NOTICE

THE FINANCE & FACILITIES COMMITTEE OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL MEET AT 3:00 P.M. ON MONDAY, APRIL 4, 2016 IN THE PRESIDENT’S CONFERENCE ROOM, 2nd FLOOR OF THE HELEN G. SHAUGHNESSY ADMINISTRATION BUILDING.

1. CALL TO ORDER

2. WSU INVESTMENT ACCOUNT PRESENTATION (*materials to follow*)

3. UNDERGRADUATE FEE APPROVAL

4. ADJOURNMENT

Judith St. Amand
March 29, 2016

FINANCE & FACILITIES COMMITTEE
Trustee Craig Blais, Chair
Trustee George Albro
Trustee Aleta Fazzone
Trustee Stephen Madaus
Trustee Shirley Steele
Trustee Marina Taylor
Trustee Ronald Valerio, Ex-Officio Voting Member
President Barry Maloney, Ex-Officio Non-Voting Member

All trustees are welcome at committee meetings.
Upon a motion made and seconded, it was

**VOTED:** to approve a $345.25 per year general fee increase for FY 2017 as described and presented in the March 28th memo from VP Kathleen Eichelroth to President Maloney.

Upon a motion made and seconded, it was

**VOTED:** to adjourn the meeting at
BNY Mellon Wealth Management

Prepared for:

Worcester State University
Finance & Facilities Subcommittee of the Board

Jeremy N. Baker, CFA
Senior Wealth Manager

Peter Balesano
Senior Director

CONFIDENTIAL
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<td></td>
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<tr>
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<td></td>
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</table>
### Dedication Team with Exclusive Focus on Wealth Management Clients

<table>
<thead>
<tr>
<th></th>
<th>Fixed Income Team</th>
</tr>
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<tbody>
<tr>
<td><strong>Total Team</strong></td>
<td>35+ professionals</td>
</tr>
<tr>
<td><strong>Average Experience</strong></td>
<td>26 years</td>
</tr>
<tr>
<td><strong>Average Tenure</strong></td>
<td>19 years</td>
</tr>
<tr>
<td><strong>Assets under Management</strong></td>
<td>$29 billion</td>
</tr>
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</table>

### Centralized Professionals

- 6 credit analysts
- 5 traders
- 4 trading/portfolio manager assistants
- 4 client reporting specialists
- 1 attribution/performance analysts

<table>
<thead>
<tr>
<th></th>
<th>Tax-Exempt Fixed Income</th>
<th>Taxable Fixed Income</th>
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<tbody>
<tr>
<td><strong>Portfolio Managers</strong></td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td><strong>Average Experience</strong></td>
<td>17 years</td>
<td>25 years</td>
</tr>
<tr>
<td><strong>Assets under Management</strong></td>
<td>$22 billion</td>
<td>$7 billion</td>
</tr>
<tr>
<td><strong>Approximate Relationships</strong></td>
<td>1,000</td>
<td>300</td>
</tr>
<tr>
<td><strong>Average Account Size</strong></td>
<td>$10 million</td>
<td>$15 million</td>
</tr>
</tbody>
</table>

As of 12/31/15

*Senior management team.
Fixed Income Investments

Objective
• To provide clients with a conservative fixed income portfolio structured around the benchmark, focused on preserving principal and maintaining liquidity, while controlling volatility and generating a consistent level of after-tax income

Philosophy
• We believe that our clients’ fixed income objectives are best met through active, total return management that includes:
  – Multi-dimensional search for value
    • Seeking value by uncovering market inefficiencies
    • Managing interest rate sensitivity
  – Adherence to established, conservative benchmarks
  – Disciplined risk control
    • Minimizing risk to protect capital
  – A tax-efficient approach

No investment strategy or risk management technique can guarantee returns in any market environment.
Fixed Income Process
A MULTIDIMENSIONAL APPROACH

Risk Control

Investment decisions controlled by credit experts and policy limits

Maintain Discipline
- Strict adherence to a proven process
- Intensive, expert research of economic and risk factors

Set Strict Policy Limits
- Extreme positions avoided
- Sector diversification guidelines
- Quality, investment-grade securities

Assess Portfolio Risk
- Simulations of economic and investment conditions
- Scenario testing of portfolio strategies
- Continuous portfolio monitoring

Conduct Independent Credit Analysis
- Continual assessment and review of credit quality by municipal and taxable credit analysts
- Internal ratings assigned to each credit

No investment strategy or risk management technique can guarantee returns in any market environment.
Credit Analysis

Credit Team Conducts Thorough and Continuous Review of Qualitative and Quantitative Data

Research and Analyze Prospective Bonds
- Underlying obligor
- Leverage metrics
- Economic indicators
- Financial statements
- Current performance data
- Cash flow generation
- Legal and tax covenants
- Relative value

Assign Independent, Internal Bond Ratings
- Collaborative review of analyst findings
- Assignment of ratings
  - Lower grade holdings require committee approval

Continually Monitor Bond Holdings
- Ratings agency updates, price deviations and headline news
- Weekly and monthly meetings to strategize sector positioning
- Site visits, meetings and conventions with issuers, government officials, corporate finance officers and credit agencies
- Formal annual review of each holding
- Current ratings and perspective shared across fixed income team in proprietary database
  - Significant changes in credit ratings and outlooks communicated to portfolio managers for immediate action

No investment strategy or risk management technique can guarantee returns in any market environment.
Investment Policy Statement
The investment guidelines and objectives stated below govern the management of the Fixed Income assets of (“Client”).

**Objectives**

To maximize income for The Client, consistent with the objectives of preserving capital and earning a competitive rate of return relative to the specified benchmark. Secondarily, the account shall have the objective of maintaining reasonable liquidity. The account is not subject to Federal income taxes.

Relative and absolute net-of-fees portfolio performance is important. The portfolio is expected to be structured and managed against the Barclays Capital Intermediate Government Index. The average duration of the portfolio may be extended beyond the parameters (80%-120%) of the current Benchmark as market conditions dictate and with approval of the Client.

**Allowable Securities**

Allowable securities include but are not limited to, US Government Securities including Treasury Issues, TIPS, Federal Agency Obligations, Debt of Various State and Local Governments and Political Sub-divisions (federally taxable municipal bonds), and Repurchase Agreements.

**Cash Equivalent Investments.** This portfolio should remain as fully invested as practical once the account becomes fully funded. Normally, cash balances will be held to less than 10% of the value of the portfolio. Cash in the account will be swept into a custodial money market instrument specified by The Client.

**Private Placements.** Debt investments in private placements will not be made without the prior written consent of The Client.

**Diversification and Credit Quality.** The portfolio shall:

- Maintain an effective duration for the portfolio of between 80% and 120% of the Benchmark’s effective duration.
- Individual securities must be rated **mid-A or better** at the time of purchase by at least one NRSRO or determined by our research team to be rated **mid-A or better**.
- No single obligor will represent more than five percent of the total assets. No restriction as to amount invested in obligations issued, insured, or guaranteed by the United States Government.
Leverage. Explicit use of leverage in the portfolio will not be undertaken without the prior written consent of The Client. Leverage is herein defined as a situation in which the portfolio as a whole is more than 100% invested in the securities permitted by these guidelines.

Time Horizon
Consistent with the philosophy of intermediate to long-term management, the portfolio shall be managed with an investment horizon of at least three years.

Review and Modification
1. These guidelines shall be reviewed periodically and revised or confirmed as appropriate.
2. Any changes deemed necessary by either the manager or by The Client will be agreed upon by both parties and confirmed in writing.

Guidelines
This is not a legal document and has not been reviewed by legal counsel. It is a discretionary document that provides guidance to the “The Client” and BNY Mellon Wealth Management.
Subject to the following guidelines, the portfolio manager has full discretion in investment decisions.

This IPS was updated by:
Jeremy N. Baker, CFA, Senior Portfolio Manager
BNY Mellon Wealth Management
March, 2016
Portfolio Analysis
Taxable Fixed Income

Portfolio Review as of 03/24/2016:
0 WORCESTER ST UNIV-TR FUND-IMA
**Portfolio Summary as of 03/24/2016**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Value (plus accrued)</td>
<td>$20,223,233</td>
</tr>
<tr>
<td>Average Rating</td>
<td>AAA / Aaa</td>
</tr>
<tr>
<td>Average Effective Duration</td>
<td>3.5 years</td>
</tr>
<tr>
<td>Average Life</td>
<td>3.8 years</td>
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<tr>
<td>Average Yield (To Worst)</td>
<td>1.18%</td>
</tr>
<tr>
<td>Average Book Yield</td>
<td>2.04%</td>
</tr>
<tr>
<td>Estimated Unrealized Gain/Loss</td>
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</table>

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Market Value (no accrued)</td>
<td>$20,107,125</td>
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<tr>
<td>Total Annualized Coupon Income</td>
<td>$509,779</td>
</tr>
<tr>
<td>Net Annual Amortizations (-)/ Accretions (+)</td>
<td>-$131,097/ $13,938</td>
</tr>
<tr>
<td>Net Annualized Income</td>
<td>$392,620</td>
</tr>
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<td>Average Coupon</td>
<td>2.64%</td>
</tr>
<tr>
<td>Current Yield</td>
<td>2.54%</td>
</tr>
<tr>
<td>Average Market Price</td>
<td>$104.29</td>
</tr>
</tbody>
</table>

**RATING PROFILE**

- **Portfolio Avg. Rating = AAA / Aaa**: 57.3%
- **U.S. Government Intermediate Index Avg. Rating = AAA / Aaa**: 42.7%

**SECTOR PROFILE**

- **Treasuries (57.3%)**
- **Agencies (42.7%)**

Benchmark index belongs to the Barclays family of Indices. The rating logic is the Barclays Index Rating.
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**Portfolio Profile Report**

<table>
<thead>
<tr>
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<tr>
<td>Benchmark*</td>
<td>U.S. Government Intermediate</td>
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<td>Benchmark Pricing Date</td>
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<table>
<thead>
<tr>
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<th>Portfolio</th>
<th>Index</th>
<th>Diff</th>
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<tr>
<td>Effective Duration (yrs)</td>
<td>3.55</td>
<td>3.85</td>
<td>-0.30</td>
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<tr>
<td>Average Life (yrs)</td>
<td>3.75</td>
<td>4.09</td>
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<td>Yield to Maturity (%)</td>
<td>1.18</td>
<td>1.12</td>
<td>0.06</td>
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<tr>
<td>Yield to Worst (%)</td>
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<tr>
<td>Average Credit Quality</td>
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<td>AAA</td>
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<tr>
<td>Average Coupon (%)</td>
<td>2.64</td>
<td>1.83</td>
<td>0.81</td>
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<tr>
<td>Average Price ($)</td>
<td>104.29</td>
<td>102.82</td>
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<tr>
<td>Current Yield (%)</td>
<td>2.54</td>
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<td>97.53</td>
<td>97.50</td>
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<tr>
<td>AA</td>
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<td>-0.03</td>
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<tr>
<td>A</td>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>BBB</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>&lt;BBB</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>NR</td>
<td>-</td>
<td>-</td>
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</table>

<table>
<thead>
<tr>
<th>Effective Duration (yrs)</th>
<th>%Portfolio</th>
<th>%Index</th>
<th>%Diff</th>
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<tbody>
<tr>
<td>NA</td>
<td>2.47</td>
<td>-</td>
<td>2.47</td>
</tr>
<tr>
<td>&lt;0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0 to 1</td>
<td>18.59</td>
<td>0.69</td>
<td>17.90</td>
</tr>
<tr>
<td>1 to 3</td>
<td>28.38</td>
<td>42.37</td>
<td>-13.99</td>
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<td>3 to 4</td>
<td>11.45</td>
<td>14.21</td>
<td>-2.76</td>
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<td>4 to 6</td>
<td>20.57</td>
<td>24.65</td>
<td>-4.08</td>
</tr>
<tr>
<td>6 to 8.5</td>
<td>18.54</td>
<td>15.51</td>
<td>3.03</td>
</tr>
<tr>
<td>&gt;8.5</td>
<td>-</td>
<td>2.58</td>
<td>-2.58</td>
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<table>
<thead>
<tr>
<th>Eff Maturity (Avg Life yrs)</th>
<th>%Portfolio</th>
<th>%Index</th>
<th>%Diff</th>
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<tbody>
<tr>
<td>&lt; 0</td>
<td>-</td>
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<tr>
<td>0 to 1</td>
<td>18.59</td>
<td>0.01</td>
<td>18.58</td>
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<td>1 to 3</td>
<td>27.60</td>
<td>41.57</td>
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<tr>
<td>3 to 5</td>
<td>22.89</td>
<td>28.89</td>
<td>-6.00</td>
</tr>
<tr>
<td>5 to 10</td>
<td>30.92</td>
<td>29.53</td>
<td>1.39</td>
</tr>
<tr>
<td>10 to 20</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>&gt; 20</td>
<td>-</td>
<td>-</td>
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<table>
<thead>
<tr>
<th>Final Maturity (yrs)</th>
<th>%Portfolio</th>
<th>%Index</th>
<th>%Diff</th>
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<tr>
<td>&lt; 0</td>
<td>-</td>
<td>-</td>
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<tr>
<td>0 to 1</td>
<td>18.59</td>
<td>-</td>
<td>18.59</td>
</tr>
<tr>
<td>1 to 3</td>
<td>27.60</td>
<td>40.67</td>
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<td>3 to 5</td>
<td>22.89</td>
<td>28.80</td>
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<td>5 to 10</td>
<td>30.92</td>
<td>30.53</td>
<td>0.39</td>
</tr>
<tr>
<td>10 to 20</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>&gt; 20</td>
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<tr>
<td>Treasuries</td>
<td>57.31</td>
<td>92.72</td>
<td>-35.41</td>
</tr>
<tr>
<td>U.S. TIPS</td>
<td>-</td>
<td>-</td>
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</tr>
<tr>
<td>Govt Related</td>
<td>Agencies</td>
<td>42.69</td>
<td>7.28</td>
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<td>Govt Related</td>
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<table>
<thead>
<tr>
<th>Coupon</th>
<th>%Portfolio</th>
<th>%Index</th>
<th>%Diff</th>
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</thead>
<tbody>
<tr>
<td>&lt; 3%</td>
<td>66.25</td>
<td>89.61</td>
<td>-23.36</td>
</tr>
<tr>
<td>3% to 4%</td>
<td>27.26</td>
<td>6.31</td>
<td>20.95</td>
</tr>
<tr>
<td>4% to 5%</td>
<td>1.55</td>
<td>1.25</td>
<td>0.30</td>
</tr>
<tr>
<td>5% to 6%</td>
<td>4.95</td>
<td>0.57</td>
<td>4.38</td>
</tr>
<tr>
<td>6% to 7%</td>
<td>-</td>
<td>0.46</td>
<td>-0.46</td>
</tr>
<tr>
<td>&gt; 7%</td>
<td>-</td>
<td>1.81</td>
<td>-1.81</td>
</tr>
</tbody>
</table>

Benchmark index belongs to the Barclays family of Indices. The rating logic is the Barclays Index Rating.
Portfolio Profile
AS OF 03/24/2016 BASED ON 03/23/2016 PRICING

AVERAGE LIFE PROFILE

Portfolio Average Life = 12/23/2019 (3.75 years)
U.S. Government Intermediate Index Average Life = 04/03/2020 (4.09 years)

EFFECTIVE DURATION PROFILE

Portfolio Avg. Duration = 3.55 years
U.S. Government Intermediate Index Avg. Duration = 3.85 years
Portfolio Profile
AS OF 03/24/2016 BASED ON 03/23/2016 PRICING

COUPON PROFILE

<table>
<thead>
<tr>
<th>Par (%)</th>
<th>Portfolio Avg. Coupon 2.64</th>
<th>U.S. Government Intermediate Index Avg. Coupon 1.83</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-1</td>
<td>19.0%</td>
<td>1.6%</td>
</tr>
<tr>
<td>1-2</td>
<td>44.3%</td>
<td>44.0%</td>
</tr>
<tr>
<td>2-3</td>
<td>27.6%</td>
<td>4.8%</td>
</tr>
<tr>
<td>3-4</td>
<td>6.0%</td>
<td>0.5%</td>
</tr>
<tr>
<td>4-5</td>
<td>1.2%</td>
<td>0.3%</td>
</tr>
<tr>
<td>5-6</td>
<td>1.6%</td>
<td>8.9%</td>
</tr>
<tr>
<td>6-7</td>
<td>4.8%</td>
<td>26.5%</td>
</tr>
<tr>
<td>7-8</td>
<td>0.8%</td>
<td>20.3%</td>
</tr>
<tr>
<td>8-9</td>
<td>0.5%</td>
<td>0.2%</td>
</tr>
<tr>
<td>9-10</td>
<td>0.2%</td>
<td>&lt;0.01%</td>
</tr>
<tr>
<td>&gt;10</td>
<td>0%</td>
<td>0%</td>
</tr>
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SECTOR PROFILE

<table>
<thead>
<tr>
<th>Market Value (%)</th>
<th>Portfolio</th>
<th>U.S. Government Intermediate Index</th>
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</thead>
<tbody>
<tr>
<td>Treasuries</td>
<td>57.3%</td>
<td>92.7%</td>
</tr>
<tr>
<td>Agencies</td>
<td>42.7%</td>
<td>7.3%</td>
</tr>
<tr>
<td>OTHER</td>
<td>0%</td>
<td>0%</td>
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</tbody>
</table>

Portfolio Avg. Coupon: 2.64
<table>
<thead>
<tr>
<th>Trade Date</th>
<th>Settle Date</th>
<th>Ticket Type</th>
<th>S&amp;P/Moody Rating</th>
<th>Par 000's</th>
<th>Holding</th>
<th>Sector</th>
<th>Cpn</th>
<th>Maturity</th>
<th>Call Date</th>
<th>Ticket Price</th>
<th>Ticket Yield</th>
<th>Estimated Gain/Loss</th>
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</thead>
<tbody>
<tr>
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## Fixed Income Market Summary

**AS OF 2/29/2016**

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## Yield Curve Comparison

**TREASURY VS. MUNICIPAL**

![Yield Curve Comparison](image)

Yield Curve Comparison for Treasury vs. Municipal Bonds for 1-30 Year Maturities.

Sources: Barclays Capital, Tax-exempt: MMD AAA scale, Treasury: Bloomberg
Taxable Market Highlights

- Global yields were generally lower in February with the 10-year German Bund lower by 20 bps to end at 0.15%.
- Treasury yields flattened in February with the 2-year increasing by 2 bps to end at 0.78% and the 30-year lower by 14 bps to end at 2.61%.
- Credit spreads widened by approximately 2 bps, ending at +183 OAS.
  - Intermediate Corporate outperformed Long Corporate, -0.15% excess return versus -0.68%, respectively.
- High Yield OAS was 3 bps wider, ending at +736 OAS with a total return of 0.57%.
- February issuance was $107 billion, bringing year-to-date issuance to $239 billion.
- TIPS breakevens (10-year) increased by 3 bps, ending at +143.
- MBS outperformed like-duration Treasuries as Treasury yields flattened in February.
- Positioning:
  - The Bond Fund has a target duration of +/-90% and maintaining the credit overweight.
  - The Intermediate Fund has a target duration of +/-78% and maintaining the credit overweight.
  - Credit 1-5 has a target duration of 95-100%.
  - Short Term Government has a target duration of 100-105%.
## Taxable Fixed Income Market Summary

### AS OF 2/29/2016

#### Taxable Sector Returns

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<td>1.68</td>
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<tr>
<td>ABS</td>
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<td>1.04</td>
<td>1.24</td>
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<tr>
<td>CMBS</td>
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<td>1.43</td>
<td>2.33</td>
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<td>High Yield</td>
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<td>Emerging Market Debt</td>
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#### Taxable Credit Spreads (OAS* bp)

<table>
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<th>Sector</th>
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<th>3-Mo</th>
<th>YTD</th>
<th>12-Mo</th>
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<td>Finance</td>
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<td>Industrial</td>
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<td>Utilities</td>
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<td>Energy</td>
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<td>Banking</td>
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<td>Finance Companies</td>
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<td>1</td>
<td>66</td>
<td>85</td>
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<td>Crossover</td>
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<td>66</td>
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<td>High Yield</td>
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<td>U.S. Credit</td>
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<td>2</td>
<td>36</td>
<td>27</td>
</tr>
</tbody>
</table>

---

**Source:** Barclays Capital

OAS* Option Adjusted Spread
**Accretions/Amortizations**- The addition (accretion) or reduction (amortization) of principal to a bond/portfolio over a period of time to account for the discount/premium at time of purchase. This accounting mechanism allows for an adjustment to the coupon interest received on a bond in order to offset a premium/discount paid for that bond.

**Average Book Yield**- Book yield reflects the acquisition yield. Therefore, book yield is defined as the yield-to-worst, given a book value -- except when there are no amortizations or accretions, or when the accretion is limited by the accretion method (OID only).

**Average Coupon**- Average Coupon is the par-value-weighted average of the coupon rates of the individual securities including cash. It is calculated by summing the product of each security's coupon times its par value and then dividing the result by the total portfolio par value.

**Average Credit Quality**- Average credit quality gives a snapshot of the portfolio's overall credit quality. It is an average of each bond's credit rating, adjusted for its relative weighting in the portfolio.

**Average Duration (modified)**- The market-value-weighted average of modified durations of the individual securities. Modified duration follows the concept that interest rates and bond prices move in opposite directions. This formula is used to determine the effect that a 100-basis-point (1%) change in interest rates will have on the price of a bond.

**Average Market Price**- Average Market Price is the par-value-weighted average of the market prices of the individual securities including cash. It is calculated by summing the product of each security's market price times its par value and then dividing the result by the total portfolio par value.

**Average Maturity**- Market-value-weighted average of the effective maturity dates of the individual securities including cash. It is calculated by summing the product of each security's effective maturity times its market value (including accrued interest) and then dividing the result by the total portfolio market value. Effective maturity dates reflect put (tender) option dates (on variable rate securities), mandatory put dates and refunding dates for prerefunded and crossover refunded securities.

**Average Price-to-Date**- For an individual security, its "priced-to" date is its maturity date, or alternatively, an earlier redemption date that is used in the yield/price calculation to determine yield-to-worst.* The Average "Priced-To" Date is the market-value-weighted average of the "priced-to" dates of the individual securities including cash. It is calculated by summing the product of each security's "priced-to" date times its market value (including accrued interest) and then dividing the result by the total portfolio market value.

**Average Yield (To Worst)**- Yield is the basis on which a bond is priced and sold. It reflects the value of the bond giving consideration to the length of time to maturity, credit quality of the issuer/guarantor, and general market conditions.

**Current Yield**- Coupon divided by market value (no accrued).

**Estimated Unrealized Gain/Loss**- The difference between Total Market Value (no accrued interest) and the total of book values of all lots of individual securities.

**Net Annualized Income**- This is the Total Annualized Coupon Income less Annualized Amortizations and plus Annualized Accretions.

**Total Annualized Coupon Income**- This is the sum of each security's coupon rate times its par value including cash. Includes income from step coupons, calculated as the current daily rate annualized rather than projecting coupon income over the succeeding year.

Sources: Investortools, Inc.
Taxable Municipal Bonds – Definition

• Fixed-income securities issued by a state or local government such as a city or county or related agencies, the income from which is not exempt from tax. Taxable municipal bonds are generally issued to finance a project or activity that does not provide a major benefit to the public. In such cases, the federal government will not permit the tax-exemption that is a prominent feature of most municipal bonds.

• Build America Bonds (BABs), issued as part of the American Recovery and Reinvestment Act of 2009, are considered taxable municipal bonds. BABs, issued to fund new infrastructure projects and create jobs at the local level during the financial crisis, represent a relatively large portion of outstanding taxable municipal bonds.

• Other examples of situations where taxable municipal bonds may be issued include financing local sports facilities and funding an under-funded municipal pension plan. Non-profit hospitals and public universities have also taken advantage of issuing taxable municipal bonds.

Source: Investopedia
Taxable Municipal Bonds - Advantages

• Taxable municipal bonds offer yields more comparable to those of other taxable sectors, such as corporate bonds or bonds issued by U.S. governmental agencies, while providing credit quality that is distinct from corporate issuers

• Underlying credit quality of larger state and local general obligation issuers tends to be high

• Increases diversification within overall portfolio without diminishing liquidity, particularly for index-eligible issues
Memorandum

DATE: March 28, 2016

TO: Barry M. Maloney, President

FROM: Kathleen Eichelroth, Vice President for Administration and Finance

RE: FISCAL YEAR 2017 UNDERGRADUATE FEES

The FY 2017 budget process began in October with a focus on the opening of the new Wellness Center. The reconciliation of the previous Athletic Department budget and building of the new Wellness Center budget continued through the fall and winter. An initial presentation was made to the Finance and Facilities sub-committee and the Board in January, with an additional update in early March. During these meetings there was also discussion concerning FY 2017 collective bargaining costs. Those discussions identified the cost associated with the contractual increases and, as in the past, the general fee increase that would be necessary should the University not receive resources from the Commonwealth to fund the increases. A presentation was also made regarding the stabilization of the University’s unrestricted reserves and several scenarios were proposed to build the reserves in the Capital Improvement Trust Fund as a means of leveraging funds for future campus improvements.

Since the March 8th board meeting the budget process has progressed. Budget managers have prepared their funding request for FY 2017 and have forwarded them through their division. A prioritized list of requests has been prepared by each division. The requests will be discussed in the President’s Direct report meeting and further ranked and prioritized at the campus level. The requests are being evaluated with regard to need as a foundational level request to support core University operations or as a request specifically linked to the overarching goals and strategies of the strategic plan. A Cabinet level discussion of the results of the campus level prioritization will also take place in early April.

During the month of April a reconciliation of operating expenses and revenues will be finalized. The reconciliation is relied upon to identify resources available to fund new initiatives in the coming year once all non-discretionary costs have been identified. Available net resources will then be offset from the list of campus wide prioritized requests and a determination will be made of the level of resources that may be committed to the stabilization of unrestricted reserves. The results of this process will be presented to the Finance and Facilities sub-committee prior to the June board meeting.
As in the past, it is important to receive Board approval for the undergraduate fee increases for the coming year as soon as possible. Though the budget process is not complete, consideration and approval of changes in the fee structure for undergraduate students in early April provides incoming students with official tuition and fee information for the coming year and allows the Financial Aid Office to prepare financial aid awards based on actual costs of attendance for the coming year.

- At this time we seek Board approval of a $345.25 per year general fee increase for FY 2017.

- The portion of the increase that relates to new programming in the Wellness Center is $155.25 per year.

- As in the past we seek approval of a general fee increase to fund collective bargaining costs should the Commonwealth not fund this obligation. The fee increase associated with collective bargaining costs is $230 a year. The fee will not be assessed to students should the Commonwealth provide funds to cover this obligation at the conclusion of the FY 2017 budget process, but prior to the University’s distribution of fall semester invoices during the second week of July.

- The General Fee is currently set at $7,189 per year, with cumulative mandatory fees set at $7,887 and in-state tuition of $970 per year.

- An approved increase in the General Fee will set that rate at $7,534.25 per year, with a total annual cost of tuition and fees of $9,202.25 for the 2016/2017 academic year.
NOTICE

A MEETING OF THE ACADEMIC AFFAIRS/STUDENT DEVELOPMENT COMMITTEE OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL BE HELD ON TUESDAY, APRIL 12, 2016 AT 4:30 P.M. IN THE MULTI PURPOSE ROOM IN SHEEHAN HALL.

1. CALL TO ORDER

2. APPROVAL OF FACULTY PROMOTIONS AND AWARDING OF TENURE

3. APPROVAL OF A MASTER’S IN PUBLIC MANAGEMENT PROGRAM (MPM)

4. APPROVAL OF A MASTER’S IN PUBLIC ADMINISTRATION AND POLICY (MPAP)

5. OTHER BUSINESS

6. ADJOURNMENT

_________________
Judith A. St. Amand
April 5, 2016

ACADEMIC/STUDENT DEVELOPMENT COMMITTEE
Trustee Shirley Steele, Chair
Trustee Kurt Correia
Trustee Karen LaFond
Trustee Shirley Steele
Trustee Ronald Valerio, Ex-Officio Voting Member
President Maloney, Ex-Officio Non-Voting Member

All trustees are welcome at any committee meeting
Upon a motion made and seconded, it was

VOTED: to recommend approval of the following promotions:

**Promotion to Associate Professor**
- Patricia Donovan
  - Effective September 1, 2016
  - Occupational Therapy

**Promotion to Professor**
- Daron Barnard
  - Biology
  - Effective September 1, 2016
- Keith Darrow
  - Communication Sciences & Disorders
- Peter Holloran
  - History & Political Sciences
- Matthew Johnsen
  - Sociology

Upon a motion made and seconded, it was

VOTED: to recommend approval of the following promotions with tenure:

**Promotion to Associate Professor with Tenure**
- Tanya Mears
  - History & Political Sciences
  - Effective September 1, 2016
- Sam O’Connell
  - Visual & Performing Arts
- Christina Bebas
  - Education
- Hye-Sun Kim
  - Criminal Justice

Upon a motion made and seconded, it was

VOTED: to recommend approval of the following for the awarding of tenure:

**Tenure**
- Sara Young
  - Education
  - Effective September 1, 2016
- Denise Foley
  - Education
- Charles Fox
  - Psychology
- Jennifer Hood-De-Grenier
  - Biology
- William Shakalis
  - Library
Upon a motion made and seconded, it was

**VOTED:** to recommend approval of a Master’s in Public Management Program as presented.

Upon a motion made and seconded, it was

**VOTED:** to recommend approval of a Master’s in Public Administration and Policy as presented.

Upon a motion made and seconded, it was

**VOTED:** to adjourn the meeting at
Worcester State College
Graduate Council

Date: Dec 1, 2014

I. Proposal Title  To introduce a Master’s in Public Management (MPM)

II. Proposer/Contact Person Shiko Gathuo/Tom Conroy

III. Proposer’s Department, Phone No., email: Urban Studies; 8892; agathuo@worcester.edu

IV. Vote of Department (if applicable): 5-0

V. Proposer’s Signature:

VI. Collaborators (if applicable):

VII. Proposal Summary (If applicable, highlight changes from previous policy or practice in 25 words or fewer):
To introduce a new master’s degree - Master’s in Public Management (MPM) as part of the expansion of graduate school offerings at WSU.

VIII. Rationale for the Proposal:

Currently, the university offers a Master’s in Nonprofit Management. A survey of nonprofit education being offered nationwide shows:

a) Increased competition in nonprofit education. Nationally, there are at least 292 colleges and universities that offer such programs. In the immediate vicinity of WSU, Clark University offers a nonprofit concentration within an MBA, an MBA in social change, and an MBA/MA in community development and planning. Ana Maria College offers an MPA program with a “nonprofit strategy area.”

b) The nonprofit education is offered in a variety of programs that combine public administration, public policy, public management and business. Indeed, many books on nonprofit management also include public management e.g. Financial Management for Public and Nonprofit Organizations; Strategic Planning for Nonprofit and Public Organizations
In solely offering a Master's in Nonprofit Management, WSU does itself a disservice by losing out on those students who are interested in public management and administration.

The offering of this new degree is therefore about:

a) External Program Positioning: Where is WSU situated (positioned) in the Nonprofit Education marketplace? By offering a differentiated degree, students will have diplomas that best reflect their career paths.

b) Internal Efficiency: The new degree will be built out from the existing Nonprofit Management curriculum. The offering of a common core will make better use of the resources already being utilized to run the current program

*Please see samples of schools offering nonprofit education

IX. Proposal Narrative:

The Master's in Public Management (MPM) will be offered to students interested in careers in public management. Specifically, the program is targeted at local POLICY IMPLEMENTERS and municipal, regional, and state management staff. It is anticipated that the program would be a blended one, combining classroom and online classes.

PROPOSED COURSE OFFERING*

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<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
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<td>MPM 901**</td>
<td>Project Management</td>
<td>3</td>
</tr>
<tr>
<td>MPM 942**</td>
<td>Organizational Theory</td>
<td>3</td>
</tr>
<tr>
<td>MPM 945**</td>
<td>Financial Management for Public Organizations</td>
<td>3</td>
</tr>
<tr>
<td>MPM 949**</td>
<td>Strategic Leadership and Planning for Public Organizations</td>
<td>3</td>
</tr>
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<td>MPM 951**</td>
<td>Negotiation &amp; Conflict Resolution for Public Organizations</td>
<td>3</td>
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<tr>
<td>MPM 993**</td>
<td>Public Relations</td>
<td>3</td>
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<tr>
<td>MPM 934**</td>
<td>Ethics and Management of Human Resources</td>
<td>3</td>
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<tr>
<td>MPM 990**</td>
<td>Action Research</td>
<td>3</td>
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<tr>
<td>MPM 980**</td>
<td>Management Project Fieldwork I for Public Management</td>
<td>2</td>
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<tr>
<td>MPM 981**</td>
<td>Management Project Fieldwork II for Public Management</td>
<td>4</td>
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<tr>
<td>Additionally, 2 electives will be required</td>
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<tr>
<td>Total Number of Credits:</td>
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*Please see the curriculum as it relates to the current Master's in Nonprofit Management curriculum

**Place holder codes

DEPARTMENT APPROVAL:

APPROVED: ✓ NOT APPROVED: VOTE: 5-0

DATE OF TRANSMITTAL:

COMMENTS:
WORCESTER STATE UNIVERSITY
GRADUATE SCHOOL COURSE PROPOSAL

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓
Deletion of Present Course

DATE: Dec 2, 2014

NATURE OF CHANGE:
To introduce the course MPM 980: Management Project Fieldwork I for Public Management

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPM 980: Management Project Fieldwork I for Public Management

SEMESTER HOURS: 2

HOW FREQUENTLY OFFERED? Every Fall

PREREQUISITES:
Five core courses. Must be taken concurrently with MPM 990

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will be a practical in nature. Students will identify their management project and write a project plan

FORMAL COURSE DESCRIPTION (100 word limit):
In individual consultation with the instructor, students will identify a management project and write a plan to carry out their projects. The plan will include: An executive summary, explanation of strategic/organizational alignment, project scope, feasibility assessment and contingency plans, constraints, human resource requirements, material/equipment requirements, project schedule, budget/cost estimate, risk management, project issues, change management, communication management, approvals and attachments
Draft Syllabus

MPM 980 - MANAGEMENT PROJECT FIELDWORK I for PUBLIC MANAGEMENT
(Prerequisite: Five core courses. To be taken concurrently with MPM 990)

COURSE GOALS AND OBJECTIVES

This is the first the two courses required for the Management Project experience in the MPM. Students will identify a topic and design a plan for the management project. Students will also prepare an application for the WSU HSRB if their projects involve research with human subjects.

Students will consult individually with the instructor on a weekly basis, and provide updates on their projects.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

The final grade will be based on the weekly updates, the HSRB proposal, and the final project plan.

SUGGESTED FORMAT FOR THE MANAGEMENT PROJECT REPORT

- **Executive summary** – Summarize the project plan and explain its key elements
- **Strategic alignment** – Describe what strategic goals and objectives the project is attempting to support.
- **Project scope** – Describe the purpose and objectives of the project. What are the major deliverables? What is the product breakdown? What kind of workflow are you planning? What criteria, from the clients point of view, will be used to determine quality and success? What assumptions are you making?
- **Feasibility assessment and contingency plans** – Detail the economic, technical, operational and organization feasibility of the project. Include contingency plans for unexpected events.
- **Human resource requirements** – Define the project team’s roles and responsibility requirements as well as training requirements.
- **Material/equipment requirements** – Describe the space and material requirements for the project.
- **Project schedule and benchmarks** – Describe the timelines, benchmarks and milestone expected to be adhered to for the successful completion of the project.
- **Budget/cost estimate** – Estimate the budget for different phases of the project.
- **Risk Management** – How will risk be management in the course of the project.
- **Constraints/Barriers** – What are the constraints of the project – e.g. time, budget, human resources etc.
- **Project issues and change management** – How will issues and change be managed?
- **Communication management** – How will communication among stakeholders be managed/organized?
- **Approvals** – Include the approvals of project stakeholders.
- **Attachments** – Included all relevant documents related to the project.
JUSTIFICATION:
This is an essential course for managers and administrators of public agencies, part of whose job is to implement projects.

DEPARTMENT

NAME OF DEPARTMENT: Urban Studies

APPROVED: ✓ NOT APPROVED: VOTE: 5 0

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson          Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
WORCESTER STATE UNIVERSITY
GRADUATE SCHOOL COURSE PROPOSAL

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓
Deletion of Present Course

DATE: ___ Dec 2, 2014 ___

NATURE OF CHANGE:
To introduce the course MPM 981: Management Project Fieldwork II for Public Management

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPM 981: Management Project Fieldwork II for Public Management

SEMESTER HOURS: 4

HOW FREQUENTLY OFFERED? Every Spring

PREREQUISITES:
MPM 980 and MPM 990

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will be a practical in nature. Students will implement their chosen Management Project

FORMAL COURSE DESCRIPTION (100 word limit):
In individual consultation with the instructor, students will implement their Management Projects as identified in MPM 980.
JUSTIFICATION:

This is an essential course for public administrators who are engaged in lobbying for policy, writing policy policy implementation, and policy analysis.

DEPARTMENT

NAME OF DEPARTMENT  Urban Studies

APPROVED:  √  NOT APPROVED:  VOTE:  5  0

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson  Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED:  NOT APPROVED:  VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPM 981 - MANAGEMENT PROJECT FIELDWORK II for PUBLIC MANAGEMENT
(Prerequisite: MPM 990 & MPM 980)

COURSE GOALS AND OBJECTIVES

This is the second of the two courses required for the Management Project experience in the MPM. Students will implement the management project plan prepared during the Management Project Fieldwork I course. Students will present a management report both orally and in written form.

Students will consult individually with the instructor on a weekly basis, and provide updates on their projects.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

The final grade will be based on the weekly updates, oral report - which will be open to the public - as well the written report.

SUGGESTED FORMAT FOR THE MANAGEMENT PROJECT REPORT

- **Executive summary** – Summarizes the report
- **Introduction** – Should include an explanation of the strategic alignment, project scope, resources and other pertinent information that aids the reader in putting the findings into context
- **Methodology** – Detail the methods used in collecting information and implementing the project
- **Findings** – Detail the findings of the projects
- **Preliminary successes** – Most probably, the project will still be ongoing. Include a section of successes achieved so far
- **Challenges and obstacles** – Describe the challenges encountered in the project and how they were resolved
- **Conclusion and Recommendations** – Given the findings, what are the conclusions and recommendations with regard to the next steps for the organization?
WORCESTER STATE UNIVERSITY
GRADUATE SCHOOL COURSE PROPOSAL

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓
Deletion of Present Course

DATE: Dec 2, 2014

NATURE OF CHANGE:
To introduce the course MPM 901: Project Management for Public Organizations

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPM 901: Project Management for Public Organizations

SEMESTER HOURS: 3

HOW FREQUENTLY OFFERED? At least every two years

PREREQUISITES:
None. This course may be taken as an elective by non-MPM students

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will introduce students to the processes and dynamics of effectively managing a project from beginning to end.

FORMAL COURSE DESCRIPTION (100 word limit):
This introductory course will provide students with the skills, tools, and techniques necessarily to run a project successfully from conception to evaluation. Students will learn the systematic methods of planning, implementing and evaluating a project. Students will develop a broad range of skills including communication, team management, coordination, monitoring, and control. Specific resource management (time, space and people) will be explored.
JUSTIFICATION

This is a foundational course for the Master's in Public Management (MPM) as in many management-related degrees. As policy implementers, graduates of the MPM will be tasked with implementing specific projects related to public policy.

DEPARTMENT

NAME OF DEPARTMENT

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson

Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPM 901 - PROJECT MANAGEMENT FOR PUBLIC ORGANIZATIONS
No prerequisite; Core for MPM

COURSE GOALS AND OBJECTIVES

This introductory course will provide students with the skills, tools, and techniques necessarily to run a project successfully from conception to evaluation. Students will learn the systematic methods of planning, implementing and evaluating a project. Students will develop a broad range of skills including communication, team management, coordination, monitoring, and control. Specific resource management (time, space and people) will be explored.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

Grading will be based on oral presentations, classroom participation and written projects.

TOPICS WILL INCLUDE

- Overview of Project Management
- Project Management Growth: Concepts and Definitions
- Organizational Structures as used in Project Management
- Organizing and Staffing the Project Office and Team
- Management Functions in a Project Environment
- Management of Project Manager’s Time
- Conflicts
- The Variables for Success
- Working With Executives
- The Project Plan
- Network Scheduling Techniques
- Project Graphics
- Pricing and Estimating
- Cost Control
- Trade-Off Analysis in a Project Environment
- Risk Management
- Learning Curves
- Contract Management
- Quality Management
<table>
<thead>
<tr>
<th>School</th>
<th>Location</th>
<th>Name of Degree</th>
<th>Core Courses Offered</th>
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<tbody>
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<td>American International College</td>
<td>Springfield, MA</td>
<td>Master of Science in Nonprofit Management</td>
<td>- Organizational Leadership and Strategic Management</td>
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<td>- Board and Volunteer Development</td>
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<td>- Managerial Accounting and Finance for Nonprofit Managers</td>
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<td>- Introduction to the Nonprofit Sector</td>
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<td>- Non-Profit Law</td>
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<td>- Fund Raising Strategies</td>
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<tr>
<td>Bay Path College</td>
<td>Longmeadow, MA</td>
<td>M.S. in Nonprofit Management and Philanthropy</td>
<td>- Foundations of Nonprofit Management</td>
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<td>- Financial Decision making for nonprofits</td>
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<td>- Fundraising Theory and practice</td>
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<td>- Strategic Management for Nonprofit Organizations</td>
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<td>- Board governance and volunteer management</td>
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<td>- Leading change for nonprofit organizations</td>
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<td>- Law, Policy and governance relations in nonprofit organizations</td>
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<td>- Capstone project</td>
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<tr>
<td>Ana Maria College</td>
<td>Worcester, MA</td>
<td>MPA</td>
<td>- Ethical Theory (or equivalent)</td>
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<td>- Others are electives within concentrations (Also has mid-career track)</td>
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<tr>
<td>Clark University</td>
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<td>MPA with a concentration in Nonprofit Management</td>
<td>- Nonprofit Management</td>
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<td>- Fundraising and Grant Writing</td>
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<td>- * for those taking nonprofit concentration</td>
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<td>Boston University</td>
<td>Boston, MA</td>
<td>Certificate in Fundraising*</td>
<td>- Fundraising and Grant Writing for Nonprofit Organizations</td>
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<td>Metropolitan College</td>
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<td>- Individual Fundraising</td>
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<td>Boston University</td>
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<td>MBA with* a concentration in Public and Nonprofit</td>
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<td>School of Management</td>
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<td>- Global Social Enterprise Field Seminar - Brazil</td>
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<td>- Marketing Social Change</td>
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<td>- Strategy for Nonprofits</td>
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<td>Brandeis University</td>
<td>Waltham, MA</td>
<td>MA in sustainable development</td>
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<td>MBA (concentration in Nonprofit management)</td>
<td>- Strategic Fundraising and Corporate Philanthropy</td>
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<td>- Global Social Enterprise Field Seminar - Brazil</td>
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<td>- Social Entrepreneurship</td>
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<tr>
<td>Cambridge College</td>
<td>Cambridge, MA</td>
<td>Masters in Management (Program name: Nonprofit</td>
<td>- Grant Writing</td>
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<td>and Public Organization Management)</td>
<td>- The Manager as Negotiator</td>
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| Harvard University                             | Cambridge, MA  | MBA, Initiative on social enterprise                                           | - Effective Leadership of Social Enterprise  
- Strategic Perspectives in Nonprofit Management  
- Governing for Nonprofit Excellence  
- Performance Measurement for Effective Management of Nonprofit Organizations  
- Strategic Giving                                                                 |
| Harvard (JFK School of Government)             | Cambridge, MA  | Master in Public Policy  
Master in Public Administration                                                   | - Introduction to the Nonprofit Sector  
- Seminar: The Nonprofit Sector  
- Strategic Management of Nonprofit Organizations  
- Nonprofit Governance  
- Philanthropy: Policy and Practices  
- The Politics and Ethics of the Use of Force  
- Religion and Government: Choices of Morality, Law and Policy  
- The Informal Workforce in a Global Economy  
- Civil Society and Development  
- Entrepreneurship for Social Value Creation  
- Organizing: People, Power and Change |
| Lesley University                              | Cambridge, MA  | Master in Management (Nonprofit concentration)                                 | - Introduction to Not-for-Profit Management  
- Financial Management for Not-for-Profit Organizations  
- Marketing for Not-for-Profit Organizations  
- Capstone Internship and Seminar in Not-for-Profit Management |
| Regis College                                  | Waltham, MA    | Master of Public Administration  
- MS in Leadership and Organizational Change  
- Graduate Certificate in Nonprofit Administration                               | - Nonprofit Administration  
- Capstone Field Research/Thesis                                                  |
| Suffolk University                             | Boston, MA     | MPA (Nonprofit management concentration)                                       | - Nonprofit Organizations in the Community  
- Nonprofit Financial Management  
- Not-for-Profit Accounting and Control  
- The Entrepreneurial Nonprofit  
- Nonprofit Marketing  
- Revenue Strategies for Nonprofit Organizations  
- Nonprofit Law and Ethics  
- Grants-in-Aid and Grants Management                                                 |
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<th>School</th>
<th>Location</th>
<th>Name of Degree</th>
<th>Core Courses Offered</th>
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| Tufts University              | Medford, MA    | Master of Arts (Concentration in Nonprofit Organizations) | Nonprofit, States and Markets  
Financial Analysis and Management  
Strategic Philanthropy: New Tools and Perspectives  
Philanthropy and Fundraising  
Community Development, Planning, and Politics  
Community Economic Development |
| University of Massachusetts   | Amherst, MA    | MPPA (Master of Public Policy and Administration) | Nonprofit management: Program                                                        |
| Arizona State University      | Phoenix, AZ    | Master of Nonprofit Studies (MNpS)             | Fiscal Management for Nonprofits  
Volunteer and Human Resources in Nonprofit Organizations  
Leadership and Ethics in Nonprofit Organizations  
Program Evaluation and Information Management in NPOs  
Philanthropy: Theory and Practice in Nonprofit Organizations  
Capstone: Critical Issues in Nonprofit Management  
Foundations in Nonprofit Management  
Social Entrepreneurship  
Executive Leadership and Governance  
Practicum  
International NGOs |
| UCLA                          | Los Angeles, CA| Master of public policy                        | Management Challenges and Tools for the Nonprofit Sector  
The Nonprofit Sector, the State and Civil Society  
Community Organizing and Democracy  
Leadership, Development and Governance of Nonprofit Organizations  
Community Development and Housing Policies: The Role of the State, Civil Society and Nonprofits  
The Nonprofit Sector - An International Perspective  
Urbanization in Developing World (NGOS and International Development)  
Urbanization and Rural Development (NGOs and International Developmet)  
Nonprofit Development  
Law and Non-Profit Organizations  
Law Seminar: International Civil Society]  
Nonprofit Sector Financial Policy  
Human Resource Management in Creative and Nonprofit Sectors |
| University of Colorado at Denver | Denver, CO    | Master of Public Administration (Nonprofit management concentration) | Seminar on Nonprofit Management  
Seminar on Nonprofits & Public Policy  
Nonprofit Financial Management  
Collaboration Across Sectors  
Understanding and Achieving Funding Diversity  
Nonprofit Boards and Executive Leadership  
Social Entrepreneurship  
Grant Writing  
Civil Society and NonGovernmental Organizations |
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<th>University</th>
<th>City, State</th>
<th>Degree Program</th>
<th>Course Topics</th>
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<td>Yale University*</td>
<td>New Haven, CT</td>
<td>Master in Public &amp; Private Management</td>
<td>Strategic Management of Nonprofit Organizations</td>
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<td>Workshop on Entrepreneurship in the Nonprofit Sector</td>
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<td>Understanding the Financial Statements and Financial</td>
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<td>Condition of Private Not-For-Profit Organizations</td>
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<td>Services Marketing: Strategies for Nonprofits and For-Profits</td>
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<td>CSR: Social Venture Management</td>
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<td>Governing and Managing Nonprofit Organizations</td>
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<td>Public and Nonprofit Program Evaluation</td>
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<td>Managing Nonprofit Boards</td>
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<td>Managing Fund Raising and Philanthropy</td>
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<td>University of South Florida</td>
<td>Tampa, FL</td>
<td>MPA (Nonprofit management concentration)</td>
<td>Nonprofit Management and Leadership</td>
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<td>Financial Oversight of Nonprofit Organizations</td>
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<td>Resource Development: Fund Raising &amp; Grantsmanship</td>
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<td>Georgia State University</td>
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<td>• Masters in Public Administration</td>
<td>Introduction to the Nonprofit Sector</td>
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<td>• Masters of Science in Urban Policy Studies (Concentration in Nonprofit</td>
<td>Fundraising for Voluntary Nonprofit Organizations</td>
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<td>University of Northern Iowa</td>
<td>Cedar Fall, IA</td>
<td>Master's Degree in Philanthropy &amp; Nonprofit Development</td>
<td>Philanthropy &amp; Nonprofit Development: An Overview</td>
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<td>Designing Proposals</td>
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<td>Evaluation, Research &amp; Accountability</td>
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<td>Values, Ethics &amp; Strategic Crisis Management</td>
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<td>Strategic Management in Non-Market Environments</td>
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<td>Board Governance of Non-Profit Organizations</td>
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<td>Indiana University</td>
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<td>University of Kentucky Martin School</td>
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<td>Louisiana State University in Shreveport</td>
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<td>Master of Science in Human Services Administration</td>
<td>Development of Philanthropy and Nonprofit Organizations</td>
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<td>University of Maryland, University College</td>
<td>Adelphi, MD</td>
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<td>Nonprofit Organizations and Issues</td>
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| University of Southern Maine | Portland, ME | Master in Public Policy and Management; Certificate in Nonprofit Management | - Managing the Nonprofit Organization  
- Grant Writing and Financial Management in the Nonprofit Organization  
- Financial Management for Nonprofit Organizations |
| University of Michigan | Ann Arbor, MI | MPP with concentration in Public Management  
MSW with concentration in Management of Human Services, Community Organization and Social Planning, or Social Policy and Evaluation  
- Policy and Management in the Nonprofit Sector (Pub. Pol.)  
- Leading Non-Profit Organizations (Bus. Ad.)  
- Researching Methods for Evaluating Social Programs and Human Service Organizations (S.W.)  
- Human Service Organizations: Theories & Approaches (S.W.)  
- Budgeting and Fiscal Management (S.W.)  
- Management of Information Systems in Human Service Agencies (S.W.)  
- Grantgetting, Contracting and Fundraising (S.W.)  
- Executive Leadership and Organizational Governance (S.W.)  
- Seminar: Empirical Research on Nonprofit Organizations and Voluntary Action (S.W.)  
- Information Technologies in Small Nonprofit Organizations (Pub. Pol.)  
- Program Evaluation (Pub. Pol.)  
- Managerial Writing Fundamentals (Bus. Ad.)  
- Persuasive Management Communication (Bus. Ad.)  
- Social Marketing (Bus. Ad.) |
| University of Minnesota, Humphrey Institute | Minneapolis, MN | Master of Public Affairs  
Master of Public Policy (Concentration in Nonprofits)  
Nonprofit Management Certificate | - Management and Governance of Nonprofit Organizations  
- Financing Nonprofits: Philosophies and Realities  
- Managing Collaborations  
- Advanced Community Organization and Advocacy  
- Capstone on Leading Nonprofit Organizations |
| University of Missouri at St. Louis | St. Louis, MO | Master of Public Policy Administration (Concentration in Nonprofit Management and Leadership) | - Leadership and Management in Nonprofit Organizations  
- Legal Issues in Governing & Managing NPOs  
- Strategic and Program Planning for Nonprofit Organizations  
- Staff Management Issues in Nonprofit Organizations  
- Financial Issues in Managing Nonprofit Organizations  
- American Philanthropy and Nonprofit Resource Development |
| University of North Carolina at Chapel Hill | Chapel Hill, NC | • MPA (Concentration in Nonprofit Management) | • Nonprofit Management  
• Citizen Participation and Volunteer Involvement  
• Executive Leadership in Nonprofit Organizations  
• Nonprofit Law for Non-Lawyers  
• Community Practice and Planning  
• Sustainable Development  
• Marketing and Fundraising for Nonprofit Organizations  
• Navigating Nonprofit-Local Government Relationships  
• Financial Management of Nonprofit Organizations  
• Public Affairs Dispute Resolution and Consensus Building |
| Rutgers, The State University of New Jersey | New Brunswick, NJ | • MSW | • Management Practice and Theory  
• Strategic and Program Planning  
• Human Resources Management  
• Financial Management  
• Marketing and Fundraising  
• Child Welfare Management  
• Supervision and Consultation |
| SUNY College at Brockport | Brockport, NY | • MPA; Certificate in Nonprofit Management | • Nonprofit Management  
• Fund Raising & Development  
• Grants Writing and Management Seminar  
• Non-Profit Advocacy and Government Relations  
• Developing Sustainable Public/Private Partnerships |
| Salem International University | Salem, WV | • Master in Nonprofit Organizations | • Introduction to Management of Nonprofit  
• Professional Seminar  
• Resources Management  
• Program and Facilities Management  
• Fund Raising  
• Law and Finance in Nonprofit Management  
• Issues Seminar in Nonprofit Management  
• Internship  
• Youth and Human Services Independent Study |
| University of Washington | Seattle, WA | • MPA (Concentration in "Nonprofit Management Gateway") | • Nonprofit Financial Management  
• Management of Nonprofit Organizations  
• Nonprofit Management and Public Policy  
• The Practice of Philanthropy  
• Nonprofit Technology Leadership  
• Fundraising  
• Grantwriting  
• Program Planning and Design  
• Program Evaluation  
• Leadership Ethics  
• Budgeting and Financial Management  
• Managing People in Public and Nonprofit Agencies |
<table>
<thead>
<tr>
<th>University of Pennsylvania Fels Institute of Government</th>
<th>Philadelphia, PA</th>
<th>• Masters of Government Administration; Certificate in Nonprofit Administration</th>
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<tr>
<td></td>
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<td>• Leading Nonprofit Organizations</td>
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<td>• Nonprofits and Social Entrepreneurship</td>
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<td></td>
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<td>• Fundraising for Nonprofits</td>
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<td>• Advocacy, Lobbying and Government Relations in the Nonprofit Sector</td>
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<tr>
<td>University of Dallas, Irving</td>
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<td>• Master of Science in Management (Concentration in Not-for-Profit management)</td>
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<td>• Not-for-Profit Marketing</td>
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<td>• Management of Not-for-Profit Organizations</td>
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<td>• Not-for-Profit Fund Management</td>
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<td></td>
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<td>• Not-for-Profit Fundraising</td>
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<td>Virginia Commonwealth University</td>
<td>Richmond, VA</td>
<td>• MPA (Nonprofit Management concentration)</td>
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<td>• Principles of Nonprofit Management</td>
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<td>• Fund Development for Nonprofit Organizations</td>
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<td>• Nonprofit Law, Governance and Ethics</td>
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<td>• Program Design and Evaluation in the Nonprofit Sector</td>
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<td>• Nonprofit Advocacy and Government Relations</td>
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<td>• Grants Management</td>
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<td></td>
<td></td>
<td>• Community Power Dynamics</td>
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</tbody>
</table>

http://academic.shu.edu/npo/list.php?sort=state#MA (Seton Hall University, New Jersey)
Sample of Schools Offering Some Form of Nonprofit Management Education in the Northeast

NONPROFIT MANAGEMENT (OR CLOSE)

- **American International College (Springfield, MA)** – MS in Nonprofit Management
- **Antioch University New England (Keene, NH)** - MBA in Organizational & Environmental Sustainability

**Bay Path College (Longmeadow, MA)** -

M.S. in Nonprofit Management and Philanthropy
M.S. in Strategic Fundraising and Philanthropy
M.S. in Higher Education with Concentration in Institutional Advancement
M.S. in Higher Education with Concentration in Enrollment Management

**Boston College (Chestnut Hill, MA)** – MSW
**Boston University School of Management (Boston, MA)** - MBA
**Boston University School of Social Work (Boston, MA)** - MSW
**Brandeis University (Waltham, MA)** -

MA in Sustainable International Development
MBA

**Harvard Business School (Boston, MA)** - MBA
**Harvard University (Cambridge, MA)** –

Master in Public Policy
Master in Public Administration

**Lesley College (Cambridge, MA)** – Masters of Management
**Marlboro College Graduate School (Brattleboro, VT)** –

MS in Managing Mission-Driven Organizations
MBA in Managing for Sustainability

- **New England College (Henniker, NH)** - Master of Science in Management
- **SIT Graduate Institute (formerly School for International Training) (Brattleboro, VT)** - Master of Arts in Intercultural Service, Leadership, and Management, Self-Designed

**Southern Connecticut State University (New Haven, CT)** - MSW
**Suffolk University (Boston, MA)** - MPA
Tufts University (Medford, MA) – Master of Arts
University of Massachusetts Boston (Boston, MA) -
Master of Science in Human Services

University of Southern Maine (Portland, ME) - Public Policy and Management

Wheelock College (Boston, MA) -
Masters of Science in Organizational Leadership
MSW Certificate in Organizational Leadership

Yale University (New Haven, CT) – MBA

PUBLIC ADMINISTRATION

Clark University
Public Administration

University of New Haven
M.P.A. Public Administration

Simmons College
Master in Public Policy

University of Bridgeport
Global Development and Peace, M.A.

Northeastern University
Law and Public Policy

Tufts University
Animals and Public Policy

Roger Williams University
Master of Public Administration
Bridgewater State University
Public Administration

Brown University
Public Policy

Brandeis University
Jewish Professional Leadership, Hornstein Program
Brandeis offers three dual-degree tracks in Hornstein: Jewish Professional Leadership programs: MA/MBA; MA/MPP; and MA/MA.

University of Massachusetts - Boston
Public Affairs

Cambridge College - Cambridge, MA
Non-Profit & Public Organization Management

Harvard University
Public Policy

University of New Hampshire
Public Administration

University of Massachusetts Amherst
Public Policy and Administration

Norwich University
Justice Administration - MJA

Suffolk University
Public Management

Regis College
Public Administration - MPA
Trinity College (CT)
Public Policy Studies

Framingham State University
Public Administration

University of Southern Maine
Public Policy and Management

University of Connecticut
Master of Public Administration

University of Rhode Island
Public Administration

University of Massachusetts Dartmouth
Policy Studies

PUBLIC MANAGEMENT (*Non identified in the Northeast)

University of Maryland
Johns Hopkins
NYU
Worcester State College
Graduate Council

Date: Dec 1, 2014

I. Proposal Title  To introduce a Master's in Public Administration and Policy (MPAP)

II. Proposer/Contact Person Shiko Gathuo/Tom Conroy

III. Proposer's Department, Phone No., email: Urban Studies; 8892; agathuo@worcester.edu

IV. Vote of Department (if applicable): 5-0

V. Proposer's Signature:

VI. Collaborators (if applicable):

VII. Proposal Summary (If applicable, highlight changes from previous policy or practice in 25 words or fewer):
To introduce a new master's degree - Master's in Public Administration and Policy (MPAP) as part of the expansion of graduate school offerings at WSU.

VIII. Rationale for the Proposal:

Currently, the university offers a Master's in Nonprofit Management. A survey of nonprofit education being offered nationwide shows:

a) Increased competition in nonprofit education. Nationally, there are at least 292 colleges and universities that offer such programs. In the immediate vicinity of WSU, Clark University offers a nonprofit concentration within an MBA, an MBA in social change, and an MBA/MA in community development and planning. Ana Maria College offers an MPA program with a "nonprofit strategy area."

b) The nonprofit education is offered in a variety of programs that combine public administration, public policy, public management and business. Indeed, many books on nonprofit management also include public management e.g. Financial Management for Public and Nonprofit Organizations; Strategic Planning for Nonprofit and Public Organizations
In solely offering a Master's in Nonprofit Management, WSU does itself a disservice by losing out on those students who are interested in public management and administration.

The offering of this new degree is therefore about:

a) External Program Positioning: Where is WSU situated (positioned) in the Nonprofit Education marketplace? By offering a differentiated degree, students will have diplomas that best reflect their career paths.

b) Internal Efficiency: The new degree will be built out from the existing Nonprofit Management curriculum. The offering of a common core will make better use of the resources already being utilized to run the current program.

*Please see samples of schools offering nonprofit education

IX. Proposal Narrative:

The Master's in Public Administration and Policy (MPAP) will be offered to students interested in careers in public administration. Specifically, the program is targeted at local POLICY MAKERS - legislative aides, and municipal, regional, and state policy and planning staff. It is anticipated that the program would be a blended one, combining classroom and online classes.

PROPOSED COURSE OFFERING*

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
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</thead>
<tbody>
<tr>
<td>MPAP 901**</td>
<td>Policy Analysis</td>
<td>3</td>
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<tr>
<td>MPAP 942</td>
<td>Organizational Theory</td>
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<tr>
<td>MPAP 945</td>
<td>Financial Management for Public Organizations</td>
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<td>MPAP 949</td>
<td>Strategic Leadership and Planning for Public Organizations</td>
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<td>MPAP 951</td>
<td>Negotiation &amp; Conflict Resolution for Public Organizations</td>
<td>3</td>
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<td>MPAP 993</td>
<td>Public Relations for Public Organizations</td>
<td>3</td>
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<tr>
<td>MPAP 934</td>
<td>Ethics and Management of Human Resources</td>
<td>3</td>
</tr>
<tr>
<td>MPAP 990</td>
<td>Action Research</td>
<td>3</td>
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<tr>
<td>MPAP 980</td>
<td>Capstone Fieldwork I for Public Administration &amp; Policy</td>
<td>2</td>
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<tr>
<td>MPAP 981</td>
<td>Capstone Fieldwork II for Public Administration &amp; Policy</td>
<td>4</td>
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<td></td>
<td>Additionally, 2 electives will be required</td>
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<td>(2*3)</td>
<td>6</td>
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<tr>
<td>Total Number of Credits:</td>
<td></td>
<td>36</td>
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</tbody>
</table>

*Please see the curriculum as it relates to the current Master's in Nonprofit Management curriculum

**Place holder codes

DEPARTMENT APPROVAL:

APPROVED: ✓ NOT APPROVED: □ VOTE: 5-0

DATE OF TRANSMITTAL:

COMMENTS:
WORCESTER STATE UNIVERSITY
GRADUATE SCHOOL COURSE PROPOSAL

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

- Yes ✓ No Changes Requirements for Majors
- Yes ✓ No Changes Requirements for Minors
- Yes ✓ No Part of a New Program

DATE: Dec 2, 2014

Change in Present Courses
- New Course ✓
- Deletion of Present Course

NATURE OF CHANGE:
To introduce the course MPAP 980: Capstone Fieldwork I for Public Administration & Policy

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPAP 980: Capstone Fieldwork I

SEMESTER HOURS: 2

HOW FREQUENTLY OFFERED? Every Fall

PREREQUISITES:
Five core courses. Must be taken concurrently with MPAP 990

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will be a practical in nature. Students will identify their capstone topic and write a proposal for the topic.

FORMAL COURSE DESCRIPTION (100 word limit):
In individual (or group) consultation with the instructor, students will identify a capstone topic and write a proposal for the topic. This course will be an opportunity to synthesize the information obtained throughout the MPA program of study and apply it to a specific public policy issue for a client. Students will identify a client to serve and a policy issue to explore.
JUSTIFICATION:
This is an essential course for public administrators who are engaged in lobbying for policy, writing policy policy implementation, and policy analysis.

DEPARTMENT

NAME OF DEPARTMENT    Urban Studies

APPROVED: ✓               NOT APPROVED:               VOTE: 5      0

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson                Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED:               NOT APPROVED:               VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPAP 980 - CAPSTONE PROJECT FIELDWORK I for PUBLIC ADMINISTRATION AND POLICY

(Prerequisite: Five core courses. To be taken concurrently with MPAP 990)

COURSE GOALS AND OBJECTIVES

This is the first of the two courses required for the Capstone experience in the MPAP. This course will be an opportunity to synthesize the information obtained throughout the MPAP program of study and apply it to a specific public policy issue for a client. Students will identify a client to serve and a policy issue to explore.

In consultation with the instructor, students will identify a capstone topic (policy issue) and write a proposal for the topic. Students will also prepare an application for the WSU HSRB for projects that require research with human subjects.

Students will consult individually with the instructor on a weekly basis, and provide updates on their projects.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

The final grade will be based on the weekly updates, the HSRB application and the final proposal.

SUGGESTED FORMAT FOR THE CAPSTONE PROJECT PROPOSAL

Abstract – In this section, a brief “executive summary” of the proposal should be included.

INTRODUCTION – Include:

1. An overview of the policy issue explored as well as background of the issue
2. A detailed section on the aims of the study – what empirical evidence did the study seek to establish?
3. Importance of the study – how will the results shed light on the issue?

RESEARCH CONTEXT – Include:

1. A review of the existing literature on the subject (including proper citation using APA style);
2. A description of the conceptual framework including a narrative and concept map.

RESEARCH DESIGN – Should consist of a detailed description of:

1. The research questions including hypotheses/propositions;
2. The sampling process, i.e. sample frame, sample size and sampling procedures;
3. The data collection methods and procedures;
4. The data analyses strategies; and, A discussion of:
5. **Validity** - What threatens the validity of the study? What measures were taken to improve validity? Discuss all three forms of validity under separate headings.

6. **Reliability of the study** - What measures were taken to ensure reliability?

7. **Ethical considerations** - Were there ethical issues that pertained to the researcher and the participants during the course of the study (either inherent in the research design, position of the research or other aspect of the study, or emanating from unforeseen circumstances in the course of data collection, analysis, and reporting)? How were these issues handled?

8. **Limitations of the study** - What issues make the study less than perfect?

**LIST OF REFERENCES**
Include an APA style formatted list of references.

**APPENDICES**
Include all the relevant materials gathered or generated for the proposal as policy documents, list of organizational respondents where applicable; all research tools; the HSRB application, etc.
Worcester State University
Graduate School Course Proposal

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):  
Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓ Deletion of Present Course

Nature of Change:
To introduce the course MPAP 981: Capstone Fieldwork II for Public Administration & Policy

Originator: Shiko Gathuo  Department: Urban Studies

Proposed or Existing Course (number and title):
MPAP 981: Capstone Fieldwork II

Semester Hours: 4

How Frequently Offered? Every spring

Prerequisites:
MPAP 980 and MPAP 990

Recommended Date of Implementation: TBA

Instructor: TBA

Catalog Course Description (20-word limit as it will appear in the catalog):
This course will be a practical in nature. Students will implement their chosen capstone project

Formal Course Description (100 word limit):
In individual (or group) consultation with the instructor, students will implement their capstone projects as identified in MPAP 980.
JUSTIFICATION:
This is an essential course for public administrators who are engaged in lobbying for policy, writing policy policy implementation, and policy analysis.

DEPARTMENT

NAME OF DEPARTMENT: Urban Studies

APPROVED: ✓ NOT APPROVED: VOTE: 5 0

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPAP 981 - CAPSTONE PROJECT FIELDWORK II for PUBLIC ADMINISTRATION & POLICY

(Prerequisite: MPAP 990 & MPAP 980)

COURSE GOALS AND OBJECTIVES

This is the second of the two courses required for the Capstone experience in the MPAP. Students will implement the proposals prepared during the Capstone Project Fieldwork I course. Students will present a management report both orally and in written form.

Students will consult individually with the instructor on a weekly basis, and provide updates on their projects.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

"To be included"

GRADING

The final grade will be based on the weekly updates, oral report - which will be open to the public - as well the written report.

SUGGESTED FORMAT FOR THE CAPSTONE PROJECT REPORT

ORAL REPORT

The oral report will be a summary of the study, highlighting the methods, findings, conclusion, recommendations and lessons learned.

WRITTEN REPORT

The following format is recommended for the final written report.

Abstract – In this section, a brief “executive summary” of the report should be included – the overall goal of the study, a summary of the research design, the study findings, and the recommendations.

INTRODUCTION – Include:

1. An overview of the policy issue explored as well as background of the issue
2. A detailed section on the aims of the study - what empirical evidence did the study seek to establish?
3. Importance of the study - how will the results shed light on the issue?

RESEARCH CONTEXT – Include:

1. A review of the existing literature on the subject (including proper citation using APA style);
2. A description of the conceptual framework including a narrative and concept map.

RESEARCH DESIGN – Should consist of a detailed description of:

1. The research questions including hypotheses/propositions;
2. The sampling process, i.e. sample frame, sample size and sampling procedures;
3. The data collection methods and procedures;
4. The data analyses strategies; and,

A discussion of:
5. **Validity** – What threatens the validity of the study? What measures were taken to improve validity? Discuss all three forms of validity under separate headings.
6. **Reliability of the study** – What measures were taken to ensure reliability?
7. **Ethical considerations** – Were there ethical issues that pertained to the researcher and the participants during the course of the study (either inherent in the research design, position of the research or other aspect of the study, or emanating from unforeseen circumstances in the course of data collection, analysis, and reporting)? How were these issues handled?
8. **Limitations of the study** – What issues make the study less than perfect?

**FINDINGS** – Include:
1. A **demographic profile/summary** of background information on study units;
2. **Findings on each of the research questions.**

**DISCUSSION OF FINDINGS, CONCLUSION AND THE RECOMMENDATIONS** – Include:
1. A **discussion of the meaning of the findings** – how do the findings differ from or agree with the existing literature on the subject? With your own experience? Your expectations – your hypotheses?
2. **Conclusion** – a confirmation of conceptual framework or a re-conceptualization;
3. **Action recommendations** – what **action** should be taken in the light of the findings?
4. **Recommendations for further research** – in what ways can future researchers build on your research? What important questions were unanswered by your study that could benefit from further research? What important questions did your study raise that could benefit from further research?

**LIST OF REFERENCES**
Include an APA style formatted list of references.

**APPENDICES**
Include all the relevant materials gathered or generated during the course of the research such as list of organizational respondents where applicable; all research tools; tables and charts not included in the main body of the report, the HSRB application, etc.
NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes  ✓ No Changes Requirements for Majors
Yes  ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓
Deletion of Present Course

DATE: Dec 2, 2014

NATURE OF CHANGE:
To introduce the course MPAP/MPM 951: Negotiation & Conflict Resolution for Public Organizations

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPAP/MPM 951: Negotiation & Conflict Resolution for Public Organizations

SEMESTER HOURS: 3

HOW FREQUENTLY OFFERED? At least every two years

PREREQUISITES:
None. This course may be taken as an elective by non-MPAP/MPM students

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will prepare students to conduct effective negotiation, mediation, arbitration and conflict resolution in a variety of situations.

FORMAL COURSE DESCRIPTION (100 word limit):
Through theory and situational role playing, students will learn effective skills in negotiation, mediation, arbitration and conflict resolution. The course will provide an opportunity for students to diagnose and plan different situations requiring negotiation and conflict management, practice the negotiation process and develop confidence in approaching and diffusing tense situations.
JUSTIFICATION:
This is an essential course for managers and administrators of public agencies, who negotiate with various constituents including employees, unions, and community groups.

DEPARTMENT

NAME OF DEPARTMENT: Urban Studies

APPROVED: ✓  NOT APPROVED:  VOTE: 5 0

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:
Department Chairperson  Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED:  NOT APPROVED:  VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPM 951 - NEOTIATION AND CONFLICT RESOLUTION FOR PUBLIC ORGANIZATIONS
   No prerequisite; Core for MPM & MPAP

COURSE GOALS AND OBJECTIVES

Through theory and situational role playing, students will learn effective skills in negotiation, mediation, arbitration and conflict resolution. The course will provide an opportunity for students to diagnose and plan for different situations requiring negotiation and conflict management, practice the negotiation process and develop confidence in approaching and diffusing tense situations.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

 grading will be based on oral presentations, classroom role playing and written projects.

TOPICS WILL INCLUDE

- Overview of negotiation
- Power dynamics: Understanding your power in a negotiation situation
- Disarming the opposition
- Identifying and evaluating alternative “deals”
- Clue searching
- Bargaining
- Negotiating in sensitive situations (racial and ethnic differences)
- Standards of fairness
- Convening and mediating conflict resolution
NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓ Deletion of Present Course

DATE: Dec 2, 2014

NATURE OF CHANGE:
To introduce the course MPAP 901: Policy Analysis

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPAP 901: Policy Analysis

SEMESTER HOURS: 3

HOW FREQUENTLY OFFERED? At least every two years

PREREQUISITES:
None. This course may also be taken as an elective by non-MPAP students

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will help students to develop the foundational concepts of policy analysis as well as practical policy analytic tools.

FORMAL COURSE DESCRIPTION (100 word limit):
This course provides an introduction to policy analysis. An applied social science, policy analysis attempts to define and frame public problems, identify and evaluate policy options for addressing those problems, and recommend solutions. Through the use of primarily case studies, this course will help students to develop the foundational concepts of policy analysis as well as practical policy analytic tools. Students will learn to be both savvy policy consumers and producers.
JUSTIFICATION:
This is a foundational course for the Master's in Public Administration and Policy (MPAP) as in many policy-related degrees.

DEPARTMENT

NAME OF DEPARTMENT

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPAP 901 – POLICY ANALYSIS
No prerequisite; Core for MPAP

COURSE GOALS AND OBJECTIVES

This course provides an introduction to policy analysis for masters-level students. An applied social science, policy analysis attempts to define and frame public problems, identify and evaluate policy options for addressing those problems, and recommend solutions. Through the use of primarily case studies, this course will help students to develop the foundational concepts of policy analysis as well as practical policy analytic tools. Students will learn to be both savvy policy consumers and producers.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION

*To be included

GRADING

Grading will be based on case study analysis, oral presentations, classroom participation and written position papers.

TOPICS WILL INCLUDE

- The Foundations of policy analysis
- Identification of policy options
- Evaluation of policy options
- Adoption and implementation of policy
- Cost-Benefit analysis
- Risk analysis
- Analysis of unintended consequences of policy
- Ethics and policy analysis
- Politics and policy analysis
WORCESTER STATE UNIVERSITY
GRADUATE SCHOOL COURSE PROPOSAL

NOTE: BEFORE COMPLETING THIS FORM, PLEASE REFER TO THE CURRICULUM COURSE PROPOSAL GUIDELINES (ONLY TYPED COPIES WILL BE ACCEPTED).

TO: Chairperson, All College Committee
(check appropriate boxes):

Yes ✓ No Changes Requirements for Majors
Yes ✓ No Changes Requirements for Minors
Yes ✓ No Part of a New Program

Change in Present Courses
New Course ✓
Deletion of Present Course

DATE: Dec 2, 2014

NATURE OF CHANGE:
To introduce the course MPAP/MPM 993: Public Relations

ORIGINATOR: Shiko Gathuo
DEPARTMENT: Urban Studies

PROPOSED OR EXISTING COURSE (number and title):
MPAP/MPM 993: Public Relations

SEMESTER HOURS: 3

HOW FREQUENTLY OFFERED? At least every two years

PREREQUISITES:
None. This course may be taken as an elective by non-MPAP/MPM students

RECOMMENDED DATE OF IMPLEMENTATION: TBA

INSTRUCTOR: TBA

CATALOG COURSE DESCRIPTION (20-word limit as it will appear in the catalog):
This course will prepare students to conduct effective public relations campaigns.

FORMAL COURSE DESCRIPTION (100 word limit):
This course will explore the theories of human interaction as they relate to the public sphere. Students will acquire effective public relations skills that are essential for success in the public sector. The course will review the components of a public relations campaign, and help students learn how to develop public relations tools such as news releases, pitch letters, biographies, position papers, crisis communications, and other tools included in a strategic public relations kit.
JUSTIFICATION:

This is an essential course for managers and administrators of public agencies, who must constantly communicate their agencies' position to various, often divergent constituencies.

DEPARTMENT

NAME OF DEPARTMENT

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:

SIGNATURE:

Department Chairperson

Date

cc: Vice President, Academic Affairs

SCHOOL APPROVAL

NAME OF SCHOOL:

APPROVED: NOT APPROVED: VOTE:

DATE OF TRANSMITTAL:

COMMENTS:
Draft Syllabus

MPM/MPAP 993 - PUBLIC RELATIONS
No prerequisite; Core for MPM & MPAP

COURSE GOALS AND OBJECTIVES

This course will explore the theories of human interaction as they relate to the public sphere. Students will acquire effective public relations skills that are essential for success in the public sector. The course will review the components of a public relations campaign, and help students learn how to develop public relations tools such as news releases, pitch letters, biographies, position papers, crisis communications, and other tools included in a strategic public relations kit.

UNIVERSITY AND COURSE POLICIES; GENERAL INFORMATION
*To be included

GRADING
Grading will be based on oral presentations, classroom participation and written projects.

TOPICS WILL INCLUDE
• Overview of Public Relations
• News vs. Publicity
• Research as it relates to public relations
• Identifying the audience, tailoring the message and reaching the target
• News Releases, Pitch Letters, Media Alerts and other written techniques
• Radio, Television and the Internet
• Media Interviews, News Conferences and Speeches
• New Technologies in Public Relations - Facebook, Twitter, Instagram and YouTube campaigns
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<thead>
<tr>
<th>School</th>
<th>Location</th>
<th>Name of Degree</th>
<th>Core Courses Offered</th>
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</table>
| American International College             | Springfield, MA   | Master of Science in Nonprofit Management            | • Organizational Leadership and Strategic Management  
                                                                                   • Human Resource Management  
                                                                                   • Board and Volunteer Development  
                                                                                   • Managerial Accounting and Finance for Nonprofit Managers  
                                                                                   • Introduction to the Nonprofit Sector  
                                                                                   • Non-Profit Law  
                                                                                   • Fund Raising Strategies |
| Bay Path College                           | Longmeadow, MA    | M.S. in Nonprofit Management and Philanthropy       | • Foundations of Nonprofit Management  
                                                                                   • Financial Decision making for nonprofits  
                                                                                   • Fundraising Theory and practice  
                                                                                   • Strategic Management for Nonprofit Organizations  
                                                                                   • Board governance and volunteer management  
                                                                                   • Leading change for nonprofit organizations  
                                                                                   • Law, Policy and governance relations in nonprofit organizations  
                                                                                   • Capstone project |
| Ana Maria College                          | Worcester, MA     | MPA                                                 | • Ethical Theory (or equivalent)  
                                                                                   • Others are electives within concentrations (Also has mid-career track)  
                                                                                   • – gives credit for work done |
| Clark University                           | Worcester, MA     | MPA with a concentration in Nonprofit Management    | • Nonprofit Management  
                                                                                   • Fundraising and Grant Writing  
                                                                                   • * for those taking nonprofit concentration |
| Boston University Metropolitan College      | Boston, MA        | Certificate in Fundraising*                         | • Fundraising and Grant Writing for Nonprofit Organizations  
                                                                                   • Capital Campaigns  
                                                                                   • Financial Management for Non-Profits*  
                                                                                   • Individual Fundraising |
| Boston University School of Management     | Boston, MA        | MBA with* a concentration in Public and Nonprofit Management | • Nonprofit Finance and Accounting  
                                                                                   • Strategic Fundraising and Corporate Philanthropy  
                                                                                   • Global Social Enterprise Field Seminar - Brazil  
                                                                                   • Marketing Social Change  
                                                                                   • Strategy for Nonprofits  
                                                                                   • Social Entrepreneurship |
| Brandeis University                        | Waltham, MA       | MA in sustainable development  
                                                                                   MBA (concentration in Nonprofit management) | • Nonprofit Finance and Accounting  
                                                                                   • Strategic Fundraising and Corporate Philanthropy  
                                                                                   • Global Social Enterprise Field Seminar - Brazil  
                                                                                   • Marketing Social Change  
                                                                                   • Strategy for Nonprofits  
                                                                                   • Social Entrepreneurship |
| Cambridge College                          | Cambridge, MA     | Masters in Management  
                                                                                   (Program name: Nonprofit and Public Organization Management) | • Grant Writing  
                                                                                   • The Manager as Negotiator |
| Harvard University | Cambridge, MA | MBA, Initiative on social enterprise | - Effective Leadership of Social Enterprise
- Strategic Perspectives in Nonprofit Management
- Governing for Nonprofit Excellence
- Performance Measurement for Effective Management of Nonprofit Organizations
- Strategic Giving |
|-------------------|--------------|-----------------------------------|-----------------------------------------------------------------------------------|
| Harvard (JFK School of Government) | Cambridge, MA | Master in Public Policy
Master in Public Administration | - Introduction to the Nonprofit Sector
- Seminar: The Nonprofit Sector
- Strategic Management of Nonprofit Organizations
- Nonprofit Governance
- Philanthropy: Policy and Practices
- The Politics and Ethics of the Use of Force
- Religion and Government: Choices of Morality, Law and Policy
- The Informal Workforce in a Global Economy
- Civil Society and Development
- Entrepreneurship for Social Value Creation
- Organizing: People, Power and Change |
| Lesley University | Cambridge, MA | Master in Management (Nonprofit concentration) | - Introduction to Not-for-Profit Management
- Financial Management for Not-for-Profit Organizations
- Marketing for Not-for-Profit Organizations
- Capstone Internship and Seminar in Not-for-Profit Management |
| Regis College | Waltham, MA | - Master of Public Administration
- MS in Leadership and Organizational Change Graduate Certificate in Nonprofit Administration | - Nonprofit Administration
- Capstone Field Research/Thesis |
| Suffolk University | Boston, MA | MPA (Nonprofit management concentration) | - Nonprofit Organizations in the Community
- Nonprofit Financial Management
- Not-for-Profit Accounting and Control
- The Entrepreneurial Nonprofit
- Nonprofit Marketing
- Revenue Strategies for Nonprofit Organizations
- Nonprofit Law and Ethics
- Grants-in-Aid and Grants Management |
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<tr>
<th>School</th>
<th>Location</th>
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<td>Master of Arts (Concentration in Nonprofit Organizations)</td>
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<td>University of Massachusetts</td>
<td>Amherst, MA</td>
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<td><strong>SAMPLE OF INSTITUTIONS OFFERING NONPROFIT EDUCATION IN THE UNITED STATES</strong></td>
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<td>Phoenix, AZ</td>
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<td>Management Challenges and Tools for the Nonprofit Sector</td>
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<td>- Understanding the Financial Statements and Financial Condition of Private Not-For-Profit Organizations</td>
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<td>University of Northern Iowa</td>
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<td>University of Kentucky Martin School</td>
<td>Lexington, KY</td>
<td>MPA (Concentration in nonprofit management)</td>
<td>Not-For-Profit and Regulatory Accounting, Public Policy of the Non-Profit Sector, Financial Management of Non-Profit Organization, Non-Profit Management</td>
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<td>Louisiana State University in Shreveport</td>
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<td>Development of Philanthropy and Nonprofit Organizations, Administrative Law and Human Services Organizations, Administration in Human Services Organizations, Nonprofit Governance and Decision Making, Nonprofit Financial Administration and Resource Development, Human Services Administration Research Methods, Data Administration in Human Services Organizations</td>
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</table>
| University of Southern Maine | Portland, ME | Master in Public Policy and Management; Certificate in Nonprofit Management | - Managing the Nonprofit Organization  
- Grant Writing and Financial Management in the Nonprofit Organization  
- Financial Management for Nonprofit Organizations |
|-------------------------------|-------------|-------------------------------------------------------------|---------------------------------------------------------------------------------|
| University of Michigan       | Ann Arbor, MI | MPP with concentration in Public Management  
MSW with concentration in Management of Human Services, Community Organization and Social Planning, or Social Policy and Evaluation  
- Policy and Management in the Nonprofit Sector (Pub. Pol.)  
- Leading Non-Profit Organizations (Bus. Ad.)  
- Researching Methods for Evaluating Social Programs and Human Service Organizations (S.W.)  
- Human Service Organizations: Theories & Approaches (S.W.)  
- Budgeting and Fiscal Management (S.W.)  
- Management of Information Systems in Human Service Agencies (S.W.)  
- Grantgetting, Contracting and Fundraising (S.W.)  
- Executive Leadership and Organizational Governance (S.W.)  
- Seminar: Empirical Research on Nonprofit Organizations and Voluntary Action (S.W.)  
- Information Technologies in Small Nonprofit Organizations (Pub. Pol.)  
- Program Evaluation (Pub. Pol.)  
- Managerial Writing Fundamentals (Bus. Ad.)  
- Persuasive Management Communication (Bus. Ad.)  
- Social Marketing (Bus. Ad.) |
| University of Minnesota, Humphrey Institute | Minneapolis, MN | - Master of Public Affairs  
- Master of Public Policy (Concentration in Nonprofits)  
- Nonprofit Management Certificate | - Management and Governance of Nonprofit Organizations  
- Financing Nonprofits: Philosophies and Realities  
- Managing Collaborations  
- Advanced Community Organization and Advocacy  
- Capstone on Leading Nonprofit Organizations |
| University of Missouri at St. Louis | St. Louis, MO | Master of Public Policy Administration (Concentration in Nonprofit Management and Leadership) | - Leadership and Management in Nonprofit Organizations  
- Legal Issues in Governing & Managing NPOs  
- Strategic and Program Planning for Nonprofit Organizations  
- Staff Management Issues in Nonprofit Organizations  
- Financial Issues in Managing Nonprofit Organizations  
- American Philanthropy and Nonprofit Resource Development |
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<th>Institution</th>
<th>Location</th>
<th>Programs</th>
<th>Course Options</th>
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<td>SUNY College at Brockport</td>
<td>Brockport, NY</td>
<td>MPA; Certificate in Nonprofit Management</td>
<td>Nonprofit Management, Fund Raising &amp; Development, Grants Writing and Management Seminar, Non-Profit Advocacy and Government Relations, Developing Sustainable Public/Private Partnerships</td>
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<td>Virginia Commonwealth University</td>
<td>Richmond, VA</td>
<td>MPA (Nonprofit Management concentration)</td>
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<td>University of Dallas, Irving</td>
<td>Irving, TX</td>
<td>Master of Science in Management (Concentration in Not-for-profit management)</td>
<td>Not-for-Profit Marketing</td>
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<td>Management of Not-for-Profit Organizations</td>
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<td>Not-for-Profit Fundraising</td>
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<tr>
<td>University of Pennsylvania Fels Institute of Government</td>
<td>Philadelphia, PA</td>
<td>Masters of Government Administration; Certificate in Nonprofit Administration</td>
<td>Leading Nonprofit Organizations</td>
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<td>Nonprofits and Social Entrepreneurship</td>
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<td>Fundraising for Nonprofits</td>
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<td>Advocacy, Lobbying and Government Relations in the Nonprofit Sector</td>
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http://academic.shu.edu/npo/list.php?sort=state#MA (Seton Hall University, New Jersey)
Sample of Schools Offering Some Form of Nonprofit Management Education in the Northeast

NONPROFIT MANAGEMENT (OR CLOSE)

- American International College (Springfield, MA) – MS in Nonprofit Management
- Antioch University New England (Keene, NH) - MBA in Organizational & Environmental Sustainability

Bay Path College (Longmeadow, MA)

- M.S. in Nonprofit Management and Philanthropy
- M.S. in Strategic Fundraising and Philanthropy
- M.S. in Higher Education with Concentration in Institutional Advancement
- M.S. in Higher Education with Concentration in Enrollment Management

Boston College (Chestnut Hill, MA) – MSW
Boston University School of Management (Boston, MA) - MBA
Boston University School of Social Work (Boston, MA) - MSW
Brandeis University (Waltham, MA)

- MA in Sustainable International Development
- MBA

- Harvard Business School (Boston, MA) - MBA
- Harvard University (Cambridge, MA)
  - Master in Public Policy
  - Master in Public Administration

Lesley College (Cambridge, MA) – Masters of Management
Marlboro College Graduate School (Brattleboro, VT) –
- MS in Managing Mission-Driven Organizations
- MBA in Managing for Sustainability

- New England College (Henniker, NH) - Master of Science in Management

- SIT Graduate Institute (formerly School for International Training) (Brattleboro, VT) - Master of Arts in Intercultural Service, Leadership, and Management, Self-Designed

Southern Connecticut State University (New Haven, CT) - MSW
Suffolk University (Boston, MA) - MPA
Tufts University (Medford, MA) – Master of Arts
University of Massachusetts Boston (Boston, MA) –

Master of Science in Human Services

• University of Southern Maine (Portland, ME) – Public Policy and Management

Wheelock College (Boston, MA) –

Masters of Science in Organizational Leadership
MSW Certificate in Organizational Leadership

Yale University (New Haven, CT) – MBA

PUBLIC ADMINISTRATION

Clark University
Public Administration

University of New Haven
M.P.A. Public Administration

Simmons College
Master in Public Policy

University of Bridgeport
Global Development and Peace, M.A.

Northeastern University
Law and Public Policy

Tufts University
Animals and Public Policy

Roger Williams University
Master of Public Administration
Bridgewater State University
Public Administration

Brown University
Public Policy

Brandeis University
Jewish Professional Leadership, Hornstein Program
Brandeis offers three dual-degree tracks in Hornstein: Jewish Professional Leadership programs: MA/MBA; MA/MPP; and MA/MA.

University of Massachusetts - Boston
Public Affairs

Cambridge College - Cambridge, MA
Non-Profit & Public Organization Management

Harvard University
Public Policy

University of New Hampshire
Public Administration

University of Massachusetts Amherst
Public Policy and Administration

Norwich University
Justice Administration - MJA

Suffolk University
Public Management

Regis College
Public Administration - MPA
Trinity College (CT)
Public Policy Studies

Framingham State University
Public Administration

University of Southern Maine
Public Policy and Management

University of Connecticut
Master of Public Administration

University of Rhode Island
Public Administration

University of Massachusetts Dartmouth
Policy Studies

PUBLIC MANAGEMENT (*Non identified in the Northeast)

University of Maryland
Johns Hopkins
NYU
NOTICE

A MEETING OF THE WORCESTER STATE UNIVERSITY BOARD OF TRUSTEES WILL BE HELD ON TUESDAY, APRIL 12, 2016 AT 6:30 P.M. IN THE MULTI-PURPOSE ROOM IN SHEEHAN HALL.

1. WELCOME – Commissioner Carlos Santiago

2. CALL TO ORDER

3. APPROVAL OF MINUTES – March 8, 2016

4. CHAIR OF THE BOARD UPDATE

5. APPROVAL OF 2016 – 2017 MEETING DATES

6. PRESIDENT’S REPORT

7. APPROVAL OF HONORARY DOCTORATE – Ret. Lt. Colonel James Sheehan

8. ACADEMIC AFFAIRS/STUDENT DEVELOPMENT COMMITTEE REPORT

9. FINANCE & FACILITIES COMMITTEE REPORT

10. OTHER BUSINESS

11. ADJOURNMENT

Judith A. St. Amand
April 5, 2016
Upon a motion made and seconded, it was

VOTED: to approve the minutes of March 8, 2016 as submitted.

Upon a motion made and seconded, it was

VOTED: to approve the 2016-2017 meeting dates as presented.

Upon a motion made and seconded, it was

VOTED: to approve the awarding of an honorary degree at Academic Achievement Awards Ceremony scheduled for April 28, 2016 as follows:

Honorary Doctor of Humane Letters, Honoris Causa
Lt. Colonel James F. Sheehan ‘55, USMC Retired

Upon a motion made and seconded, it was

VOTED: to approve the recommendations of the Academic Affairs/Student Development Committee:
(promotion, tenure, master degree programs)

Upon a motion made and seconded, it was

VOTED: to accept the recommendation of the Finance & Facilities Committee and approve a $345.25 per year general fee increase for FY 2017 as described and presented in the March 28th memo from VP Eichelroth to President Maloney with correction on page 2, bullet 2 -- $115.25 and not $155.25.

Upon a motion made and seconded, it was

VOTED: to adjourn the meeting at
The provisions of General Laws, Chapter 30A having been complied with, and a quorum present, a meeting of the Worcester State University Board of Trustees was held on Tuesday, March 8, 2016, in the Multi-Purpose Room, Sheehan Hall. Trustee Valerio called the meeting to order at 6:35 p.m.

APPROVAL OF MINUTES
Chairman Valerio asked to take item #3 Approval of Minutes out of order. Upon a motion by Trustee Taylor and seconded by Trustee Hammond, it was unanimously

VOTED: to approve the minutes of January 12, 2016 as submitted.

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

VOTED: to approve the minutes of the February 11, 2016 Finance & Facilities meeting as presented.

CHAIR OF THE BOARD REPORT
Appointment of Nominating Committee
- Trustee Ronald Valerio, Chair of the Board of Trustees, appointed the Nominating Committee as follows:
  Chair, Trustee George Albro and Trustees Hammond and Madaus
- The charge to the Committee is to bring forward a slate of officers for 2016-2017 for
Appointments to Sub-Committees
- With the appointment of new trustees, Chairman Valerio appointed the following:
  - Trustee Shirley Steele  Chair, Academic Affairs/Student Development
  - Trustee Karen LaFond  Member, Academic Affairs/Student Development
  - Trustee Marina Taylor  Member, Finance and Facilities
  - Trustee Dina Nichols  Member, Human Resources Committee

Alumni Florida Events
- Chairman Valerio thanked Trustee Steele for attending the very successful Chapter Event recently held on the West Coast.
- Events extremely successful and he thanked President Maloney, VP McNamara and the University Advancement team.
- Vice Chairman Albro will represent the Board at upcoming Florida events during the next two weeks, including the St. Patrick’s Day parade.

Training
- The Office of the Inspector General is offering a training session for Board members to address: *Boards & Commissions: Responsibilities, Good Governance and What You as Member Need to Know*. A document for registration was shared with all trustees.

FEDERAL FINANCIAL AUDIT REPORT
- Jim Johnson from Bollus Lynch joined VP Kathy Eichleroth to review the draft copy of the Federal Financial Audit Report.
- This audit was conducted as required by OMB Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations.
- The financial statements and management decisions (pages 1-35) remained the same as reported in the final Audit Report for the years ended June 30, 2015 and 2014.
- All clean opinions – no findings.
- Trustee Craig Blais, Chair of the Finance and Facilities Committee, reported that the draft document has been scrubbed in detail along with the federal piece that is required in addition to the original audit and noted that it is a credit to VP Eichelroth and the members of the financial team to have repeated clean audit reports with no findings.

Upon a motion by Trustee Blais and seconded by Trustee Madaus, it was unanimously

VOTED: to approve the draft report of the *Financial Statements and Management’s discussion and Analysis with Supplementary information and Other Reports for Years ended June 30, 2015 and 2014 and the Independent Auditor’s Report* as presented.

PRESIDENT’S REPORT
- President Maloney highlighted following areas of report in additional to his regular published document for the Board.
- Budget cycle is off and running with a constant goals of trying to improve the process.
• Commissioner Santiago will attend our April 12th meeting as well as spend the day in the Worcester community noting the interaction of WSU with various city agencies.
• The Board viewed the short introductory video of the wellness construction project.
• Project is moving towards completion and on time and hopefully under budget.

SUSTAINABILITY PRESENTATION
• Presentation provided by Robert Daniels, Associate Director of Facilities and Environmental Health and Safety Officer, and Steven Bandarra, Sustainability Coordinator at WSU.
• Trustees very pleased with most informative presentation and impressed with results.
  ➢ Single Stream Recycling in 2006
  ➢ Trayless dining in 2007
  ➢ American College & University Presidents’ Climate Commitment signed in 2007
  ➢ Combined heat and power unit in Dowden Hall in 2010 and in Sheehan Hall in 2014
  ➢ Energy conservation – lighting and equipment
  ➢ LR PV Array -2009
  ➢ Wasylean OPV Array 2012
  ➢ Parking Garage Lighting Retrofit – LED Lighting 2012
  ➢ 10% Green electricity
  ➢ 2 Net-metering agreements which enable 6.5 Megawatts of solar power generation to exist in Massachusetts and saves WSU approximately $500,000 per year
  ➢ Many initiatives supported by outside funding opportunities
    - Dowden Hall LED lighting conversion
    - Sheehan Hall co-generation unit $100,000 grant from LBE
    - Wellness Canter solar thermal system $85,000 incentive from Clean Energy Center
  ➢ LED’s Save Money and Energy
    - Bulb swaps – 3,300 bulbs
    - Stairwell lighting -375 fixtures
    - Exterior lighting – 50 more this year
    - Residence hall lighting – 969 bulbs
    - Worcester Center for Crafts – 178 bulbs
    - LRC third floor conversion to LED – 539 fixtures
      Yearly anticipated savings $50,000+
      Carbon Reduction 100+ tons per years
  ➢ New Green Transportation Initiatives
    - Zipcar
    - EV Charging Station
    - Bike Share with Awnings
    - New Bus Route
    - Carpool Parking Spots
  ➢ Student Involvement
    - Sustainability Fair
    - Recycle Mania
    - Ditch the Dumpster
    - Interns – Office of Sustainability
    - EcoHouse Living Learning Community
Green Buildings
LEED Gold Buildings include Shaughnessy Administration Building and Dowden Hall
Expected LEED Silver or Gold Buildings – Sheehan Hall and Wellness Center

Trash and Recycling
- Last year recycled 143 tons
- 34% of total waste stream

Freight Farms (LGM)
- Chartwells initiative to grow lettuce
- Will produced 550-600 heads of fresh lettuce per week
- Reduces carbon footprint

Wellness Center
- Energy efficient HVAC Equipment
- Solar thermal panels for preheating domestic hot water
- Rain water harvesting for irrigation
- Hydration stations
- Lighting control systems

Carbon Mitigation Structure
- AVOIDANCE – increase space utilization instead of building or acquiring new space
- ACTIVITY – Consume fewer BTUs of energy or travel fewer miles
- INTENSITY – Fuel switching (coal to natural gas; introducing renewables)
- OFFSETS – RECs; sequestration; retail offsets

Next Strategic Plan could have a more defined environmental or sustainability component.

RESERVE STABILIZATION ANALYSIS
- Trustee Blais, Chair of the Finance and Facilities Committee reported that the items being proposed tonight have come before the Committee and have been studied and reviewed in depth.
- No formal action is being sought this evening – informational only.
- VP Eichelroth summarized the Reserve Stabilization Analysis and the three Options being proposed:
  - At the close of FY 2015 the unrestricted operating reserves were significantly depleted by the implementation of GASB 68 requiring the University to record the net pension liability for Commonwealth employees that work at Worcester State University. The University transferred $9M of unrestricted reserves to the Division of Capital Asset Management in accordance with the Memorandum of Agreement identifying the sources of funds for construction of the Wellness Center.
  - As a result, unrestricted reserves are expected to drop to $15.9M by June 30, 2016, a decrease of $18.1M since June 30, 2014.
  - The reduction impairs the University’s ability to leverage funds for future campus improvements. The University’s ratios have experienced unfavorable declines as a result of the decrease in unrestricted reserve balance over the short term.
OPTION A
- Proposes an annual operating transfer to the Capital Improvement Trust Fund of $750,000 beginning in FY 2017
- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by June 30, 2019
- The ability to leverage reserves occurs in FY 2020 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee remains flat throughout this scenario with no increases
- Unrestricted fund balance is projected to be $26,186,738 by June 30, 2020 with a viability ratio of 1:18
- At June 30, 2020, unrestricted reserves are expected to exceed outstanding debt by $4,052,187.

OPTION B
- Proposes an annual operating transfer to the Capital Improvement Trust Fund of $1,000,000 beginning in FY 2017
- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by December 31, 2018
- The ability to leverage reserves occurs in FY 2019 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee is increased by $5 a credit hour or $120 a year in FY 2018 and then remains flat at an annual rate of $636 through June 30, 2020
- Unrestricted fund balance is projected to be $29,128,068 by June 30, 2020 with a viability ratio of 1.32
- At June 30, 2020, unrestricted reserves are expected to exceed outstanding debt by $6,993,517.

OPTION C
- Proposes an annual operating transfer to the Capital Improvement Trust Fund of $1,000,000 beginning in FY 2017
- This option builds up unrestricted reserves to cover all outstanding debt dollar for dollar by December 31, 2018
- The ability to leverage reserves occurs in FY 2019 when we have unrestricted reserves in excess of outstanding debt
- The capital improvement fee is increased by $5 a credit hour or $120 a year in FY 2018, and then again in FY 2019 by an additional $5 a credit hour or $120 a year. The annual rate then remains flat at $756 a year through June 30, 2020
- Unrestricted fund balance is projected to be $30,422,088 by June 30, 2020 with a viability ratio of 1.37
- At June 30, 2020, unrestricted reserves are expected to exceed outstanding debt by $8,287,537.
DEFERRED MAINTENANCE AND CAPITAL PROJECTS

- The University provides funds for deferred maintenance and capital adaptation and renewal in its annual operating budget – approximately $3.3M on an annual basis.
- The University does not receive funds on a regular basis from Commonwealth resources to maintain the campus.
- Annual resources provided in the operating budget no longer provide us the ability to maintain the facilities at the same rate that systems require replacement and we have started to fall behind.
- Operating resources do not exist to fund replacement cycles for furnishings and renovation of academic spaces to remain competitive when vying for students.
- Unlikely that WSU will receive any funds from the Commonwealth to address space planning and academic programming needs or to renovate facilities such as the May Street Building.
- Following is a sample of projects that will require funding outside of the operating budget in coming years:

  Science and Technology Building air handlers/ventilation/cooling systems $4,000,000
  Student Center Envelope Refurbishment $1,500,000
  Upgrades to electrical loop feeds $1,550,000
  Athletic field refurbishment and upgrades $2,750,000
  Sullivan Auditorium ADA compliance $1,000,000
  Sullivan Building air handlers/ventilation/cooling system $2,000,000
  Sullivan Building flooring replacement/painting $2,700,000
  LRC new boiler plant, duct distribution and sprinklers $3,500,000
  Furnishing replacements for areas not renovated in the past 8-10 years $2,500,000
  May Street Building fire protection and safety $1,800,000
  May Street Building accessibility, structural upgrades $3,200,000
  May Street Building life cycle replacements (roof/mechanical/electrical) $4,500,000
  May Street Building adaptation to address programming needs TBD
  Adaptation of space for academic programing $1,750,000

- Stabilizing and building unrestricted reserves will provide the university with leverage to borrow funds through MSCBA or MassDevelopment (with legislative approval) to accomplish some of these projects.
- Board asked that the Finance & Facilities Committee taken under consideration again all information relative to the three options being proposed to provide direction to the full Board.
- All members were encouraged to review materials and to submit their comments and recommendations to Trustee Blais, Chair of the Finance & Facilities Committee.

WELLNESS CENTER OPERATING BUDGET

- The Board reviewed the following documents: Budget Narrative, Draft Budget, FF&E List and Timeline and Summarization of the Wellness Center Budget and Sources of Funds.
- The athletic department operating budget has been funded at a level scenario over many years with a slight increase in FY 2014 to provide resources related to the relocation of athletic programs when the old gym building was demolished.
- Starting point for the operating budget for the Wellness Center during its first year of operations in FY17 is the reconciled Athletic Department budget.
• Categories listed below are additional costs related to operation, maintenance and upkeep of a facility that is 40,000 square feet larger than the old facility with many more amenities and associated costs.

• **Annual Facilities Costs**
  - Annual review and certification is required of the roof anchor system, suspended walking track, backflow preventers, grease traps and elevators that never existed in the old building
  - Expanded services are needed for service and preventative maintenance of the boilers, hot water tanks, lighting system, exhaust ducts, life safety systems, HVAC, roofs and curtain and wall window cleaning.

• **Annual Athletic Cost**
  - Opening of the new Wellness Center brings expanded programming for the student body and larger WSU community
  - The two story fitness center will be outfitted with state of the art cardio and strength equipment that will be leased allowing for a three year replacement cycle
  - Systems will be established to allow for card access
  - Music will be provided throughout the building and additional resources are needed for programming supplies and promotional supplies in addition to the unveiling of a new WSU mascot
  - Annual operating budget provides for replacement of equipment used for recreational, intramural and varsity sports as the useful lives of the items deteriorate
  - Coach salaries will be evaluated and aligned with the MASCAC athletic conference averages and team food allowances will be increased to match standard per diem rates offered to university employees.

• **Part-time Employees**
  - Wellness Center will offer expanded programming in areas of fitness and recreation
  - Facility will have expanded hours and the two story layout requires the presence of two fitness center monitors
  - Additional staff will be needed to manage the facility during operating hours and staff to support the information desk, laundry services and the new intramural programs
  - Fitness instructors will be hired to offer programs as well.

• **Full-time Employees**
  - To support the new recreational programming including fitness classes training on the use of equipment and intramural offerings a Fitness Center Manager will be hired
  - An Intramural Coordinator/Night & Weekend Manager will be hired
  - The size and complexity of the building, which includes 3 sets of locker rooms, a competition gym, 2 recreational gyms, juice bar, concession stand and two story fitness center, exercise and function rooms, necessitates the hiring of maintenance staff to cover 3 shifts daily in addition to an HV Technician specifically trained to support the systems of the new building.
Utilities
- There will be increased cost to heat and cool the larger facility
- Multiple sets of locker rooms will place additional demand on water and heating of the water
- Curtain wall surrounding the fitness center was designed to provide efficiencies with regard to heating and cooling however there will be an increased cost to heat and cool this space in comparison to old facility.

PROPOSED INCREASE TO GENERAL FEE
- The Wellness Center FY 2017 Operating Budget requires an investment of $1,236,426 to expand programming and support the operations of the new facility
- Majority of resources to fund this expansion will come from the re-allocation of existing resources
- Seeking to increase the general fee for undergraduate students and the administrative fee for courses offered through DGCE to fund these costs
- The increased cost of $4.80 a credit hour or $115 a year will underwrite this expanded programming moving forward.

No action was taken on the items visited this evening. Board members were encouraged to review the documents and provide their comments to Trustee Blais, Chair of the Finance & Facilities Committee. A formal recommendation will be forwarded to the Board for a vote at the April 12th meeting.

Upon a motion by Trustee Blais, and seconded by Trustee Madaus, it was unanimously

**VOTED:** to adjourn the meeting at 9:05 p.m.

Respectfully submitted,

Judith A. St. Amand
Assistant Secretary
Dinners are held at 5:30 P.M.
followed by Board meetings at 6:30 P.M.
President’s Update

From the President’s Office

President’s Message

April is perhaps the busiest time of year at Worcester State. Not only are our students heading into “finals season,” we have many end-of-the-year events for the entire community. April also is the month when we encourage our accepted students to join us next fall, leading up to the all-important May 1st deposit deadline.

Congratulations Day for accepted students is Saturday, April 9, and our staff and faculty work hard to ensure that our best foot is placed firmly forward.

Academic achievers shine this month as we head toward graduation, with the Celebration of Scholarship and Creativity on April 13, and the Academic Achievement Award ceremony at Mechanics Hall on April 28.

Be sure to check our webpage to see what is happening during the next five weeks, and I hope you celebrate with us our students’ many achievements.

Newsworthy

Hot topics on campus picked up by regional media outlets since early March include:

- A story in the Worcester Business Journal highlighting our commitment to affordability;
- Several stories about our early April Worcester State Theatre production of CitySpeaks (here’s one);

To see more media coverage, click on “View All” beneath “In the News” at WSU News, and scroll to the bottom to view our recent Twitter and Facebook posts.

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Building a Better Worcester State University ..............

PRESIDENT’S OFFICE
Worcester State University
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Worcester, MA 01602
508-929-8000
www.worcester.edu
Community, Government, and International Relations

• Worcester state’s “community” can be found across the country. President Maloney represented Worcester State at Florida alumni events in March, including the annual WSU Alumni & Friends Red Sox Spring Training Game in Fort Myers; Worcester State’s second entry into the annual St. Patrick’s Day Parade in Naples; and Worcester State’s first-ever alumni event in Palm Harbor, Florida, hosted by alumna Doris Schur-Watters (’62).

• President Maloney represented Worcester State University and spoke on behalf of the Council of Presidents at a nine state universities’ alumni event in the Dirksen Senate Office Building in Washington, D.C., in mid-March; met separately with members of Congress; and then participated in New England Council-sponsored events with members and their aides. He also joined student leaders who were in Washington during spring break to educate members of Congress about higher education priorities.

Promoting Diversity and Inclusion
In February, President Maloney announced Worcester State’s Five Points of Action, a plan geared toward realizing the campus’s core value of becoming an inclusive community where “diversity enhances learning for all.” (Read more here.) In March, activities included:

• The Center for Teaching and Learning hosted several brown bag discussions during which faculty shared experiences that can help create open, inclusive classroom environments.

• The Third World Alliance student group hosted a talk by Dr. Cornel West, acclaimed author, professor, and activist, on March 30, providing the campus an opportunity for cross-racial interaction.

• The Division of Student Affairs has made a commitment to training on topics of diversity as it relates to social justice, an inclusive workplace, and engagement of our student body. Their annual division-wide retreat will focus on how to incorporate these topics into daily work practices.
Organizational Updates

• Interim Dean Jane Friederichs will be with us through next semester, and the search for a permanent Dean of Humanities and Social Sciences continues.

• Marilyn Cleary has joined Worcester State as the new Assistant Dean of Graduate and Continuing Education. Marilyn was formerly the Director of Operations in the Center for Workforce Development and Continuing Education at Quinsigamond Community College, where she has worked for the past nine years. Prior to joining QCC, she worked at EMC Corporation as a Business Analyst/Business Operations Manager. Marilyn holds a Bachelor of Science degree in Biotechnology and a Master of Business Administration degree, both from WPI.

• Provost Lois Wims served as a NEASC accrediting team member for the University of Southern Maine this April, and she recently completed the Chief Academic Officer Institute from the American Council on Education.
Academic Excellence

- For the 2016-2017 academic year, graduate students will have the opportunity to apply for one of over thirty assistantships in academic and administrative departments. Ten current graduate students will be extending their current placements for an additional year.

- During the Fall 2015 semester, the Worcester State Writing Center held 996 client sessions led by a team of 19 trained undergraduate writing consultants. Of these 996 sessions, 507 were returning students who had used the Writing Center in the past, and 32 of the sessions were with groups of three or more working on collaborative projects. The mission of the Writing Center is to build better writers. By using each session as an opportunity to hone the skills essential to writing, consultants help students realize a fuller command of the written word. Consultants are able to assist students at any stage in their writing process, from brainstorming to final revisions.

- The Worcester State Math Center (established Fall 2016), helps students develop a conceptual understanding of mathematics that will enable them to succeed in their courses. The Center provides support for all Mathematics Department courses and any other courses with mathematical content, including nursing, science, business and psychology courses, as well as for standardized testing. During its inaugural year, the center served 214 students with 612 tutoring session, hired 16 student tutors, and supported end of fall semester review sessions for 124 students across 11 Mathematics Department courses.

- Worcester State’s Center for STEM Research and Education supports student success in STEM fields through facilitating interdisciplinary collaboration and initiatives in two areas: providing supplemental instruction for key courses in the STEM disciplines and developing a program to enhance undergraduate research in the STEM fields through the support of interdisciplinary research teams.

- More than 540 students have entered Worcester State’s scholarship application system, submitting 5,302 individual applications as of March 29, 2016. Last year, 548 students completed applications. Applications will continue to be accepted through mid-April.
Engaging with Local and Global Communities

• The Center for Business and Industry signed a contract with Spectrum Health Systems to provide a Substance Abuse Counseling Certificate to twenty-five employees. Participants will be able to sit for the Certified Alcohol/Drug Abuse Counselor (CADC) certification after the completion of the program.

• Seventy-nine international students will receive certificates of completion from the Intensive English Language Institute at their end of spring ceremony on May 6th.

• Worcester State collaborated with the Massachusetts International Academy (MAIA) to encourage greater international student enrollment. MAIA, an innovative college preparatory school located in Marlborough, educates high school graduates from overseas, mostly from China, in English. In past years, these students primarily have enrolled in the University of Massachusetts. This month’s meeting was intended to begin a relationship with MAIA to encourage greater enrollment of MAIA graduates at Worcester State.

• Career Services developed a new series of programs that support faculty through opportunities for students to interact with employers, such as field-specific panels, breakfasts, and luncheons with regional businesses. These programs will enable stronger connections between what students are learning in the classroom and employment trends.
Building a Better Worcester State University

- This month, the Enrollment Management Division conducted a division-wide customer service training for all employees. Premier customer service is critical for the success of the university, and especially so in WSU’s service-heavy areas.

- Worcester State’s first student athlete-focused career panel will launch this month with Lancer Athletics: Pathways to a Career, on April 11. Featuring five alumni who were student athletes, the panel will provide an overview of their career development and insights into how being a student athlete can benefit a job search and career growth. Students will interact with panelists in question and answer sessions and have an opportunity for personal follow-up later that evening.

- As part of a collaboration between the Communications Department and Athletics, the Communication and Sports Broadcasting Internship program has made great strides over the past few months. Student interns provide broadcasts of select Worcester State home games. These broadcasts, called “Lancer Selects,” have enabled parents, alumni, and other Worcester State supporters to receive quality live video, play-by-play commentary, and color analysis. The student interns also have created “Lancer Nation Station,” a YouTube channel that provides highlights and pre- and post-game coverage for Worcester State sporting events.

- The Day of Giving fundraising campaign will have taken place on Wednesday, April 6, with a special focus this year on young alumni. In addition to the Wasylean Challenge already in place for this fiscal year, Foundation Board member Gregg Rosen ’86 has issued a challenge gift of $10,000. For each young alumnus and student who makes a gift, Mr. Rosen will contribute $25, up to $10,000 in total. New for the Day of Giving this year will be text-to-donate opportunities and viral marketing via social media.

- Worcester State’s new Alumni Connection events will kick off in April and help link students and alumni. Alumni Connection events will invite alumni back to Worcester State to give real-world career advice and share their path for success with our students. The events will offer an alumni panel that represents popular career paths for specific disciplines, and the sessions will be open to all. These events will conclude with informal networking opportunities.
• In conjunction with the Young Alumni and the Student Engagement Committees of the Alumni Association’s Advisory Board as well as the Lifetime Lancers, the Alumni Office will launch an alumni speaker series for students and young alumni on Wednesday, April 13. The inaugural event, Reset: Making the Most of Your Stress, will feature Dr. Kristen Lee Costa ('96), an award-winning behavioral sciences professor, clinician, and author. Using her expertise, Dr. Kris will provide her tips for navigating academic and work stress.

• As of February 29, 2016, the Worcester State Foundation has provided to the University:
  o $175,859 – Student Scholarships, Awards, Internship Stipends
  o $98,078 – Programs and Community Involvement
  o $78,827 - Real Estate (including the May Street Building, Chandler Street properties, and Worcester Center for Crafts)
  o $18,348 – Faculty Research/Support
  o $23,740 – Plant, Property & Equipment

• Worcester State Foundation’s and University Advancement’s dashboard:

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TO: Members, WSU Board of Trustees

FROM: Barry M. Maloney

RE: Honorary Doctorate for Ret. Lt. Colonel James Sheehan

DATE: April 4, 2016

I am recommending to you that Ret. Lt. Colonel Sheehan be awarded an honorary doctorate degree at our Academic Achievement Awards Ceremony. The Speaker and Awards Committee forwarded his name in February of 2015 for inclusion in the pool of nominees for future speaker/recipients of an honorary degree.

Lt. Colonel James F. Sheehan, USMC Retired, graduated from Worcester State Teachers College (as it was known at the time) in 1955 and embarked on a twenty-two year career with the Marine Corps. During his years in the Marines, Mr. Sheehan served in Viet Nam, where as an infantry officer he commanded everything “from a platoon to a battalion”. In addition to rising to the rank of Lt. Colonel, Mr. Sheehan headed up a joint services computer science school and served as deputy chief of JINTACS (Joint Interoperability of Tactical Command and Control Systems) which conceptualized defense systems for the 1990’s including the system widely known as “Star Wars”. After retiring from the Marine Corps, he used his math and business skills to launch a successful career as a venture capitalist. He and his wife settled in Florida where they established a number of scholarships at local universities.

Fifty years after his graduation from Worcester State, Mr. Sheehan made the largest cash gift in the history of WSU. With this first gift of $500,000, The Lt. Colonel James F. Sheehan ’55 USMC Retired Endowed Scholarship was established that provides two $2500.00 annual awards. Additionally, this gift provides the funding for the Sheehan Awards which offers up to $5,000.00 per student and are given out each year at the Academic Achievement Awards Ceremony to the highest ranking students in the freshman, sophomore, junior and senior classes.

Mr. Sheehan also made an additional gift of $100,000 to support the Honors Program and a bequest of $3,000,000 to create an Honors College and provide funding for a Study Abroad Scholarship Program.

In recognition of his outstanding service to the United States of America and to Worcester State University, I respectfully request your approval of the awarding of an Honorary Doctor of Humane Letters, Honoris Causa, to Lt. Colonel James F. Sheehan ’55, USMC Retired at the Academic Achievement Awards ceremony scheduled for Thursday, April 28, 2016.