Sources / (Uses)	$ -	$ -	$ -	$ -

Worcester State University
General Operating Budget (111 & 400)
FY 2021 Budget - Amendment #4

	FY2021 Approved Budget Amendment #4	FY2021 Approved Budget Amendment #3	FY2021 Approved Budget Amendment #2	FY2021 Approved Budget Amendment #1	FY2021 Approved Budget
Sources of Funds:					
Revenues	$ 41,334,742	$ 41,334,742	$ 41,334,742	$ 41,334,742	$ 47,965,057
State Appropriations	30,471,800	30,471,800	27,038,460	27,038,460	30,042,733
State Funded Fringe Benefits	11,676,794	11,676,794	10,512,553	10,512,553	11,680,615
Transfer In- CITF	-	-	1,978,260	1,978,260	
Transfer In -Reserves	-	1,398,461	3,543,942		
COVID-19 Response Grant	303,800	303,800			
Federal Grant - CARES ACT 1	2,111,416	2,111,416	2,111,416		
Federal Grant- CARES ACT 2	3,240,142				
Total Sources	$ 89,138,694	$ 87,297,013	$ 86,519,373	$ 80,864,015	$ 89,688,405
Uses of Funds:					
AA Regular Employees	42,418,640	42,418,640	$ 42,218,640	$ 41,802,753	$ 42,133,903
BB Employee Related Expenses	348,907	348,907	348,907	348,907	733,162
CC Temporary Part-Time Employees	7,756,461	5,914,780	5,798,780	5,613,780	8,612,145
DD Staff Benefit Expenses	16,603,187	16,603,187	16,526,547	16,450,154	16,450,154
EE Administrative Expenses	2,986,707	2,986,707	2,986,707	2,480,547	2,629,549
FF Facility Operation Supplies	1,496,899	1,496,899	1,411,899	1,335,399	1,891,406
GG Energy/Space Rental	2,370,519	2,370,519	2,370,519	2,370,519	2,460,910
HH Professional Services	859,022	859,022	859,022	624,022	1,001,188
JJ Operational Services	3,497,140	3,497,140	3,497,140	726,140	915,383
KK Equipment Purchase	235,861	235,861	235,861	-	-
LL Equipment Lease, Maintenance, Repair	1,076,540	1,076,540	1,076,540	1,071,540	1,253,157
NN Infrastructure & Building Improvements	3,289,847	3,289,847	3,289,847	3,157,869	5,207,619
RR Educational Assistance	2,490,961	2,490,961	2,490,961	2,490,961	2,490,961
SS Debt Service					307,013
UU Technology Expenses	3,708,003	3,708,003	3,408,003	2,391,424	2,391,424
Transfer to - Capital Improvement Trust Fund					1,210,431
Transfer to-Reserves	-	-			
Total Uses	$ 89,138,694	$ 87,297,013	$ 86,519,373	$ 80,864,015	$ 89,688,405
Net Sources / (Uses)	$ -	$ -	$ -	$ -	$ -

WORCESTER
STATE
UNIVERSITY

FY 2022

Comprehensive
University Budget

Worcester State University
FY 2022 Budget Package

I. Fiscal Year 2022 Budget Overview

Memorandum

DATE: **MARCH 30, 2021**

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: **PRESENTATION OF PROVISIONAL FY 2022 BUDGET**

The University continues to respond to the everchanging circumstances brought on by the pandemic and its effect on enrollment and operations. In response to the uncertainty surrounding the path forward during the pandemic we are presenting a provisional budget for FY 2022. This budget provides the framework for University operations for the fiscal year beginning July 1, 2021. An extension of the Safe Return to Campus Budget is not included for Board approval at this time. We continue to address our response to the pandemic to ensure we provide a safe and robust experience for our students during this unprecedented time. As we reconcile the original Safe Return to Campus Budget we will continue to update projected spending addressing campus needs through June 30, 2021. At the same time, work groups are assessing campus needs to address continued pandemic response planning through the fall 2021 semester. We will bring the pandemic response budget for FY 2022 to the Board later in the spring. We believe at this time there will be sufficient funding from COVID 19 federal relief funds to offset planned response costs through the end of the 2021 calendar year.

As with the most recent version of the FY 2021 operating budget, the FY 2022 provisional budget reflects anticipated declines in enrollment across all course offerings as a result of the pandemic. In addition ancillary revenue streams historically relied upon to support operations have been detrimentally impacted by the pandemic and there is significant uncertainty with regard to the ability to recover these revenue streams, or the period over which such recovery could be predicted. The FY 2022 operating revenue as presented in this budget is approximately $6M lower than FY 2021 original budget.

Spending reductions had been built in to the final FY 2021 budget including areas of discretionary spending related to in person events such as food, speakers and consultants. In addition travel, conferencing and professional development were budgeted close to zero. All part-time employment lines were significantly scaled back due to most campus functions being remote and a desire to deploy faculty in the classroom to the fullest extent possible. As we reconcile actual spending in FY 2021 and plan for FY 2022 we have identified activities that should be funded closer to pre-pandemic levels. Expenditures have increased by approximately $5M in FY2022 across various spending categories. Those requiring an increase in maintenance of effort included Facility Operating Expenses (FFF), Professional Services (HHH), Operational Services (JJJ), Equipment Lease/Rent (LLL), and Technology Expenses. Special Employees (CCC) has experienced the largest increase of $2.7M as many part-time positions are necessary to support university operations. A $2M reduction in Capital Adaptation and Renewal funds has been sustained in FY 2022 while still providing the requisite campus based funds to provide a match towards the critical repair grants provided by the Commonwealth.

Our budget assumptions include a sustained decline in revenue through FY 2022 in addition to the need to restore various spending categories which results in a projected budget deficit of $4,677,152. The projected budget deficit is directly attributable the projected decline in revenue in response to changes in student attitudes and preferences and suspended activities in response to the world wide pandemic. The FY 2022 budget is offset with funds from the American Rescue Plan Higher Education Emergency Relief Fund (HEERF) III enacted on March 11, 2021. The university is identified to receive $13,191,199 of COVID relief funds through this bill. $6.6M must be processed as direct payments to students and the remaining $6,558,606 is available to the institution in accordance with federal guidelines. On March 19, 2021 the Department of Education provided additional guidance on use of funds that includes recovery of revenue losses as a result of the pandemic. The guidance directly correlates to our FY 2022 projected budget shortfall which we will continue to monitor in real time. Our intent is to monitor year over year revenue losses at the close of each semester and prepare federal drawdowns based on actual revenue reporting.

The remaining trust fund budgets have been updated to reflect the projected decline in revenue with appropriate reductions in spending as necessary. The Residence Hall Trust Fund FY 2022 budget has been prepared with an assumption of 60% occupancy for the year and appropriate reductions in spending including the deferral of maintenance costs to FY 2023 when we anticipate occupancy will be more in line with pre-pandemic levels. The Capital Improvement Trust Fund budget for FY 2022 reflects a plan to assist Worcester State Foundation (WSF) in recovering occupancy costs for past use of the May Street building. The University entered into a use agreement with WSF in 2012 that provides for interest only payments in relation to the third party loan that WSF executed with a local bank to purchase the property. Over the past ten years the balloon payment of $2.2M has continued to be extended, however the occupancy agreement was never updated to address annual payments to WSF to address defeasance of the loan. FY 2022 includes the first half of a payment towards defeasance of the loan on the property over the next two years. The second annual payment would be included in the FY 2023 budget.

Finally, at the Board of Trustee meeting on March 16th the Trustees approved a motion to freeze rates in effect during FY 2021 and have them remain in effect for FY 2022. The Academic Year 2021 - 2022 Tuition and Fee schedule is on the last page of the budget package. The budget package as presented provides for a provisional comprehensive annual operating budget of $107,191,902. Tuition and fees for an undergraduate Massachusetts resident is set at $10,586 per year. Tuition and fees for an undergraduate out- of- state student is set at $16,666 per year. The average cost of room and board is set at $12,103 per year.

II. Fiscal Year 2022 Budget

Worcester State University
Summary of Sources and Uses of Funds
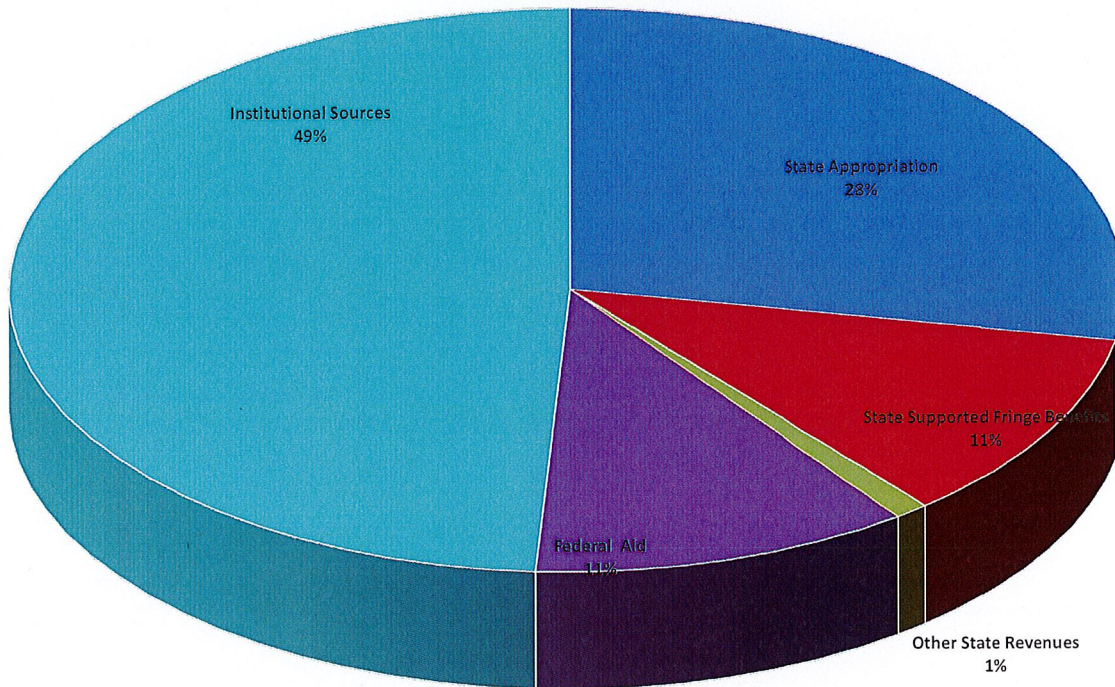FY 2022 - All Sources and Trust Funds

Sources of Funds:

	State Appropriation	$ 30,071,800
	State Supported Fringe Benefits	11,878,361
	Other State Revenues	1,057,800
	Federal Aid	11,951,869
	Institutional Sources	52,232,072
	Total Sources	$ 107,191,902

Uses of Funds:

AA	Regular Employees	$ 43,605,231
BB	Employee Related Expenses	412,973
CC	Temporary Part-Time Employees	8,679,902
DD	Staff Benefit Expenses	17,177,582
EE	Administrative Expenses	2,629,621
FF	Facility Operation Supplies	1,798,332
GG	Energy/Space Rental	9,136,005
HH	Professional Services	967,537
JJ	Operational Services	902,700
KK	Equipment Purchase	5,000
LL	Equipment Lease, Maintenance, Repair	1,281,850
NN	Infrastructure & Building Improvements	3,556,345
RR	Educational Assistance	11,295,428
SS	Debt Service	994,087
UU	Information Technology	2,835,368
XX	Unallocated	524,831
	Transfer Out	1,389,110
	Transfer to Reserves	-
	Total Uses	$ 107,191,902

3/30/2021

Worcester State University
Sources Of Funds
FY 2022 Budget

Worcester State University
Uses of Funds
FY 2022 Budget

Bar chart showing FY22 Budget uses of funds by category:

Category	FY22 Budget (approx.)
Regular Employees	$43,500,000
Employee Related Expenses	$400,000
Temporary Part-Time Employees	$8,700,000
Staff Benefit Expenses	$17,200,000
Administrative Expenses	$2,700,000
Facility Operation Supplies	$1,800,000
Energy/Space Rental	$9,100,000
Professional Services	$1,000,000
Operational Services	$900,000
Equipment Purchase	—
Equipment Lease, Maintenance, Repair	$1,300,000
Infrastructure & Building Improvements	$3,600,000
Educational Assistance	$11,300,000
Debt Service	$1,000,000
Information Technology	$2,900,000
Unallocated	$500,000
Transfer Out	$1,300,000
Transfer to Reserves	—

Worcester State University
Summary of Sources
FY 2022 - All Sources and Trust Funds

State Sources

Annual State Maintenance Appropriation		$	30,071,800
State Supported Fringe Benefits	11,878,361		
Student Aid Program (Cash Grant & PT Student)	1,057,800		
Total Other State Sources			12,936,161
Total State Sources			43,007,961

Federal Sources

Federal Grant -HEERF	4,677,152		
SEOG Program	224,054		
College Work Study Program	113,447		
Pell Grants	6,838,468		
Local match (Transfer from General Trust Fund Reserve)	98,748		
Total Federal Sources			11,951,869

Institutional Sources

Revenue

General Fund	39,343,231		
Parking Fines Fund	25,000		
Health Services Fund	410,243		
Residence Halls Fund	7,798,282		
Student Activities Fund	267,076		
Residence Hall Technology and Equip. Fund	174,570		
Capital Improvement Fund	2,740,301		
Wellness Center Trust Fund	45,000		

Transfers In

Transfer from Health Services Fund Reserve	-		
Transfer from Student Activities Trust Fund Reserve	-		
Transfer from Capital Improvement Trust Fund Reserve	744,174		
Transfer from Parking Fines Trust Fund Reserve	65,000		
Transfer from Strategic Plan Trust Fund Reserves	524,831		
Transfer from General Trust Fund	94,364		
Total Institutional Sources			52,232,072

Total Sources		$	107,191,902

3/30/2021

Worcester State University
Trust Fund Summary
FY 2022 Requested Budget

	Budget FY 2022		
	Sources	Uses	
General Fund (400)	$39,343,231	$ 39,343,231	75.3%
Parking Fines (439)	90,000	90,000	0.2%
Health Services (442)	410,243	410,243	0.8%
Residence Hall (445)	7,798,282	7,798,282	14.9%
Student Activities (446)	267,076	267,076	0.5%
Residence Hall Technology and Equip. Fund (448)	268,934	268,934	0.5%
Capital Improvement Fund (405)	2,740,301	2,740,301	5.2%
Parking Garage Operating Fund (408)	744,174	744,174	1.4%
Wellness Center (429)	45,000	45,000	0.1%
Strategic Plan (410)	524,831	524,831	1.0%
Total Trust Fund Budget	$52,232,072	$ 52,232,072	

3/30/2021

Worcester State University
Trust Fund Summary
FY 2022 Budget

Parking Garage Operating Fund
(408)
1.4%

Wellness Center (429)
0.1%

Residence Hall Technology and
Equip. Fund (448)
0.5%

[CATEGORY NAME]
[CELLREF]

Strategic Plan (410)
1.0%

Student Activities (446)
0.5%

Health Services (442)
0.8%

[CATEGORY NAME]
[CELLREF]

Parking Fines (439)
0.2%

General Fund (400)
75.3%
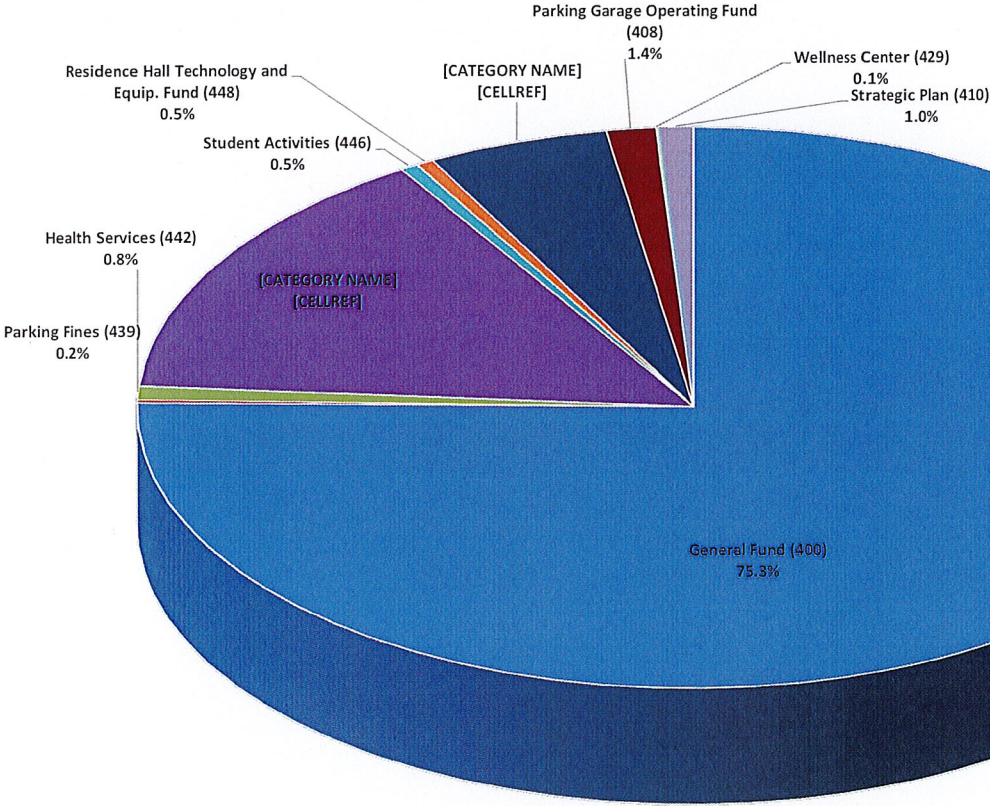
Worcester State University
Operating Revenue
FY 2022 Revenue

	FY 2022 Proposed Budget	Amendment #1 FY 2021 Approved Budget	FY 2021 Aprroved Budget
State Sources			
State Maintenance	30,071,800	27,038,460	30,042,733
State Funded Fringe Benefits	11,878,361	10,512,553	11,680,615
Total State Sources	41,950,161	37,551,013	41,723,348
Institutional Sources			
General Trust Fund			
Tuition/ In state Undergraduate	3,603,306	3,933,727	4,283,392
Tuition/ Graduate	1,406,815	1,588,394	1,708,605
Tuition/ Out of State Undergraduate	1,214,237	1,475,548	1,288,377
Total Tuition	6,224,358	6,997,669	7,280,374
Waivers/Undergraduate	(110,504)	(159,307)	(173,468)
Waivers/Graduate	(188,112)	(215,286)	(248,839)
Total Tuition Waivers	(298,616)	(374,593)	(422,307)
Net Tuition	5,925,742	6,623,076	6,858,067
Undergraduate Day Division	29,814,186	29,814,186	33,355,280
Undergraduate Eve/Summer Programs	2,225,796	2,347,864	2,556,563
Graduate School	1,056,954	1,250,745	1,328,694
Total Fees	33,096,936	33,412,795	37,240,537
Undergraduate Day Division waivers	(620,589)	(860,232)	(936,697)
Undergraduate Eve/Summer Programs/waiv	(45,670)	(62,113)	(67,634)
Graduate Fee waiver	(131,351)	(130,219)	(160,753)
Total Fees Waivers	(797,610)	(1,052,564)	(1,165,084)
Net Fees	32,299,326	32,360,231	36,075,453
Application Fees	38,152	107,730	119,700
Special fees	263,675	299,437	332,708
Commencement Fees	1,215	3,443	3,825
Transcript Fees	37,745	47,925	53,250
Orientation Fees	36,375	124,079	137,865
Testing Fees	600	10,863	12,070
Libr. fines/ copier inc.	-	752	835
Activity income	388	45,279	50,310
Commissions	99,717	151,284	302,568
Non-Credit Courses incl Restricted	155,660	528,635	537,497
Center for Effective Instruction	39,685	263,974	268,209
Intensive English Institute	152,080	453,248	487,982
Center for Business & Industry	32,354	45,000	300,000
Facilities rentals	90,731	100,000	480,746
Miscellaneous	169,786	169,786	215,000
Other income	1,118,163	2,351,435	3,302,565
Total General Trust Fund Source	39,343,231	41,334,742	46,236,085
General Operating Budget Income	$ 81,293,392	$ 78,885,755	$ 87,959,433

III.   Individual Fund Budgets

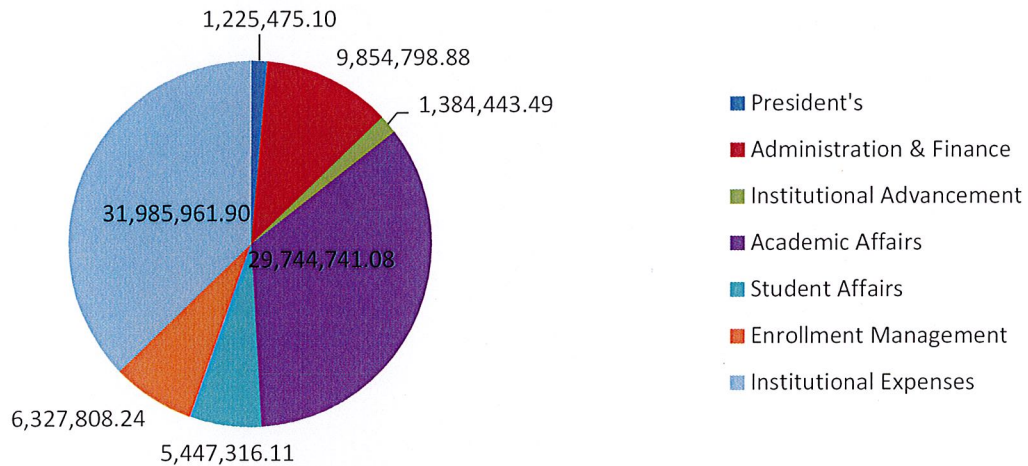# Worcester State University
General Operating Budget (111 & 400)
FY 2022 Budget

		FY2022 Requested Budget		FY2021 Approved Budget
Sources of Funds:				
	Institutional Revenue	$ 39,343,231	$	78,007,790
	State Appropriation	$ 30,071,800	$	-
	State Funded Fringe Benefits	$ 11,878,361	$	11,680,615
	Federal Grant- HEERF	$ 4,677,152	$	-
	Total Sources	$ 85,970,544	$	89,688,405
Uses of Funds:				
AA	Regular Employees	$ 42,290,944	$	42,133,903
BB	Employee Related Expenses	411,973		733,162
CC	Temporary Part-Time Employees	8,422,402		8,612,145
DD	Staff Benefit Expenses	16,666,721		16,450,154
EE	Administrative Expenses	2,523,701		2,629,549
FF	Facility Operation Supplies	1,562,261		1,891,406
GG	Energy/Space Rental	2,370,519		2,460,910
HH	Professional Services	728,230		1,001,188
JJ	Operational Services	893,150		915,383
KK	Equipment Purchase	-		-
LL	Equipment Lease, Maintenance, Repair	1,243,924		1,253,157
NN	Infrastructure & Building Improvements	3,171,100		5,207,619
RR	Educational Assistance	2,545,961		2,490,961
SS	Debt Service	315,000		307,013
UU	Technology Expenses	2,824,658		2,391,424
	Transfer to - Capital Improvement Trust Fund	-		1,210,431
	Total Uses	$ 85,970,544	$	89,688,405
	Net Sources / (Uses)	$ -	$	-

3/30/2021

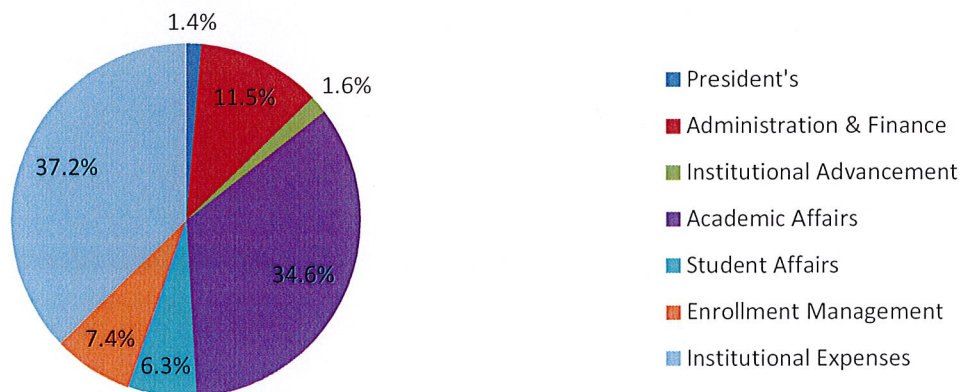## Worcester State University
400/111 Expenditures by Division
FY 2022 Budget

Class	Division	Budget FY22 Subtotals	Budget FY22 Exp %
2	President's	1,225,475.10	1.4%
3	Administration & Finance	9,854,798.88	11.5%
4	Institutional Advancement	1,384,443.49	1.6%
6	Academic Affairs	29,744,741.08	34.6%
7	Student Affairs	5,447,316.11	6.3%
8	Enrollment Management	6,327,808.24	7.4%
3	Institutional Expenses	31,985,961.90	37.2%
		$85,970,544.79	100.0%

Budget FY2022
Subtotals by Division

1,225,475.10
9,854,798.88
1,384,443.49
31,985,961.90
29,744,741.08
6,327,808.24
5,447,316.11

- President's
- Administration & Finance
- Institutional Advancement
- Academic Affairs
- Student Affairs
- Enrollment Management
- Institutional Expenses

Budget FY2022
Expense % by Division

1.4%
1.6%
11.5%
37.2%
34.6%
7.4%
6.3%

- President's
- Administration & Finance
- Institutional Advancement
- Academic Affairs
- Student Affairs
- Enrollment Management
- Institutional Expenses

Worcester State University
State Maintenance Appropriation (111)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	State Appropriation	$30,071,800	$30,042,733
	State Funded Fringe Benefits	11,878,361	11,680,615
	Total Sources	$41,950,161	$41,723,348
Uses of Funds:			
AA	Regular Employees	$30,071,800	$30,042,733
BB	Employee Related Expenses	-	-
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	11,878,361	11,680,615
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	-
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
KK	Equipment Purchase	-	-
NN	Infrastructure & Building Improvements	-	-
	Total Uses	$41,950,161	$41,723,348
	Net Sources / (Uses)	$ -	$ -

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Worcester State University
General Trust Fund (400)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Institutional Revenue	$ 39,343,231	$ 47,965,057
	Federal Grant- HEERF	$ 4,677,152	$ -
	Total Sources	$ 44,020,383	$ 47,965,057
Uses of Funds:			
AA	Regular Employees	$ 12,219,144	$ 12,091,170
BB	Employee Related Expenses	411,973	733,162
CC	Temporary Part-Time Employees	8,422,402	8,612,145
DD	Staff Benefit Expenses	4,788,360	4,769,539
EE	Administrative Expenses	2,523,701	2,629,549
FF	Facility Operation Supplies	1,562,261	1,891,406
GG	Energy/Space Rental	2,370,519	2,389,498
HH	Professional Services	728,230	1,001,188
JJ	Operational Services	893,150	915,383
KK	Equipment Purchase	-	71,412
LL	Equipment Lease, Maintenance, Repair	1,243,924	1,253,157
NN	Infrastructure & Building Improvements	3,171,100	5,207,619
RR	Educational Assistance	2,545,961	2,490,961
SS	Debt Service	315,000	307,013
UU	Technology Expenses	2,824,658	2,391,424
	Transfer to - Capital Improvement Trust Fund	-	1,210,431
	Total Uses	$ 44,020,383	$ 47,965,057
	Net Sources / (Uses)	$ -	$ -

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Worcester State University
Capital Improvement Trust Fund (405)
FY 2022 Budget

	FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:		
Capital Improvement Fee	$ 2,740,301	$ 3,281,678
Transfer In - General Fund	-	1,210,431
Parking Revenue	-	61,015
Total Sources	$ 2,740,301	$ 4,553,124
Uses of Funds:		
GG - Energy/Space rental	$ 750,000	-
SS - Debt Service	679,087	$ 679,087
Transfer Out - Parking Garage Oper. Fund	744,174	744,174
Transfer Out - To Reserves	567,040	3,129,863
Total Uses	$ 2,740,301	$ 4,553,124
Net Sources / (Uses)	$ -	$ -

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Worcester State University

Parking Garage Operating Fund (408)
FY 2022 Requested Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Transfer In - Capital Improvement T. F.	$ 744,174	$ 744,174
	Total Sources	$ 744,174	$ 744,174
Uses of Funds:			
FF	Facility operating supplies	$ -	$ -
GG	Energy and space rental	703,044	703,044
HH	Professional services	630	630
JJ	Operational services	-	-
LL	Equipment lease, maint and repair	2,500	2,500
NN	Construction/Maintenance/Improvements	$ 38,000	$ 38,000
	Total Uses	$ 744,174	$ 744,174
	Net Sources / (Uses)	$ -	$ -

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Worcester State University
Strategic Plan Trust Fund (410)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Transfer in -Reserves	$ 524,831	$ 524,831
	Total Sources	$ 524,831	$ 524,831
Uses of Funds:			
BB	Employee Related Expenses	$ -	$ -
CC	Temporary Part-Time Employees	-	-
DD	Staff Benefit Expenses	-	-
EE	Administrative Expenses	-	-
FF	Facility Operation Supplies	-	-
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	-	-
KK	Equipment Purchase	-	-
LL	Equipment Lease, Maintenance, Repair	-	-
NN	Construction/Maintenance/Improvements	-	-
XX	Unallocated	524,831	524,831
	Total Uses	$ 524,831	$ 524,831
	Net Sources / (Uses)	$ -	$ -

Worcester State University
Wellness Center Trust Fund (429)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Revenues	$ 45,000	$ 125,000
	Total Sources	$ 45,000	$ 125,000
Uses of Funds:			
BB	Employee Related Expenses	$ -	$ -
CC	Temporary Part-Time Employees	6,500	9,000
DD	Staff Benefit Expenses	200	-
EE	Administrative Expenses	6,000	25,000
FF	Facility Operation Supplies	15,000	9,000
GG	Energy/Space Rental	-	-
HH	Professional Services	-	-
JJ	Operational Services	2,300	-
KK	Equipment Purchase	5,000	40,000
LL	Equipment Lease, Maintenance, Repair	10,000	30,000
NN	Construction/Maintenance/Improvements	-	-
	Transfer Out - To Reserves	-	12,000
	Total Uses	$ 45,000	$ 125,000
	Net Sources / (Uses)	$ -	$ -

Worcester State University
Parking Fines Fund (439)
FY 2022 Budget

		FY2022 Requested Budget		FY2021 Approved Budget	
Sources of Funds:					
	Fines and Other Income	$	25,000	$	78,205
	Transfer in - Reserves		65,000		18,691
	Total Sources	$	90,000	$	96,896
Uses of Funds:					
EE	Administrative Supplies		30,000		36,896
RR	Educational Assistance		60,000		60,000
	Transfer Out - To Reserves		-		-
	Total Uses	$	90,000	$	96,896
	Net Sources / (Uses)	$	-	$	-

Worcester State University

Health Services Trust Fund (442)
FY 2022 Budget

		FY2022 Requested Budget		FY2021 Approved Budget	
Sources of Funds:					
	Fees and Other Income	$	410,243	$	445,573
	Transfer In - Reserves	$	-	$	104,188
	Total Sources	$	410,243	$	549,761
Uses of Funds:					
AA	Regular Employees	$	79,895	$	77,731
BB	Employee Related Expenses		-		3,500
CC	Temporary Part-Time Employees		8,000		12,750
DD	Staff Benefit Expenses		30,352		29,530
EE	Administrative Expenses		650		2,500
FF	Facility Operation Supplies		12,000		18,000
HH	Professional Services		200,000		400,000
LL	Equipment Lease, Mainttenance, Repair		500		800
RR	Client Medical Services		950		950
UU	Technology Expenses		-		4,000
	Transfer Out - Reserves		77,896		-
	Total Uses	$	410,243	$	549,761
	Net Sources / (Uses)	$	-	$	-

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Worcester State University

Resident Hall Trust Fund (445)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Fees and Other Income	$ 7,798,282	$ 12,909,144
	Total Sources	$ 7,798,282	$ 12,909,144
Uses of Funds:			
AA	Regular Employees	$ 1,234,392	$ 1,387,023
BB	Employee Related Expenses	-	12,000
CC	Temporary Part-Time Employees	225,000	257,000
DD	Staff Benefit Expenses	479,932	525,820
EE	Administrative Expenses	39,270	127,000
FF	Facility Operation Supplies	50,872	245,000
GG	Energy/Space Rental	5,043,508	8,694,557
HH	Professional Services	3,677	16,000
JJ	Operational Services	1,250	10,000
KK	Equipment Purchase	-	9,000
LL	Equipment Lease, Maintenance, Repair	6,426	120,000
NN	Infrastructure & Building Improvements	347,245	780,000
RR	Educational Assistance	356,000	691,744
UU	Technology Related Expenses	10,710	34,000
	Total Uses	$ 7,798,282	$ 12,909,144
	Net Sources / (Uses)	$ -	$ -

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Worcester State University
Student Activities Trust Fund (446)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Fees	$ 267,076	$ 295,913
	Transfer In - Reserves	$ -	$ 134,087
	Total Sources	$ 267,076	$ 430,000
Uses of Funds:			
BB	Employee Related Expenses	$ 1,000	$ 8,000
CC	Temporary Part-Time Employees	18,000	30,000
DD	Staff Benefit Expenses	377	-
EE	Administrative Expenses	30,000	30,000
FF	Facility Operation Supplies	158,199	230,500
GG	Energy/Space Rental	-	-
HH	Professional Services	35,000	70,000
JJ	Operational Services	6,000	6,000
KK	Equipment Purchase	-	5,000
LL	Equipment Lease, Maintenance, Repair	18,500	50,000
NN	Construction/Maintenance/Improvements	-	500
	Total Uses	$ 267,076	$ 430,000
	Net Sources / (Uses)	$ -	$ -

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Worcester State University
Residence Hall Technology and Equipment Trust Fund (448)
FY 2022 Budget

		FY2022 Requested Budget	FY2021 Approved Budget
Sources of Funds:			
	Fees and Other Income	$ 174,570	$ 327,580
	Transfer In - General Fund	$ 94,364	$ -
	Total Sources	$ 268,934	$ 327,580
Uses of Funds:			
AA	Regular Employees	$ -	$ -
DD	Staff Benefits Expense	-	-
EE	Administrative Expenses	-	-
GG	Energy/Space Rental	268,934	300,438
LL	Equipment Lease, Maintenance, Repair	-	-
UU	Technology Expenses	-	-
	Transfer Out - To Reserves	-	27,142
	Total Uses	$ 268,934	$ 327,580

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Appendix

Worcester State University
Capital Adaptation and Renewal
FY 2022

Critical Repair Projects	2,000,000
$	2,000,000

Worcester State University
Tuition and Fees - Academic Year 2021/2022

		Annual
Undergraduate Day Division		
Cost for Full-Time In-State Student		***10,161.00***
Tuition:		
MA Resident		970.00
Non-Resident		7,050.00
NE Regional		1,455.00
Fees:		
General Fee		8,373.00
Student Activity Fee		72.00
Student Health Svc Fee		110.00
Capital Improvement Fee		636.00
Total Fees		9,191.00
Health Insurance		**TBD**
Orientation Fee (New Students)		75.00
Commuter Meal Plan - freshman, sophomore and junior		300.00
Residence Halls		
Residence Hall rates		
Chandler Village I		8,078.00
Dowden Hall		7,778.00
Wasylean Hall		8,478.00
Sheehan Hall		8,298.00
Single room varies (average additional charge)		600.00
Residence Activity Fee		50.00
Technology and equipment fee		220.00
Resident Parking Fee-satellite lot		100.00
Board		3,750.00
Damage Deposit (1st Semester)		100.00

		Credit Hour
Division of Graduate and Continuing Education		
Tuition:		
Undergraduate		130.00
Graduate		169.00
Fees:		
Administrative Fee		
Undergraduate		125.00
Graduate		126.50
Capital Improvement Fee		26.50
Online Graduate Degree Pograms;		
Master of Education - Moderate Disabilities		365.00
Master of Education - Early Childhood Education		365.00
Master of Education - Elementary Education		365.00
Master of Science in Nursing - Nurse Educator		450.00
Master of Science in Nursing - Public and Population Health		450.00

Other University fees:

All students		
Application fee	per item	50.00
Transcript fee	per item	10.00
Applied music fee	per course	260.00
Lab Instruction	per course	90.00
Undergraduate Day Division - only		
Student Teaching	per course	75.00
Continuing Education Division - only		
Art Model Fee	per course	25.00
Student Teaching	per course	15.00
Field Work Supervision	per cr hr	15.00
Internship	per cr hr	15.00

Moody's INVESTORS SERVICE	FitchRatings	S&P Global Ratings	Rating Grade Description
Aaa	AAA	AAA	Highest credit quality, lowest level of credit risk
Aa1	AA+	AA+	Very high credit quality with very low credit risk
Aa2	AA	AA	
Aa3	AA-	AA-	
A1	A+	A+	High credit quality with low credit risk
A2	A	A	
A3	A-	A-	
Baa1	BBB+	BBB+	Good credit quality with moderate credit risk
Baa2	BBB	BBB	
Baa3	BBB-	BBB-	
Ba1	BB+	BB+	Speculative with substantial credit risk
Ba2	BB	BB	
Ba3	BB-	BB-	
B1	B+	B+	Highly speculative with high credit risk
B2	B	B	
B3	B-	B-	
Caa1	CCC+	CCC+	Substantial credit risk with default as a real possibility
Caa2	CCC	CCC	
Caa3	CCC-	CCC-	
Ca	CC	CC	Very high levels of credit risk with default either occurring or about to occur
C	C	C	Default or default-like process has begun
	SD	RD	Selective Default (SD): Issuers have defaulted on one or more specific issues but are expected to meet their other payment obligations. Restricted Default (RD): Issuers have missed one or more payments but are not under supervision for reorganization or liquidation.
	D	D	Default: Issuers are unlikely to pay their obligations and have likely entered into bankruptcy filings, administration, receivership, liquidation or other formal winding-up procedures.

Investment Grade (left side label, rows Aaa through Baa3)

Speculative Grade (left side label, rows Ba1 through D)

S&P Global
Ratings

RatingsDirect®

Massachusetts Development Finance Agency
Worcester State University; Public Coll/Univ - Unlimited Student Fees

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Massachusetts Development Finance Agency Worcester State University; Public Coll/Univ - Unlimited Student Fees

Rating Action

S&P Global Ratings affirmed its 'A' long-term rating on the Massachusetts Development Finance Agency's (MDFA) series 2012 bonds issued for Worcester State University (WSU). The outlook is stable.

As of June 30, 2020, WSU had $22 million in total debt outstanding, composed of MDFA-issued series 2007 bonds of $41,000 and series 2012 bonds of $8.9 million, as well as a $13 million financing agreement with MSCBA to fund part of its wellness project that was completed in 2016. The 2012 bonds are a general obligation of WSU and do not contain a debt service reserve (DSR).

WSU makes lease payments to cover the associated debt service on additional bonds that are separately secured dormitory bonds issued through the Massachusetts State College Building Authority (MSCBA). These bonds are secured by project revenues, multi-tiered series of DSRs, and a state intercept if project revenues are insufficient to secure all MSCBA debt. The MSCBA finances auxiliary debt for state colleges and universities. For more information on the security and pledge related to these debt obligations, see the full analysis on the MSCBA, published Feb. 21, 2020, on RatingsDirect. As of June 30, 2020, total debt outstanding issued through the MSCBA for WSU was $117 million. The university's adjusted maximum annual debt service (MADS) burden, including these required lease payments, is just under 8% of fiscal 2020 operating expenses, which is somewhat high but manageable for the rating. The MSCBA refinanced its outstanding debt in summer 2020, restructuring debt service to be lower in fiscal years 2021 and 2022 given current enrollment and occupancy levels across the state colleges and universities. In our view, this provides some flexibility as WSU and the other institutions rebuild occupancy levels to ultimate support required lease payments under this debt structure.

While there is a high level of uncertainty regarding the duration and extent of the effects of the COVID-19 outbreak, we believe that WSU has taken prudent steps to ensure the safety of its students, faculty, and staff, while also supporting financial stability. In March 2020, the university transitioned to an online format and reopened for fall 2020 with a combination of in-person, hybrid, and fully virtual learning. The university incurred about $4.5 million in COVID-19 related costs in fiscal 2020, including approximately $2.8 million in room and board refunds to students. WSU was allocated about $4.2 million in Coronavirus Aid, Relief, and Economic Security (CARES) Act stimulus

funding, 50% of which went directly to aid students with emergency funding and the remainder for institutional use. About $1.9 million of the student related funds were spent in fiscal 2020, with the rest utilized in fiscal 2021. In addition, under the Coronavirus Response and Relief Supplemental Appropriations Act 2021 (CRRSAA), WSU has been allocated an additional $5.2 million for the institution and $2.1 million for student support. Management expects to utilize these funds in fiscal 2021 as well.

With some portion of students on campus, WSU reopened its dorms but did limit occupancy for health and safety reasons. Housing occupancy in fall 2020 was 58% compared with 99% the prior year; current occupancy for the spring is 42%. Auxiliary revenue typically accounts for just over 10% of total adjusted operating revenue. Given the enrollment and occupancy pressures faced by all state colleges and universities, the MSCBA refinanced its outstanding obligations last summer for significant savings. In addition, the refinancing lowered near-term debt payments to provide relief while institutions move toward achieving closer to historical occupancy levels beyond the impacts of the current pandemic. In addition to this relief on required lease payments to support debt service, WSU also took a close look at expense savings and delaying deferred maintenance needs to balance the fiscal 2021 budget. We understand with these efforts, as well as the support from CARES and CRRSAA, the university expects to post close to breakeven operations for fiscal 2021.

Credit overview

We assessed WSU's enterprise profile as strong, reflecting fairly stable enrollment, outside of the large decline for fall 2020 affected by COVID-19, sufficient demand metrics for a school that largely has a regional draw in a competitive market, and proactive management team. We assessed WSU's financial profile as very strong, characterized by healthy available resource levels and low MADS burden, reflecting the benefit of its relationship with the MSCBA, which offset operating deficits on a full-accrual basis. The combined enterprise and financial profile assessments lead to an indicative standalone credit profile of 'a+'. As our criteria indicate, the final rating can be within one notch of the of the indicative credit level. In our view, the final 'A' rating on the university's bonds better reflects WSU's relatively modest enrollment base with weakening selectivity and financial performance trends that lag higher rated peers.

The 'A' rating also reflects our assessment of WSU's:

- Fairly stable enrollment over the past five years, outside of the large decline for fall 2020, with acceptable demand metrics for the rating level;

- History of modest operating deficits on a full-accrual basis, though the university has posted consistent cash-based operating surpluses;

- Steady operating and fringe benefit appropriations from the Commonwealth of Massachusetts and expected capital support; and

- Low debt levels, with a 1.4% MADS burden of fiscal 2020 operating expenses.

Partially offsetting credit factors include our view of WSU's:

- Significant amount of off-balance-sheet debt, issued for WSU through the MSCBA, which somewhat understates the university's MADS burden and financial resource ratios relative to debt;

- Strong competition for students from other state schools, including community colleges; and

- Somewhat low adjusted unrestricted net assets (UNA) to operating expense metric for the rating level, though this ratio has improved in recent years.

The stable outlook reflects our expectation that beyond the current impacts of the pandemic, enrollment will rebound, operations will remain consistent, and available resources will likely grow incrementally, with no additional debt expected.

WSU is a public, commonwealth-supported university located in Worcester, Mass. While the university, prior to COVID-19, had been focused on expanding its on-campus residential presence, it still caters to a large commuter population, which accounts for two-thirds of the student body, according to management. WSU offers 60 undergraduate majors and minors; 29 master's degrees, post-baccalaureate certificates, and graduate programs; and real-time access to online, noncredit professional training. The university is expanding its online programs and launch fully online graduate programs in nursing and education for the first time. WSU is accredited by the New England Commission on Higher Education.

Environment, social, and governance factors

We view the risks posed by COVID-19 as an elevated social risk for all higher education entities given the uncertainty around the duration and impact on overall operations. As WSU has adopted strategies to protect the health The pandemic has affected WSU's enrollment levels and mode of instruction, creating revenue and expense pressures. Despite the elevated social risk, we believe the university's environmental and governance risk are in line with our view of the sector.

Stable Outlook

Downside scenario

We could consider a negative rating action during the outlook period if WSU's enrollment declines substantially, full-accrual deficits continue to grow, or if available resources decline relative to operating expenses and debt. We would also consider a significant increase in debt or notable cuts in commonwealth support to be a credit risk. While we believe management has been proactive in its response, unforeseen pressures from the pandemic that cause material weakening of demand, finances, or the trajectory of university may also result in a negative rating action.

Upside scenario

We consider a positive rating action as unlikely over the outlook period given the current enrollment and financial challenges presented by COVID-19, as well as the impacts of a slow economic recovery. We could consider such an action over the longer term should WSU's enrollment and demand trends strengthen significantly, with consistent surpluses on a full-accrual basis and growth in available resources to a level commensurate with a higher rating.

Credit Opinion

Enterprise Profile

Economic fundamentals

In our view, the university has limited geographic diversity. About 94% of WSU's students are drawn from within Massachusetts, with the vast majority from Worcester County, where the university is located. Therefore, our assessment of WSU's economic fundamentals is anchored by Massachusetts' GDP per capita.

Market position and demand

Outside of the disruption caused by the current pandemic, enrollment at WSU had been fairly steady in prior years as part of an intentional enrollment maintenance strategy. Fall 2020 enrollment declined across both undergraduate and graduate programs, though we view the 5.4% decline in full-time equivalent enrollment as generally consistent with regional and industry wide trends. For the current academic year, just under 25% of students are in-person, about 15% are hybrid, and the remainder are learning virtually. Given the impacts of the pandemic and uncertainty heading into fall 2021, management expects enrollment and demand for next year is likely to be affected as well. The university is planning for in-person learning to reach about 75% of total capacity, with continuation of virtual programming options, which should support some stabilizing trends.

Despite prior declines, freshman applications increased by about 4% for fall 2020, indicating that demand for the university is likely to remain steady over time despite demographic challenges in a competitive market. Selectivity has continued to weaken, though we view overall acceptance rates as still in line with that of other similarly rated regional universities. Softened selectivity is offset by improved retention rates, which are hovering just below 80%. In recent years, management has focused on centralized efforts to improve student retention, including retention-based scholarships, a student emergency fund, and comprehensive tracking of student data to function as an early alert system when a student may need additional support.

WSU's tuition is among the lowest for public colleges and universities in the commonwealth. Costs for the 2020-2021 school year for an in-state student, including tuition, room, and board, total $23,154, an increase of just under 3% from the previous year's cost due to an increase in fees as tuition has been flat. For the 2021-2022 academic year, tuition and fees will be held flat.

Management reports WSU has managed two large capital campaigns historically and that it exceeded its goals for each. Annual giving remains on track, at $500,000 to $600,000 annually. WSU's 150th year anniversary is a few years away in 2024. In conjunction with this, the university is planning a major fundraising effort with a goal of growing the endowment to $50 million by 2025 as well as raising funds for scholarships and other support.

Management and governance

In our view, WSU is led by a capable and experienced senior management team, with good oversight provided by an active board of trustees. Barry Maloney, WSU's current president, joined the university in 2011, and the leadership team has been stable in recent years, with no expected changes. The university is in the early stages of implementing its current five-year strategic plan, which was finalized in summer 2020 and will guide priorities through 2025. Overall goals are aligned with prior areas of focus including the broad areas of academic excellence and distinction, student support and success, marketing and enrollment, community engagement and public good, people and culture, and

resources and infrastructure. There is a specific focus on equity as a driving force and improving access for first generation students, and continuation of a goal to increase four-year graduation rates and a "Succeed in 4" initiative that improves communication between students and advisors. WSU's six-year graduation rate is up to 58%, from a previous low of 50%.

Financial Profile

Financial policies
The university has formal policies for reserves, investment management, and debt. It operates according to a five-year strategic plan and has a formal reserve liquidity policy. The university meets standard annual disclosure requirements. The financial policies assessment reflects our opinion that, while there may be some areas of risk, the organization's overall financial policies are not likely to weaken its future ability to pay debt service. Our analysis of financial policies includes a review of the organization's financial reporting and disclosure, investment allocation, liquidity, debt profile, contingent liabilities, and legal structure, and a comparison of these policies with those of similar providers.

Financial performance
Overall, WSU has fluctuated between modest surpluses and deficits on a full-accrual basis, which we view as manageable at the current rating level. Given the impacts of COVID-19, with increased costs and revenue pressures, as well as a transfer of operating funds to its capital reserve fund, the university posted a deficit on a full-accrual basis for fiscal 2020. WSU did not recognize the institutional portion of its CARES allocation in fiscal 2020. Including this funding and conservative assumptions on enrollment and expenses, WSU's initial fiscal 2021 budget called for utilizing operating reserves and deferring $2 million of deferred maintenance needs to support balanced operations. With the additional relief funding from CRRSAA and careful expense management, WSU expects to offset these budget pressures without utilizing the additional reserves. In addition, the university recognized some savings in utilities, travel and dining as fewer students have been on campus. Performance for fiscal 2021 is expected to be close to breakeven.

The largest source of WSU's adjusted operating revenue is tuition revenue, at 42% of the total, followed by state operating appropriation at 36%, auxiliary operations at 10%, and other at 12%. The university received $41.1 million (including fringe benefits and tuition remitted back to the state) in net state appropriation in fiscal 2020, up 4% from 2019. In addition, WSU received additional performance funding of $250,000 from the state, which is likely to be ongoing in nature. For fiscal 2020, state appropriations are flat, with an additional $400,000 in funding that was originally vetoed and then restored. At this time, fiscal 2022 state appropriations are expected to remain flat.

Available resources
We believe WSU's available resources overall are healthy; however, the university's adjusted UNA to operating expense ratio is somewhat modest for the rating category, compared with those of the rating medians and the university's peers. In fiscal 2019, WSU's adjusted UNA to operating expenses were 37.3%, reflecting some growth in recent years. WSU maintains stronger ratios relative to debt outstanding, with available resources to debt at a much higher 202%; however, we view this figure as overstated, as MSCBA is the conduit issuer for the majority of WSU's debt. With MSCBA debt included in our ratios, fiscal 2020 available resources to debt equals approximately 30%,

which we view as modest, but sufficient for the rating level. The balance sheet also receives support from a small endowment, which had a fiscal 2020 market value of approximately $24.9 million. We expect resource ratios will remain somewhat steady given expectations of near breakeven operations and no plans for additional debt.

Debt and contingent liabilities

On Dec. 20, 2012, WSU entered into a memorandum of understanding with the commonwealth and the MSCBA to jointly finance a new wellness center at WSU (a $50.7 million project). Management indicates that the commonwealth used funds earmarked for the project in the amount of $25.5 million and the university used $15 million of MSBCA loan proceeds, as well as approximately $10 million of its reserves set aside for capital purposes. Although WSU's reserves were reduced as a result of the drawdown for the wellness center, the institution continues to rebuild reserves from previous and ongoing fundraising efforts.

WSU contributes to the Massachusetts State Employees' Retirement System, a cost-sharing, multiple-employer, defined-benefit pension plan administered by the state of Massachusetts. We understand that the pension plan's funded status is approximately 66.3%, which we view as sufficient. Massachusetts sets its annual pension contribution based on its own methodology under state statute. It has not fully funded its annual required contribution since fiscal 2011, but currently plans to increase pension contributions by 8.9% per year to fully amortize the unfunded liability by 2036. WSU's contributions for pension and other postemployment benefits are currently at 1.9% of total adjusted operating expenses, which we view as manageable.

Worcester State University, Massachusetts Enterprise And Financial Statistics

	--Fiscal year ended June 30--				Medians for 'A' rated public colleges and universities
	2021	2020	2019	2018	2019
Enrollment and demand					
Headcount	5,724	6,204	6,217	6,434	MNR
Full-time equivalent	4,596	4,850	4,930	4,954	14,995
Freshman acceptance rate (%)	81.0	80.7	77.8	76.3	77.2
Freshman matriculation rate (%)	24.6	28.2	28.1	31.8	MNR
Undergraduates as a % of total enrollment (%)	86.6	85.9	86.5	85.4	82.9
Freshman retention (%)	79.7	79.0	78.4	80.0	77.1
Graduation rates (six years) (%)	58.0	57.6	56.8	55.4	MNR
Income statement					
Adjusted operating revenue ($000s)	N.A.	115,512	116,777	110,177	MNR
Adjusted operating expense ($000s)	N.A.	119,321	116,593	112,178	MNR
Net adjusted operating income ($000s)	N.A.	(3,809)	184	(2,001)	MNR
Net adjusted operating margin (%)	N.A.	(3.19)	0.16	(1.78)	(0.30)
Estimated operating gain/loss before depreciation ($000s)	N.A.	1,664	5,632	3,654	MNR
Change in unrestricted net assets (UNA; $000s)	N.A.	(257)	(873)	(30,050)	MNR
State operating appropriations ($000s)	N.A.	41,087	39,400	35,415	MNR
State appropriations to revenue (%)	N.A.	35.6	33.7	32.1	22.7

Worcester State University, Massachusetts Enterprise And Financial Statistics (cont.)					
	--Fiscal year ended June 30--				Medians for 'A' rated public colleges and universities
	2021	2020	2019	2018	2019
Student dependence (%)	N.A.	51.7	53.7	54.8	54.1
Research dependence (%)	N.A.	8.7	8.5	8.6	MNR
Endowment and investment income dependence (%)	N.A.	0.4	0.4	0.4	1.2
Debt					
Outstanding debt ($000s)	N.A.	22,026	22,576	22,841	224,613
Current debt service burden (%)	N.A.	1.15	1.17	1.13	MNR
Current MADS burden (%)	N.A.	1.41	1.45	1.50	4.50
Financial resource ratios					
Endowment market value ($000s)	N.A.	24,916	24,942	23,111	131,376
Related foundation market value ($000s)	N.A.	35,116	33,471	31,836	159,566
Cash and investments ($000s)	N.A.	52,328	53,339	43,527	MNR
UNA ($000s)	N.A.	(17,788)	(17,531)	(16,658)	MNR
Adjusted UNA ($000s)	N.A.	44,456	31,626	36,231	MNR
Cash and investments to operations (%)	N.A.	43.9	45.7	38.8	46.0
Cash and investments to debt (%)	N.A.	237.6	236.3	190.6	88.4
Adjusted UNA to operations (%)	N.A.	37.3	27.1	32.3	33.5
Adjusted UNA plus debt service reserve to debt (%)	N.A.	201.8	140.1	158.6	57.2
Average age of plant (years)	N.A.	15.1	14.2	12.7	15.3
OPEB liability to total liabilities (%)	N.A.	31.4	40.0	37.9	MNR

N.A.--Not available. MNR--Median not reported. MADS--Maximum annual debt service. Total adjusted operating revenue = unrestricted revenue less realized and unrealized gains/losses and financial aid. Total adjusted operating expense = unrestricted expense plus financial aid expense. Net operating margin = 100*(net adjusted operating income/adjusted operating expense). Student dependence = 100*(gross tuition revenue + auxiliary revenue) / adjusted operating revenue. Current debt service burden = 100*(current debt service expense/adjusted operating expenses). Current MADS burden = 100*(maximum annual debt service expense/adjusted operating expenses). Cash and investments = cash + short-term and long-term investments. Adjusted UNA = Unrestricted net assets + unrestricted net assets of the foundation. Average age of plant = accumulated depreciation/depreciation and amortization expense.

Related Research

Through The ESG Lens 2.0: A Deeper Dive Into U.S. Public Finance Credit Factors, April 28, 2020

WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
Academic and Student Development Meeting
Tuesday, April 6, 2021
3:00 PM
REMOTE PARTICIPATION
Join Zoom Meeting
https://worcester.zoom.us/j/7540181608
Meeting ID: 754 018 1608

Meeting Called By: Karen LaFond (Chair)	**Minutes**: Nikki Kapurch

Board Members: Karen LaFond (Chair); Lisa Colombo; Anna Johnson; Stephen Madaus; William Mosley; David Tuttle

WSU Staff: Barry Maloney; Nikki Kapurch; Carl Herrin; Lois Wims

All documents 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: January 13, 2021 *
	Karen LaFond	
		
		B. Vote required

2.   *Academic and Student Development Committee Report*
        Discussion Regarding Tenure and Promotion
            a.   President Maloney Memo to Trustees*
            b.   Provost Wims Memo to President Maloney*
            c.   Powerpoint Presentation*
        DESE formal review report
            a.   DESE Report Summary*
            b.   Response from the Education Department*
            c.   DESE's formal review report*
            d.   NCTQ Teacher Prep Review: Program Diversity and Admissions Scores*
	Karen LaFond
	
	Lois Wims
		Recommendation to the Full Board **- 4 Votes Required**
		    a. Informational
		    b. Informational
		    c. Informational
		
		    a. Informational
		    b. Informational
		    c. Informational
		    d. Informational

3. *Administrative Updates* A. Other Business	Karen LaFond	
4. *Adjournment*	Karen LaFond	4. **Vote Required**

*Attachments

WORCESTER STATE UNIVERSITY
ACADEMIC AND STUDENT DEVELOPMENT MEETING
Meeting Minutes

CHAIR:	Ms. Karen LaFond (Chair)	DATE:	January 13, 2021
LOCATION:	Remote Participation	MINUTES BY:	Nikki Kapurch
TIME:	3:00 PM		
COMMITTEE MEMBERS PRESENT:	Lisa Colombo; Karen Lafond; Stephen Madaus; William Mosley; Anna Johnson; David Tuttle		
BOARD MEMBERS PRESENT:	Maryanne Hammond (Vice-Chair)		
WSU STAFF:	Barry Maloney; Carl Herrin; Nikki Kapurch; Stacey Luster; Mike McKenna; Lois Wims		

The provision of General Laws, Chapter 30A having been complied with and a quorum present, a meeting of the Academic and Student Development Committee was held on Wednesday, January 13, 2021, through a Zoom remote call. Chair LaFond called the meeting to order at 3 pm. Trustee LaFond reported that all Trustees will participate by remote access and announced that all votes will be by recorded roll call.

Administrative Business

- Trustee LaFond reported we will go into an executive session through a separate zoom link that was provided to the Trustees.

The motion was made by Trustee Tuttle and seconded by Trustee Colombo, to move into Executive Session to discuss strategy with respect to collective bargaining, and to reconvene in Open Session

VOTED: By recorded roll call to enter into an Executive Session at 3:04 pm to discuss strategy with respect to collective bargaining and to reconvene in open session.

ROLL CALL VOTE: Lisa Colombo; Karen Lafond; Stephen Madaus; William Mosley; Anna Johnson; David Tuttle

Reconvened in open session at 3:26 pm. Chairperson LaFond introduced Provost Wims, who offered her sabbatical presentation.

Sabbaticals

- President Maloney concurred with the recommendation of Provost Wims forwarding eleven proposals for sabbatical leave for consideration.
- A total of sixteen were received leaving five not recommended. Those five are in the grievance process.
- Provost Wims provided a detailed presentation outlining the process and each candidate.

1

- Department chairs have affirmed that the individual study for each candidate will contribute to the respective department's course offerings.
- Five (5) are for the Fall Semester 2022, five (5) are for the Spring Semester 2023, and one (1) is for Fall 2023 and Spring 2023 (Full-Year).
- Faculty on sabbatical leave for one semester receive full salary during the period of the leave and those on a full-year sabbatical receive one-half salary for the full year.
- Cost to WSU is for hiring part-time, adjunct faculty. Typically, not every course that would have been taught is offered during the sabbatical semester because some electives can be postponed and taught during a later semester.
- Sections are offered based on student demand, not on faculty availability.
- Average cost of $5,000 per section, this equals approximately $220,000.
- Funds to cover this expense will be included in the adjunct line of the 2023 budget.
- Recipients of a sabbatical commit in writing to return to the institution for an academic year following the sabbatical and will be responsible to reimburse the university should they not return for the required timeframe.
- Sabbaticals provide significant professional opportunities for the faculty.

Following the presentation and review of all proposed sabbaticals, a motion was made by Trustee Tuttle and seconded by Trustee Colombo, it was unanimously

VOTED: **To recommend to the full Board the approval of the AY 2022-2023 slate of sabbatical leave proposals as presented.**

Full Year 2022-2023

Tona Hangen

Fall 2022

Karl Wurst

Nicole Rosa

Katherine Murphy

William Hansen

Aldo Guevera Garcia

Spring 2023

Elizabeth Bidinger

Allison Dunn

Roger Greenwell
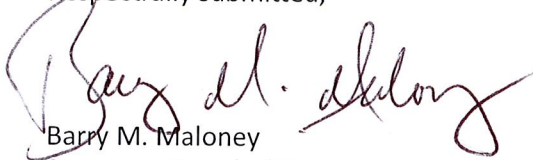
Benjamin Jee

Hugh Cleve Wiese

ROLL CALL VOTE: Lisa Colombo; Karen Lafond; Stephen Madaus; William Mosley; Anna Johnson; David Tuttle

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

VOTED: **To adjourn the meeting at 3:43 pm**

ROLL CALL VOTE: Lisa Colombo; Karen Lafond; Stephen Madaus; William Mosley; Anna Johnson; David Tuttle
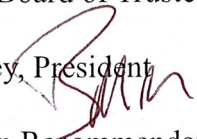
Respectfully submitted,

Barry M. Maloney
Secretary, Board of Trustees

WORCESTER
STATE
UNIVERSITY

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

TO: Members, WSU Board of Trustees

FROM: Barry M. Maloney, President

RE: Tenure/Promotion Recommendations

DATE: March 29, 2021

Following the recommendation of Dr. Lois Wims, Provost and Vice President for Academic Affairs, I am pleased to submit for your consideration and approval the following faculty members to be promoted and/or awarded tenure, effective September 1, 2021:

The following tenure track faculty are recommended for **Tenure**:

Benjamin Jee	Psychology
Syamak Moattari	Health Sciences

The following faculty are recommended for **Tenure with Promotion:**

Timothy Antonelli	Mathematics
Kristina Curro	Communication Sciences & Disorders
Noah Daleo	Mathematics

The following tenure track faculty are recommended for Promotion to **Full Professor:**

Elizabeth Bidinger	English
Hyesun Kim	Criminal Justice
Samuel O'Connell	Visual and Performing Arts
Ana Perez Manrique	World Languages
Elizabeth Siler	Business Administration

The following tenure track faculty are recommended for promotion to **Associate Professor:**

Timothy Antonelli	Mathematics
Kristina Curro	Communication Sciences & Disorders
Noah Daleo	Mathematics
Elizabeth Osborne	World Languages

In making the recommendations, each applicant was given due and serious consideration as required under the provisions of the collective bargaining agreement.

cc: L. Wims
         S. O'Connell
         S. Moore

WORCESTER
STATE
UNIVERSITY

Office of Academic Affairs
Phone: 508-929-8038 and 8938
Fax: 508-929-8187

TO: President Barry Maloney

FROM: Lois A. Wims, Provost

DATE: March 21, 2021

RE: Tenure and Tenure with Promotion

The following faculty are recommended for **Tenure**:

Benjamin Jee	Psychology
Syamak Moattari	Health Sciences

The following faculty are recommended for **Tenure with Promotion**:

Timothy Antonelli	Mathematics
Kristina Curro	Communication Sciences & Disorders
Noah Daleo	Mathematics

APPROVED

MAR 2 2 2021

BARRY M. MALONEY
PRESIDENT

CC: Susan Moore

       Samuel O'Connell

TO: President Barry Maloney

FROM: Lois A. Wims, Provost

DATE: March 21, 2021

RE: Promotions to Associate Professor

The following faculty are recommended for **Promotion to Associate Professor**:

Timothy Antonelli   Mathematics

Kristina Curro   Communication Sciences & Disorders

Noah Daleo   Mathematics

Elizabeth Osborne   World Languages

APPROVED

MAR 2 2 2021

BARRY M. MALONEY
PRESIDENT

CC: Susan Moore

Samuel O'Connell

WORCESTER
STATE
UNIVERSITY

Office of Academic Affairs
Phone: 508-929-8038 and 8938
Fax: 508-929-8187

TO: President Barry Maloney

FROM: Lois A. Wims, Provost

DATE: March 21, 2021

RE: Promotions to Full Professor

The following faculty are recommended for **Promotion to Full Professor**:

Elizabeth Bidinger	English
Hyesun Kim	Criminal Justice
Samuel O'Connell	Visual and Performing Arts
Ana Perez-Manrique	World Languages
Elizabeth Siler	Business

APPROVED

MAR 2 2 2021

BARRY M. MALONEY
PRESIDENT

CC: Susan Moore

        Samuel O'Connell

WORCESTER STATE UNIVERSITY · 1874 ·

Tenure & Promotion Process

2020-2021

TENURE PROCESS AT WSU

- Each tenure-track faculty member is evaluated every year.

- Process is governed by the MSCA Contract and includes:
    - Classroom Observation
    - Peer Evaluation
    - Chair Evaluation
    - Dean Evaluation and Recommendation
    - Provost Recommendation
    - President Recommendation and Approval

- At each of the first 5 years, a recommendation is made regarding reappointment to the next year.

TENURE PROCESS AT WSU

- During the sixth year, candidates **must** come up for tenure.

- Each tenure candidate produces an extensive portfolio of accomplishments in:

  o Teaching Excellence

  o Scholarship / Creative Activity

  o Professional Service

  o Alternative Assignments

  o Classroom Observation

  o Peer Evaluation (Department)

  o Chair Evaluation

  o University-wide Tenure Committee Vote

  o Includes an Interview

  o Dean Evaluation and Recommendation

  o Provost Recommendation

  o President Recommendation

  o Board of Trustees Decision

TENURE PROCESS AT WSU

- In cases where individuals came to WSU with experience elsewhere or tenure elsewhere, the candidate may apply for an early tenure decision.

- Tenure is a commitment for continuous employment by the institution.

- A negative tenure decision requires a terminal contract to the faculty member for the seventh year.

FACULTY MEMBERS RECOMMENDED FOR TENURE

FACULTY MEMBER	DEGREE	DEGREE FIELD
Timothy Antonelli	Ph.D.	Mathematics
Kristina Curro	Ph.D.	Communication Sciences & Disorders
Noah Daleo	Ph.D.	Mathematics
Benjamin Jee	Ph.D.	Psychology
Syamak Moattari	Ph.D.	Health Science

FACULTY MEMBER FOR TENURE:
Timothy Antonelli, Ph.D.

- Department of Mathematics

- Ph.D. Biomathematics, NC State University

- 3 Peer Reviewed Articles

- Collaboration with WPI

- Taught Mathematical Modeling in Peru

FACULTY MEMBER FOR TENURE:
Kristina Curro, Ph.D.

- Department of Communication Sciences & Disorders
- Ph.D. Communication Sciences and Disorders UMass Amherst
- CEU Workshop Presenter
- Graduate Teaching
- Conference Presentation

FACULTY MEMBER FOR TENURE:
Noah Daleo, Ph.D.

- Department of Mathematics

- Ph.D. Mathematics North Carolina State University

- 8 Conference Presentations

- 7 Peer Reviewed Publications

- APC Committee Membership

FACULTY MEMBER FOR TENURE:
Benjamin Jee, Ph.D.

- Department of Psychology

- Ph.D. Cognitive Psychology University of Illinois at Chicago

- Over 2 Million Dollars in Grant Funding

- 4 Peer Reviewed Publications

- 23 Presentations and Commitment to Undergraduate Student Researchers

FACULTY MEMBER FOR TENURE: Syamak Moattari, Ph.D.

- Department of Health Sciences

- DPH Boston University, MD Shaid Beheshti Medical University

- Former Chair of Health Sciences

- Extraordinary Dedication Award at WSU

- Advising Innovator and Community Health Initiative Participant

PROMOTION PROCESS AT WSU

- All hires who have the terminal degree in their field are appointed at the Assistant Professor rank.

- After a contractual time period, Assistant Professors may apply for promotion –
  - April 1st of prior year notification
  - Candidates may request consideration for promotion early.

- Associate Professors, after a contractual time period, may apply for promotion to Professor.

- Promotion to Professor requires a higher level of merit.

PROMOTION PROCESS AT WSU

- The promotion process requires:

  - o Classroom Observation
  - o Peer Evaluation (Department)
  - o Chair Evaluation
  - o University-wide Promotion Committee Vote
  - o Dean Evaluation and Recommendation
  - o Provost Recommendation
  - o President Recommendation
  - o Board of Trustees Decision

PROMOTION PROCESS AT WSU

- Each promotion∗ increases the base salary by academic rank by whichever is the greater amount equal to 5% of the current salary or to the corresponding rate below:

Academic Rank	Base Salary Increase	Faculty Candidates	Annual Cost to WSU

- Associate Professor: $4,462 x 4 = $17,848
- Full Professor: $4,977 x 5 = $24,885

Annual Total: = $42,733

∗ *These rates are effective as of September 2019*

FACULTY MEMBERS RECOMMENDED FOR PROMOTION TO FULL PROFESSOR

FACULTY MEMBER	DEGREE	DEGREE FIELD
Elizabeth Bidinger	Ph.D.	English
Hyesun Kim	Ph.D.	Criminal Justice
Samuel O'Connell	Ph.D.	Visual & Performing Arts
Ana Perez-Manrique	Ph.D.	World Languages
Elizabeth Siler	Ph.D.	Business

FACULTY MEMBER FOR PROMOTION TO FULL PROFESSOR:
Elizabeth Bidinger, Ph.D.

- Department of English

- Ph.D. University of Connecticut

- Equity in Pedagogy Innovator

- Fosters *Ink* Organization for Student Writers

- Driving Force Behind Memoir by the Numbers

FACULTY MEMBER FOR PROMOTION TO FULL PROFESSOR:
Hyesun Kim, Ph.D.

- Department of Criminal Justice
- Ph.D. from Indiana University of Pennsylvania
- Study Abroad Leader in South Korea
- Partnership with Massachusetts Department of Corrections
- Peer Reviewed Publication and Multiple Presentations
- APC Committee Member

FACULTY MEMBER FOR PROMOTION TO FULL PROFESSOR:
Samuel O'Connell, Ph.D.

- Department of Visual & Performing Arts
- Interdisciplinary Ph.D. in Theater and Drama at Northwestern University
- Numerous Publications and Presentations, Several Grants
- MSCA President
- Incoming Chair of Visual and Performing Arts

FACULTY MEMBER FOR PROMOTION TO FULL PROFESSOR:
Ana Perez-Manrique, Ph.D.

- Department of World Languages
- Ph.D. Spanish Florida State University
- Editor of Currents
- 13 Presentations, 4 Published Essays
- Graduate Coordinator
- Chair of the Department of World Languages

FACULTY MEMBER FOR PROMOTION TO FULL PROFESSOR:
Elizabeth Siler, Ph.D.

- Department Of Business

- Ph.D. University of Massachusetts Amherst

- 16 Conference Presentations

- Open Education Resources Participation

- Reviewer for Scholarly Publications

FACULTY MEMBERS RECOMMENDED FOR PROMOTION TO ASSOCIATE PROFESSOR

FACULTY MEMBER	DEGREE	DEGREE FIELD
Timothy Antonelli	Ph.D.	Mathematics
Kristina Curro	Ph.D.	Communication Sciences & Disorders
Noah Daleo	Ph.D.	Mathematics
Elizabeth Osborne	Ph.D.	World Languages

FACULTY MEMBER FOR PROMOTION TO ASSOCIATE PROFESSOR:
Elizabeth Osborne, Ph.D.

- Department of World Languages

- Ph.D. Hispanic Languages and Literatures, SUNY Stony Brook

- Director of Spanish Clinic

- 9 Conference Presentations

- Multiple Grants

QUESTIONS?

The Massachusetts Department of Elementary and Secondary Education accreditation of our Education programs issued their report of Worcester State University's programs recently. What follows is a summary of their findings and the department's response to date. On April 7, 2021, President Maloney, Dean Larrivee, and the Provost will meet with representatives of DESE to provide an institutional response to the report and the questions that spring from the findings.

The DESE report follows a self- study process conducted by our Education faculty under the leadership of Dean Linda Larrivee, Associate Dean Raynold Lewis, and Department Chair Christina Kaniu.   The Education Department and DESE review and assess the following domains in the process: The Organization, Partnerships, Continuous Improvement, The Candidate, and Field Experiences and Instruction.   The process utilizes ratings of exemplary, proficient, needs improvement, or unsatisfactory.

Worcester State University received Exemplary ratings under Partnerships, proficient ratings in Continuous Improvement, The Candidate, and Field Experiences. The Organization was rated as Needs Improvement. The Response to Covid-19 was added to the DESE Report process this year, and multiple positive comments were received. The program cited its support for students first and the experience of the department with on-line learning as a strength heading into the conversion to completely remote learning last spring of 2020.

EDUCATION DEPARTMENT: SUMMARY OF FINDINGS

March 2021

CURRENT STRENGTHS: Several strengths were highlighted in the DESE report. In particular, the area of "partnerships" was judged to be exemplary.

1. Partnerships
WSU's long-term partnerships with the Worcester Public Schools and other local school systems has been noted as a particular strength. In particular, the Education Department's system of Professional Development Schools was noted as exceptional.

2. Continuous improvement
The Education Department's ability to respond to the needs of local school districts was noted. Specifically, the department's commitment to collecting and reviewing internal and external data to make changes and respond to the need of both the students and the partners is strong.

3. Students
"The Education Department has a multi-stage approach to support and track students' progress throughout their time in the program."

4. Field-based experiences
Students are able to have effective field-based experiences due to the strong partnerships as noted above.

CURRENT CONCERNS: Overall, the university must provide more support for the department and its programs (see DESE report section "Organization").

1. The department needs **additional faculty members** to be able to offer the range of courses necessary for students in the various programs.

   a. Two faculty members are retiring at the end of the 2020-2021 academic year: one in Early Childhood and one in Middle-Secondary Education. These positions are critical. Early Childhood Education currently has 132 students and Early Education and Care currently has 45 students at the undergraduate level as well as having an accelerated online along with a face-to-face on-campus graduate program. Middle-secondary, although a minor rather than a major, has 174 students (middle = 5, secondary =169) at the undergraduate level and 90 at the graduate level. Although the department has been approved to hire two full-time temporary faculty members for the 2021-2022 year, they also request full searches during that year for tenure-track lines to begin in the fall of 2022.

b. In the past decade, two faculty lines in Education were released to other departments: one due to a retirement (education leadership) and one due to a faculty member entering administration (middle-secondary). To assure support for programs indicated as needs by the DESE report, a faculty member with expertise in assessment and education leadership should be added for the 2021-2022 academic year as a full-time temporary position with a search for tenure track in the subsequent year.

2. The department is in need of its own internal **specialized data management system**. Yearly reports to DESE and AQEP demand that various types of data (e.g., *TK 20, Livetext, etc.*) are collected and analyzed on an ongoing basis. Note: Blackboard may have a feature for educational assessment, but it may be an add-on, additional cost feature. We will be happy to explore options with WSU IT.

3. As noted by DESE: "evidence indicates licensure candidates in the Education Department are less diverse than the student population on WSU's campus overall." A continuing goal is the ability to **support and mentor a diverse group of students and to encourage more BIPOC students** to enter the field of education. The need for the university to support early college courses specifically designed to encourage students to be prepared for a major in education is needed. Support for mentoring students throughout the program is also needed. For example, the Education Department could hire graduate student assistants as mentors along with providing teachers of color in the community with stipends to work with our students of color.

4. Both the Reading and Educational Leadership programs were shown to "need improvement." The department has already made changes but will review continued needs.

GOALS AND OPPORTUNITIES

1. Replace the two faculty members retiring at the end of the 2020-2021 academic year with full-time temporary faculty members in the same areas (Early Childhood and Middle-Secondary Education).

2. Conduct a search for tenure track faculty members for these two positions in 20201-2022 for a start date of fall 2022.

3. Replace the two vacant faculty lines.
   a. Add an additional full-time temporary faculty line for 2021-2022 in the area of education leadership with a subspeciality in assessment. Conduct a full search during the 2022-2023 AY for a start date of fall 2023.
   b. Add an additional full-time temporary faculty line for 2022-2023 in an area specified by the department after a full review of the most striking need. Conduct a full search during the 2023-2024 AY for a start date of fall 2024.

4. Purchase a data-management system for the department. The Education Department must collect and manage a great deal of data for both DESE and AAQEP (Association for Advancing Quality in Educator Preparation) accreditation. The data must be collected, entered, and analyzed on an ongoing basis for yearly reports as well as for full re-accreditation reports due to DESE every seven years.

5. Embrace the opportunities provided by WSU's new Major Plus program by to highlight the benefits of a minor in secondary education as well in the minor in Education Studies to students across the university.

SUMMARY

FULL APPROVAL
DESE is impressed with all that the Education Department is able to accomplish. However, they are concerned with the sustainability of the department's successes with the lack of resources (see above). DESE representatives stated that the department can accomplish even more with more and specific support from the university. In addition, the Education Department will need to submit yearly reports to DESE and AAQEP to show progress in areas of concern noted above. However, the Education Department cannot add any new programs without evidence of the capacity to support these programs.

Respectfully submitted, March 2021
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Worcester State University

Formal Review Report

Review Results for PK-12 Educator Preparation Programs in Massachusetts

2020-2021

Factual Accuracy Draft: February 9, 2021

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Contents

Review Context

The information below provides context for the report that follows.

2020-2021 Formal Review
Standards
The formal review was conducted in accordance with the regulations outlined in 603 CMR 7.00 and the Massachusetts Department of Elementary and Secondary Education's (DESE) *Guidelines for Program Approval*. New standards for program approval were passed in 2012 which elevated expectations for review and approval in the Commonwealth. Through the review process, DESE seeks to ensure that preparation in Massachusetts results in effective educators ready to support the success of all students. Several key shifts articulated by the 2012 Program Approval standards are worth noting as context for the report that follows:

- Expectation of Impact: Providers are required to demonstrate the impact of their preparation programs through the outcomes-based review. Evidence of program impact is weighted to a greater extent in the review process, which examines both inputs and outcomes. Evidence of outcomes may include information collected and reported by the organization and also includes state-reported output measures. For the 2020-2021 review cycle, these state-reported output measures included:
  - Completer totals
  - Employment data (placement overall and by district as well as retention)
  - Educator Evaluation Data (for top three employing districts)
  - Massachusetts Tests for Educator Licensure (MTEL) data (pass rates)
  - Stakeholder surveys

  Several output measures are published on DESE's public profiles. Future reviews will include additional state-reported output measures as they become available.
- Emphasis at the Organizational Level: In Massachusetts, approval is granted to a Sponsoring Organization (SO). The authority granted to providers is significant in terms of both scope and duration. This means the Commonwealth places a great responsibility in SOs to maintain and improve high-quality programs during the period of approval[1]. As a result, the summative evaluation that is the formal review seeks to ensure that there are systematic and structural elements in place at the organizational level, providing greater assurances that all programs are producing effective educators during the term of approval. The Program Approval standards are categorized into six categories, called domains, five of which are evaluated at the organizational level: The Organization, Partnerships, Continuous Improvement, The Candidate, and Field-Based Experiences. The sixth is the Instruction Domain.

Process
In order to uphold the rigor articulated in the 2012 standards, DESE built an improved formal review process. The 2020-2021 review year was the seventh implementation of this process. In the design and development of the process, DESE sought to ensure that it is effective, efficient, and consistently rigorous. The ultimate goal is that the review process builds a solid evidence base for decision-making. Several integrated features of the system help achieve this goal, including:

- Evaluation Tools & Criteria – The Review Evaluation Tool is the centerpiece of DESE's review system. It makes explicit the criteria against which Sponsoring Organizations are evaluated and

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[1] Period of approval is seven years, unless the program ceases to meet requirements. Under 603 CMR 7.03(6) "The Department may conduct an interim review of an approved preparation program on an as-needed basis."

guides the review team through the collection, analysis and evaluation of the evidence-base. The Eval Tool Overview provides the most comprehensive discussion of the development and planned implementation of the review process.

- Review Toolkit – The Toolkit provides instructions and materials for each phase of the review. It ensures that the process is streamlined and consistent.
- Elite cohort of Reviewers – DESE recruits, selects, and trains an experienced group of educators to support the evaluation of SOs.

Based on implementation of this review system, DESE is confident in the judgments and decisions detailed in this report. For more information on Massachusetts' program approval standards and review procedures, please email EducatorPreparation@mass.gov.

COVID-19 Pandemic & Formal Review Context

In March 2020, the Governor of Massachusetts declared a State of Emergency in response to the 2019 novel coronavirus (COVID-19) outbreak. With confirmed cases on the rise, the Governor placed restrictions on gatherings and ordered PK-12 Schools to close (Governor's COVID-19 Orders #3, #16, and #28).

In adherence with the orders, Sponsoring Organizations and PK-12 schools/districts closed physical buildings and transitioned to distance (remote) teaching and learning. As a result, the experiences of educator preparation candidates enrolled in programs during Spring 2020 were impacted. Given the extenuating statewide circumstances, DESE expanded waiver guidance on the implementation of the end-of-program performance assessments to allow Sponsoring Organizations to approach supporting candidates during the pandemic with more flexibility.

While many Sponsoring Organizations and PK-12 schools/districts opened doors to candidates and students in Fall 2020, the COVID-19 pandemic continues to require Sponsoring Organizations to nimbly respond to the changes in their geographic regions and to the policies set forth by their partner PK-12 schools/districts.

With the understanding that the COVID-19 outbreak required Sponsoring Organizations to deviate from routine practices in order to respond to candidates', schools'/districts', and the organization's needs, DESE focused the formal review on the Sponsoring Organization's educator preparation efforts pre-pandemic (prior to March 2020). For organizations undergoing review:

- When possible, DESE advised Sponsoring Organizations to prepare the offsite submission materials based on practices and evidence prior to the pandemic. Sponsoring Organizations may have also shared evidence reflective of ongoing systems and structures, which may include data collected during and after the state of emergency.
- During the offsite phase of the formal review, DESE focused on state output measures available from the 2017-18 and 2018-19 school years, pulling in data from 2016-17 as needed, for example when looking at stakeholder surveys. DESE also considered state output measures from 2019-20 as appropriate, recognizing the context of state closures related to the state of emergency.
- Recognizing the ongoing pandemic, DESE and WSU converted the previously scheduled in-person onsite visit to a fully virtual onsite visit by moving all focus groups and interviews into a video conference format.
- During onsite portion of the formal review, DESE hosted virtual focus groups and facilitators instructed all stakeholder groups to focus responses on pre-pandemic experiences. DESE also provided an opportunity for stakeholders to share their experience based on how WSU responded/is responding to the pandemic. In cases where recent examples were relevant, they have been highlighted in the report.

As a result, this report will focus on evidence from pre-March 2020, however, may also reference current efforts as appropriate.

Overview

The following is an organization overview written by Worcester State University and provided to DESE during the offsite portion of the review:

Worcester State University (WSU) is a four-year public, liberal arts and sciences university located in a diverse metropolitan setting west of Boston in the Commonwealth of Massachusetts. WSU has a long history of state approval and accreditation, both with the Massachusetts Department of Elementary and Secondary Education (DESE) and with different national accrediting bodies (NCATE, TEAC now CAEP). WSU program graduates are well prepared in content (GPA 3.65; spring 2019) and pedagogy (100% Pass rate on MTEL).

Over the last three years WSU has produced an average of 140 completers each year. Program completers in the STEM areas are predominantly in the Post-Baccalaureate programs.

The program is structured into three stages. Students enter Stage 1 when they matriculate in their freshmen year; and enter Stage 2 after 60 credits and passing scores in the Reading and writing MTEL; and enter stage 3 during their Student Teaching assignment. Students are officially claimed for Title II purposes at Stage 2. Currently, WSU offers a wide variety of majors and programs designed to provide the teaching profession with competent teachers in the liberal arts and sciences.

Since our last program approval visit in October 2013, WSU has added a new degree program - Mathematics for Elementary Educators (MEE) in response to needs of its constituency. To date 21 students have graduated from the program and are employed in teaching positions or are in graduate degree programs.

With specialized programs in Reading, School Psychology, English as a Second Language, Moderate Disabilities, and Educational Leadership, WSU continues to meet the needs of critical personnel in the public schools. WSU utilizes a major part of its budget to fund two Clinical Professors. This Clinical Professor Model has tightened the partnership between Worcester Public Schools and WSU and has helped with implementation of the DESE pre-practicum expectations. WSU utilizes endowment funds through the Office of University Advancement to fund its technology needs and to support student travel to conferences. Over the last six years WSU has had a sustained recruiting program designed to attract more "teachers of color" into the field of education, and WSU has seen a rise in the number of students of color entering and completing the teacher education program.

Graduates from the program when evaluated are rated 5.3% exemplary (State – 5.3%); 92.1% proficient (State – 86.2%), 2.6% Needs Improvement (State – 8.4%); and 0% Unsatisfactory (State - .1%). When asked "How well did WSU teacher Preparation Program prepare you to teach?" WSU scored 3.93; 3.44 & 4.05 on a 5-point scale over the last 3 years. Among these same program completers, would recommend WSU to other students with a score of 4.35; 4.2 & 4.5 over the last three years. More recently, WSU has been approved to offer an endorsement at the Middle School level in mathematics and science. WSU is constantly seeking better ways to prepare students through the curriculum review process and by developing new initiatives in response to changing regulations and organizational focus.

Information about WSU is best accessed on the Sponsoring Organization's website:
https://www.worcester.edu/Education/

Additional data and information specific to educator preparation programs can be found on DESE's public profiles page.

Glossary of Key Terms

The terms below are used throughout this report. As these terms have state-specific meaning and are often misunderstood, DESE has defined them below. For ease of understanding, the definitions provided are informal. For the regulatory definitions, see 603 CMR 7.02. Commonly used synonyms are *italicized*.

Sponsoring Organization (SO): Institution of higher education or alternative preparation organization that provides, or seeks to provide, approved preparation programs with the ability to endorse candidates for Massachusetts licensure; *prep provider, program, institution*

Program: Content- and license-specific program within a SO. Programs are labeled by the subject area and level of the license being sought (e.g., Mathematics 5-8, Mathematics 8-12 are individual programs)

Candidate Assessment of Performance (CAP): A culminating assessment required for program completion in the Commonwealth. The assessment establishes an intentional bridge from training to practice by aligning expectations with the Massachusetts Educator Evaluation Framework.

Candidate: A person who is currently enrolled in an Ed Prep Program; *students*

Completer: A person who has successfully completed an Ed Prep Program; *alumni, graduates*

Student: PK-12 child

Supervising Practitioner (SP): A licensed teacher who oversees the candidates' field-based experience; *cooperating teacher, mentor teacher*

Program Supervisor (PS): A member of the SO staff. The PS serves as the liaison between the SO and the practicum placement. He/she/they is/are responsible for overseeing the student teaching experience, observing and providing feedback to the candidate, and coordinating the assessment for program completion

Faculty: A person who teaches coursework in the program. This includes part-time (sometimes referred to as adjunct) and full-time faculty; *instructors; adjuncts; professors*

Initial License: A candidate is eligible for an Initial license once he/she/they successfully complete(s) an educator preparation program approved by the Commissioner, and meets other eligibility requirements established by the Board of Elementary and Secondary Education.

Professional License: A candidate is eligible for a Professional License, which is an advanced license, after obtaining an Initial license for at least three years and completing additional graduate coursework.

See Appendix C: Formal Review Decision Making for additional terms and definitions.

Overview of Approval Status

Approval Recommendation

As a result of this review, The Department of Elementary and Secondary Education (DESE), in conjunction with a team of reviewers, has determined that Worcester State University be recommended for "_____."

[Approval status pending Commissioner's recommendation. This will be added when the Final Report is released.]

For more information on the decision-making process and definitions for the rating levels, see Appendix C.

The chart below provides an overview of the rating for each domain.

Organization Level: Domain Recommendations

Domain	Exemplary	Proficient	Needs Improvement	Unsatisfactory
The Organization			✓	
Partnerships	✓			
Continuous Improvement		✓		
The Candidate		✓		
Field-Based Experiences		✓		
Instruction (By Program)	*See Program Level: Domain Recommendations*			

Domain: The Organization

Is the organization set up to support and sustain effective preparation programs?

Commendations
None

Met Criteria

✓ ORG 1: Organization demonstrates sufficient capacity and authority to effectively support and sustain effective educator preparation programs.

- Overall, evidence indicates the Education Department believes they have what they need to support educator preparation efforts despite having limited capacity. Onsite, 55 percent of Full-time Faculty (n=11), 100 percent of Part-time Faculty (n=8), and 44 percent of Arts & Sciences Faculty (n=9) agreed Leadership for preparation programs has sufficient capacity and authority to make decisions necessary to support effective educator preparation programs. When asked to elaborate, an arts and sciences faculty member referred to the education programs as running "bare bones" and stated, "The education department has very few people doing a lot of work. I think they are doing a good job but there are not enough people. In our department we want to do more but it's hard because we are so overwhelmed." When asked to elaborate on their experience, several full-time faculty members referenced the Associate Dean and Program Chairs. One faculty member stated, "The fact that we have an Associate Dean who is in education helps us be more nimble. We have been talking about programmatic changes that have occurred, I attribute that to the fact that we are collaborative, but also, we have someone in leadership. The decisions go smoother because the person making the decision is deeply involved in the field of educator preparation." Another faculty shared, "Over these past years [the Chairs] have added a lot to the program and brought a lot of initiatives into the programs and worked to make it easier for us to do our jobs." In the offsite submission, WSU described three recent examples of decisions leadership has made to support educator preparation (e.g., expansion of field-based experiences sites beyond Worcester Public Schools (WPS), collaboration between WSU and WPS to support paraprofessionals to pursue licensure, pursuit of additional TEACH grant funding).

✓ ORG 4: All candidates, regardless of program or delivery model, have equitable and consistent access to resources.

- Onsite, most Candidates/Completers (76 percent, n=97) agreed they have/had equitable access to the resources necessary to complete their program requirements. Similarly, in stakeholder surveys issued by DESE between 2017-18 and 2018-19, 65 percent (n=26) of Candidates and 88 percent (n=16) of Completers agreed the program ensured access to the resources required for learning (e.g., technology, facilities, personnel). Candidates/Completers onsite noted the dedication of their faculty. There was consensus when one shared, "Faculty came on weekends and at weird times to help us prepare [for MTELs]." In the offsite, WSU named a variety of practices to support candidates (e.g., materials available via curriculum library, one-on-one tutoring for MTELs, MTEL workshops, TEACH grant open to all students).

✓ ORG 6: Faculty/instructors and staff engage in professional development or work in the field that has a positive impact on the quality of preparation provided to candidates.

- In the offsite, WSU explains the Massachusetts State Colleges Association (MSCA) contract requires faculty to engage in continuing scholarship for promotion and tenure. Evidence collected throughout the review indicates full-time and part-time education faculty participate in professional development specific to educator preparation, meanwhile few arts and sciences faculty members do the same. When asked onsite, 73 percent (n=11) of Full-time Faculty and 75 percent (n=8) of Part-

time Faculty agreed they participate in professional development experiences through or supported by WSU that have a positive impact on the work of preparing educators. Only 11 percent (n=9) of Arts & Sciences Faculty agreed. WSU supports faculty engagement in professional development opportunities via a variety of strategies (e.g., innovation grants, travel funding, conferences). WSU's Center for Teaching and Learning also offers a variety of workshops on student-centered learning, cross-cultural awareness, and cultural competence and bias training. During onsite focus groups, full-time and part-time education faculty referenced the Center for Teaching and Learning as a valuable professional development resource.

Findings

- ❑ ORG 2: Systems/structures support collaboration within departments and across disciplines and improve candidate preparation.
    - ● Full-time faculty regularly collaborate to support candidate preparation; however, evidence indicates there is a lack of systems/structures that enable ongoing collaboration between arts and sciences faculty members and part-time faculty with full-time faculty members. In the offsite submission, WSU identified several examples of collaborative opportunities (e.g., monthly department meetings, faculty liaisons collaborate with Arts & Sciences and Humanities Departments, collaboration between departments to support development of new programs) as well as several outcomes of collaboration (e.g., new courses to meet pre-practicum requirements, development of the math elementary education major resulting in higher mean score for WSU on math MTEL, redesigned coursework). In some of the previously mentioned examples, full-time education faculty and arts and sciences faculty collaborated to implement the change. However, WSU did not share any examples of collaboration for part-time faculty. Onsite, results from stakeholders are mixed, with part-time and arts and sciences faculty indicating lower agreement rates relative to collaboration both *within* and *across* disciplines (Table 1). When asked to elaborate on experiences, arts and sciences faculty from multiple departments shared different experiences, signaling inconsistencies in opportunities for collaboration:
        - o "History is working to revise our curriculum to make it better suited for future educators," but "Collaboration feels dependent upon the energy of individuals. It does not feel supported institutionally and structurally."
        - o "The English Department has a subcommittee that works collaboratively with the education department. We try to meet monthly."
        - o "We have regular meetings where we discuss education and include it on our agenda, but we do not have any representative from the education department."

    When asked who arts and sciences faculty regularly connect with from the Education Department, faculty named several different individuals (i.e., Ray Lewis, Sara Young, program chairs).

Table 1. Percentage of Full-time Education Faculty, Part-time Education Faculty, and Arts & Sciences Faculty agreeing with various statements about collaboration at WSU.

Statement	Full-time Education Faculty (n=11)	Part-time Education Faculty (n=8)	Arts & Sciences Faculty (n=9)
There are structures and systems that support collaboration <u>within</u> departments.	82%	50%	11%
There are structures and systems that support collaboration <u>across</u> disciplines.	82%	38%	0%
Collaboration has resulted in improved candidate preparation.	82%	75%	22%
I participate in a collaborative structure at the Sponsoring Organization.	82%	63%	22%

❏ ORG 3: Budgets support ongoing educator preparation program sustainability and allocate resources according to the Sponsoring Organization's goals.
- Overall, evidence indicates WSU's budget does not sufficiently support the educator preparation efforts. Only 27 percent (n=11) of Full-time Faculty and 63 percent (n=8) of Part-time Faculty agreed the budget allocates resources to the educator preparation programs according to organizational goals. Furthermore, only 45 percent (n=11) of Full-time Faculty and 44 percent (n=9) of Arts & Sciences Faculty agreed they have the resources they need to effectively prepare educators. All Part-time Faculty (n=8) agreed they had the resources needed. Full-time faculty and arts and sciences faculty shared the following comments about their experiences over the past few years, which signaled these concerns existed prior to the pandemic:
  - "There are never enough resources to be divided across campus priorities. The Education Department doesn't quite hold its premier place in the campus pecking-order as it once did."
  - "[The] Chair works well within the budget allotted by WSU Administrators. Prior to COVID, [the] budget has been frozen for several years. Each curriculum area was given $300-500 ($2000 total for the department) for supplies/teaching materials. It took an "act of congress" to get approval [and] funding for the Education Department to access the Teaching Channel to supplement/allow for alternative field hours for 2020-21. Prior to that, individual faculty members paid out of pocket."
  - "I've been here a long time and it seems Education does a very good job dealing with a wide range of programs and requirements and at times they seem to be under-resourced."
- It is evident faculty are doing the best they can with the resources allotted. In cases where additional resources are needed and not yet supported by the institution, faculty/staff and/or members of the WSU community supplement from their personal income. During focus group discussions onsite, a faculty member shared, "We also have funds to provide vouchers for our students for the MTELs because as indicated our [candidates] work in addition to being full-time students, so many of them are tight in terms of paying for the MTELs. This is from alumni and funds from a former faculty member." In regard to faculty load, WSU noted "Full-time faculty also teach in the graduate programs above their regular load. This sharing of faculty with the graduate school has been the model for some time." Onsite, a part-time faculty member shared, "I've been teaching for 11 years and initially a minimum course was eight students and was then increased to 10, but there was no adjustment to salary to adjuncts. If you have between 10 to 25 students, there are no adjustments to salary. I find this inequitable as there is more adjunct teaching in the profession than regular faculty."

❏ ORG 5: Recruitment, selection, and evaluation processes result in the hiring and retention of effective faculty/instructors and staff.
- Overall, candidates/completers had mixed experiences with regard to faculty effectiveness. Meanwhile, faculty also reported challenges with their hiring process, preventing them from hiring faculty with the expertise needed to support their candidates (Table 2).
  - In stakeholder surveys issued by DESE between 2017-18 and 2018-19, 62 percent (n=26) of Candidates and 63 percent (n=16) of Completers agreed their faculty/instructors were effective at preparing educators. Onsite, 56 percent (n=97) of Candidates/Completers agreed their faculty/instructors are/were effective in preparing candidates for licensure role. There was consensus when a candidate/completer onsite noted, "There were good and not so great. Overall, [faculty] were really awesome and did prepare us well." Candidates/completers highlighted some faculty "had been teachers themselves," or were "gurus." Meanwhile, other candidates/completers shared, "there was discrepancy in instructor ability," and while most faculty members helped them, there were faculty who "hindered" their success more than supported them.

o From the faculty perspective, there are a number of challenges affecting both hiring and retention of effective faculty including Human Resources (HR) controlling the hiring process, limited opportunity for current faculty to weigh in, and budget concerns (see ORG 3).

- o An arts and sciences faculty member noted, "Education has had issues with HR," and they had "personal experience with HR not understanding the specialties and not hiring the person that is the right fit for the position."
- o A full-time faculty member shared, "Faculty hiring is determined by the Provost. We are not able to prioritize names that are moved forward. There can be strong opinions from HR who should make-up the hiring pool."
- o In terms of retention, a full-time faculty member noted, "Though we have been able to hire strong candidates we have 'lost' many due to budget concerns or they have left for better paying positions. Administration has not allowed us to hire replacements due to retirement."

Table 2. Percentage of faculty groups agreeing their recruitment, selection, and evaluation process results in faculty who prepare effective educators.

Statement	Full-time Faculty (n=11)	Arts & Sciences Faculty (n=9)	Part-time Faculty (n=8)
Our recruitment and hiring processes result in the employment of effective faculty.	64%	56%	88%
Our evaluation processes result in the retention of effective faculty.	64%	56%	88%
Faculty are evaluated based on our ability to effectively prepare educators.	73%	0%	88%

Overall Domain Recommendation		Exemplary
		Proficient
	✓	Needs Improvement
		Unsatisfactory

Domain Summary

Evidence collected throughout the formal review indicates program leadership and faculty are able to support candidates to have an effective preparation experience, however existing systems and structures may not afford faculty sufficient capacity, authority, and resources to sustain effective programming. The limitations of existing systems and structures are most notable in the Organization domain given this domain emphasizes the faculty/staff experience.

For example, evidence indicated candidates/completers receive the necessary advising (see CAN 3), however faculty may require additional time and resources to effectively advise candidates. Onsite, only 64 percent (n=11) of Full-time Education Faculty and only 33 percent (n=9) of Arts & Sciences Faculty agreed they have the time and resources necessary to effectively advise educator preparation candidates. One faculty member shared, "[As]an institution, we do not do a very good job at allocating faculty lines towards assessed needs within the academic curriculum." Another faculty member stated, "We are so overworked [to] find the space to do one more thing. In the last four years or so, [we are] hiring less and less tenure line faculty [and] it's been more difficult to make those cases [for more faculty members]." In regard to hiring new faculty, evidence also signaled current faculty have limited influence on the selection process. In turn, this may be contributing to candidates' mixed experiences with faculty effectiveness.

The education department staff and faculty members are committed to the success of candidates and its programs. The education department has leveraged external funding to support its programming and initiatives

(e.g., TEACH grants, MassTeach). When the Education Department is not able to utilize funds from the institution or from grants overall, faculty/staff draw resources from the broader WSU community and supplement with personal income when necessary.

Overall, evidence indicates faculty and staff are carrying out the work necessary to support candidates as well as meet the needs of PK-12 Partners (see Partnership domain), however WSU as an institution may need to invest more resources and grant the Education Department more authority and capacity to fully support and sustain its educator preparation programs. The findings outlined in this domain are directly a result of limited faculty capacity and limited resources dedicated to educator preparation programs at WSU.

Professional Suggestions

- While there is limited input from faculty in the hiring process, promising practices that focus on pedagogy should continue. According to a full-time faculty member, prospect faculty members "do teach a class" as part of the hiring process. This faculty member further explained, "The [potential faculty members] coming in do need to strut their stuff in front of [WSU] students and we ask students for their feedback….We do ask them to demonstrate their ability and we can see it is working. New hires are staying and are contributing to helping us understand with their own research and classroom experiences."

Domain: Partnerships

Is educator preparation from your organization meeting the needs of the PK-12 system?

Commendations

★ PAR 1: Sponsoring Organization responds to the needs of PK-12 districts/schools.
   - Onsite, the majority of Partners agreed WSU is responsive to their needs (Table 3). Evidence collected throughout the review shows WSU has responded to the needs of PK-12 schools/districts, in particular through several initiatives: development of Math for Elementary Educators major, design of the administrator leadership cohort, and programs to increase the diversity of the workforce.
     - *Math for Elementary Educators (MEE) major:* Partners, through the Teacher Education Advisory Council (TEAC), identified a need for elementary educators to have deeper mathematical knowledge. WSU responded by creating and seeking approval from the Department of Higher Education for the MEE major. By the time of the offsite submission, WSU had prepared 21 MEE candidates and 18 have been hired by MA public schools.
     - *Administrator off-campus cohorts:* Since Fall 2016, WSU has offered preparation coursework for aspiring school leaders in district-based cohorts, in their buildings, to support the administrator pipeline. To date, WSU has prepared cohorts of aspiring school leaders in Worcester Public Schools (WPS), the Public Schools of Northborough/Southborough, and in the Franklin area. More recently, the WPS Superintendent requested the WPS leadership cohort be redesigned to follow a residency model to allow for more time in schools, which will increase opportunities for candidates to shadow district leaders and have more shared responsibilities (see FBE 2 for more details). WSU responded to the request and began offering a residency leadership program for 14 internal WPS candidates in Fall 2020.
     - *Diversity Initiatives:* In response to districts' need for a diverse educator workforce, WSU has implemented programming (e.g., *A Call to Teaching* Program and *Worcester Future Teachers)* and continues to respond to requests from Worcester's leaders to develop additional initiatives.
       - *Licensure for WPS Instructional Assistants (IAs):* During the summer of 2019, WPS requested support from WSU to help prepare WPS IAs for licensure. WSU responded by offering MTEL workshops during times outside of school hours to support IAs. As a result, two cohorts of 50 IAs from WPS engaged in MTEL preparation during the summer of 2019 and spring of 2020; WSU reported there has been a 75 percent pass rate for participating IAs. Additionally, six IAs completed the WSU licensure programs in Spring 2020, and an additional four IAs were on track to complete by December 2020. To support their efforts, WSU provided IAs financial support via a DESE Diversity grant, JET Scholarships, and WSU MTEL voucher assistance.
       - *Mayor's initiative:* At the Welcome Meeting, Leadership spoke to recent collaborative efforts with the Mayor of Worcester to increase the diversity of the workforce in WPS. WSU worked to develop strategies and was prepared to present to the Mayor until efforts were interrupted by the coronavirus pandemic in March. Onsite, the Superintendent of WPS spoke to this, "The mayor's taskforce on diversity… we're trying to find solutions to add diversity in [the] hiring process and how to maintain or keep our educators of color. A document was produced by the President of WSU, and there were a lot of education professors from WSU

[involved]. Dr. Lewis was actually the Chair of the committee. Their recommendations have been passed on to Ivonne [WPS' Chief Diversity Officer] who is implementing many of the suggestions…."

- *MassTeach:* One partner onsite also named the *MassTeach* initiative, a partnership between Quinsigamond Community College (QCC) and WSU, sponsored by DHE, to support the STEM pipeline as a diversity initiative. The partner shared MassTeach Scholars "receive a 25k stipend to complete their junior and senior year at WSU…. [candidates] get their associates at QCC, bachelors [at] WSU, and teach four years at local high schools," and noted this is "awesome if we can get women and students with diversity" as a result of the program.

Table 3. Partners agreeing WSU has been responsive to their school/district needs.

Statement	Partners (n=10)	Supervising Practitioners (n=13)
WSU responds to my school's/district's/org's needs (e.g., employment, professional development, through design and delivery of their educator preparation program, etc.)		77%
WSU has inquired about my PK-12 school's/district's needs.	80%	
WSU is responsive to my school's/district's hiring needs.	90%	
WSU responds to my school/district needs by shaping key aspects of curriculum and instruction within the educator preparation program.	80%	
WSU responds to my school's/district's needs via professional development.	60%	
The partnership between my school/district and the WSU is mutually beneficial.	100%	

Met Criteria

✓ PAR 2: PK-12 partners make contributions that inform Sponsoring Organization's continuous improvement efforts.
- Evidence indicates WSU has a reciprocal relationship with its partners, in particular Worcester Public Schools, that have enabled open dialogue. A Partner onsite shared, "We hear back weekly and sometimes daily [from WSU]. Together with WSU, [we] modify what needs to be worked on. It's a constant back and forth about what the [candidates] need and what WPS's needs are." In the offsite submission, WSU describes several structures and strategies for soliciting partner input (e.g., TEAC includes local school/district administrators, Professional Development Schools (PDS) Council includes PDS principals, Clinical Professors who are also WPS teachers). In a WSU-issued partner survey, 90 percent (n=10) of respondents indicated "Administration, faculty, or staff from [their] school/district have had the opportunity to provide feedback to WSU's education department." Similarly, 90 percent of Partners onsite (n=10) agreed WSU solicits their contributions (other than feedback) to inform continuous improvement efforts. Seventy percent (n=10) of Partners agreed WSU uses data generated by the partnership to improve educator preparation programming and outcomes (e.g., retention data, student learning), and 50 percent of Partners (n=10) agreed they have seen WSU make changes to educator preparation programs based on their contributions.

✓ PAR 3: Partnerships improve experience for preparation candidates.

- Worcester Public Schools and WSU work together to support the candidate experience. Onsite a Partner shared, "Dr. Young is constantly bending over backwards as is our AVID Office to accommodate [candidate] needs regarding transportation and hours worked outside of the classroom." The Partner continued to explain, "We offer bus passes to [candidates] that don't have cars. Many of them do commute with cars, but their hours outside of school can be problematic, so we may have to switch a class/school for their timing. And we do that often." In the offsite narrative, WSU outlined several examples for how their established partnerships have benefitted candidates (e.g., service projects and methods courses held at the 12 established Professional Development Schools (PDSs), Friday morning instructional rounds, seminar classes team-taught by WSU education faculty and teachers from WPS). WSU also shared data demonstrating this benefit:
  - 81.2 percent (n=32) of candidates and completers surveyed 'agreed' or 'strongly agreed' that their experiences with the PDS were an important part of their teacher preparation.
  - 87.5 percent (n=32) of candidates and completers surveyed said that working with the PDS throughout their time at WSU has made them feel more prepared to teach.

Similarly, in stakeholder surveys issued by DESE between 2017-18 and 2018-19, 62 percent (n=26) of Candidates and 88 percent (n=16) of Completers agreed they benefited from the relationship that their program had with the school/district where they had their field-based experiences.

✓ PAR 4: Partnerships positively impact the outcomes of PK-12 students.
- Partners reported their partnership with WSU has positively PK-12 students within their district. A partner onsite stated, "The twice-weekly AVID tutorials are really integral. Those tutorials allow our [PK-12] students to matriculate into AP and honors. It's really essential that we have approximately 40 [candidates] from WSU in our AVID classrooms every single year… It also gives the WSU [candidates] a very active role in the classroom." Ninety percent (n=10) of Partners onsite agreed WSU is responsive to the needs of PK-12 students in their school/district. Additionally, 90 percent (n=10) of Partners agreed their partnership with WSU has had a positive impact on the outcome of students. In the offsite submission, WSU shared some specific examples of how their collaboration with WPS enhanced the student learning experience. In one example, faculty at WSU partnered with 5th grade teachers to establish a project every October, called "Columbus on Trial," to support effective integration of elementary social studies with multiculturalism.

✓ PAR 5: Sponsoring Organization evaluates partnerships on an ongoing basis, sustains those that are effective, and takes steps to improve those that are not.
- Onsite, all Partners (n=10) agreed WSU evaluates the quality of their partnership on an ongoing basis and WSU takes steps to improve the partnership. Similarly, 90 percent (n=10) of Partners indicated their partnership is open to change and regularly steps back to discuss progress and challenges. According to the Field-Based Experiences staff, WSU reaches out to PK-12 principals each year to discuss PK-12 schools' needs as well as what WSU has done (e.g., WPS designed courses with faculty, faculty teaching in PK-12 buildings). The conversation results in a "briefing with faculty on what worked and what didn't work." In the offsite submission, WSU identifies several ways in which partnerships are evaluated (e.g., PDS Council to assess PDS partnerships, TEAC). Through their ongoing evaluation, WSU has identified their most active partnerships are PDS schools that are closer to campus or schools that have been long-standing partners. As a result, WSU is working to enrich their partnerships at schools located further away; an example includes bringing projects WSU has implemented at one PDS school to other schools.

Findings

None		
Overall Domain Recommendation	✓	Exemplary
		Proficient
		Needs Improvement
		Unsatisfactory

Domain Summary

Worcester State University's partnerships with Worcester Public Schools have proven beneficial for WSU's candidates as well as Partners, therefore WSU is rated "Exemplary" in this domain.

Through the Professional Development Schools in WPS, WSU has integrated candidates into the WPS experience in a variety of ways. For example, WSU offers educator preparation courses to candidates within the PK-12 schools. Candidates' field-based experiences are supported by educators within WSU's PDS network and WSU's clinical faculty members, who are WPS teachers working directly with WSU, help to monitor the quality of field-based experiences. Each year, WPS hires around 30 percent of WSU's completers into the district, indicating the integrated training experience has supported a strong, consistent pipeline of educators who are ready to enter the district as practitioners. A Partner onsite stated:

> *"The benefit of having the partnership is we love to hire them [WSU candidates]. The experience that they have and the bonds they create with students, families, and colleagues really help [to] transition really smoothly. They know the whole climate, process, procedures. When we're able to hire, they're like 5th year employees."*

When asked onsite, 100 percent (n=5) of Partners who identified as PK-12 school/district leaders (e.g., Superintendents, Central Office Staff, Principals) agreed candidates who complete the program are prepared to be effective educators. All PK-12 school/district leaders (n=5) also agreed they would hire candidates who complete WSU's program.

Onsite, partners across several districts and organizations attested to the mutually beneficial partnership with WSU and highlighted ways in which WSU has supported their programs and teachers (see Table 4 for Partners represented onsite). For example, WSU has been integral in staffing the AVID tutorial program and WSU faculty have offered support to PK-12 teachers to prepare for civic learning projects (e.g., Columbus on Trial and the Blackstone River Watershed projects at May Street School); other projects/events supported by WSU include Math Center Days at May Street School and Columbus Park School; and Family Math Night and Book Buddies at Tatnuck Magnet. Via the TEAC and PDS Council, WSU is able to identify the school/district needs on an ongoing basis and as a result has developed programming to support district goals (e.g., stronger math preparation for elementary educators, district diversity goals, preparation for administrators).

Overall, 67 percent (n=9) of Partners (including PK-12, non-profit, and community college partners) indicated their partnership can be best described as a partnership that is designed around the effective preparation and strategic recruitment/ hiring/ongoing development of educators in order to improve both student learning and the long-term sustainability of the educator pipeline. Additionally, 89 percent (n=9) of Partners agreed considering the costs of their partnership (e.g., monetary, time, capacity, etc.), their district is getting a valuable return on its investment. All (n=9) Partners also agreed they would recommend other schools/districts establish partnerships with WSU.

Table 4. WSU's declared partner from the offsite submission, partner represented during the onsite portion of the review, and WSU's top hiring PK-12 districts.

WSU's Declared Partners	Partner Represented During Onsite Portion of Review	WSU's Top Hiring Districts (2018)
• AVID Program • Auburn Public School • Dudley-Charlton Regional School District • Tantasqua Regional Union 61 • Wachusett Regional School District • Worcester Public Schools	PK-12 Districts: • Auburn • Tantasqua Regional & Union 61 Districts • Wachusett • Worcester (7 people) Other: • AVID Program Specialist • Quinsigamond Community College	• Worcester (28.7%) • Wachusett (3.0%) • Auburn (2.9%) • Douglas (2.3%)

Professional Suggestions

● Onsite, Field-Based Experiences Staff shared they are in the "pilot stage of setting up" and strengthening their partnership with Auburn Public Schools. They are working on this after reaching out to schools to ask about interest in establishing a "partnership at the district level." As WSU works to strengthen partnerships with districts other than Worcester Public Schools, WSU should consider aspects of the WSU-WPS partnership that can be best replicated and scaled (e.g., PDS, cohorts of candidates placed in schools, etc.).

Domain: Continuous Improvement

Is your organization driven by continuous improvement efforts that result in better prepared educators?

Commendations
None

Met Criteria

✓ CI 2: The consistent and ongoing use of internal and external evidence, including DESE data, informs strategic decisions that impact the Sponsoring Organization, education programs, candidates, and employing schools/districts.

- Overall, evidence indicates WSU considers a variety of internal and external data sources to support continuous improvement efforts. When asked onsite, 82 percent (n=11) of Full-time Faculty, 75 percent (n=8) of Part-time Faculty, and 60 percent (n=5) of Program Supervisors agreed data, including DESE data, is consistently used to inform strategic decisions that impact WSU, preparation programs, candidates, and employing schools/districts. When asked to elaborate on their responses, full-time faculty referenced MTEL data, sharing this data has informed the development of MTEL prep courses. A part-time faculty member explained, "WSU has made strategic decisions based on what the districts need. When they say they needed strong math teachers in the elementary field, they worked to get an elementary math program together." Another part-time faculty member also noted WSU has offered additional sections of coursework in the evening to support candidates who had daytime jobs. Throughout the offsite submission, WSU outlined examples of decisions made and explained how internal and external data informed the decisions (e.g., MTEL pass rates; program enrollment numbers; DESE's stakeholder survey; WSU's surveys for partners, candidates, and WSU alumni). In the offsite narrative, WSU also shared they are in the process of revising some internal data tools. For example, the existing program completer survey did not capture the full experience of candidates and were not fully aligned with program approval domains, therefore WSU made the decision to revise the survey.

✓ CI 3: Sponsoring Organization acts on feedback solicited from internal and external stakeholders (including candidates, graduates, district and school personnel, and employers) in continuous improvement efforts.

- Most stakeholder groups onsite agreed WSU collects feedback from them and makes changes as a result (Table 5). While fewer candidates/completers agreed they have seen WSU make changes, several candidates/completers onsite cited examples of when WSU has acted on their feedback. One candidate/completer shared, "I was part of the [Reading] program when it was not a good set up. I told them they had to put someone in charge if the program was to continue. [It] was so hard to get information [about] licensure. Reading was pushed to the side. It wasn't a great experience. [I am] glad to hear that there is someone in charge now." An Administrator candidate/completer also shared, "The professors have asked for feedback throughout the courses and they adjusted based on [our] feedback." Candidates/completer in the Initial, Baccalaureate programs noted WSU set up a committee to open dialogue between candidates and faculty. Candidates/completers shared:
    - "WSU uses feedback. [I am] part of a committee that they put together for student feedback and [we] meet a couple of times a semester with Dr. Kaniu (Education Chair). We gather information to inform what they are doing. One of my professors asked me to participate."
    - "I am also in that committee. I love it and think it's a great way to communicate between students and professors."
    - "The education department continues to evolve by asking students for feedback and making changes based on it. Specifically, they established a committee including enrolled

students to keep a pulse on how students in various programs feel throughout the semester."

Table 5. Internal and external stakeholders in agreement WSU asks for feedback and acts on feedback provided.

Question	Internal Stakeholders			External Stakeholders		
	Full-time Faculty (n=11)	Part-time Faculty (n=8)	Program Supervisors (n=5)	Partners (n=10)	Supervising Practitioners (n=10)	Candidates/ Completers (n=97)
The organization acts on feedback from candidates, partners, employers, etc. in continuous improvement efforts.	73%	100%				
The program asks/asked for my feedback.			100%	90%	90%	61%
WSU makes changes as a result of feedback provided.			80%	90%	70%	26%

✓ CI 4: Goals articulated in the State Annual Report yield improvements to the Sponsoring Organization's educator preparation programs.
   ● In the offsite narrative, WSU explains the Education Department connects its goals to strategic initiatives of the campus community. When asked to share examples of recent goals and the resulting effect, WSU referred to goals in three areas: 1) recruiting and retaining candidates of color, 2) staying current with technology, and 3) support paraprofessionals in WPS to obtain licensure. The examples demonstrated WSU's ability to persist towards goals focused on improvements to the education programs, even when goals are not easily attainable (see Table 6).

Table 6. WSU's recent goals and progress towards goals.

Goal	Progress
Recruit a cohort of 20 students from underrepresented groups to pursue teacher education in fall 2017.	WSU collaborates with Quinsigamond Community College and WPS to attract students of color to careers in education. The EPIC grant was used to develop a pipeline to attract students of color into education. In 2017-2018, 15 students of color were recruited into the WSU teacher education program for fall 2017.
Intentionally integrate technology in education courses to focus on pedagogy and expand the use of technology beyond the use of iPads.	Additional technology has been purchased and installed in a number of classrooms at WSU. Interactive white boards, touch screens, iPads, and Chromebooks were purchased and are all being used with candidates in the licensure programs. WSU also submitted a proposal for a Digital Literacy and Computer Science licensure program to DESE. While the program did not receive approval for the new program, WSU's Education Department is working with the Communications and Computer Science Departments to integrate digital literacy into coursework as required by the SMK Guidelines.
To provide support for our external partners and Professional Development Schools in meeting their most	In Summer 2019, a cohort of 29 paraprofessionals registered for MTEL preparation and took both Reading and Writing tests with 73 percent (n=15) and 86 percent (n=14), respectively. Currently, 1 student will

urgent need to obtain teacher licensure for paraprofessionals.	receive endorsement in May for Biology, and 5 from the Moderate Disabilities Initial Licensure Program.	

Findings

❏ CI 1: Sponsoring Organization monitors individual program efficacy and ensures that candidates who complete the program are prepared to be effective in the licensure role.
  ● When asked about how WSU monitors individual program efficacy in the offsite, WSU described their process for monitoring candidates' progression through the program (e.g., moving from Stage 1 to Stage 2, candidate dispositions, passing MTELs). WSU did not explain how their oversight ensures each program is effectively preparing candidates for licensure. When asked to provide examples of changes to individual programs, two out of three examples named focused on MTEL pass rates. The third example named DESE's new pre-practicum guidelines which required all programs to develop additional pre-practicum coursework. During the Welcome Meeting onsite, Leadership noted there are "So many ways [we] collect data and as a group [we] meet on a regular basis to discuss the meaning of the information. [We] look at how to update the program and better service the students and better serve the community." Evidence collected throughout the review indicates WSU monitors programs via multiple sources of data (e.g., candidate advising surveys, course evaluations, program supervisor surveys, supervising practitioner surveys, data in Edwin). Despite this, evidence indicates candidates' experience varied by programs, signaling additional monitoring of individual program efficacy is needed to support all programs to be effective (Table 7).

Table 7. Agreement rates from candidates/completers onsite when asked about their overall program experience.

Statement	Teacher, Initial Baccalaureate (n=45)	Teacher, Initial Post-Baccalaureate (n=16)	English as a Second Language, Initial Post-Baccalaureate (n=8)	Moderate Disabilities, Initial Post-Baccalaureate (n=8)	Reading Specialist (n=3)	Administrative Leadership (n=9)
Overall, I would recommend this program to others.	69%	94%	88%	75%	33%	78%
Overall, my experience in this program has prepared me to be an effective educator.	64%	94%	75%	75%	33%	78%

Overall Domain Recommendation			Exemplary
	✓		Proficient
			Needs Improvement
			Unsatisfactory

Domain Summary

Throughout the review, WSU identified several changes and initiatives the organization has taken on that were heavily influenced by schools'/districts' needs (e.g., new program proposals, evening coursework to support working IAs, additional MTEL supports, development of a liberal studies major to increase STEM enrollment).

These examples demonstrate WSU is committed to continuous improvement efforts in service of PK-12 districts. Some changes were large-scale and complex (for example, WSU redesigned the administrator program to be responsive to the WPS Superintendent's feedback (see FBE 2)), while others were extensions of current practices (e.g., offering additional MTEL workshop times). This indicates WSU has the capacity to drive changes and work towards identified goals.

Additionally, it was evident WSU is actively collecting and reviewing internal and external data to inform decision-making, although some data systems and structures are just emerging (e.g., candidate feedback committees, a candidate advising survey). WSU should continue to invest in systems and structures to support internal monitoring based on the candidate experience across programs (e.g., coursework experienced by candidates, faculty effectiveness) so they can act to ensure effective preparation across individual programs. Overall, evidence reviewed across domains indicates WSU engages in ongoing continuous improvement efforts that have had a positive impact on its stakeholders, therefore this domain is rated "Proficient."

Professional Suggestions

None

Domain: The Candidate

Is the candidate's experience throughout the program contributing to effective preparation?

Commendations

None

Met Criteria

✓ CAN 2: Admission criteria and processes are rigorous such that those admitted demonstrate success in the program and during employment in the licensure role.
- Overall, evidence indicates WSU's admission process supports the admissions of candidates who are able to be successful in the program.
  - To enroll in the licensure program as an undergraduate (baccalaureate candidate), candidates must be accepted by the institution, declare a major or minor in Education, and hold a 2.5+ high school GPA; this requirement is higher than the institution's 2.0 minimum GPA threshold. Candidates are accepted into Stage 1 of the educator preparation track and begin by completing introductory coursework. Candidates progress to Stage 2 and Stage 3 by meeting a number of additional requirements (e.g., MTELs, GPA).
  - In the Post-baccalaureate programs, candidates submit an application package to be considered for admission (e.g., career plan essay, transcripts, evidence of passing Communications & Literacy MTELs, letters of recommendation). Faculty program coordinators review application materials to ensure candidates have sufficient subject matter knowledge. Candidates may be fully accepted, conditionally accepted, or denied admissions. In a review of candidate artifacts, examples provided confirm that WSU follows their admission process for post-baccalaureate candidates to verify content, looking at undergraduate transcripts with a GPA of 2.7 in chosen content area, and passing MTEL scores for Communication & Literacy as well as content MTELs. In one example provided, an applicant had demonstrated insufficient content knowledge and was required to take an additional content-specific course prior to admission into the education program.
- When asked onsite, 73 percent (n=11) of Full-time Faculty and 75 percent (n=8) of Part-time Faculty agreed admission criteria and processes for educator preparation programs are rigorous such that candidates admitted demonstrate success in the program. All Program Supervisors (n=5) and 80 percent (n=10) of Supervising Practitioners agreed candidates have the required subject-matter knowledge to be successful in the licensure role. Eighty percent (n=5) of Program Supervisors and 89 Percent (n=9*) of Supervising Practitioners agreed Candidates have the dispositions necessary for effectiveness in the licensure role.

✓ CAN 3: Candidates receive effective advising throughout the program (including, but not limited to, being knowledgeable about licensure requirements and career development and placement services that contribute to employment upon completion).
- While candidate/completers were mixed on the overall quality of their advising, evidence indicates WSU has processes in place to support candidates with effective advising.
  - In the offsite narrative, WSU outlines a clear process for advising (e.g., Admissions Open House, guidance on program requirements at Orientation, candidates meet with advisors each semester during Pre-Registration periods, candidates are assigned an education advisor and a content advisor) and offers candidates opportunities to engage with campus resources (e.g., resume writing workshops and mock job interviews arranged through the Career Services Department, encourage candidates to attend the Massachusetts Education Recruiting Consortium (MERC) Career Fair). In regard to career advising, WSU has hosted six visits from WPS Human Service Department between 2017 and 2019.

Additionally, the Superintendent from Tantasqua comes out to a seminar to talk about job opportunities for candidates, and WPS does a special substitute teacher training for on campus, allowing candidates to begin working as WPS substitutes in their third (junior) year. WSU also tracks candidates' advising experiences via survey each fall and spring. Survey data from Fall 2019 showed 75 percent (n=89) of candidates rated their overall experience with their advisor as "extremely positive", and 76 percent (n=89) answered "almost always" to the survey statement, "I have been able to visit my advisor when I needed to."

- While WSU outlined clear structures and processes in the offsite, some candidates/completers onsite reported they did not always have effective advising. Overall, 61 percent (n=97) of Candidates/Completers agreed they are/were effectively advised throughout the program. When exploring more specific aspects of advising, 64 percent (n=97) of Candidates/Completers agreed they are/were well informed by the program about the requirements for licensure, and 45 percent agreed they received career development and support that will have/had a positive impact on their ability to get employed upon completion. When asked to elaborate on their advising experience, one candidate/completer shared, "The beginning of my time at Worcester State was rough with the advising. I felt my advisor didn't take the time to make sure I was on the right track and because of that I ended up falling behind. However, after I switched my advisor things went smoother." Most other comments shared by candidates/completers were positive (e.g., faculty were accessible, advisor checks in). A candidate/completer noted they "especially appreciated the stages" WSU set up, and another shared that WSU "made it very clear as to what requirements were necessary in order to complete the program and receive [the] license." In a review of candidate artifacts, DESE found evidence of robust advising throughout a candidate's program.

✓ CAN 4: Candidates at risk of not meeting standards are identified throughout the program (in pre-practicum, during coursework, and while in practicum) and receive necessary supports and guidance to improve or exit the program.
  - According to the offsite submission, candidates needing additional support are identified early in their program in a variety of ways (e.g., disposition instrument, progress through stages including tracking of course grades and MTELs). Candidate artifacts reviewed by DESE confirmed WSU has a strong candidate dispositions tracking system. Artifacts also showed WSU identifies candidates at risk during coursework as well as during practicum, explicitly outlining areas of concerns and files included a plan for improvement. In some cases, candidates ultimately left the licensure route, while in other cases, candidates improved and were able to complete successfully. In most cases, the outcome was unclear or ongoing as candidates are still enrolled. Onsite, faculty noted their process to identify candidates at risk has improved, sharing "Prior to our current chair, who is amazing, the actions taken regarding [candidates] who are at risk were very inconsistent." Faculty now use several indicators that help them identify candidates at risk (e.g., grades, MTELs, key assessments). Additionally, faculty shared the Clinical Faculty play a key role as, "They are able to see our [candidates] and observe them with the modified version of the CAP. Sometimes [candidates] will re-do that part of the student teaching, we are paying attention to what they are doing in the field. The clinical faculty support them in improving and giving them the targets to improve."
  - Most stakeholders, when asked onsite, agreed candidates at risk are identified and supported to improve. Fewer stakeholders agreed candidates unable to meet standards exit the program (Table 8). When asked to elaborate however, most comments indicated they did not have experience where a candidate was at risk.

Table 8. Percentage of stakeholders agreeing candidates who are at risk are identified, supported and improve, or exit the program.

Statement	Full-time Education Faculty (n=11)	Part-time Education Faculty (n=8)	Program Supervisors (n=5)	Supervising Practitioners (n=10)
Candidates at risk of not meeting standards are identified early in coursework and/or field-based experiences.	82%	75%	80%	60%
Candidates identified to be at risk receive the support needed to improve.	91%	88%	80%	70%
Candidates who are unable to meet standards exit the program.	73%	38%	40%	50%

✓ CAN 5: Waiver policy ensures that academic and professional standards of the licensure role are met.
  ● According to the offsite submission, candidates may seek course substitutions or credit for courses completed at other institutions of higher education. Candidates complete a "waiver application" along with pertinent documents; the request package is reviewed by the Curriculum Committee to ensure coursework fulfils the requirements in the WSU course candidates hope to waive. In a review of candidate waiver artifacts submitted by WSU, all waiver examples provided were for waivers related to coursework and waivers were issued in alignment with WSU's waiver policy.

*N-sizes may shift throughout the domain when stakeholders did not answer the question in the survey.

Findings

❏ CAN 1: Systems to recruit and admit candidates result in the increased racial and ethnic diversity of completers in the workforce.
  ● While WSU has put in concerted efforts to respond to the needs of PK-12 schools/districts for a more diverse candidate pool through active recruitment (see PAR 1), efforts have not yet effectively produced an increase in the racial and ethnic diversity of completers in the workforce. Throughout the review, evidence shows WSU has implemented several long-term strategies to recruit students including efforts at Quinsigamond Community College (QCC) and in the WPS. For example:
    o WSU has developed opportunities for students who begin at QCC to enroll in the licensure programs at WSU (e.g., dual enrollment opportunities, EPIC grant, MassTeach). In the offsite, WSU explained 70 high school students have benefitted from tuition-free courses via the dual enrollment program at QCC and WSU. Since the program began in 2016, 15 students who benefitted from the dual enrollment program have received a teaching license through WSU.
    o Since 2016, WSU has held recruitment events for middle and high school students of color, such as *A Call to Teaching*, to promote enrollment in WSU's undergraduate licensure programs; to date, 250 students of color have participated in the recruitment event.
    o At the Welcome Meeting, Leadership spoke to the *Worcester Future Teachers* program, calling it a "giant program" that is a "pipeline for high school students [to] becoming teachers." The program, operated in partnership with WPS, invites high school students to campus for a week-long immersion experience where students are introduced to college campus life and the teaching career; during the academic year, the *Worcester Future Teachers* clubs come to campus each semester for a visit. In the offsite, WSU shared 120 students from WPS have participated in the two programs as high school students over the past three years and 20 students have enrolled as education majors/minors at WSU. Five students have graduated with a teaching license and are currently employed as teachers in Massachusetts. At the Welcome Meeting, faculty/staff acknowledged the Associate Dean

has positively impacted diversity efforts given WSU had fewer than 10 candidates of color when he first moved into the Associate Dean role.

- Despite ongoing efforts, candidate data over the past several years indicates WSU is not yet able to significantly increase the diversity of their completers. Since 2015-16, 8-9 percent of education completers at WSU have identified as people of color (Table 9).

Table 9. Percentage of WSU completers who identify as people of color between 2015-16 and 2019-20.

	2015-16	2016-17	2017-18	2018-19	2019-20
Completers from WSU identifying as people of color	8.4% (n=225)	8.1% (n=296)	8.6% (n=291)	9.0% (n=288)	9.1% (n=252)

Note: Completer data retrieved from the DESE Edwin Analytics database (Report EP701). Percentages and n-sizes do not include individuals who did not report their race or ethnicity.

Meanwhile, the percentage of first-year undergraduates who identify as people of color at the institution of higher education overall has increased from 23 percent (n=814) in 2015-16 to 32 percent (n=886) in 2019-20. Enrollment at the graduate level has remained between 13 and 14 percent over the past five years. The diversity of degree-seeking transfer students is higher than undergraduate and graduate enrollment with 31 to 39 percent of transfer students identifying as people of color; based on WSU's data from Fall 2019, 37 percent (n=179) of all WSU transfer students began at QCC (Table 10).

Table 10. Percentage of first-year students enrolled at Worcester State University who identify as people of color between 2015-16 and 2019-20 (Source: Worcester State University Fact Book 2019)

	2015-16	2016-17	2017-18	2018-19	2019-20
Degree-Seeking First-Time, First-Year Students at the IHE overall	23% (n=814)	26% (n=789)	30% (n=909)	33% (n=891)	32% (n=886)
Degree-Seeking Transfer Students*	31% (n=597)	37% (n=522)	38% (n=533)	39% (n=530)	34% (n=490)
Degree-Seeking Graduate and Post-Baccalaureate Students at the IHE overall	13% (n=792)	13% (n=1,090)	13% (n=939)	14% (n=837)	14% (n=872)

Note: Student profile data for Worcester State University (overall institution) retrieved from *Worcester State University Fact Book 2019*, data was compiled by WSU's Office of Institutional Research.
* The majority of degree-seeking transfer students enrolled at WSU in Fall 2019 came from Quinsigamond Community College.

Overall, evidence indicates licensure candidates in the Education Department are less diverse than the student population on WSU's campus overall. WSU's recruiting efforts at QCC are promising given the diversity of transfer students, however efforts have not yet resulted in a noticeable change. Given WSU's relatively recent efforts at QCC in addition to its long-term strategy to focus recruitment programming at the middle and high school levels, WSU should monitor efforts to determine the return of investment in its programs.

Overall Domain Recommendation		Exemplary

	✓	Proficient
		Needs Improvement
		Unsatisfactory

Domain Summary

Overall, WSU is meeting expectations in this domain, therefore the Candidate domain is rated Proficient. WSU has implemented a multi-stage approach to support and track candidates' progress throughout their time in the program (i.e., Stage 1, Stage 2, Stage 3). Each stage has specific criteria and expectations candidates must meet before they are able to advance to the next. Throughout the offsite submission, WSU cited specific data showing the number of candidates moving through the different programs and licensure pathways, demonstrating WSU is keenly aware of candidates' progress. Additionally, the multi-stage structure has enabled WSU to identify candidates in need of additional support throughout the program, including through coursework and field-based experiences. Candidates generally received the advising they needed throughout the program, although a few candidates/completers noted they had ineffective or inconsistent advising experiences. Onsite, 72 percent (n=89) of Candidates/Completers agreed overall, their experience at WSU has prepared them to be an effective educator.

While WSU has intentionally put in effort to recruit and support more candidates of color, evidence from the past few years indicates there has not yet been a significant increase in completers of color. Despite this, WSU has remained persistent in its efforts by developing new programs and initiatives and has closely tracked its impact (e.g., number of PK-12 students exploring education at WSU, number of WPS employees benefiting from WSU's licensure supports, number of recruits from QCC). There is promise in the Education Department's strategy to recruit directly from QCC and WPS, however, evidence suggests there is also possibility the Education Department may be able to increase the diversity of its candidate pool more quickly by attracting students from the overall WSU community. Overall, evidence indicates this is an ongoing area of focus and WSU is continuing to address it.

Professional Suggestions

● In 2020, DESE issued an advisory on the use of MTELs, stating, "Providers that have an existing policy in place where MTELs are used as a determining factor in decisions about admission, continuation in, or completion of initial teacher preparation programs should interrogate the implications of this policy and should consider revising existing policy based on information in this advisory."
   o Given Worcester State's current admissions requirements for Post-Baccalaureate candidates, WSU should examine potential impacts on applicants.
   o Additionally, given WSU's criteria for candidates to advance from Stage 1 to Stage 2, where passing scores on the Communications & Literacy MTEL are required, and Stage 2 to Stage 3, where passing scores on all licensure-specific MTELs are required, WSU should examine potential impacts on candidates.

Domain: Field Based Experiences

Do candidates have the necessary experiences in the field to be ready for the licensure role?

Commendations

None

Met Criteria

✓ FBE 1: Practicum hours meet regulatory requirements as per 603 CMR 7.04 (4)
- All files in the random candidate sample included evidence that practicum hours meet regulatory requirements, with the exception of a Reading Specialist who only had evidence of 78.5 of the required 150 hours. This may have been due to a clerical error in completing forms; it is recommended that WSU ensure that performance assessment cover forms are used to indicate the final number of practicum hours experienced.

✓ FBE 2: District partners are involved in the design, implementation, and assessment of field-based experiences.
- WSU integrates partners' voice into the design and delivery of their program through a variety of mechanisms (e.g., TEAC, PDS Council, principal round tables, hiring Clinical Professors). A Partner onsite cited the Clinical Professorship as an effective practice, sharing, "There is effective monitoring of student teachers. I absolutely love the agreement with WSU that gives us two or three WPS teachers that leave our schools for 2-3 years and serve WSU as WSU professors supervising student teachers and teaching classes." The Superintendent of Worcester Public Schools also noted WSU designs and shapes their programs based on WPS' input. Onsite, the Superintendent shared, "I felt that teachers who were in [the admin cohort] didn't get the experience they needed in the short period of time… I also felt as though the future administrators need to have more direct training in SPED as well as how to work with ELL students. In the new admin cohort that starts this year, for WPS candidates only, they're running courses in SPED required for our candidates as well as how to work with ELLs. [Candidates] are also going to have to do a required one-year residency in order to be able to start the year with a school leader and also learn how to end the year… That's [been] our conversation." When asked, all Partners (n=9**) generally agreed their school/district is involved in the design (56 percent), implementation (67 percent), and assessment (78 percent) of field-based experiences.

✓ FBE 3: Field-based experiences are fully embedded in program coursework such that connections between theory and practice are explicit.
- In stakeholder surveys issued by DESE between 2017-18 and 2018-19, 73 percent (n=26) of Candidates and 88 percent (n=16) of Completers agreed their field-based experiences were explicitly connected to their coursework. Similarly, 74 percent (n=78) of Candidates/Completers onsite agreed their experiences in the field are/were embedded as part of their coursework such that connections between theory and practice are/were explicit. Comments from candidates/completers signaled coursework prepared them for the practicum experience:
  - "Every course with fieldwork gives specific goals about the focus of the assignment. For example, ED149 involved classroom observation. We were provided checklists with things to pay attention to when visiting a school/classroom and had the opportunity to discuss our experiences when the class met next."
  - "Same exact thing we are seeing in practicum is what we are learning in the class as well. Classes and practicum and all those hours line up."
- According to the offsite submission, Elementary and Early Childhood candidates may participate in *Friday Rounds*, instructional rounds, at various Professional Development Schools (PDS).

During these half-days, Friday programs, candidates meet at one of the PDS where they engage in pre-rounds instruction, demonstrations, and discussion around what they observed.

✓ FBE 4: Responsibilities in pre-practicum and practicum experiences build to candidate readiness for full responsibility in licensure role.
  ● WSU has structured their program to follow a three-stage approach. In Stage 1, candidates visit the Professional Development Schools to participate in structured observations, analyze lessons, and work with small groups of PK-12 students. In Stage 2, candidates are enrolled in methods coursework and work to design, deliver, and evaluate lessons in PDS classrooms. During these pre-practicum experiences, candidates work with an assigned PK-12 educator and their Program Supervisor to assess their skill level, set goals, and develop skills; candidates have the opportunity to observe and be observed. In the practicum experience, WSU utilizes a gradual release of responsibility model where the candidate takes on increasing responsibilities throughout the practicum semester, leading to a full takeover towards the end of the practicum. Candidates' progression through the practicum is negotiated in the Triad (e.g., Supervising Practitioner, program supervisor, candidate). Candidates are also encouraged to attend professional development, Parent-Teacher conferences, student support process meetings, faculty meetings, and IEP meetings where appropriate. Onsite, 64 percent (n=73*) of Candidates/Completers agreed they feel/felt ready to take full responsibility in their licensure role during the practicum. Meanwhile, 80 percent (n=5) of Program Supervisors agreed the pre-practicum and early practicum experience prepared the candidate to take full responsibility in the licensure role by the end of the practicum. In the 2017-18 and 2018-19 stakeholder surveys issued by DESE, 67 percent (n=163) of Supervising Practitioners agreed the candidate's pre-practicum experience prepared him/her for his/her full student-teaching experience in the practicum.

✓ FBE 5: Sponsoring Organization secures and/or verifies placement(s) that meet regulatory requirements and the SO's expectations for a high-quality placement for all candidates.
  ● Overall, evidence indicates WSU is able to support candidates to have high-quality placements. Seventy-eight percent (n=9) of Partners agreed candidates are intentionally matched with site-based Supervising Practitioners that meet the organization's expectations for a high-quality placement. Seventy-four percent (n=66*) of Candidates/Completers say their practicum placement is/was high quality. Several candidates/completers noted, "WSU and WPS have a great partnership so the exposure [they] received was incredible."
  ● In the offsite narrative, WSU stated all placements must be assigned by the university, and most will be within a partner school. The only exceptions to this policy are granted to teachers of record who do their placements in the school where they are already employed. Reading Specialists onsite, who were teachers of record while enrolled in the program, noted they used their own classroom for their placement and in some cases were observed "doing reading tutoring and in their general classroom." While candidates are observed doing work aligned with the Reading Specialist license, one Reading Specialist candidate/completer shared, "It seemed out of place to be observed in my own classroom setting [and not a Reading Specialist class]." Administrator candidates shared, "Placements were not sought out for [them and they] had found the placement within the buildings that they have worked in," although many noted they thought their placements were high quality.

✓ FBE 7: Field-based experiences are in settings with diverse learners (e.g., students from diverse ethnic, racial, gender, socioeconomic, and exceptional groups).
  ● According to Field-Based Experiences staff, most candidates complete their pre-practicum experiences in Worcester Public Schools. Candidates primarily stay in two PDS schools, and the PDS schools are "very diverse [with] many students from different cultural and language

backgrounds. [Candidates] get to see a variety of what education classrooms could look like. That gets them that exposure." Many Candidates/Completers onsite agreed (80 percent, n=76) that they have had field-based experiences in settings with diverse learners (e.g., students from diverse ethnic, racial, gender, socioeconomic, and exceptional groups). Ninety-six percent (n=26) of Candidates and 94 percent (n=16) of Completers, via stakeholder surveys issued by DESE between 2017-18 and 2018-19 agreed, during their field-based experiences, they worked with students from diverse ethnic, racial, socioeconomic and exceptional groups.

✓ FBE 8: Supervising Practitioner qualifications meet regulatory requirements set forth in [603 CMR 7.02](#) and in [Guidelines for Program Approval.](#)
  ● In a review of candidate artifacts, evidence from the random candidate files supports that Supervising Practitioner's qualifications meet regulatory requirements.

✓ FBE 9: Supervising Practitioners and Program Supervisors receive training, support and development from the SO that impacts candidate effectiveness.
  ● Overall, evidence indicates Supervising Practitioners and Program Supervisors believe they receive sufficient training and support from WSU for their role. Sixty-four percent (n=11) of Supervising Practitioners and 60 percent (n=5) of Program Supervisors agreed they receive training from WSU that helps them be an effective supervisor. Seventy-three percent (n=11) of Supervising Practitioners and 80 percent (n=5) of Program Supervisors agreed they receive support and development from WSU. A Supervising Practitioner shared they "attended a meeting and was provided with a package of information from day 1." A Supervising Practitioner also noted, "There are training opportunities and modules that help [them] to evaluate candidates' readiness. It ensures a non-biased and evidence-based evaluation system and feedback." Another Supervising Practitioner shared, "Worcester State University has supported me in my role as Supervising Practitioner by providing me with reading material, online professional development, and meetings with the Worcester State staff and other Supervising Practitioners at the start of each semester." Field-Based Experiences staff shared several strategies for training and supporting both Program Supervisors (e.g., orientation, training on CAP, roundtable discussions, video recordings, calibration discussions) as well as Supervising Practitioners (e.g., practitioner conference, meet regularly with Program Supervisors, ongoing communication, completing CAP training and sending certificates to WSU).

✓ FBE 10: Candidates receive high-quality, targeted feedback during field-based experiences that improves their practice.
  ● Most Candidates/Completers agreed they received high-quality targeted feedback from their Supervising Practitioner (76 percent, n=68*) or Program Supervisor (77 percent, n=69*) during the field-based experiences. When asked to share more about their experience, candidates/completers across all program areas shared positive experiences, noting they received direct, specific feedback from their Supervising Practitioners and/or their Program Supervisors. All Program Supervisors (n=5) onsite agreed Supervising Practitioners provided candidates with high-quality, targeted feedback during the field-based experiences that improves their practice. Seventy-eight percent (n=163) of Supervising Practitioners, via stakeholder surveys issued between 2017-18 and 2018-19, agreed the candidate's Program Supervisor provided feedback that improved the practice of the candidate. Evidence from a random sample of candidate files showed concrete feedback was provided during field experiences, though in some cases feedback was vague.

*The n-size of candidates/completers varies because some indicated 'Not Yet Applicable' for questions in the Field-Based Experiences section and/or partial candidate/completer surveys were submitted. In the case of partial surveys, DESE

reviewed duplicate surveys from candidates/completers and only included responses where each candidate/completer made the most progress.
**The n-size of partners may vary because partial surveys were submitted.

Findings

❏ FBE 6: Candidates participate in field-based experiences that cover the full academic year.
  - According to Field-Based Experiences staff, candidates see the full range because, "Pre-practicum [experiences are] set up to go one semester and [candidates] go to the following semester for practicum." Despite this, evidence indicates not all candidates may have field-based experiences that cover the full year. Only 67 percent (n=73*) of Candidates/Completers onsite agreed they have had field-based experiences that cover a range of time periods throughout the full school year (e.g. start of the year, middle of the year, assessment period, end of year). Other than noting field-experiences are tied to certain courses that are offered throughout the year, Field-based Experiences staff onsite did not articulate how they ensure candidates have experiences that cover the full academic year.

❏ FBE 11: Sponsoring Organization ensures that Program Supervisors and Supervising Practitioners are measurably contributing to and effectively evaluating the readiness of candidates.
  - Throughout the formal review, WSU did not articulate how they ensure Program Supervisors and Supervising Practitioners are positively impacting candidates' preparation experience or effectively evaluating candidates. When asked onsite, Field-Based Experiences staff shared they know field supervisors are effective given WSU works with Program Supervisors who have been educators. In terms of ensuring Supervising Practitioners are effective with candidates, WSU cited the calibration conversations with the Program Supervisor as part of the CAP implementation. Additionally, at the end of the year, WSU collects feedback from candidates about their experiences. Despite this, evidence also indicates WSU is not actively monitoring performance assessments given WSU is not yet able to ensure full implementation of CAP (see FBE 12). Overall, it does not appear WSU is consistently monitoring Program Supervisors' and Supervising Practitioners' experiences with candidates in the field to ensure they are effectively evaluating candidate readiness throughout the program.

❏ FBE 12: Candidate readiness for the licensure role is measured using a performance assessment (e.g. Candidate Assessment of Performance) that is implemented consistently across/within programs and rigorously such that only candidates who are ready to make a positive impact for PK-12 students in the licensure role complete the program.
  - Overall, there is mixed evidence regarding WSU's ability to consistently and rigorously evaluate candidates' readiness for licensure via the end-of-program performance assessment across all programs.
    - Onsite, 80 percent (n=5) of Program Supervisors and 70 percent (n=10) of Supervising Practitioners agreed candidates' ratings on the end-of-practicum assessment reflect their readiness for the licensure role. However, fewer Program Supervisors (60 percent, n=5) and Supervising Practitioners (50 percent, n=10) agreed only candidates who are ready to make a positive impact for PK-12 students in the licensure role complete the program.
    - In most random candidate files reviewed by DESE, candidate ratings did not appear to be informed by PK-12 student feedback or student learning measures; these are both required evidence sources in the CAP. The only form of evidence used to support formative and summative ratings were observations, indicating WSU is not yet ensuring full implementation of the CAP. According to the CAP Dashboard (EP901), WSU issued 'Exemplary' ratings in 'Quality' at significantly higher rates for several programs when compared to the state in 2017-18 and 2018-19. This signals more attention is needed in these program areas to ensure consistent, rigorous, and full implementation of the end-of-program performance assessment (see Table 11).

Table 11. Percentage of Exemplary Ratings in Quality issued by WSU in comparison to all programs across the state.

Year	Program	Percentage of Exemplary Ratings Issued at the WSU	Percentage of Exemplary Ratings Issued at the State Level
2017-18	Chemistry 8-12 Initial, Post-Baccalaureate	50% (n=6)	29% (n=21)
	Spanish 5-12 Initial, Post-Baccalaureate	78% (n=14)	37% (n=64)
2018-19	Biology 8-12 Initial, Post-Baccalaureate	50% (n=6)	14% (n=53)
	Chemistry 8-12 Initial, Post-Baccalaureate	58% (n=7)	25% (n=35)
	English 8-12 Initial, Post-Baccalaureate	83% (n=5)	19% (n=90)

Overall Domain Recommendation		
		Exemplary
	✓	Proficient
		Needs Improvement
		Unsatisfactory

Domain Summary

Evidence indicates WSU is able to facilitate effective field-based experiences for candidates, in particular by leveraging their partnership schools. Through the PDS, WSU organizes observations and hands-on experiences for candidates that have bridged the connections between coursework and practice. The majority of WSU candidates complete pre-practica in the PDS which enables WSU to ensure candidates work with diverse learners. This practice also supports candidates to receive support and supervision from a cadre of Program Supervisors and Supervising Practitioners who are familiar with WSU's expectations. Most candidates are also placed within partner schools for their practicum experience; WSU works directly with school leaders to identify effective Supervising Practitioners who are able to mentor and give candidates actionable feedback on a regular basis. Overall, stakeholder surveys issued between 2017-18 and 2018-19 indicated field-based experiences helped prepare candidates for their licensure role:

- 77 percent (n=163) of Supervising Practitioners agreed the candidates' field-based experiences prepared them to be an effective educator;
- 77 percent (n=26) of Candidates, at the end of their program, agreed their field-based experiences prepared them to be an effective educator; and
- 94 percent (n=16) of Completers, after one full year of PK-12 employment, agreed their field-based experiences prepared them to be an effective educator.

Despite this, throughout the review, DESE also identified findings that WSU needs to address to ensure consistently effective field-based experiences. For example, WSU embedded field-based experiences in required coursework to support candidates to have experiences throughout the year, however evidence indicates WSU is not yet able to ensure this is the case. Additionally, performance assessment data revealed inconsistency in rigor across programs. For example, CAP summative ratings do not yet explicitly include PK-12 student feedback or student learning measures. Additionally, WSU rated candidates "Exemplary" at significantly high rates in several program areas. While WSU has systems and structures in place to support candidates' field-based experiences overall, WSU may consider bolstering efforts in some areas to address the identified gaps moving forward; for example, WSU may consider updating training and providing more direct support to Supervising Practitioners and Program Supervisors in order to ensure the rigorous implementation of CAP across all programs.

Professional Suggestions

None

Domain: Instruction

Do candidates have the necessary knowledge and skills to be effective educators?

Program Level: Domain Recommendations

Program Name	Exemplary	Proficient	Needs Improvement	Unsatisfactory	New Program
Administrative Leadership Programs ● Principal/Assistant Principal, PreK-8, Initial, Post-Baccalaureate ● Principal/Assistant Principal, 5-12, Initial, Post-Baccalaureate			✓		
Teacher, Initial Baccalaureate Programs ● Biology, 8-12 ● Chemistry, 8-12 ● Early Childhood, PreK-2 ● Earth and Space Science, 8-12 ● Elementary, 1-6 ● English, 5-12 ● Foreign Language - [Spanish], 5-12 ● General Science, 5-8 ● Health/Family and Consumer Sciences, All Levels ● History, 5-12 ● Mathematics, 5-8 ● Mathematics, 8-12			✓		
Teacher, Initial Post-Baccalaureate Programs ● Biology, 8-12 ● Chemistry, 8-12 ● Early Childhood, PreK-2 ● Earth and Space Science, 8-12 ● Elementary, 1-6 ● English, 5-12 ● Foreign Language - [Spanish], 5-12 ● General Science, 5-8 ● History, 5-12 ● Mathematics, 5-8 ● Mathematics, 8-12		✓			
English as a Second Language, Initial Post-Baccalaureate Programs ● English as a Second Language, PreK-6		✓			

● English as a Second Language, 5-12					
Moderate Disabilities, Initial Post-Baccalaureate Programs ● Moderate Disabilities, PreK-8 ● Moderate Disabilities, 5-12		✓			
Reading Specialist, All Levels, Initial, Post-Baccalaureate			✓		
Middle School: Mathematics/Science 5-8, Initial Baccalaureate					✓
School Psychologist, All Levels, Initial, Post-Baccalaureate	Accredited by the National Association of School Psychologists – WSU has approval until September 15, 2024				
Speech Language and Hearing Disorders, All Levels, Initial, Post-Baccalaureate	Accredited by the Council on Academic Accreditation in Audiology and Speech-Language Pathology – WSU has approval until March 31, 2027				

Instruction: Administrative Leadership Programs (Principal/Assistant Principal PreK-8, and Principal/Assistant Principal 5-12, Initial, Post-Baccalaureate Programs)

Instruction Domain Criteria Determinations
Commendations
None
Met
None
Findings

❏ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
  - According to the offsite submission, WSU monitors completers' pass rates for the Performance Assessment for Leaders (PAL) to ensure completers are ready for the licensure role. Over the past three years, 100 percent (n=37) of WSU completers have passed PAL. Despite this, it is important to note PAL requires principal candidates demonstrate their leadership knowledge and skills based on actual experiences within PK-12 schools.
  - When asked about their coursework in the administrator programs at WSU, Principal candidates/completers onsite reported mixed experiences. Less than half, (44 percent, n=9), agreed their overall coursework provides/ed them with the instructional skill necessary to be effective administrators. When asked about specific professional standards for administrative leadership:
    - 44 percent (n=9) agreed they are/were well prepared to support teachers to meet the needs of English Language Learners.
    - 78 percent (n=9) agreed they are/were well prepared to ensure instructional practices reflect high expectations, engage all students, and are personalized to accommodate diverse learning styles and needs.
    - 67 percent (n=9) agreed they are/were well prepared to provide effective supervision and evaluation in alignment with state regulations and contract provisions.
    - 67 percent (n=9) agreed they are/were well prepared to establish routines that give a staff and students a sense of order, discipline, and predictability and address a full range of safety, health, and student needs.

Comments from candidates/completers signaled courses were insufficiently differentiated for their licensure grade bands and noted inconsistency in the quality of coursework (see domain summary below for specific examples).

❏ INS 3: Completers have a positive impact on outcomes for PK-12 students.
  ● According to WSU, completers do or will have a positive impact on students due to their preparation experience, including coursework and field experiences. Principal candidates complete the necessary 500-hour practicum and gain experiences that will prepare them for the licensure role. Despite this, only 56 percent (n=9) of Principal Candidates/Completers onsite agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of this program.

Not Applicable

INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.

Overall Domain Recommendation		Exemplary
		Proficient
	✓	Needs Improvement
		Unsatisfactory

Domain Summary

The Instruction domain for Principal programs has a rating of Needs Improvement due to gaps and inconsistencies in candidates' experiences in the program, particularly through coursework. More specifically, several candidates/completers noted the lack of differentiation in coursework affected their experience. Only 33 percent (n=9) of Principal Candidates/Completers onsite agreed coursework is/was differentiated for their specific grade level. Additionally, only 33 percent (n=9) agreed the sequence of preparation coursework supports/ed their increased knowledge and skills. When asked to share more about their experiences, candidates/completers stated:
  ● "[There] is no differentiation between high school and elementary school. Our needs are vastly different, but [I] have learned a lot from my Elementary peers. [I] think it's one place for the program to improve and grow."
  ● "[We] had 20 or 18 in our cohort. [We] took the same classes and we broke off for short topics. [I] learned a lot, but the focus [was] on high school. It wasn't always relevant to me."
  ● "[I] felt ill prepared for Ed Law. [It] could have been more practical."
  ● "Ed law… there's a lot of intricate laws that need to be followed. [The] course I took didn't prepare me as well as I hope."
  ● "Some courses, [such as teacher evaluation and finance], were very beneficial. The course involving educational law needed to be more relevant, practical, and engaging."

When asked further about their coursework, Principal Candidates/Completers (n=9) indicated the following:
  ● 67 percent agreed there are/were clear connections between the different courses in the program.
  ● 56 percent agreed content delivery is/was consistently high-quality regardless of different instructors.
  ● 56 percent agreed faculty do/did use formative and summative assessment data to target their areas of need.
  ● 67 percent indicated faculty regularly model/ed pedagogical and content practices of the discipline.
  ● 67 percent indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

While there are inconsistencies in coursework, 78 percent (n=9) of Principal Candidates/Completers agreed their experience in this program overall has prepared them to be an effective administrator. Similarly, 78 percent (n=9) agreed overall, they would recommend the principal programs at WSU to others.

Professional Suggestions

None

Instruction: Teacher, Initial Baccalaureate Programs (Biology 8-12, Chemistry 8-12, Early Childhood PreK-2, Earth and Space Science 8-12, Elementary 1-6, English 5-12, Foreign Language - [Spanish] 5-12, General Science 5-8, Health/Family and Consumer Sciences All Levels, History 5-12, Mathematics 5-8, and Mathematics 8-12, Initial Baccalaureate)

Instruction Domain Criteria Determinations

Commendations

None

Met

✓ INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.
- According to the offsite, WSU requires candidates in the Early Childhood and Elementary programs at WSU pursue two majors, one in Education and another in the arts or sciences. Middle school and high school candidates are required to pursue a major in the content area of their license along with the minor in Education. In the 2018-19 Program Completer Survey data shared by WSU, 61 percent (n=61) of completers agreed coursework provided them with the content knowledge necessary to be an effective educator. Similarly, 62 percent (n=47) of Candidates/Completers onsite agreed WSU ensures/ed they have the content knowledge necessary to be an effective educator. Supervising Practitioners who have supervised baccalaureate candidates were more positive; 89 percent (n=9) of Supervising Practitioners agreed completers have the content knowledge necessary to be effective in the licensure role.

✓ INS 3: Completers have a positive impact on outcomes for PK-12 students.
- In the offsite submission, WSU shared data from a recent exit survey of WSU Program Completers indicating 77 percent (n=38) of completers believed that coursework prepared them to make a positive impact on PK-12 student learning. When asked onsite, 62 percent (n=45*) of Baccalaureate Candidates/Completers agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of the program. Seventy-eight percent (n=9) of Supervising Practitioners agreed the programs at WSU prepares licensure candidates to have a positive impact on outcomes for PK-12 students.

Findings

❏ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
- While WSU has a system in place to track candidates' progress through the program, candidates/completers were mixed about their pedagogical preparation.
  - In the offsite, WSU explained candidates are expected to begin integrating methods and content knowledge in Stage 2 of the program; in this stage, coursework is designed to develop candidates' pedagogical content knowledge. As part of its multi-stage tracking,

WSU requires candidates pass each course with a C+ or above to progress through the program.

- When asked onsite, 60 percent (n=45*) of Teacher, Initial Baccalaureate Candidates/Completers agreed coursework provides/ed them with the instructional skill necessary to be effective in their licensure role. However, only 40 percent (n=45*) agreed they are/were well prepared to meet the needs of English Language Learners. Several candidates/completers shared they "did not find the ELL class effective" and it was their field-based experiences that supported their learning in this area. When asked about other instructional skills, candidates/completers (n=45*) were mixed on their experience:
  - 42 percent agreed they are/were well prepared to employ a variety of classroom management strategies.
  - 56 percent agreed they are/were well prepared to design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
  - 44 percent agreed they are/were well prepared to analyze data from assessments, draw conclusions, and share them appropriately.
  - 47 percent agreed they are/were well prepared to employ a variety of strategies to assist students to develop social-emotional competencies.
  - 42 percent agreed they are/were well prepared to engage in regular, two-way, and culturally proficient communication with families about student learning and performance.
  - 62 percent agreed they are/were well prepared to reflect on their practice to improve teaching and learning.
- Supervising Practitioners who have supervised baccalaureate candidates also reported mixed experiences. When asked about overall instructional skills, 67 percent (n=9) of Supervising Practitioners agreed completers have the pedagogical skills necessary to be an effective educator. However, only 56 percent (n=9) agreed completers are well-prepared to meet the needs of English Language Learners, and only 44 percent (n=9) agreed completers are well-prepared to employ a variety of classroom management strategies. However, one Supervising Practitioner also noted, "Candidates who come from WSU have every tool they need [to be effective] aside from experience."

Overall Domain Recommendation		
		Exemplary
		Proficient
	✓	Needs Improvement
		Unsatisfactory

Domain Summary

The Instruction domain for Teacher, Initial Baccalaureate programs has a rating of Needs Improvement because of inconsistencies in candidates' experiences and preparedness relative to gaining the pedagogical skills necessary to be effective in their role.

Onsite, 57 percent (n=47) of Initial, Baccalaureate Candidates/Completers agreed the sequence of preparation coursework supports/ed their increased knowledge and skills. One candidate/completer shared, "Our courses here at Worcester State build upon one another. In many courses we talk about best practice and accessing and building upon students' prior knowledge and that's exactly how our professors teach us."

Other candidates/completers shared mixed experiences about the quality of their coursework and referenced the multi-stage program design noting, "the education courses [they] took at the beginning of [the] program (i.e.,

Stage 1 and Stage 2) were not differentiated for their specific subject area. However, many of the courses in Stage 3 were focused on or the professor made it a point to focus more on the subject areas of study for the students in the class." When all Initial, Baccalaureate Candidates/Completers were asked about their experience, only 36 percent (n=47) agreed coursework is/was differentiated for their specific subject area and grade level. Additionally, only 43 percent (n=47) agreed content delivery is consistently high-quality regardless of different instructors. Several candidates/completers also shared the following:

- "I did not find the ELL class effective. My pre-practicum experience in [an] ELL class was what helped me."
- "I feel as though there was little feedback in some courses [so] I had to rely on feedback from my observations to improve my teaching."
- "I really did not receive much instruction on how to provide for diverse learners until I took the *Provisions for Diverse Learners* course."
- "I definitely would have preferred more targeted feedback [in coursework] to improve my practice."
- "We definitely learned more of [classroom culture] in the practicum and then come back and talk about it. [Coursework did] not necessarily prepare us for that."

Overall, 69 percent (n=45*) of Initial, Baccalaureate Candidates/Completers onsite agreed they would recommend the program to others. Similarly, 64 percent (n=45*) agreed their experience in this program prepared them to be an effective educator.

When asked to report on coursework experience, Initial, Baccalaureate Candidates/Completers indicated their agreement with whether the following practices were done at a consistently high-level:

- 62 percent (n=47) agreed there are/were clear connections between the different courses in the program.
- 51 percent (n=45*) indicated faculty regularly model/ed pedagogical and content practices of the discipline.
- 58 percent (n=45*) indicated faculty regularly model/ed practices and strategies for meeting the needs of diverse learners.
- 58 percent (n=45*) indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

The n-size of candidates/completers varies because the candidate/completer did not respond to all questions or partial candidate/completer surveys were submitted. In the case of partial surveys, DESE reviewed duplicate surveys from candidates/completers and only included responses where each candidate/completer made the most progress.

Professional Suggestions

None

Instruction: Teacher, Initial Post-Baccalaureate Programs (Biology 8-12, Chemistry 8-12, Early Childhood PreK-2, Earth and Space Science 8-12, Elementary 1-6, English 5-12, Foreign Language - [Spanish] 5-12, General Science 5-8, History 5-12, Mathematics 5-8, and Mathematics 8-12 Initial, Post-Baccalaureate)

Instruction Domain Criteria Determinations
Commendations
None
Met

- ✓ INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.
  - Onsite, 88 percent (n=17) of Initial, Post-Baccalaureate Candidates/Completers agreed WSU ensures/ed they have the content knowledge necessary to be an effective educator. Similarly, 75 percent (n=4) of Initial, Post-Baccalaureate Supervising Practitioners agreed completers have the content knowledge necessary to be effective in the licensure role. According to the offsite submission, WSU screens for candidates' content knowledge at the start of the program through several measures (e.g., passing content MTELs, transcript review for undergraduate major or coursework aligned with SMKs).

- ✓ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
  - According to the offsite, the post-baccalaureate program is structured to emphasize pedagogy and focuses on pedagogical development through demonstration, analysis, and planning. When asked onsite, 81 percent (n=16*) of Teacher, Initial Post-Baccalaureate Candidates/Completers agreed coursework provides/ed them with the instructional skill necessary to be effective in their licensure role. When asked further candidates/completers (n=16*) indicated they were mostly prepared with instructional skills:
    - 75 percent agreed they are/were well prepared to meet the needs of English Language Learners.
    - 81 percent agreed they are/were well prepared to employ a variety of classroom management strategies.
    - 88 percent agreed they are/were well prepared to design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
    - 63 percent agreed they are/were well prepared to analyze data from assessments, draw conclusions, and share them appropriately.
    - 63 percent agreed they are/were well prepared to employ a variety of strategies to assist students to develop social-emotional competencies.
    - 75 percent agreed they are/were well prepared to engage in regular, two-way, and culturally proficient communication with families about student learning and performance.
    - 94 percent agreed they are/were well prepared to reflect on their practice to improve teaching and learning.

- ✓ INS 3: Completers have a positive impact on outcomes for PK-12 students.
  - According to WSU, 77 percent (n=38) of WSU Program Completers, via an exit survey, believed that coursework prepared them to make a positive impact on PK-12 student learning. This is similar to results from onsite data collection, where 88 percent (n=16*) of Candidates/Completers agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of their program. Additionally, 75 percent (n=4) of Supervising Practitioners who have supervised Initial, Post-Baccalaureate candidates agreed the program prepares licensure candidates to have a positive impact on outcomes for PK-12 students.

Findings

None

Overall Domain Recommendation		Exemplary
	✓	Proficient
		Needs Improvement
		Unsatisfactory

Domain Summary

The Instruction domain for Teacher, Initial Post-Baccalaureate programs has a rating of Proficient because overall evidence indicates Initial, Post-Bacc candidates/completers are well-served through the program.

- One candidate/completer praised WSU's coursework, sharing, "[Coursework] is always differentiated and the content appropriate in my experience. I was especially fortunate to have Dr. Monaghan, who was a public science teacher for years. teaching me the ropes."
- Other candidates/completers appreciated the faculty in the program. One candidate/completer stated, "Most [professors at WSU] had been teachers themselves and had [experiences in] a variety of diverse districts. [Professors] Young and Monaghan are the gurus for me... Without their teaching, I would've struggled. They make their lessons so authentic." Another candidate/completer added, "The feedback I have gotten is really good. You can tell [the professors] really care about what they are saying to you. They care about how you are making your way through the program."

Most Initial, Post-Baccalaureate Candidates/Completers reported their experiences were effective overall. Ninety-four percent (n=16) agreed they would recommend the program to others. Additionally, 94 percent (n=16) agreed their experience in the program has prepared them to be an effective educator.

Furthermore, Candidates/Completers indicated their agreement the following practices were done at a consistently high-level:

- 88 percent (n=17) agreed the sequence of preparation coursework supports/ed their increased knowledge and skills.
- 81 percent (n=16*) agreed faculty do/did use formative and summative assessment data to target their areas of need.
- 88 percent (n=16*) indicated faculty regularly model/ed pedagogical and content practices of the discipline.
- 75 percent (n=16*) indicated faculty regularly model/ed practices and strategies for meeting the needs of diverse learners.
- 81 percent (n=16*) indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

The n-size of candidates/completers varies because the candidate/completer did not respond to all questions or partial candidate/completer surveys were submitted. In the case of partial surveys, DESE reviewed duplicate surveys from candidates/completers and only included responses where each candidate/completer made the most progress.

Professional Suggestions

None

Instruction: English as a Second Language Teacher, Initial Post-Baccalaureate Programs (English as a Second Language PreK-6 and English as a Second Language 5-12, Initial, Post-Baccalaureate)
Instruction Domain Criteria Determinations
Commendations
None
Met
✓ INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.   ● Onsite, 75 percent (n=8) of ESL Candidates/Completers agreed WSU ensures/ed they have the content knowledge necessary to be an effective educator. A few candidates/completers onsite

shared the, "connection and repetition of the theorists and methods" in their coursework helped them learn the content" One candidate/completer shared, "There were a lot of connections between the classes. It helped me to remember things better. Language theorists would come up across courses and their views on how we should set up our lessons and things about English language learners. Helped me prepare for the classroom."

- ✓ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
  - ● In the offsite, WSU shared an example of an ESL candidates' portfolio as evidence for how WSU knows completers have the pedagogical skills necessary to be effective. Onsite, 63 percent (n=8) of ESL Candidates/Completers agreed coursework provides/ed them with the instructional skill necessary to be effective in their licensure role. When asked about specific instructional skills, candidates/completers (n=8) reported the following:
    - ▪ 63 percent agreed they are/were well prepared to meet the needs of English Language Learners.
    - ▪ 50 percent agreed they are/were well prepared to employ a variety of classroom management strategies. A candidate/completer shared, "I never felt equipped in classroom management. That was definitely lacking in the coursework."
    - ▪ 75 percent agreed they are/were well prepared to design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
    - ▪ 63 percent agreed they are/were well prepared to analyze data from assessments, draw conclusions, and share them appropriately. One candidate/completer shared, "There could have been more preparation with learning how to analyze assessment. Although we were taught well how to administer, create, and implement appropriate assessment tools, I feel I could have liked more practice on how to utilize results to achieve the best outcomes for instructions."
    - ▪ 38 percent agreed they are/were well prepared to employ a variety of strategies to assist students to develop social-emotional competencies.
    - ▪ 63 percent agreed they are/were well prepared to engage in regular, two-way, and culturally proficient communication with families about student learning and performance.
    - ▪ 88 percent agreed they are/were well prepared to reflect on their practice to improve teaching and learning.

- ✓ INS 3: Completers have a positive impact on outcomes for PK-12 students.
  - ● In the offsite submission, WSU explains there is no data on student outcomes, however WSU also shared two anecdotal examples of ESL program completers taking leadership roles within their districts (e.g., serving as Supervising Practitioner, providing professional development). Eighty-eight (n=8) of ESL Candidates/Completers onsite agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of this program.

Findings		
None		

		Exemplary
Overall Domain Recommendation	✓	Proficient
		Needs Improvement
		Unsatisfactory
Domain Summary		

The Instruction domain for English as a Second Language, Initial Post-Baccalaureate programs have a rating of Proficient because candidates/completers noted they were well-supported by faculty through the program. One ESL candidate/completer said, "I always received targeted feedback on my thesis and on assignments. Professors would take their time to let me know where I did well and where I was missing the mark." Another candidate/completer shared, "Coursework helped me with lesson planning, setting realistic goals, and use of accurate assessments."

The majority, 75 percent (n=8), of Candidates/Completers onsite agreed their experience in the program has prepared them to be an effective educator. Eighty-eight percent (n=8) of ESL Candidates/Completers agreed they would recommend the program to others.

When asked further, ESL Candidates/Completers (n=8) indicated the following:
- 63 percent agreed the sequence of preparation coursework supports/ed their increased knowledge and skills.
- 63 percent agreed coursework is/was differentiated for their specific subject area and grade level.
- 75 percent agreed faculty do/did use formative and summative assessment data to target their areas of need.
- 88 percent indicated faculty regularly model/ed practices and strategies for meeting the needs of diverse learners.
- 75 percent indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

Professional Suggestions

None

Instruction: Moderate Disabilities Teacher, Initial, Post-Baccalaureate Programs (Moderate Disabilities PreK-8 and Moderate Disabilities 5-12, Initial, Post-Baccalaureate)

Instruction Domain Criteria Determinations

Commendations

None

Met

✓ INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.
- Onsite, 88 percent (n=8) of Moderate Disabilities Candidates/Completers agreed WSU ensures/ed they have the content knowledge necessary to be an effective educator. In the offsite, WSU lists several key assignments the program uses to ensure candidates have the sufficient content knowledge and pedagogical skills (e.g., development and implementation of a functional behavior assessment (FBA) plan, class presentations on disabilities and laws, critical analysis of educational software programs, projects on assessing and implementing intervention strategies for mathematics, reading, writing and social skills, development and implementation of IEPs, etc.).

✓ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
- As explained above, WSU uses several key assignments to ensure candidates have the instructional skills necessary for the Teacher of Students with Moderate Disabilities licensure role. When asked onsite, 75 percent (n=8) of Candidates/Completers agreed coursework provides/ed them with the

instructional skill necessary to be effective in their licensure role. When asked about specific instructional skills, candidates/completers (n=8) reported the following:

- ▪ 63 percent agreed they are/were well prepared to meet the needs of English Language Learners.
- ▪ 75 percent agreed they are/were well prepared to employ a variety of classroom management strategies.
- ▪ 63 percent agreed they are/were well prepared to design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
- ▪ 63 percent agreed they are/were well prepared to analyze data from assessments, draw conclusions, and share them appropriately.
- ▪ 63 percent agreed they are/were well prepared to employ a variety of strategies to assist students to develop social-emotional competencies.
- ▪ 50 percent agreed they are/were well prepared to engage in regular, two-way, and culturally proficient communication with families about student learning and performance.
- ▪ 88 percent agreed they are/were well prepared to reflect on their practice to improve teaching and learning.

✓ INS 3: Completers have a positive impact on outcomes for PK-12 students.
  - ● When asked onsite, 88 percent (n=8) of Candidates/Completers agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of this program.

Findings

None

		Exemplary
Overall Domain Recommendation	✓	Proficient
		Needs Improvement
		Unsatisfactory

Domain Summary

The Instruction domain for Moderate Disabilities, Initial Post-Baccalaureate programs has a rating of Proficient because evidence indicates candidates are well-prepared through this program. For example, through coursework WSU has embedded several key assignments to support the development of candidates' knowledge and skills for the Moderate Disabilities license. One candidate/completer, however, did note they did not feel sufficiently prepared to write IEPs. This candidate/completer stated:

"We did not get a chance to focus on actual writing of IEPs and what that process looks like. We did a lot of focus on Woodcock-Johnson and ways to assess, but not the actual writing of the IEP. I learned more about the IEP process during the practicum with the [Supervising Practitioner] and collaborating with other teachers during a hands-on experience [but] not during my courses. I would have liked more insight. It's a huge part of being in Moderate Disabilities."

A candidate currently enrolled in the program shared coursework was effective overall, "I learned a lot about how to work with students from a global perspective… I felt fully prepared with my coursework and with the feedback [and] regular discussions to take on my own classroom." Overall, 75 percent (n=8) of Candidates/Completers agreed they would recommend the program to others and that their experience in the program has prepared them to be an effective educator.

When asked onsite, Moderate Disabilities Candidates/Completers (n=8) indicated their agreement with whether the following practices were done at a consistently high-level:

- 63 percent agreed the sequence of preparation coursework supports/ed their increased knowledge and skills.
- 75 percent agreed faculty do/did use formative and summative assessment data to target their areas of need.
- 75 percent indicated faculty regularly model/ed pedagogical and content practices of the discipline.
- 75 percent indicated faculty regularly model/ed practices and strategies for meeting the needs of diverse learners.
- 75 percent indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

Professional Suggestions
None

Instruction: Reading Specialist, All Levels, Initial Post-Baccalaureate

Instruction Domain Criteria Determinations
Commendations
None
Met
None
Findings

- ❏ INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.
  - While WSU has practices in place to support candidates develop content knowledge, evidence indicates practices do not yet sufficiently prepare candidates for the role. Through the program of study, candidates complete coursework covering advanced reading and writing theory. Candidates also conduct their own literature review to support classroom research. Despite this, only 33 percent (n=3) of Reading Specialists Candidates/Completers onsite agreed WSU ensures/ed they have the content knowledge necessary to be an effective educator. One candidate/completer stated, "I did not feel like I had the content knowledge necessary by the time I hit the practicum. I got a lot of fantastic information about testing, [but] as far as the actual strategies to employ, the classes were not effective. I do think they have changed the curriculum since then so they may be more effective. However, I felt like [Professor] Heidi was backfilling a lot of info for me during the practicum."

- ❏ INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.
  - Overall evidence indicates WSU is not yet able to ensure candidates have the pedagogy necessary for the licensure role. In the offsite, WSU explains pedagogical skills are achieved through coursework, pre-practicum, and practicum. Candidates also complete a portfolio that includes "examples of plans and assessment for teaching and assessing reading." Onsite, 67 percent (n=3) of Candidates/Completers agreed coursework provides/ed them with the instructional skill necessary to be effective in their licensure role. However, when Reading Specialists were asked further about their preparation experience, candidates/completers (n=3) reported mixed experiences:
    - ▪ 33 percent agreed they are/were well prepared to meet the needs of English Language Learners. A candidate/completer elaborated in this area stating, "We did not really have

preparation for working with ELs. The class we took that was supposed to be about ELs focused entirely on students with autism. I'm not sure why this was."

- 0 percent agreed they are/were well prepared to employ a variety of classroom management strategies.
- 67 percent agreed they are/were well prepared to design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
- 100 percent agreed they are/were well prepared to analyze data from assessments, draw conclusions, and share them appropriately.
- 0 percent agreed they are/were well prepared to employ a variety of strategies to assist students to develop social-emotional competencies.
- 0 percent agreed they are/were well prepared to engage in regular, two-way, and culturally proficient communication with families about student learning and performance.
- 33 percent agreed they are/were well prepared to reflect on their practice to improve teaching and learning.

❏ INS 3: Completers have a positive impact on outcomes for PK-12 students.
- According to WSU, candidates in the Reading Specialist program complete a classroom-based action research project that is "designed to improve the outcomes in their classroom." This project asks candidates to focus on two PK-12 students: one in K-3 and a second in 4-12. Candidates conduct a literacy analysis for each student which includes assessing and evaluating students using standardized, informal, and authentic assessments. While WSU believes candidates are well-prepared to positively impact PK-12 students as a result of the coursework and action research based project, only 33 percent (n=3) of Reading Specialists Candidates/Completers onsite agreed they are prepared to have a positive impact on outcomes for PK-12 students as a result of this program.

		Exemplary
Overall Domain Recommendation		Proficient
	✓	Needs Improvement
		Unsatisfactory

Domain Summary

Overall evidence indicates the Reading Specialist program is in need of improvement. Completers onsite reported the program, historically, did not well-prepare them for the licensure role, however the candidate noted they believe their preparation experience has been effective so far. Discussions between the candidate and completers onsite signaled WSU has recently made changes to the program and these changes may be supporting the candidate to have a more positive experience. Reading Specialist candidates/completers shared the following comments showing they had mixed experiences:
- "It's hard for me to parse out what came from the program and what came from my learning as a teacher of record. One thing that is important to note is we did not really have preparation for working with English Learners. The class we took that was supposed to be about English Learners focused entirely on students with autism. I'm not sure why this was."
- "I was part of the program when it was not a good set up. I told [WSU] they had to put someone in charge if the program was to continue. [It] was so hard to get information… It wasn't a great experience. [I'm] glad to hear that there is someone in charge now."
- "[I] did the program over the last few years. Heidi Wojcik was incredible. [There has been] a lot of change over the last few years. Before Heidi had the admin role, it was difficult to find out what I had to do. Once I had Heidi to talk to it was helpful. Before her it was more difficult."

- "I have been so impressed with the Reading Specialist program. Every [faculty member] is highly experienced in teaching the course and in their practical experience. They demonstrated it in every class with their experience. [The] syllabus was comprehensive [and the] activities and collaborative work was helpful. [I am] very satisfied."

As WSU makes updates to the program, it is imperative WSU monitors the quality of coursework content, faculty effectiveness, quality of field-based experiences, as well as the overall Reading Specialist candidate experience. A program completer onsite shared the following perspective and suggestion:

"The reading program seems to be super in flux. Anything Heidi Wojcik is doing is absolutely phenomenal. Her knowledge of the material is incredible, and she is an excellent teacher. She should really be running the show! My experiences with other professors were not as great, but my experiences with Heidi were so fantastic that ultimately, I felt prepared. Also, I think a lot of the professors I initially had have since retired. If I had done the entire program under Heidi's guidance, I would have had a much more positive experience."

Overall, only 33 percent (n=3) of Reading Specialist Candidates/Completers agreed that they would recommend the program to others. Similarly, only 33 percent (n=3) agreed their experience in the program has prepared them to be an effective educator.

When Reading Specialist Candidates/Completers (n=3) were asked further about their coursework:
- 33 percent agreed the sequence of preparation coursework supports/ed their increased knowledge and skills.
- 33 percent agreed there are/were clear connections between the different courses in the program.
- 33 percent agreed faculty do/did use formative and summative assessment data to target their areas of need.
- 67 percent indicated faculty regularly model/ed pedagogical and content practices of the discipline.
- 67 percent indicated faculty regularly model/ed practices and strategies for meeting the needs of diverse learners.
- 33 percent indicated during coursework they regularly receive/ed targeted feedback that improved their practice.

Professional Suggestions

None

Instruction: Middle School: Mathematics/Science 5-8, Initial Baccalaureate [new program]

Instruction Domain Criteria Determinations
Commendations
Met
Findings

Overall Domain Recommendation		Exemplary
		Proficient
		Needs Improvement
		Unsatisfactory
		New Program

Domain Summary
The new program proposal is currently under review.
Professional Suggestions
This program proposal is currently under review.

Appendix A: COVID-19 Response

Since March 2020, all approved Sponsoring Organizations had to shift practices in response to the COVID-19 outbreak. During the onsite portion of the review, DESE provided an opportunity for stakeholders to share their experience with WSU during this time, if applicable. In doing so, DESE hopes to support organizations in understanding the impact of the Sponsoring Organization's response on different stakeholder groups. No comments shared by stakeholders signaled larger concerns regarding WSU's ability to support and sustain practices to support the candidate experience. In cases where recent examples were relevant, they have been highlighted in the report. Below, DESE highlights some direct quotes from stakeholder groups relative to WSU's response during the pandemic, some of which may be specific and relate directly to criteria for program approval, while other quotes may be more general.

Stakeholder Group	Direct Quotes Showcasing Positive Reactions to COVID-19 Response
Arts & Sciences Faculty	● The university has proven rather adept in adjusting its operations and curriculum delivery in a rapidly changing COVID environment. Because the university has been effective fiscal stewards, the financial impact of COVID, though significant, is not experiencing the same degree of distress as its partner institutions.
Full-time Education Faculty	● Worcester State has been supportive. The institution has made sure that faculty have all of the resources needed to support students. ● In addition to providing technical support to students. Worcester State University has weekly testing and weekly briefing from the President's Office. The university is also working hard to address the equity issue. ● The university has thought of students first to have the resources necessary to be able to access courses and have success. ● At the departmental level, we discussed strategies to ensure students were still learning about field experiences and the topics typically addressed through our fieldwork attached to almost all courses. The university [finally] subscribed to the Teaching Channel so that we would have access to a larger library of videos for use in analysis.
Part-time Education Faculty	● I am pleased to say that President Maloney and his staff have been very timely, supportive, and respectful of handling this shift in how we must do things today. There have been daily updates, and a high regard for the safety and well-being of all students, staff, and faculty. I don't think he could have done a better job. [WSU also provides] emergency funds for students who need financial and emotional support. ● This has been obviously a difficult time, but I feel that WSU has really geared up for the online aspect. The Center for Teaching and Learning has been incredibly helpful for the teachers. Our Department Head is exceptionally supportive, helpful, and accessible. I am impressed with the eagerness of the students and their wanting to learn is outstanding. There is an attitude of can do! I certainly miss being on campus face-to-face with students and colleagues, but we are doing our best.
Program Supervisors	● WSU's response to COVID has been very thoughtful and well-planned. Remote learning is a new challenge for most of us and the students, but WSU has ensured that there was tech training for all and that all COVID planning included many voices.

	● WSU used the data and feedback from Spring 2020 to plan for the implementation of the CAP in Fall 2020. [We are] working closely with participating districts [and] students are having successful experiences as reported at a recent Program Supervisor Roundtable. I am very impressed with the cooperation and working relationships that have developed in support of student learning experience. I think everyone is learning to make adjustments as needed to their pedagogy and the experience will likely result in the inclusion of effective virtual learning strategies.
Partners	● The transition to full remote learning with WSU students and faculty has been seamless. The students are being supported and are presenting top quality curriculum [to] our PK-6 students. The [Program Supervisors] have easily accessed the virtual classrooms and have been communicating well with the school leadership, student teachers and the [Supervising Practitioner]. ● WSU supported their educator candidates throughout the difficult Spring. We were thankful for their support. We hired a counselor from WSU this fall (graduated this past May), who had done her practicum work in the WPS. She has been extremely valuable to our team so far. Her experience last year, working through the pandemic, has allowed her to smoothly transition to our school year in a hybrid model. ● The JET participants had to switch to an online course[model] mid- semester in Spring 2020. The feedback JET received from its participants was that WSU provided support for online course taking, and we believe that all JET participants were able to successfully complete their spring courses. ● The student teachers are incredibly well prepared and have offered us an advantage [because they are] technical savvy. They have been true partners in the classroom as our teachers are learning from their student teachers while mentoring them. ● Remote Learning, due to COVID, for our Early College students taking college credit courses at QCC and WSU has been very successful. Student Mentors, hired by WSU, have supported our Early College students during the pandemic.
Supervising Practitioners	● I have nothing but positive things to say about that Teaching Candidate and her Program Supervisor from last spring. My teaching candidate was always checking in to see how she could help and ask about the students. She regularly joined our class Zoom meetings as well. The Program Supervisor always kept me up to date through emails and I had a very positive experience during our final three-way Zoom meeting to evaluate the teaching candidate. ● WSU has been very understanding and adaptable throughout this pandemic. They continue to hold their high expectations throughout student's classes and practicums, but they communicate well with supervising practitioners and ensure that all that is expected is appropriate and attainable. ● I have been asked how I feel the student teachers can meet their role through remote learning and feel the WSU has been both supportive and open to hearing my thoughts and ideas. I realize this time has been a challenge for all of us, but feel WSU is doing everything they can to support their future teachers and prepare them for the world of teaching. ● I teach in Worcester. We have been totally remote since September. When classes began I emailed the [program supervisor] that my candidates lesson plan would be 2 days late as I was learning a new schedule, a new way of

	teaching and was having difficulty making adjustments to what I was doing. The practitioner was very understanding.
Candidates (and Completers, if applicable)	Administrative Leadership Programs ● WSU has been very supportive with clear, constant communication throughout the pandemic.
	Teacher, Initial Baccalaureate Programs ● Worcester State University has put their students first in the pandemic. I have had a positive experience in all of the graduate level classes I have taken since the pandemic started. My professors have transitioned to teaching remotely nicely. ● The department was extremely flexible around scheduling and emotional needs during the start of the pandemic. Coursework was adapted to accommodate fieldwork cancellation. ● My online classes have been great and very straightforward. I wish Worcester State would send out Covid statistics on a regular basis, as I cannot attend the Covid briefings. ● I thought Worcester State did a great job reaching out to all students and keeping us updated and informed with the ever-changing information at the beginning of the pandemic. Worcester State also made sure that each student was aware of the many services that Worcester State has to offer so that each student was able to receive whatever help was necessary during a time of crisis. Thankfully, I never needed to use any of these services so I'm not able to speak about those specifically, but I knew where to go and who to contact if I did. ● Worcester State University was already offering a food bank for students on campus, but once COVID-19 they increased their efforts for students to succeed in school. They offered an emergency fund as well. ● Personally, my student teaching experience has been really positive and very successful even with remote learning. I've still gained so much knowledge in content, classroom management, and lesson making. ● One professor did [one-on-one] zoom office hours to help me better understand coursework. Professors seemed to care and want to assist once we reach out to them and ask for help.
	Teacher, Initial Post-Baccalaureate Programs ● My Supervising Practitioner had COVID and Worcester State made sure that I was safe and could [still] meet [program requirements]. ● As far as the education department goes, they have made transitioning to online learning very seamless and they are willing to work with us as we all figure out these unprecedented times together. ● I think WSU has handled the pandemic well from my point of view of being at home - I don't know if students who are in-person on campus would view it differently. But the professors have done a great job of doing their best to accommodate us and what we are able to do/adjust to remotely. ● There is the missing aspect of camaraderie amongst Teacher Candidates that simply cannot be attained in the remote setting [but] overall, the experience has been as good as it can be.
	Moderate Disabilities, Initial Post-Baccalaureate Programs ● WSU has done a fantastic job responding to the pandemic. They send frequent updates, surveys, etc.

	● Worcester State was really great about sending regular email updates about the COVID situation on campus in the spring.
	English as a Second Language, Initial Post-Baccalaureate Programs
	● I was just doing my thesis at the time of the pandemic, so I was already doing everything remotely by emailing my supervisor. As ever, she was extremely helpful and responsive.
	● I had to do my thesis last spring, the support and encouragement received helped me to successfully complete the program.
	Reading Specialist, All Levels, Initial, Post-Baccalaureate
	● I was in the middle of my practicum and my program supervisor gave a lot of guidance in how to adjust my experience so I could complete it and still have a valuable experience.

Stakeholder Group	Direct Quotes of Constructive/Critical Feedback for Additional Consideration
Arts & Sciences Faculty	● I cannot speak to the Education program. WSU has responded to the pandemic by cutting many things for faculty - faculty development, sabbaticals, the use of earned work credits - so very negative toward faculty - who worked all summer without pay and worked incredibly hard to transform our courses.
	● From the instructor's point of view, I must say that not all faculty had the knowledge and skills to move to remote teaching in such a short time. The Center for Teaching and Learning has offered many valuable resources, workshops, etc. (including training from Quality Matters). WSU has also equipped classrooms to accommodate as many instruction methods as possible. Of course, it is always a work in progress.
Candidates (and Completers, if applicable)	Administrative Leadership Programs
	● Worcester State seemed very slow in response to the pandemic. Our courses had to shift online, and the instructors were not very prepared (understandable as many teachers were.) Some instructors were very understanding of the stress and work level that we are dealing with, while others seemed very out of touch with what we as students are experiencing in our profession and with the class.
	● The pandemic affected a few of the courses within Cohort IV. One of the practicums was pushed to the following semester and the Law and Ethics class was then moved online. This was I feel the only area where I would say might need improvement due to the manner in which the law course was given and how much information was involved in that class it was hard to complete assignments solely online and only read articles. If we had had online zoom courses or even some small group work this may have been more helpful for me as a learner. An area where I may suggest a change... allow online courses to use different platforms as a means of social interaction and learning to meet the needs of all learners in the courses.
	Teacher, Initial Baccalaureate Programs
	● Some classes work very well remotely. Others, like EdPsych 250, do not work. We cannot do in person observations, so we rely on DESE and Teacher Channel videos. The class seems strange online.

	● WSU has figured out a nice plan for the pandemic however, the coursework has definitely increased while the level of understanding has decreased in some areas. ● I have been off campus for over 10 years and decided to return. Unfortunately, I was bounced around to different areas of the campus. After being persistent and tears rolling down my face someone was able to help me. Another challenge was lack of responsiveness from faculty. It's imperative for students to be respected in every area of the university. I currently don't have an education advisor. So, I have been doing coursework without an advisor. ● It's been extremely hard. I really don't think you guys quite understand how difficult it is during COVID-19. We work for Worcester Public Schools from 7:45 till 3 PM and then we take online classes at Worcester State from 4:30-7:30, plus do schoolwork. [The professor] is requesting a lot of work [and] we have to interview teachers whereas for me, teachers haven't really responded because they're so busy with remote learning and really don't have the time so this has been hard and I haven't been able to complete schoolwork. I wish that my professors and advisors were more responsive to emails as I have been struggling to keep track of all my coursework.
	English as a Second Language, Initial Post-Baccalaureate Programs ● [My] professor failed me [when]some of my assignments were late because of COVID. I offered to make them up and she refused to reconsider. Now I have to pay to take the course again with the same teacher.

Appendix B: Findings Requiring Action

Outlined below are the actions required by the Sponsoring Organization in order to address the findings identified as a result of the 2020-2021 review. DESE considers several factors when determining the required actions, including the context of the review and the significance of the finding on overall program quality. Required actions are descriptive of expectations, not prescriptive of approaches.

In addition to meeting all current and future preparation program requirements, all findings included in this report must be addressed at the time of the next visit in order for WSU to continue operating educator preparation programs leading to MA licensure. DESE reserves the right during this approval period to conduct an interim review should additional or continual concerns arise.

Organization-Level Findings

| Domain	Criteria	Timeline
The Organization	ORG 2: Systems/structures support collaboration within departments and across disciplines and improve candidate preparation.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review
	ORG 3: Budgets support ongoing educator preparation program sustainability and allocate resources according to the Sponsoring Organization's goals.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
	ORG 5: Recruitment, selection, and evaluation processes result in the hiring and retention of effective faculty/instructors and staff.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
Continuous Improvement	CI 1: Sponsoring Organization monitors individual program efficacy and ensures that candidates who complete the program are prepared to be effective in the licensure role.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
The Candidate	CAN 1: Systems to recruit and admit candidates result in the increased racial and ethnic diversity of completers in the workforce.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
Field-Based Experiences	FBE 6: Candidates participate in field-based experiences that cover the full academic year.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
	FBE 11: Sponsoring Organization ensures that Program Supervisors and Supervising Practitioners are measurably contributing to and effectively evaluating the readiness of candidates.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.

	FBE 12: Candidate readiness for the licensure role is measured using a performance assessment (e.g. Candidate Assessment of Performance) that is implemented consistently across/within programs and rigorously such that only candidates who are ready to make a positive impact for PK-12 students in the licensure role complete the program.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.

Instruction-Level Findings

Domain	Criteria	Timeline
Administrative Leadership Programs	INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
	INS 3: Completers have a positive impact on outcomes for PK-12 students.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
Teacher, Initial Baccalaureate Program	INS 2: Completers have the pedagogical skills (PST/PSI) to be effective in the licensure role.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.
Reading Specialist, All Levels, Initial, Post-Baccalaureate	INS 1: Completers have the Subject Matter Knowledge (SMK) to be effective in the licensure role.	Address as soon as possible. Plan to have 2+ years of evidence prior to next review.

Appendix C: Formal Review Decision Making

Decisions and recommendations occur at several different levels during the process.
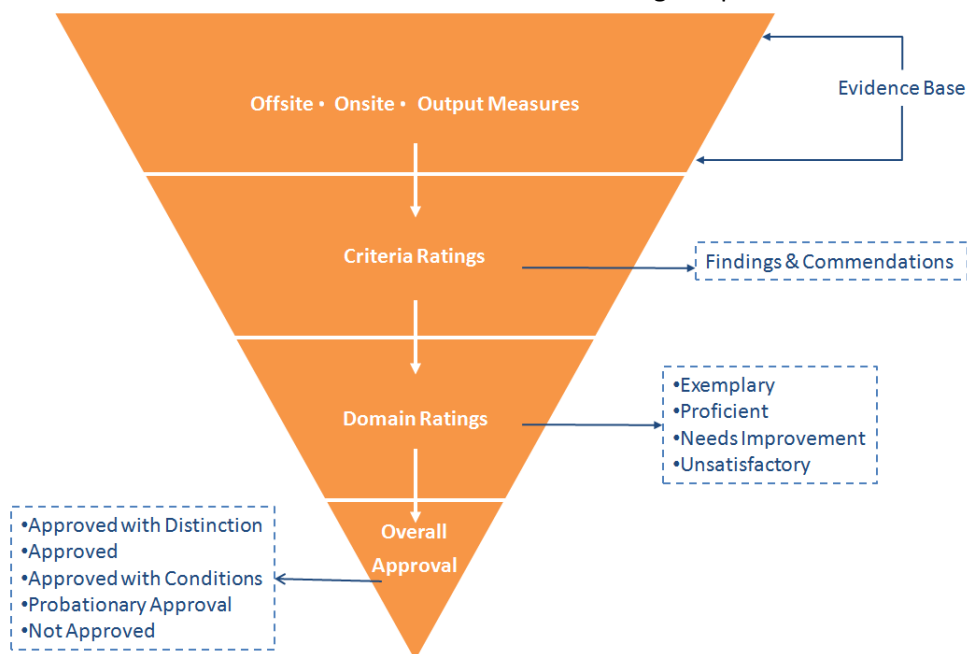
Criteria Ratings: During the review, an individual reviewer's summative criteria ratings are challenged and corroborated by the entire review team. The review team, under the guidance of the DESE Ed Prep Specialist, must work towards agreement for each finding and/or commendation cited in the report. DESE reserves the right to change a criterion rating based on an in-depth understanding of regulatory requirements or in order to maintain consistency across reviews. Criteria recommendations result in:

- *Commendation*: Commendations are reserved for truly exceptional, innovative or outstanding practices.

- *Finding*: Findings are areas of concern that require corrective action. Findings impact an SO's overall approval status.

- *Professional Suggestions*: Professional suggestions serve as recommendations for continuous improvement. They do not require a mandatory response/action.

Domain Recommendations: Once the review team has rated all criteria in a domain, the team will make an overall recommendation weighing the cumulative impact and significance of the findings and commendations within that domain. Domain recommendations result in one of the following descriptions:

- *Exemplary*: The Exemplary level represents the highest level of performance. It exceeds the already high standard of Proficient. A rating of Exemplary is reserved for performance on a domain that is of such a high level that it could serve as a model for other providers in the organization, state, or nation.

- *Proficient*: Proficient is the expected, rigorous level of performance for SOs. It is a demanding, but attainable level of performance.

- *Needs Improvement*: SOs whose performance on a domain is rated as Needs Improvement may demonstrate inconsistencies in implementation or weaknesses in a few key areas. They may not yet have fully developed systems to provide preparation in an effective way.

- *Unsatisfactory*: SOs whose performance on a domain is rated as Unsatisfactory is significantly underperforming as compared to the expectations.

Approval Determinations: Once all domain recommendations have been determined, the review team again weighs the cumulative impact and significance of all the domain ratings on an organization's ability to effectively prepare educators and recommends one of the following approval determinations:

- *Approval with Distinction*: A Sponsoring Organization or program granted approval with distinction has exceeded the already high bar for approval, demonstrating exemplary performance. The Sponsoring Organization or program is operating at such a high level that it could serve as a model for other providers in the state or nation. Programs approved with distinction are authorized by the state to endorse candidates for licensure with full reciprocity benefits.

- *Approval:* A Sponsoring Organization that has been granted full approval is recognized by the state to have met all standards for preparing effective educators in Massachusetts. An approved determination signals that candidates are well-served by this organization or program and receive a high-quality preparation experience. Approved programs are authorized by the state to endorse candidates for licensure with full reciprocity benefits.

- *Approval with Conditions:* Approval with conditions may be granted after a formal or informal review. Sponsoring Organizations who have demonstrated overall program readiness and commitment to improvement, despite findings in a report, will be granted approval with conditions. Conditional approval signals that there are significant areas that must be addressed in order to meet state standards. Findings indicate that areas of concern impact candidates.

- *Probationary Approval:* A Sponsoring Organization or program that is granted probationary approval has insufficiently met state standards. Probationary approval signals that there are significant areas that must be addressed and candidate efficacy and/or experience in the program is not consistently assured to be high quality. Findings indicate that areas of concern impact candidates.

- *Not Approved*: Approval will not be granted if findings outlined in either a formal or informal review are determined to be significant, and therefore neither full approval nor approval with conditions is granted.

Commissioner Determination: The review team's recommendations and determinations are assessed by an internal DESE panel to ensure that the proper review protocols were followed and that sufficient evidence exists in support of all judgements. Upon the panel's agreement, the approval status recommendation goes to the Commissioner for a final determination with a report detailing the evidence collected during the review.

Dear Mr. Maloney and Mr. Lewis,

Today, the National Council on Teacher Quality (NCTQ) released new data as part of our
ongoing *Teacher Prep Review*, examining two critical issues often portrayed as competing
goals: the academic standards for admission into teacher preparation and programs'
contributions to racial diversity in the teaching profession. We present new and compelling
evidence that **these two considerations can sit side by side. Of the 420 programs we find
making positive contributions to racial diversity in enrollments, about half (198) do so
while maintaining adequate admissions standards and, in doing so, dispel a harmful
myth.**

Worcester State University's scores, as seen below, are now visible on our website:

	Program Diversity Score	Admissions Score	URL to Public Page
Undergraduate Elementary Program	**C**	**B**	https://www.nctq.org/review/viewProgram/Worcester-State-University-MA-1
Graduate Elementary Program	**NA**	**NA**	NA

Our website includes several resources to support programs in understanding and advancing
these areas. **Leading programs have provided statements on how they have maintained
both strong academic requirements and contributed to the diversity of the teacher
profession.**

We have also **created a tool** that we encourage you to use to see how your program compares
to others in your region or nationally.

We are indebted to many people and organizations who helped to make this work stronger, including great minds from the Center for American Progress, Educators for Excellence, Education Trust, NEA, AFT, Brookings, US PREP, WestEd, and others.

The full web resources include:

- National summary of our **findings on Program Diversity and Admissions**
- Our **press release** on these findings
- Full methodology, scoring rubric, and research rationale for the **Program Diversity standard**
- Full methodology, scoring rubric, and research rationale for the **Admissions standard**
- All **Program Diversity scores** for elementary programs
- All **Admissions scores** for elementary programs
- Our **response** to the AACTE critique (February 12, 2021) of this report

If you have any questions, suggestions, or concerns, feel free to reach out to our Director of University Relations, Laura Pomerance (laura.pomerance@nctq.org).

Sincerely,

Kate Walsh
--
Kate Walsh | President

National Council on Teacher Quality
1032 15th Street NW #242, Washington, DC 20005
Office 202-393-0020 (ext 700)

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President's Update

WORCESTER
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President's Message

We come before the Trustees every April with recommendations for faculty tenure and promotion, and in November for sabbaticals – a process that ensures the board hears almost solely about their benefits- and compensation-related work. What is not often shared are the many ways faculty members give back to Worcester State University and to students, going above and beyond professional requirements.

Dozens of faculty, along with many staff, put long hours into developing our Fall 2020 Safe Return to Campus plan (listed below). One illustrative example of faculty members' input: Colleen Sullivan, Ph.D., associate professor of psychology, and Nabin Malakar, Ph.D., assistant professor of earth, environment, and physics, helped create and deliver the new "Lancer Learning" summer course (read more here). Emily Soltano, Ph.D., professor of psychology, as head of the Center for Teaching and Learning, sprang into action, organizing faculty training for remote learning (read more here.) Others spend significant time on University priorities, as Adam Zahler, MFA, professor of visual and performing arts, and Donald Vescio Jr., Ph.D., associate professor of English, did in implementation of the RASE (Roadmap for Advancing Student Excellence) Plan and as Julie Frechette, Ph.D., professor of communication, did in serving as the faculty lead for the 2020-2025 Strategic Plan development. For the NECHE Self Study, Prof. Soltano serves as the faculty chair of the steering committee, and additional faculty are also involved. Without their dedication and contributions, we could not carry the University forward.

And our faculty's excellence continues to shine. Countless examples of outstanding teaching, research, scholarship, and creativity can be found on the Worcester State news site (news.worcester.edu), under the "Achievers" section.

I am grateful for the many ways faculty members make Worcester State a great university.

Contents

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Safe Return to Campus

Employees participating in the Safe Return to Campus planning process included more than 70 faculty members and librarians (in bold), as of July 2020, and many more were involved as plans were updated.

Anthony Adade
Rosemary Ahmadi
Jeremy Andreatta
Nathan Angelo
Elena Arranz
Daron Barnard
Mark Beaudry
Matt Bejune
Elizabeth Bidinger
Laxmi Bissoondial
Dean Bowen
Donald Brickman
Erika Briesacher
Jodi Briggs-Pickett
Donald Bullens
Paula Bylaska-Davies
Kristine Camacho
Madeline Campbell
William Chadbourne
Marilyn Cleary
Thomas Conroy
Michelle Corbin
Meghna Dilip
Sharon De Klerk
Anthony Dell'Aera
Andrea Dever
Joseph Dicarlo
Kirsh Donis
Allison Dunn
Dawn Eades
Kathleen Eichelroth
Kevin Fenlon
Sue Foo
Ryan Forsythe
Charlie Fox
Curtis Fraser
Adrian Gage
Lisa Gaimari

Joanne Gallagher Worthley
Maria Gariepy
Rebecca Giard
Sara Grady
Roger Greenwell
Vicky Gruzynski
Charlotte Haller
Tara Hancock
Tona Hangen
William Hansen
Carl A. Herrin
Cheryl Hersperger
Jennifer Hood-Degrenier
Yan Hu
Eihab Jaber
Brittany Jeye
Christina Kaniu
Bonnie Kanner
Jason Kapurch
Nikki Kapurch
Joshua Katz
Julie Kazarian
Thomas Kelley
Margaret Kerr
Douglas Kowalewski
Roberta Kyle
Mark LaCroix
Linda Larrivee
Hana Lasell
Angela Latter
Kenneth Melnick
Susanna Meyer
Susan Mitroka-Batsford
Syamak Moattari
Susan Moore

Michael Mudd
Charisse Murphy
Laura Murphy
Timothy Murphy
David Needham
Kristen Nelson
Eric Nichols
Christie Nigro
Sam O'Connell
Steven Oliver
Sandra Olson
Kristen O'Reilly
Michelle Page
Katey Palumbo
Eileen Perez
Andrew Piazza
Miriam Plavin-Masterman
Sarah Potrikus
Russ Pottle
Joseph Quattrucci
Robin Quill
Jennifer Quinn
Hilda Ramirez
Brittney Rende
Lawrence Roberge
Kathleen Rogan
Sharon McDonald
Michael McKenna
Sarah McMaster
Kristie McNamara
Tom McNamara
John Meany
Nicole Rosa
A**dam Saltsman**
Christina Santana
MaryLynn Saul
Nancy Sheehan
Hardeep Sidhu

Elizabeth Siler
Danielle Shaver
Kenny Smith
Emily Soltano
Champika Soysa
Maureen Stokes
Sarah Strout
Colleen Sullivan
Seth Surgan
Louise Taylor
Tammy Tebo
Karen Tessmer
Henry Theriault
Tanya Trudell
Marcela Uribe-Jennings
Jaime Vallejos
Sebastian Velez
Don Vescio
Mark Wagner
Marc Wagoner
Jonathan Walker
Elizabeth Wark
Cleve Wiese
Lois Wims
Karen Woods-Weierman
Maribeth Wrobel
Weichu Xu
Adam Zahler

The University values its faculty, who consistently put students first. Worcester State's faculty have graduated from some of the finest universities in the world, and they represent a wide range of backgrounds, experiences, and interests. Those who come to our campus have a strong commitment to teaching and the success of their students, both inside the classroom and in the broader world. As active scholars, they bring their research to their students, providing opportunities for them to make a difference in their lives and the lives of others.

Worcester State's dedicated faculty include many in the early stages of their careers who are making a significant impact on the institution. What follows are profiles of such faculty, along with an introduction to a faculty member who continues to dedicate her professional life to the University in creative and meaningful ways. Unfortunately, there is not enough time and space to share the remarkable work of all of our faculty; what follows are representative examples of the quality of individuals who teach at Worcester State.

Frank Boardman, Philosophy

Dr. Boardman is completing his first year as chair of the Philosophy Department and has applied for his Third Year Reappointment. An engaged scholar who is interested in logic, film ontology, artistic style, and humor in art, he has developed multimodal, technology-supported instructional strategies that have proven to be highly effective. He is able to draw upon the methodologies of his more traditional scholarship to become a valued contributor as a classroom instructor and academic chair. In his teaching, Dr. Boardman shows how it is possible that strong skills can be promoted in courses that enroll students from a wide range of academic backgrounds. In his Philosophy of Art courses, Dr. Boardman regularly schedules sessions at the Worcester Art Museum, and in his Logic courses, he manages to strike a balance between students who are looking to satisfy general education requirements with philosophy minors and mathematically-inclined students. An active member of the Worcester State community, Dr. Boardman has served on academic governance committees and Massachusetts State Colleges Association (MSCA) committees (such as the Committee on Immigration), hosted many student outreach events, and continues to work on revising his department's curriculum. Dr. Boardman's work demonstrates how early-career faculty can make a significant and sustained contribution to the University.

Christina Santana, English

Dr. Christina Santana has applied for her Fifth Year Reappointment. Dr. Santana is an exceptional professor in the English Department. She is an engaged teacher-scholar who draws upon her scholarship to challenge her students intellectually and practically in their professional development. She is an adept discussion facilitator and a charismatic and engaging instructor who more than maintains her students' avid interest and participation. As the university's Writing Center director, Dr. Santana's teaching extends beyond the classroom. She works with student writing consultants to effectively respond to documents in progress. Across her composition and business communications courses, Dr. Santana helps students become multi-literate, publicly engaged, and critically reflective. As a community literacy scholar, she sees students as situated experts with important knowledge to contribute to problem-solving. As a teacher, she helps students identify their specific areas of expertise and works with them to locate gaps in their knowledge and develop their skills in rhetorically sophisticated ways. Dr. Santana was awarded 2020's George I. Alden Excellence in Teaching Award, an honor that publicly acknowledges Worcester State University professors who have made a difference in students' lives through their teaching excellence.

Alexander Tarr, Geography

Dr. Alexander Tarr has applied for his Fifth Year Reappointment. Dr. Tarr is a broadly trained human geographer with interests in urban geography, critical cartography and GIS, and digital culture. His current research and teaching focuses largely on the City of Worcester and how the city is imagined and remade in a period of widespread gentrification in U.S. cities amidst the rise of digital cultures. His co-authored book with Rachel Brahinsky, "A People's Guide to the San Francisco Bay Area," provides a critical geography of the Bay Area region. In addition, Dr. Tarr has been contributing to the development of a digital platform to host People's Guide projects, collaborating with the series editors and teams throughout the U.Ss. He is active in a number of University and national initiatives, including serving as the faculty advisor to Gamma Theta Upsilon (the national geography honor society), the University's Information Technology and Women, Gender, and Sexuality committees, and as a board member of the national Living New Deal Project. Dr. Tarr is known as an effective teacher who is thoughtful in his approach and is dedicated to helping all of his students meet their goals, from selecting courses, to preparing for life after graduation.

Elizabeth Gilbert, Mathematics

Dr. Elizabeth Gilbert has applied for her Fifth Year Reappointment. A member of Worcester State's Mathematics Department, Dr. Gilbert is a statistician who offers a wide range of courses, including Probability and Statistics, Financial Math, and Data Analysis, and she strives to integrate emerging best practices into her teaching. Her record of successful teaching extends to other areas of a student's undergraduate education, including significant work with the University's math placement process for entering students and analysis of support for data on student achievement. Dr. Gilbert also served as the director of Worcester State's Math Center during the 2019 - 2020 academic year. In her role, she led the pivot to online tutoring to assure that all students continued to have the support they needed for their math classes. A scholar of note, Dr. Gilbert has presented at local, regional, and national conferences on such topics as mathematics corequisite models, math placement and developmental course acceleration, and data analysis of a math tutoring center. In 2020, she was a nominee for Worcester State's Extraordinary Dedication Award. It is clear that as the information economy accelerates, Dr. Gilbert's skills will be in even greater demand and her dedication will continue to help Worcester State succeed.
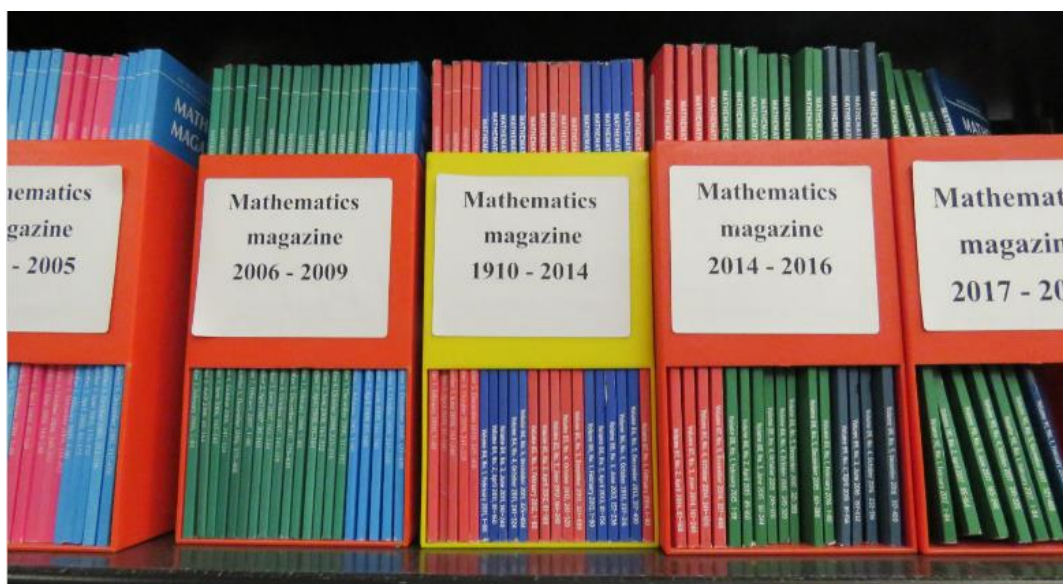
Dr. Ana Perez-Manrique, World Languages

Dr. Ana Perez-Manrique has applied for Promotion to Full Professor. A specialist in 20th-century Spanish literature, Border Studies, Spanish cultural studies, and Spanish film and narrative, she serves as her department's chair. Dr. Perez-Manrique is a talented teacher who is attuned to the changing demographics of higher education in the Northeast and the significant growth in Spanish-speaking populations in the region; she has developed courses, such as Spanish for Anatomy and Medical Translation, to prepare students to meet the increasing demand for regional healthcare delivery to diverse communities. Additionally, Dr. Perez-Manrique has offered courses that support the university's efforts to promote values of inclusion and diversity, emphasizing the importance of global awareness, the sociopolitical factors that can lead to the silencing of underrepresented voices, and the value of personal empowerment in public discourse. In addition to her excellence as a teacher, Dr. Perez-Manrique is an accomplished scholar who contributes regularly to the growth and development of her discipline. She has presented or chaired multiple national and international panels on contemporary Spanish literature and culture, and she explores the use of disruptive technologies in translation studies. Additionally, she has guided the development and implementation of Central Massachusetts' only mInor in Spanish for Health Professionals, which highlights a critical move toward interdisciplinarity within her department. Dr. Perez-Manrique is strongly committed to the University and has worked to provide greater recognition for under-represented students and to foster greater diversity and inclusion.

University Advancement's Dashboard

Click here to view University Advancement's Dashboard