

**WORCESTER STATE UNIVERSITY
BOARD OF TRUSTEES
HUMAN RESOURCES COMMITTEE MEETING
Tuesday, June 10, 2025
2:00 P.M.
Wellness Center, Room 204**

Meeting Called By: Maureen Power (Chair)

Minutes: Nikki Kapurch

Board Members: Maureen Power (Chair), Amy Peterson (Vice Chair), Dina Nichols, David Tuttle

WSU Staff: Barry Maloney; Ashlynn Allain; Nikki Kapurch; Sathi Mitra

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

AGENDA		
ITEM	RESPONSIBLE	ACTION
1. <i>Administrative Business</i> A. Call to Order	Maureen Power	
2. <i>Human Resources Committee Report</i> A. Appointment of the Assistant VP for Communications and Marketing* B. President Maloney's 2024–2025 Self-Evaluation* 1. Memo from Commissioner Ortega*	Maureen Power Barry Maloney	A. vote required B. vote required 1. informational
3. <i>Adjournment</i>	Maureen Power	3. vote required

*Attachments

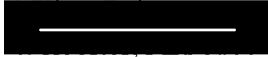


WORCESTER
STATE
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President's Office
Phone: 508-929-8020
Fax: 508-929-8191
Email: bmaloney@worcester.edu

May 22, 2025

Deborah O'Neil



Dear Ms. O'Neil,


I am pleased to inform you that I intend to submit to the Board of Trustees of Worcester State University at their June 10, 2025 meeting, your appointment at the University as the Assistant Vice President of Communications and Marketing. Your appointment is subject to Board approval upon the terms described as follows;

1. The Assistant Vice President of Communications and Marketing is responsible for leading the university strategy for communications, marketing, public relations, media relations, crisis communications, advancement communications, and internal communications. The incumbent is responsible for developing and implementing integrated communications and marketing strategy and messaging across the institution that supports the university's strategic priorities and ensures university-wide brand consistency. You will report to the Vice President for Enrollment Management and will be held to the standards of the University, and the Board of Trustees and the Massachusetts Board of Education. You will serve in the position at the pleasure of the President and the Board of Trustees.
2. Your appointment will begin effective Monday, June 16, 2025.
3. Your annual salary will be in the amount of \$130,000. Furthermore, you will be accorded all the other benefits and entitlements due to you based on your employment status as a Non-Unit Professional.

Please indicate that you accept this offer of appointment by signing and dating the original letter and returning it to the Director of Employee Services Operations.

I congratulate you on your appointment and extend my best wishes for a challenging and rewarding work experience.

Sincerely,


Barry M. Maloney
President
BMM/jlc

I accept the position of Assistant Vice President of Communications and Marketing effective June 16, 2025.

DocuSigned by:



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Deborah O'Neil

5/22/2025

Date



WORCESTER
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UNIVERSITY

NON-UNIT JOB DESCRIPTION

Position Number: 00106328

Reports to: 00195251

Incumbent: D. O'Neil

Department: 819

UPDATED - JAN 2025

OFFICIAL TITLE: Assistant Vice President of Communications and Marketing

SUPERVISION RECEIVED: Vice President for Enrollment Management

SUPERVISION EXERCISED: Office of Communications, Marketing, Design and Printing

GENERAL STATEMENT OF DUTIES:

The Assistant Vice President of Communications and Marketing (AVP) is a university leader serving as part of the President's Executive Cabinet who champions the university's brand, reputation, and the Worcester State story. Overseeing the Office of Communications, Marketing, Design and Printing, the AVP and leads university strategy for communications, marketing, public relations, media relations, crisis communications, advancement communications, and internal communications. The AVP is responsible for developing and implementing integrated communications and marketing strategy and messaging across the institution that supports the university's strategic priorities and ensures university-wide brand consistency. The AVP must be able to work independently and constructively in an institutional setting that strongly values cross-division collaboration, and do so beyond normal business hours.

The AVP is the university's spokesperson and, as the Public Information Officer, is responsible for responding to media inquiries, conducting media outreach and fostering relationships with news reporters. During emergencies, the AVP is the university's Emergency Management PIO and is responsible for leading all crisis communications. As PIO, the AVP works cross-divisionally to support continual improvements to the university's emergency management plans and preparedness, to include appropriate training for the MARCOM team and key leadership members.

The AVP manages, creates, edits, and ensures timely, accurate, clear, and creative communications that promote positive internal, community, and constituent relations. As the champion of the university's brand, the AVP is a key position involved in promoting campus pride and enhancing Worcester State University's reputation.

RESPONSIBILITIES:

1. (E) Is a direct report to the Vice President for Enrollment Management, and also serves as a member of the President's Leadership Team. As a member of the University Cabinet, makes recommendations to the campus's senior leadership on



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a wide variety of campus matters and brings the perspective of a communications and marketing expert to the table.

2. (E) Develops and implements integrated communication and marketing strategies and messaging to support the strategic goals of the University, works with MARCOM departments to set marketing and communications strategies, and develop and track appropriate communications and marketing metrics to assess effectiveness of institutional and department-level strategies, uses metric to engage in continuous improvement;
3. (E) Oversees undergraduate, graduate and university marketing strategies for student enrollment in close collaboration with the Director of Marketing and VP of Enrollment;
4. (E) Oversees advancement communications strategy for fundraising and alumni engagement in collaboration with the MARCOM Communications Director and the Director of Advancement Communications in collaboration with the VP of University Advancement
5. (E) Serves as university's Emergency Management PIO, completes all training associated with the role, and ensures MARCOM staff is appropriately trained for emergency management duties. Acts as an essential employee during emergency and weather-related events, as the PIO on the Emergency Management team, to assure timely and accurate communication to campus constituencies.
6. (E) Oversees and makes continual improvement to university's communications practices, procedures and systems. Ensures that all university communication practitioners are adhering to university editorial standards, and writing and sharing content so that it is widely available for repurposing through various communication and social media vehicles, in an integrated way;
7. (E) Works to ensure the most efficient means of coordinating design, editing, photography, and videography functions in a way that best serves marketing and communication priorities;
8. (E) Oversees internal communications and collaborates with the Communications Director to develop and maintain effective internal communications practices that meet internal campus communication goals; provides communications leadership in support of diversity and inclusion efforts on campus.
9. (E) Works with the President's Office collaboratively and as needed providing communication and public relations support for efforts led by that office. Also provides communications support and advice to other university leaders, including the Vice President for Enrollment Management and the Vice President for Advancement, for key messages to the campus community.
10. (E) Works to meet the University's strategic goal of a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued, including designing and communicating appropriate messages regarding the



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- university's diversity-related efforts and publicly highlighting the diversity of the university to the community at large.
11. (E) Raises the visibility and profile of the university by developing a comprehensive media relations strategy that brings positive earned media coverage to the university, to include building relationships with news reporters across media outlets, developing and pitching story ideas that generate positive media coverage, responding to media inquiries, working with faculty and university leaders to respond to media inquiries, developing a faculty expert database available to the media. Organizes and leads media invitations and statements as needed across the university, promotes faculty and staff experts to the media.
 12. (E) Develops a public relations strategy to foster a positive public image, to include regular communication with area PIOs in higher education and the university's partner organization to seek collaborative opportunities to promote shared work and the state universities
 13. (E) Works closely with the university's Records Access Officer on public records requests that are generated from media outlets or may attract the attention of the media.
 14. (E) Oversees the President's social media accounts, coordinating closely with Marketing staff responsible for the University social media accounts. Oversees the University's news site and ensures that resources are available to provide adequate written content, as well as photography and videography. Oversees employee(s), cross-divisional staff, freelancers, and intern(s) to ensure they are providing adequate and appropriate content, and creates content.
 15. (E) Ensures appropriate monitoring of the University's online reputation and presence in traditional media outlets, and responds as needed.
 16. (E) Works collaboratively across divisions and between offices to ensure the communications goals of the senior leadership and the University are coordinated.
 17. (E) Serves as a liaison with other colleges, the Department of Higher Education, the Council of Presidents, and other organizations as necessary and appropriate for University public relations efforts and serves as a member of appropriate campus committees as determined by the VP for Enrollment Management.
 18. (E) Oversees the fiscal budgets for marketing, public relations, communications, and other supervised areas, as well as personnel, team professional development and workplace practices
 19. (E) Responsible for contributing to the WSU Strategic Plan.
 20. (E) Responsible for contributing to the Equal Opportunity/Affirmative Action objectives.
 21. (E) Performs similar and related duties as assigned.

REQUIRED QUALIFICATIONS:



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1. Knowledge of the U.S. higher education community, its principles, practices and procedures.
2. Familiarity with communications, marketing and branding, media relations, and design in a higher education environment.
3. A minimum of five (5) years' experience in public relations, marketing, communication, media/news, and/or a related field.
4. Impeccable writing and editing skills, and strong effective interpersonal and verbal communication skills working in an environment that is deadline-oriented, with a premium on transparency.
5. Experience working within an organization, with professional strengths including self-direction, credibility, project management, flexibility, respect for confidentiality, and affinity for teamwork.
6. Ability to exercise judgment and discretion as a member of the Executive Cabinet and in applying and interpreting University policies and procedures.
7. Ability to work effectively with faculty, administrators, and students in an environment with sensitive time constraints and an ability to anticipate and meet deadlines.
8. Current experience and ability to work with standard office and online communication tools and is comfortable working with social media.
9. Commitment to campus efforts to promote diversity and inclusion.

PREFERRED QUALIFICATIONS:

1. Master's Degree or appropriate equivalent professional experience.
2. Familiarity with media relations, communications, design, and marketing demands in a public higher education environment.
3. Experience with and contacts in public relations, marketing, communication, media/news in Central Massachusetts media outlets preferred.

By signing below, I acknowledge that I have received a copy of this job description. I understand that I must be able to perform the essential functions of my position with or without reasonable accommodation. Questions relating to my responsibilities or need for accommodation, now or in the future, will be directed to my supervisor and/or Human Resources.

DocuSigned by:

Deborah O'Neil

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AVP of Comm and Marketing

5/22/2025

Date

DocuSigned by:

Jennifer Collins

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Employee Services

5/22/2025

Date

CONTACT



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Worcester, MA

EDUCATION

Master of Arts

Latin American and Caribbean
Studies, Concentration:
Religious Studies
Florida International University

Bachelor of Arts

Mass Communication
University of South Florida

MILITARY SERVICE

U.S. Army Reserves

Hanscom Air Force Base
and Fort Devens, MA
1990–1994

TEACHING

Adjunct journalism instructor

English Department
Worcester State
Fall 2023

Adjunct journalism professor

FIU School of Journalism
and Mass Communication
2004–2005

Upward Bound

High school English
co-teacher, grades 10–12
1999

ACADEMIC PUBLISHING

“The Saint and the Siren: Liberation Hagiography in a Haitian Village,”

Deborah O’Neil and Terry Rey,
Studies in Religion,
Vol. 41, No. 2
June 2012

DEBORAH ALVAREZ O’NEIL

PROFESSIONAL PROFILE

- Communications and marketing leader with 25 years experience building and managing cross-functional teams in higher education, nonprofits and philanthropy.
- Proven expertise in public relations, thought leadership, and crisis communications, with a demonstrated skill in managing sensitive situations and safeguarding organizational reputation.
- Extensive experience in successful communications and marketing strategy, brand development, and creative campaign leadership.
- Passionate about advancing the mission of public higher education through a commitment to access, academic excellence, and community engagement.

PROFESSIONAL

Interim Assistant Vice President of Communications and Marketing, Worcester State University October 2024–Present

- Oversee 12-member team in Communications, Marketing and Printing & Publications Departments during a time of transition
- Serve on President’s Executive Cabinet; charged with advise the president on policy change as part of a 3-person team
- Manage internal communications and public relations for critical issues and successfully safeguard the university’s reputation.
- Advise and collaborate with University Advancement to develop university’s next fundraising campaign



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Director of Editorial Communications, Worcester State University January 2022–October 2024

As the head of the Communications in the Office of Communications and Marketing, oversaw university news, supported media relations and led University Advancement communications and marketing efforts.

- Oversaw university’s news platforms
- Edited Worcester State University Magazine, weekly campus newsletter and monthly alumni newsletter
- Supervised and mentored student interns
- Wrote stories, announcements, press releases, remarks
- Hired and coordinated photographers for publications
- Responsible for all alumni social media channels
- Worked closely with University Advancement on outreach and communications efforts, marketing campaigns and affinity building activities

RECOGNITION

Five FIU Presidential Excellence Awards 2005–2012

News, web, and branding,
Highest award given to FIU's
8,000 employees

Council for the Advancement and Support of Education (CASE) Awards 2016

University Magazine Excellence in Online Writing for

Teacher and poet, rebel and traveler, David Menasche showed us how to live

2013

University Magazine General Excellence Grand Prize Award

University Magazine Illustration Design Grand Prize Award

University Magazine Cover Design Excellence Award

News & Research Videos Circle of Excellence Silver Award

2011

General Excellence in Feature Writing for "Bragging Rights & Basic Truths"

JOURNALISM AWARDS

Pulitzer Prize nominee
for investigative reporting and explanatory reporting,
"The CEO and His Church,"
St. Petersburg Times
2003

Gerald Loeb Award
winner
2003

Vintage Books 2003 Best Business Stories of the Year,
story selected for inclusion

Courageous Journalist Award
by the Society of Professional Journalist's—Tampa Bay
1996

Director of Communications, Patrick J. McGovern Foundation, Boston 2019–January 2022

The Patrick J. McGovern Foundation is a global \$1.5 billion philanthropy advancing data science and AI. Served as the first communications director building all communications infrastructure and overseeing storytelling and messaging, brand development, social media, website, special events, public relations, and thought leadership.

- Led a rebranding to include new logo, branding guidelines, collateral
- Launched new website with complete redesign and new messaging
- Lead writer for Foundation communications including announcements, remarks, website content, messaging, keynotes, talking points, remarks and op-eds
- Pitched stories to reporters, respond to media inquiries

Director of Communications, Ariadne Labs at Harvard School of Public Health 2015–2019

Founded by Dr. Atul Gawande, Ariadne Labs is a non-profit, global public health innovation center at the Harvard School of Public Health and Brigham and Women's Hospital in Boston. Served as the first communications director, leading organizational storytelling, messaging, brand elevation, marketing, social media, website development, media relations and special events.

- Served as communications thought partner to Dr. Atul Gawande, founder and chairman, Dr. Asaf Bitton, executive director, and Dr. Evan Benjamin, CMO
- Led strategic communications and marketing for a portfolio of more than 20 public health projects around the world to drive support and adoption of programs and interventions
- Developed integrated public health communication programs in close collaboration with leading health organizations
- Built and managed a six-member, communications department
- Managed contractors for design, videography, web services, marketing
- Coached Ariadne Labs scientists and physicians for media interviews, presentations, program messaging and personal brand development

Associate Director of News and Communications, Florida International University Division of External Relations 2003–2015

FIU in Miami is the fourth largest public research university in the U.S., and the country's largest Hispanic serving institution

- Served as speechwriter to FIU President Modesto A. Maidique
- Helped plan and execute university communication strategy
- Assigned, wrote and edited content for university news channels
- Produced videos for university news channels
- Traveled with researchers, students and alumni to create stories/videos about research/project initiatives around the world
- Supervised multi-disciplinary creative staff of writers, videographers and designers
- Co-led FIU's first national branding campaign, Worlds Ahead
- Co-created TEDxFIU
- Served as lead writer for brand communications and editor, FIU Magazine for 12 years, circulation 120,000

St. Petersburg Times, Staff Writer 1997–2002

- Covered police, civil and criminal courts, local and state politics
- Handled newspaper's most sensitive beat, the Church of Scientology, culminating in Loeb Award winning story and two Pulitzer Prize nominations



BRANDING: TEDxFIU

Branding Objective: At the time, FIU sat in the shadow of a private university and rival. And although FIU was among the largest R1 public universities in the country, its academic reputation did not reflect the quality of its educational excellence, and its national profile was virtually nonexistent. People would jokingly ask, FI-Who? The charge given to the two leaders of marketing and communications was to elevate the university's brand and national visibility.

Project: We proposed a big, ambitious idea: a fully licensed TED talk event that featured students, alumni and faculty - TEDxFIU. University leaders provided a small budget for us to launch this experimental idea.

My Role: As co-director of TEDxFIU, I helped lead all aspects of this project, from event conceptualization to speaker applications and event promotion. Once we selected speakers, my role shifted to working directly with speakers to develop their talks and run rehearsals.

Target Audience: A national audience. We also aimed to foster pride and affinity among students and alumni.

Strategy: While we recognized the one-night event would generate buzz locally, we knew an event would not result in a shift in public awareness and visibility. Our strategy was to produce high-quality TEDxFIU videos of each talk that would reach much larger audiences online in perpetuity – potentially millions of viewers on the official TEDx YouTube channel. Along with executing a flawless event, a great deal of effort went into filming and producing videos for each talk.

Results: Promotional efforts led to so much excitement that tickets to the first TEDxFIU event sold out in minutes. The following year, we moved to a bigger venue and university leaders invited donors and other VIPs. It became a signature event in Miami. Starting the second year, we implemented a ticket fee (for everyone except students) and were able to recoup some of our expenses. Today, TEDxFIU videos have garnered millions of views on YouTube, showcasing FIU's incredible students, alumni and faculty, including one with over one million views featuring [Worcester State alumnus John Dufresne](#). This project successfully played a pivotal role in helping to establish FIU's national visibility.



MEDIA: *THE ECONOMIST*

Media Objective: Generate public visibility and positive coverage of the Ariadne Labs Serious Illness Care Program.

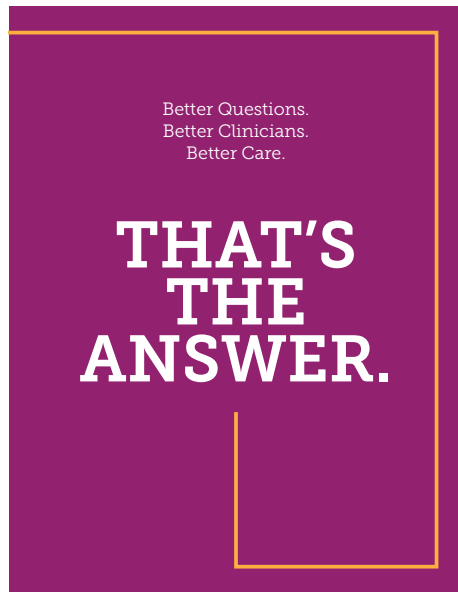
Project: I received a routine media inquiry from a reporter at *The Economist* who was looking for a physician to comment on end-of-life care. I turned this inquiry into a month- long project to earn media coverage of the Ariadne Labs Serious Illness Care program.

My Role: I was the media spokesperson for the organization.

Target Audience: International readership of *The Economist*

Strategy: I provided the reporter, who was based in London, with an expert, and went on to tell the reporter about the Serious Illness Care program, which offers a different approach to end-of-life care. I lined up an opportunity for the reporter to have an informational interview with the program's manager to learn more. To give the reporter a closer understanding of the program, I reached out to a partner hospital that had implemented the program and coordinated interviews between the reporter and partner physicians. Then, I arranged for my organization's founder, Dr. Atul Gawande, to be interviewed about the program on Economist Radio while he was traveling in England.

Results: The Serious Illness Care program was featured in the April 29, 2017 cover story of *The Economist*. The coverage included a news feature, an editorial praising the program, and [Economist Radio's interview](#) with Dr. Gawande. [View the entire package here.](#)



MARKETING: SERIOUS ILLNESS CARE PROGRAM

Marketing Objective: To enroll 19 hospitals/health care organizations from around the United States in the Serious Illness Care Program training.

Project: The Ariadne Labs' Serious Illness Conversation and Care Program is a pioneering hospital-level intervention to train doctors and nurses to have more effective conversations with seriously ill patients. Ariadne Labs introduced scaled-up cohort training for hospital systems to implement Serious Illness Care and needed a marketing campaign to fill the training. The cost to participate was \$50,000 and required hospitals to designate a program coordinator and make significant improvements to patient care processes and records.

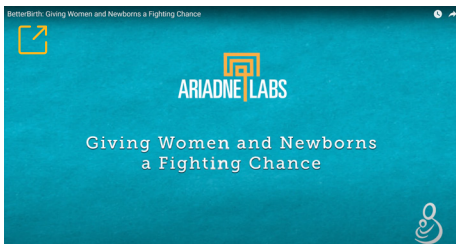
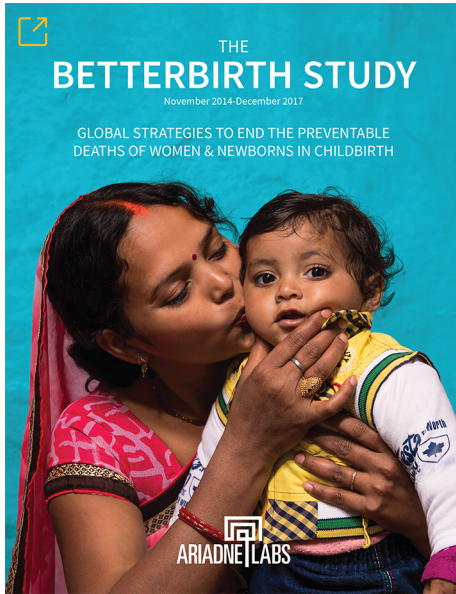
My Role: My role was to lead this marketing campaign; and I brought on a trusted marketing firm, Stinghouse, to partner in the project. I took them on site visits to three New England hospitals that had implemented the program so we could do extensive informational interviews to inform the marketing strategy.

Target Audience: The first audience for this campaign included physicians within the prospective hospitals who would implement the program in their practice. Their enthusiasm for the patient benefits of the program was critical. The next and equally important audience members were C-suite hospital/health system administrators whose buy-in was necessary to secure the institutional commitment and investment.

Strategy: Leverage Ariadne Labs physicians, all highly respected Mass General, Brigham and Dana Farber doctors, to recruit their peers from around the country. To do so, we needed to equip the doctors with appropriate marketing tools and to distill their enthusiasm for the program into a marketable campaign. We built the marketing campaign around several touch points in the recruitment process. First, we developed a flexible script for physicians to follow when making initial calls to their peers. Second, we developed a [brief video](#) that we would send to the prospects in the follow-up to establish an in-person visit. For the C-suite visit, we developed a presentation, a [brochure](#) and [Return on Objectives](#) leave-behind sheet.

Results: We successfully filled the first cohort of the training program and had a wait list for the second cohort.





INTEGRATED COMMUNICATIONS AND MARKETING: THE BETTERBIRTH STUDY

Communications and Marketing Objective: Disseminate the findings and recommendations of the Ariadne Labs BetterBirth study. Our goal ultimately was to drive adoption of the BetterBirth program, which was designed to end the preventable deaths of women and newborns in childbirth.

Project: The BetterBirth study was a \$26 million Gates Foundation funded, six-year randomized control trial led by Ariadne Labs in India and one of the largest trials ever conducted in maternal and newborn health. The study investigated the effectiveness of the Ariadne Labs Safe Childbirth Checklist and coaching program in ending morbidity and mortality in childbirth. When the study was concluded, the results were published in *The New England Journal of Medicine*. Next, Ariadne Labs needed an integrated communications and marketing strategy for organizing its massive volume of findings and data into actionable recommendations for policy makers and maternal health organizations around the world.

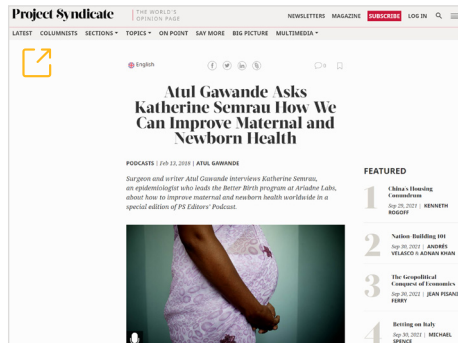
My Role: I developed and implemented the integrated communications and marketing strategy that spanned more than one year and involved the completion of a public report, media outreach, videos, development of a microsite, and an international launch event. I served as a co-author of the [BetterBirth report](#), producer and writer for the [BetterBirth video](#), lead writer for all messaging, and thought leadership partner to the study's lead researchers Drs. Katherine Semrau and Atul Gawande.

Target Audience: Global public health policy makers, maternal health program designers and implementers, and national/regional health system leaders.

Strategy: The global maternal health community is scattered around the world and includes national policy makers, regional/ local maternal health program designers and the international implementation organizations that run maternal health programs in low- and middle-income countries. We needed a multi-pronged strategy that would provide these national, regional and local leaders with our program's practical, feasible, and actionable recommendations, strategies and tools to improve their maternal health care.

We also wanted to reach fellow maternal health researchers to build awareness of the BetterBirth findings and recommendations. To start, we secured a [plenary address](#) at the 2017 Royal College of Obstetricians and Gynecologists World Congress in Cape Town, South Africa before a global audience of 2,500 ob/gyns to announce the findings of the study. My team designed a BetterBirth booth at the event that I staffed with a maternal health nurse. We spoke with hundreds of attendees about the BetterBirth program and provided the program tools as takeaways.

The next step of our strategy was to synthesize the scientific data from the trial into a clearly written, highly engaging, beautifully designed, readable and actionable report for policy makers and maternal health NGOs.



INTEGRATED COMMUNICATIONS AND MARKETING: THE BETTERBIRTH STUDY CONT.

In tandem, we developed a [microsite](#), videos, and a report launch event at [Women Deliver in Vancouver](#). Along with a targeted invitation-only launch event, we hosted an [open panel session](#) for all attendees. My team designed a BetterBirth booth at Women Deliver, which I staffed with the BetterBirth lead researcher to hand out the report, promote the recommendations, share the Safe Childbirth Checklist, and engage directly with the 60,000 attendees, many of them members of the global maternal health community.

In addition, I established a partnership with Project Syndicate to develop an [op-ed](#), [video](#) and [podcast](#) about the BetterBirth recommendations.

Results: Our objectives were not only reached, but surpassed based on the high level of engagement, inquiry and enthusiasm surrounding the reports findings. We captured hundreds of names and contacts in the Women Deliver booth and were able to do personalized followup. In the months following the launch of the report, we saw a significant increase in the BetterBirth Community of Practice, made up organizations interested in or already implementing the program. After Women Deliver, the BetterBirth team traveled to numerous countries to lead trainings and provide support for program implementation.



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Division of Enrollment Management

Phone: 508-929-8497

Fax: 508-929-8194

May 19, 2025

Mr. Barry M. Maloney
Worcester State University
President's Office
486 Chandler Street
Worcester, MA 01602

Dear President Maloney,

Please accept this letter as my recommendation of the candidate to fill the position of Assistant Vice President for Communications and Marketing at Worcester State University. After a lengthy and thorough search, including a national position posting, the review of a great number of applicants, and a comprehensive interview and credential review process, I recommend Deborah Alvarez-O'Neil to fill the position.

Ms. Alvarez-O'Neil brings to WSU a wide variety and applicable set of professional experiences in campus-level higher education communications and marketing. In her tenure at Worcester State University, Deborah has been an effective leader, strategist, and communicator. Deborah has enhanced the university's preparedness for emergency communications and demonstrated her commitment to the WSU mission and strategic plan.

Deborah impressed me and others with her ability to communicate with broad audiences, organize efforts to lead to institutional change in marketing and communication, and support the enrollment, student, academic, and advancement efforts of the university. As a strategist and advisor to campus leaders, Deborah has a great deal of experience, which will surely serve Worcester State University well.

As this appointment must be confirmed by the Board of Trustees, I ask for your support of Deborah Alvarez-O'Neil. If you have any questions or need additional information, please let me know.

Sincerely,

Ryan G. Forsythe, Ed.D.
Vice President for Enrollment Management



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Self-Evaluation, July 2024 - June 2025

President Barry M. Maloney

Barry M. Maloney

Self-Evaluation

Evaluation period July 2024 - June 2025

Overview

In submitting this 2024–2025 Self-Evaluation, I begin with an “Overview” section, followed by responses to the specific areas identified by the Department of Higher Education. My intention is that this structure will provide clear context for the responses that follow.

New this year, the Department has requested that each Chair of the local Board of Trustees submit 3 to 5 examples of how their president has helped advance the Commonwealth’s priorities—specifically in making our institution more learner-ready and equity-minded. These examples should be supported by relevant quantitative or qualitative evidence in the areas of:

- **Affordability:** Addressing college costs and implementing financial aid initiatives
- **Access:** Expanding admissions opportunities, early college programs, or similar pathways
- **Student Success:** Enhancing support systems, including wraparound services

In response, this self-evaluation references and includes data that reflect significant progress in these domains. Highlights include:

1. ValuePlus – a major initiative improving affordability and access
2. Operational Excellence and Financial Stability Task Force (FSTF) – efforts to narrow the budget gap through administrative efficiencies
3. Enhanced Financial Aid Packaging – leading to improved student retention
4. Targeted Allocation of SUCCESS Fund Resources – supporting equity and student achievement

The “Beyond 150 Mid-Cycle Progress Report,” which captures progress through the end of last year on our 2020-2027 strategic plan and provides the data illustrating that progress, is also included as supporting documentation.

As always, I deeply value the guidance and support of the Board. Your partnership has been instrumental in helping both me and Worcester State navigate challenges while continuing to reach—and in some cases surpass—the goals we set at the year’s outset.

Finally, as I engage in this process of reflection, I do so with a mix of pride and humility. Serving as president of Worcester State University remains a profound privilege and responsibility. This self-assessment is intended to provide a candid account of my leadership over the past year—highlighting achievements, acknowledging challenges, and identifying opportunities for growth—all in service to our shared mission and enduring commitment to student success, equity, and institutional excellence.

To assist the Board with its review, you will find the following reports in the following appendices:

- Appendix A: Beyond 150 Mid-Cycle Progress Report
- Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”
- Appendix C: WSU Strategic Enrollment Management plan
- Appendix D: Culture of Respect Report – WSU results

The reports are included to provide greater detail about the highlights below, in the key areas of financial sustainability; recruitment, retention, and strategic planning; equity work; and communications about all of these areas.

1. Retention and Student Success

(Numeric Rating 5)

As for total enrollment, in Spring 2025 (as of May 6), we had 5,664 undergraduate and graduate students. This represents a 1.6% increase over Spring 2024's total enrollment of 5,575 (point-in-time comparison), which was a 4.9% increase over Spring 2023. **Our Spring 2025 persistence rate (Fall 2024 to Spring 2025, as of May 6) is the same as our Fall 2023 to Spring 2024 persistence rate of ~87%, after increasing from 85.63% in Spring 2023.** I am encouraged that the initiatives we've implemented to boost enrollment, and to help students stay in school and on track toward graduation, are paying off. Worcester State is making headway toward meeting our ambitious 2027 enrollment target of 6,500, as called for in the Strategic Enrollment Management Plan.

As for admissions, 2024-2025 was a difficult year. After experiencing our largest new student class in university history in Fall 2023, we were optimistic to repeat in Fall 2024. Then came the complications of the "simplified" FAFSA rollout and violent incidents on and around our campus. Despite Fall 2024 applications being the highest in university history (even more than Fall 2023), in Fall 2024, the university enrolled our smallest new incoming class in over a decade. On the university's survey of admitted students last fall, 26% indicated that the violent incidents had a significant effect on their decision and 44% indicated that the timing of their financial aid package (delayed by the FAFSA rollout) was a significant factor in their decision.

To help the university return to enrolling robust new student classes, **we employed the services of EAB and their Enroll360 suite of services.** This work began last summer, in anticipation of the increasing effects of demographic changes and changes of opinion about higher education in New England and across the country. Enroll360 aims to increase undergraduate admission applications and new student enrollment through more robust prospective student cultivation. This has grown our number of prospective students, enhanced our communications with prospects, and endeavors to convert more prospective students to applicants and yield 6-16% more new enrollees. For Fall 2025, this work appears to be on track to meet that goal, with 9.3% more deposits from new first-year students (798, as of May 14), as compared to the average of 730 from the last five falls (point-in-time comparison).

Highlights:

- We continue to implement the 2022-2027 Strategic Enrollment Management plan (Appendix C), a comprehensive initiative designed to enhance our undergraduate and graduate student body over the next five years. The plan's aim is to grow undergraduate enrollment by 6%.
- The Math Center offers many sessions throughout the day during both fall and spring semesters to support success in math learning across the campus. This summer, the Math Center also will offer virtual sessions for students who are taking math courses. In addition, the Math Department is offering a free course, MA 099, for students who need the support to continue in their major.

- WSU is attracting traditional-aged students and transfer students and actively seeking to expand enrollment of adult learners, other non-traditional students, and graduate students. We also are engaging faculty in enrollment efforts and developing a parent/family association and a targeted communication plan.
- We are reaching other specific student populations, as well, via various initiatives such as dual enrollment with Worcester Public Schools, in order to address the effects of demographic shifts and the pandemic.
- We continue as a Common Application institution, which has broadened our access.
- The MajorPlus academic framework is fully operational, which redesigned the undergraduate curriculum to enable students to graduate with two majors or a major and a minor within four years. MajorPlus was cited by 73% of new students who responded to a survey as somewhat important, important, or very important in considering WSU and was one of the reasons some out-of-state students chose Worcester State (an increase of 8% from Fall 2023).
- Student success following graduation remains extremely strong. The most recent post-graduation survey showed that 98% have jobs or are furthering their education, or are doing both, within six months of graduation.
- Incoming Fall '24 Class Profile, Degree-Seeking First-Time First-Years:
 - GPA 3.4
 - Female 62%
 - Male 38%
 - ALANA (African, Latine, Asian, Native American)/BIPOC (Black, Indigenous, People of Color) 44%
 - In-state 93%; Out-of-State or International 7%
 - First Generation 52%

Challenges/Opportunities:

- Despite our overall progress, we continue to see equity gaps in student outcomes. Compared to the 86% of white first-year students retained, the retention rate was 82% for African American students and 79% for Latine students. For graduation rates, 67% of white students graduated in six years, compared to 55% of Black students and 42% of Latine students.
- We are beginning to see an impact of Free Community College on WSU undergraduate Day and DGCE enrollments.
- Adult learners represent a potential new market for us, and we have a plan for attracting and retaining them.

2. Academic Management and Leadership

(Numeric Rating 4)

One of the primary goals outlined in our 2020-2027 Strategic Plan: Beyond 150 is to achieve "Academic Excellence and Distinction." I am pleased to report that we have made significant progress towards this goal, thanks in large part to the exceptional leadership of our faculty.

Academic Excellence Highlights:

- The online Master of Science in Nursing (MSN) program was ranked [second best in the state](#) for 2025 by RegisteredNursing.org, based on factors including program quality, affordability, and graduate success rates. The California-based nursing advocacy organization has also ranked WSU's undergraduate nursing program as the number one program in the state for the past three years.
- WSU recently received a \$1.24 million gift from the former Becker College that will have a profound, lasting impact on the university's nationally ranked Dr. Lillian R. Goodman Department of Nursing. The gift will establish the Becker Legacy Endowed Scholarship for Nursing Leadership, which will provide financial support to Worcester State nursing students in perpetuity.
- In fall of 2024, the National Endowment for the Humanities awarded a grant establishing a Spotlight Fellows program whereby WSU's Department of Interdisciplinary Studies, the John J. Bliniana Center, and the Center for Teaching and Learning, are forging new academic-community partnerships that support student learning outcomes in the humanities.

Academic Management:

- As part of the nine state universities' efforts, Worcester State successfully reached collective bargaining agreements with two units, the AFSCME and APA units.
- A presidential-appointed team of faculty have been engaged in a deep review and recommendation process to overhaul the general education program, which is expected to come before governance committees in the next academic year.
- Senior Academic Affairs Division leaders have commenced a review of the Information Technology area that will position the university to meet changing technological needs as we enter the second quarter of the 21st century.

Expanding Academic Offerings and Academic Innovation:

- The School of Humanities and Social Sciences (SHSS) pursued initiatives to expand access for undergraduate students to pursue graduate-level and professional legal education. These initiatives were undertaken with an eye on enrollment in the university's Pre-Law minor curriculum, which has more than tripled since fall 2019, and an expanded interest by new students in the accelerated "3+3" program offered between the university and its in-state partners, the University of Massachusetts School of Law and Western New England University School of Law. SHSS expanded on-campus visits and events by admissions teams, ensuring that those teams established a regular, once-per-semester schedule, visiting a variety of classes, in order to describe accelerated and regular admissions processes and options for emphasis in study for the institutions' Juris Doctor programs. Additionally, with the university's international partner Ulster University, through Ulster's School of Law, SHSS established a pathway that

allows graduates from undergraduate majors in English, History, Political Science, Sociology, and Urban Studies to gain entrance seamlessly to Ulster University's Master of Laws (LLM) programs in Access to Justice, Gender and Human Rights, and Human Rights Law and Transitional Justice, and to Ulster University's Master of Science program in Peace and Conflict Studies.

Experiential Learning and International Experiences:

- The [Aisiku STEM Center](#) has focused on providing academic support using the Supplemental Instruction Model (which WSU calls Peer Assisted Learning, or PAL) for introductory and 200-level courses that are crucial for success in the STEM disciplines. Over the past two years, we have expanded the PAL program to offer support to basic science courses required for Nursing and other clinical disciplines including Occupational Therapy, Communication Sciences and Disorders, and Public Health. The support has included Medical Microbiology (BI206; 8 sections 119 students), Anatomy and Physiology 1 (BI161 - 9 sections, 178 students), Anatomy and Physiology 2 (BI162; 8 sections, 157 students), and Survey of Chemistry (CH112; 8 sections, 117 students).

Early College (tied to Access, Success, Equity, and Affordability):

Spring 2025 Enrollments

- 56 dual enrollment/Early College classes
- 22 high schools (13 districts)
- 892 enrollments
- 763 individual students

Fall 2024 Enrollments

- 57 dual enrollment/Early College classes
- 19 high schools (10 districts)
- 1,011 enrollments
- 872 individual students

Success rates for Fall 2024 (success defined as earning a grade of C- or better; D/F/Ws are considered unsuccessful):

- Worcester Public Schools Fall '24 success rate is 78.3%
- Springfield Empowerment Zone Schools Fall '24 success rate is 63.8%
- All other schools' Fall '24 success rate is 78.6% or better

Challenges/Opportunities:

- Changes in leadership in the Center for Teaching and Learning (CTL) are ahead.
- WSU's new Gen Education platform is targeted for implementation in Fall 2026.

3. Assessment

(Numeric Rating 4)

At the midpoint of our 2020-2027 strategic plan, Beyond 150: Lead, Succeed, Engage, we have made considerable progress across all six goals and two overarching areas. As we enter the second half of the strategic plan and celebrate our 150th anniversary, we are well-positioned to build upon the achievements of the first four years and fulfill the promise of our strategic plan: To lead, succeed, and engage beyond 150 years.

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

- A comprehensive General Education/Liberal Arts and Sciences Curriculum (LASC) assessment/review is underway, having launched in Spring 2024 with a team of 35 faculty led by Associate Vice President for Academic Affairs Henry Theriault. The General Education group has conducted surveys of faculty regarding the definition of a baccalaureate-educated person within the context of Worcester State's mission and values. The team will look to align the MajorPlus academic framework and the commitment to inclusive excellence and belonging through the general education core offerings.
- Strategic Plan progress to date:
 - 91% of metrics are at least halfway toward their targets.
 - 52% of metric targets have been met or exceeded.
 - 80% of initiatives have been fully implemented.
 - 37% of initiatives are now well established via ongoing practices.
 - 86% of IE&B (Inclusive Excellence & Belonging) initiatives have been fully implemented.
 - 81% of Continuous Improvement initiatives have been fully implemented.
- We are moving forward to address focus areas identified at the end of the last academic year by the New England Commission of Higher Education (NECHE) as a response to our comprehensive self-study, which was a university-wide review of our institution. The NECHE process is conducted every ten years and the last review resulted in a full 10-year reaccreditation for WSU.
- A successful program review for the WSU Occupational Therapy program was completed.

Challenges/Opportunities:

- We will continue to implement the 2020 -2027 WSU Strategic Plan, "Beyond 150."
- We seek to complete, in a timely fashion, the review of the Liberal Arts and Sciences Curriculum (LASC)/General Education common core. Anticipated rollout of the new general education platform is Fall of 2026.
- We will continue to pursue recommendations coming out of the NECHE Self Study – assessment, budget oversight, and enrollment management, in particular.
- We aim to strengthen campus involvement in the Strategic Plan Review process.

4. Infrastructure

(Numeric Rating 4)

Campus Infrastructure, Planning, and Partnerships

The University has made steady progress on capital projects and infrastructure upgrades that support both student learning and operational efficiency. Over \$10 million in capital investment has supported renovations and modernization efforts, including upgrades to HVAC systems, classroom technologies, and critical building infrastructure. Recent projects included the Wellness Center Phase 2 renovation, fire panel replacements, Learning Resource Center upgrades, and improvements to the Wasylean Hall roof and residence hall bathrooms. Each project has been guided by student needs, safety, and long-term facilities planning.

Worcester State continues to work closely with the Division of Capital Asset Management and Maintenance (DCAMM) and the Massachusetts State College Building Authority (MSCBA) to align local priorities with state capital planning and funding streams. As part of the FY25 capital planning cycle, the university submitted funding proposals totaling \$5.8 million for critical deferred maintenance and energy projects. At the same time, internal space planning efforts have been refreshed to ensure that academic and student spaces are aligned with current and projected usage. This integrated planning framework helps ensure that future projects are both strategic and sustainable.

Decarbonization and Student-Centered Improvements

Meeting the Commonwealth's decarbonization goals under Executive Order 594S continues to guide many of Worcester State's facilities decisions, with multiple energy efficiency initiatives underway. The university dedicated \$1.9 million to HVAC improvements, including system upgrades and energy-efficient retrofits in academic and residential buildings. Additional funding supported LED lighting replacements and building automation enhancements.

During FY24 and FY25, a new electrical distribution system to all buildings was installed in order to replace the existing aging and failing infrastructure. This project was advocated for with DCAMM over many years and, through these efforts, attained 100% state funding. An entirely new system was installed which included new manholes & ducts, cabling and transformers to greatly improve the reliability and operability of the campus' electrical system for many decades. The value of this work totaled \$10.7M. These improvements are expected to yield annual savings in energy costs and support progress toward state climate and decarbonization goals.

At the same time, Worcester State remained focused on improving the student experience through targeted facility investments. Over \$750,000 was allocated for student-centered improvements, including upgrades to dining facilities, ADA accessibility enhancements, and residence hall repairs. These investments are informed by student feedback and designed to create a welcoming, accessible, and supportive living and learning environment. Together, these efforts reflect the university's commitment to aligning physical infrastructure with the values of inclusion, sustainability, and student well-being.

Highlights:

In addition, the following projects were undertaken in 2024-25:

- Campus paving projects, \$716,915.
- Sullivan RTU replacement project underway, \$3,619,339
- Replaced data center cooling units, \$740,049
- Completed various landscape and hardscape projects, \$616,000
- Student Center: Relocated food pantry; created Veteran's lounge; created LGBTQ+ Community Center, \$146,963
- With the assistance of DCAMM, and in compliance with state law, completed the WSU Decarbonization Plan 2025 to 2050.

Challenges/Opportunities:

- In anticipation of the passage of Governor Healey's BRIGHT Act - a bond bill in support of public higher education – we aim to launch, implement, and complete a new Master Plan for Worcester State
- We will continue to coordinate and modify the City of Worcester's plans to redesign Chandler Street.
- Meeting the new state energy decarbonization plan's targets may be a challenge.
- We aim to finalize development of funding strategies to implement May Street renovations and campus classroom technology work.

5. Fiscal Management and Budgeting

(Numeric Rating 4)

Strategic Financial Management

The fiscal challenges Worcester State has faced since the height of the COVID 19 pandemic have been met with prudent fiscal planning and a campus-wide shift toward operational excellence. Those initiatives have resulted in \$5.2 million in efficiencies, which has helped us avoid drawing down reserves to balance this year's budget and has narrowed the deficit that arose during the pandemic.

Worcester State continues to demonstrate disciplined financial leadership through responsible budgeting, targeted investments, and careful long-range planning. Throughout the academic year, Finance and Facilities committee reports emphasized the university's commitment to maintaining a balanced budget while clearly tracking expenditures and preparing for FY26 planning. The current FY25 general fund budget totals approximately \$104 million, reflecting a modest increase from FY24. Federal funding, including allocations from the American Rescue Plan Act (ARPA) and Higher Education Emergency Relief Funds (HEERF), has played a crucial role in supporting deferred maintenance and one-time capital needs. Worcester State leveraged approximately \$2.7 million in remaining federal funds during FY24, focusing on high-priority infrastructure and instructional needs.

In tandem, the University has maintained a proactive approach to managing debt and aligning capital investments with enrollment and institutional priorities. Long-term planning ensuring the sustainability of future capital investments. Scenario modeling, forecasting, and revenue and expense reconciliation are underway for FY26, with careful attention to compensation increases, enrollment shifts, and fixed cost pressures. These efforts underscore the university's strong fiscal foundation, as well as its ability to strategically navigate complex financial challenges.

Highlights

- Operational Excellence (OpEx) is producing results. To date, \$5.2 million in efficiencies have been gained from both the FSTF and OpEx processes.
- On a tight time frame, WSU solicited, reviewed and awarded 28 projects to improve student outcomes, in order to expend, within about six months, the state's FY25 mid-year appropriation of \$1.6 million in SUCCESS funding. The projects are well underway and most are on track to meet their milestones. We anticipate a need to reallocate only about 4% of the funds. The DHE has selected us to partner with the National Institute for Student Success (NISS) in developing our FY26 SUCCESS plan.

Challenges/Opportunities

- We seek development of a cost/benefit grid to assess the true cost of all academic programs.
- We seek development of a financing plan for the demolition and re-use of the May Street site.
- The institutional transition to an organization that operates within the Operational Excellence paradigm must progress, as we work to close the remaining \$7+ million budget gap created by the enrollment decline that resulted from the COVID pandemic.
- Procurement/Accounts Payable staffing has turned over 100% since 2021. A high-priority effort is underway to train employees and stabilize operations while still experiencing a vacancy in the critical contracting role.

6. Communication

(Numeric Rating 4)

In my role as university president, I prioritize clear and transparent communication to foster collaboration, engage stakeholders, and ensure alignment with the institution's vision and objectives. Therefore, I have continued to focus on student's success as the most important goal in everything we do as an institution. **Continuing in FY25, I attempted to keep transparent lines of communication accessible to students and employees, even as we established Operational Excellence project working groups for course scheduling and first alert software. The emphasis on broad participation from all corners of the campus was as important as developing the cost savings plans.**

In recent months, the federal government has proposed or implemented numerous initiatives that have (or may) impact not only our finances, but also certain groups of students. Therefore, in February we began holding more frequent "Campus Conversations" over Zoom, open to all faculty, staff and students. In these 45-minute sessions, I provide updates on federal, state, and campus actions and answer any questions they have for me or for the senior leadership team. The marketing office also created a Web page for federal actions that affect higher education.

Highlights:

- Held an Academic Year Kickoff Meeting for all employees in September, with keynote speaker Massachusetts Department of Higher Education Commissioner, Dr. Noe Ortega.
- Substantially increased social media engagement again this year, with our Instagram account up nearly 30% and tripling our TikTok video views.
- The university received substantial positive traditional media coverage, across the state and across the Atlantic. Highlights include:
 - Masslive and Worcester Telegram stories about ValuePlus, the tuition-free announcement;
 - Central Mass. coverage of our \$1.2M gift from Becker College for the nursing program;
 - Worcester Business Journal coverage, as well as an event celebrating, my receiving the Large Business Leader of the Year award from them;
 - Stories in Worcester and Ireland outlets about honorary degrees WSU bestowed upon the Mayor of Derry City and Strabane and Cathaoirleach of the Donegal County Council; and
 - Commencement coverage that included a full-page story with photos in the Boston Globe and a WCVB profile of an 81-year-old graduating graduate student.
- WSU launched a 150th campaign logo, theme, video, and Web landing page.
- The Communications and Marketing area published a special, commemorative 150th magazine and completed a new Crisis Communication Plan, with associated training provided for campus leadership.
- A 29.2% increase in Instagram engagement was realized, including 106,083 total interactions (likes, saves, comments, shares, and Direct Messages).

- A 191.26% increase in TikTok video views was realized, with 115,622 total views, alongside significant engagement growth across interactions, including +286.7% in likes (3,927 total likes), 378.95% increase in comments (91 total comments), 288.39% increase in shares (435 total shares).

Challenges/Opportunities:

- Filling the Assistant Vice President for Marketing and Communication position due to the departure of Maureen Stokes is a priority.
- Developing and executing a communication plan focused on the implementation phase of the Financial Sustainability work, including our WSU Rapid Improvement Events (RIE), will be needed.
- We seek more exposure in all forms of media – social, web, print, news outlets, etc.
- Continuing with the 150th anniversary Communications and Marketing plan will elevate our visibility.
- Assisting the Advancement area with the development and messaging for a comprehensive fundraising campaign is on the docket.

7. Administrative Management and Leadership

(Numeric Rating 4)

Administrative challenges included continuing to address a structural, multi-million-dollar budget gap which resulted from the decline in enrollment precipitated by the pandemic. With the Board's continued support, and through the newly launched OpEx platform, we continued to aggressively implement recommendations of the 2022 Financial Sustainability Task Force (FSTF) and to move the university toward Rapid Improvement Event process efficiencies and full campus-wide adoption of Operational Excellence.

Highlights:

- Completed an after-action review process related to the October 2023 shooting incident, with the help of Healy +, and a nationally recognized security group, to improve campus safety (policy, physical campus, and response preparedness training).
- Based on the recommendations, I have:
 - Hired an Executive Director of Campus Safety and Security
 - Reorganized Environmental Health and Safety and University Police under the Administration and Finance Division, and have both areas report to the new Executive Director.
- Initiated Year Two of WSU's Operational Excellence (OpEx) process, which will play a significant role in setting direction for WSU's post-pandemic economic recovery strategy.
- Continued to enlist the help of EAB, a nationally recognized strategic thought partner, to assist university leadership with the strategic decision-making process post COVID. Topics included: orientation on state-of-the-sector priorities for higher education fiscal planning, enrollment management, data usage, responding to federal changes, governance, AI, and Board engagement.

Challenges/Opportunities:

- Ongoing engagement and cultivation of the Board of Trustees is necessary, especially after successfully onboarding two new trustees (Brissette and Dunn).
- I must spend time recruiting new BOT members to present to the Governor for consideration, as several current members' terms will expire between 2026 and 2027.
- Orienting new Board of Trustees members will be a priority, and we have planned to hold an orientation scheduled for January 2026.
- I will be continuing to cultivate "rising stars" for the administrative team, beyond the Executive Cabinet level – those who are supportive of each other and the mission of the institution – and continue to develop a strong bench for the university to pull talent from, when opportunities arise.

8. Decision Making and Problem Solving

(Numeric Rating 4)

As the university president, I am entrusted with the responsibility of leading our institution with integrity, vision, and a commitment to excellence. Central to my role is effective decision-making and problem-solving, which are essential skills in navigating the complex challenges facing higher education today. In evaluating my performance in these areas, I have consistently strived to approach decision-making with careful consideration of diverse perspectives, data-driven analyses, and long-term implications. By fostering an environment of collaboration and open communication, I have sought to harness the collective wisdom of our faculty, staff, students, and stakeholders in making informed decisions that align with our institutional mission and values. Moreover, I have endeavored to cultivate a culture of adaptability and built a leadership team based on shared values and innovation, recognizing that the landscape of higher education is constantly evolving. In confronting challenges such as budget constraints, demographic shifts, and technological advancements, I have embraced a proactive approach to problem-solving, seeking creative solutions and opportunities for growth. Through ongoing reflection and feedback, I am committed to continuously refining my decision-making and problem-solving skills, ensuring that I am effectively serving the needs of the WSU community and advancing our shared goals of academic excellence, equity, and student success.

In the fourteen years I have served Worcester State, we have used broad-based, participatory processes to develop our campus's guiding documents. With the Board of Trustees' support, we have adapted those participatory models to the FSTF process, from which our Operational Excellence program has emerged, so we can address the budget gap thoughtfully and strategically, rather than quickly and reflexively. In this manner, we surfaced the best recommendations for closing our budget deficit and have initiated the organizational change necessary for fostering a culture of assessment and continuous improvement – an approach that we must embrace in order to remain a financially healthy university, one ready and able to provide quality academic programs for the students of tomorrow.

Highlights:

- Implementing recommendations from the Healey + report concerning the October 2023 shooting incident.
- Successes from the participatory FSTF and Operational Excellence process are bearing fruit in terms of cost savings/revenue raising to address our budget deficit. We realized savings of \$2 million in FY24 due to changes in personnel spending – hiring freeze, and efficiencies realized to date now total \$5.2M.
- A highly qualified team is in place to transition the university to one that pursues Operational Excellence, building upon the success of the Rapid Improvement Events that demonstrated the value of the model.

Challenges/Opportunities:

- Continuing to implement recommendations from the Healey + report concerning the October 28 2023 shooting incident is a priority.
- Carrying forward lessons we have learned about making timely, grounded decisions and involving more staff members in making and carrying out those decisions, continues to need attention. We will need to apply these lessons moving forward with strategic planning goals, for example, and in furthering the adoption of the Operational Excellence business model across divisions and departments.
- Develop tools and strategies to keep morale high/avoid burnout from those who served as decision-makers, as well as implementers, on an all-hours basis over the past 38 months.
- Address the challenges of employee morale amidst a continued tight labor market, while ensuring we remain committed to a more diverse faculty and staff.

9. Fundraising

(Numeric Rating 5)

University Advancement continues to be an area where I have stayed closely connected with the division. The tight job market has been particularly challenging in the Advancement field, and the division has faced significant staffing challenges. Despite that, our fundraising efforts remained strong. Growth of scholarship dollars continues to be a significant factor in our retention efforts, as students who receive even one scholarship graduate at a significantly higher percentage than non-scholarship peers. **Lastly, the WSU Office of Grants and Sponsored Research continues paying off, with over \$1 million dollars received.**

Alumni Engagement Highlights:

The Office of Alumni Relations successfully coordinated 30 events, attracting a total of 1,468 attendees, including the following.

- The 50th Anniversaries of the Nursing and the Urban Studies departments, engaging and soliciting over 100 alumni at each event.
- The Florida events on the east and west coasts, connecting with approximately 100 alumni and friends.
- Sea Change screening, featuring renowned photojournalist and alumnus Brian Skerry, served as both a donor stewardship event and an educational experience for the broader university community. The program highlighted critical ocean conservation issues, engaging alumni, students, and faculty, while reinforcing the university's commitment to global environmental awareness and sustainability.
- Partnering with Office of Student Involvement and Leadership Development and Career Development Center to plan Future Forum for young alumni and students, replacing the Backpack Briefcase event.
- Partnering with Athletics to support six alumni games and receptions for alumni and two events honoring alumni athletes: the first teams of each athletic program and the Athletic Hall of Fame.

Grant Highlights/Awards

- \$760,000 - Anonymous Foundation: Funding will provide support for projects related to Enrollment Management and Career Services, including the implementation of EAB's Enroll360, Financial Aid and yield expansion models to increase the overall enrollment numbers of first-year students, which will positively impact the university's future financial stability.
- Quinncia, an advanced career preparation platform designed to transition students from academics into the workplace will also be implemented. Student support provided by a Career Explorations Counselor will help to provide holistic services to enhance career outcomes for students and improve their engagement, retention and satisfaction with WSU.
- \$153,978 - Project SERVE - U.S. Department of Education: Grant funding provided reimbursement for safety, security, and counseling services that were needed as a result of a shooting on WSU's campus in October of 2023. Funding supported costs associated with additional police presence, security camera installation, counseling services for students and staff, as well as RAVE training.

- \$101,146 - National Science Foundation CAREER: Building a more expansive understanding adaptation in marine phytoplankton across the ocean. Year 1 award: \$16,655. Lead agency is Clark University. This project's educational objective is to increase literacy in research and support the science pipeline by broadening participation in AREs among both local elementary school students at Columbus Park Preparatory Elementary School, pre-Kindergarten through Grade 6 school part of the Worcester Public Schools school district and undergraduate students at Clark University.
- \$24,927 - National Endowment for the Humanities: Mapping our future. Through this project, WSU will embark on a curriculum mapping project within its Asian Studies, Ethnic Studies, Global Studies, and Women, Gender and Sexuality Studies programs to align the academic structures within these minors with intentional, engaged experiences to create pathways for students that are meaningful, supported, and relevant.
- \$25,000 - Santander Bank: Grant funds will be used to support student scholarships for fall and spring semester, summer and short-term study abroad travel. Semester awards of a maximum of \$1,000 and short-term and summer program awards of \$500-\$750 will be awarded to needy students with a focus on underrepresented populations.
- \$109,505 - Massachusetts Inclusive Concurrent Enrollment Initiative (MAICEI): MAICEI funds support college and high school partnerships that provide opportunities for public high school students with intellectual disabilities (ages 18-22) to enroll in college courses. The WSU MAICEI program is designed to: 1. Enable students with severe disabilities to be placed in credit courses with their non-disabled peers; 2. provide a college experience that includes academic and extracurricular opportunities that are person-centered and designed to meet established transitional goals; and 3. provide opportunities for the university community to have substantive conversations pertaining to student equity and accommodations.
- \$45,000 - STEM Connections – Cornerstone Bank: \$15,000/year for a three-year period. With multi-year funding through Cornerstone Bank, WSU will provide a week-long STEM Connections summer workshop for high school students. Students from Worcester public high schools.
- \$270,725 - Behavioral and Mental Health - Massachusetts Department of Higher Education: to support programming for students mental and behavioral health including Resilient U; activities for mental health awareness and building supported and safe environments for all students.
- \$94,757 - Early College – Massachusetts Department of Higher Education: in support of Early College initiatives including Dual Enrollment.
- \$15,718 - Hunger Initiative - Massachusetts Department of Higher Education: to support the Hunger Initiative: addressing food insecurity efforts on campus through provision of meals, food and personal care items to students in need.

Continuing Support from Multi-Year Grants

- \$715,950 - United States Department of Education (FIPSE) - Early College Central Massachusetts.
- \$371,001 - Nursing Pathways Expansion - Massachusetts Workforce Skills Cabinet: funds support equipment purchases that will lead to increases in the numbers of nursing students and also provide support for Nursing adjuncts.
- \$174,458 - National Oceanic and Atmospheric Association, Year III extension: to support efforts to increase diversity, equity, and inclusion in sciences by providing a pathway to STEM education.
- \$27,445 - National Science Foundation - Computing Collaborative (Year 5): A project to increase success rates in computing education and create a more diverse workforce through incorporating Humanitarian Free and Open-Source Software (HFOSS) into computing education.

- \$46,203 - National Science Foundation EDU (Year II): Collaborative Research Leveraging Simple Card Games to Promote Children's.
- \$52,274 - MassTEACH - National Science Foundation Noyce award to the MA Department of Higher Education (final year).

Latino Education Institute (LEI) Awards

- \$100,000 - Barr Foundation: Support for the Youth Civics Union and FLAMA.
- \$25,000 - Hanover Foundation: ISLA (Innovative Services for Latino Achievers) program support.
- \$80,000 - Balfour Foundation: LIDER (Latinos Involved in Discovering Educational Resources).
- \$50,000 - Ellsworth Foundation: Club E (Adult ESL program for language proficiency).
- \$108,360 - The United Way of Central Massachusetts in support of several key programs including Club E - Club Educación; ISLA (Innovative Services for Latino Achievers); LASOS (Latina Achievers in Search of Success) and the Aspire Summer Academy.
- \$75,000 - The Fred Harris Daniels Foundation for support of the One Circle program.
- \$15,000 - Massachusetts BioTech Initiative: to increase diversity in STEM among youth.
- \$29,500 - Greater Worcester Community Foundation: operational support for LEI and support of LIDER program.
- \$97,500 - UMASS Determination of Need, Strengthening Community Wellness (through 2027).
- Promotoras de Salud – Health Ambassadors for a training program that builds on LEI's successful REACH Initiative work. Total award is \$195,000.

Major Submissions – Pending Award

- \$498,443 Spencer Foundation (resubmission) – Large Research Grant: School Segregation in Massachusetts & #39; Gateway Cities: A Transdisciplinary Approach to Exploring Education and its Effects in Small- to Mid-Sized Cities – three-year research project.
- \$175,000 National Endowment for the Humanities K- 12 Institutes (resubmission): This request will support a K-12 Professional Development Institute titled, Linguistic Assimilation in US Immigration: Education, Law, Politics and Society. This proposed two-week, (10-day) summer institute to be held in June 2026 for middle and high school teachers of Grades 7 through 12, will be designed to provide a venue for middle and high school teachers to explore the role and impacts of English language education in the assimilation process for immigrant students.
- \$178,945 – National Science Foundation: Designing Materials to Revolutionize and Engineer our Future. Working in collaboration with researchers at Kent State University, WSU's Dr. Maxim Lavrentovich will be responsible for all theoretical and computational work. This project aims to engineer materials with a predesigned response to spatial confinement and dynamic excitation by temperature gradient and electric fields through experimental characterization, theoretical modeling, and numerical simulations of long-range electrostatic interactions and their influence on the structures of these materials.
- \$51,726 - Space Telescope Science Institute - This collaboration with Virginia Military Institute will assist with development of new open source theoretical/computational tools which incorporate recent advances in modeling the chemical evolution of ice under astrophysical conditions. Project takes a tripartite approach to this problem, focusing on: how reactions occur within solids at low temperatures, the physics of UV photon and cosmic ray ice bombardment, and the underlying chemical reactions driven by energetic ice processing.

- \$105,000 - The Health Foundation of Central MA Activation Fund: A proposal to support WSU's Speech-Language-Hearing Center for expanded outreach and hearing screenings through the acquisition of new equipment and strengthened community partnerships.
- \$837,457 MA Broadband Institute: A proposal to provide digital literacy training to underserved residents in greater Worcester.
- \$272,364 - TRIO Student Support Services - U.S. Department of Education: To provide academic and other support services to increase retention and graduation rates of low-income, first generation, and students with disabilities.

Direct Support

The Worcester State Foundation has provided \$1.8 million in support of university priorities so far, this fiscal year.

- \$15,640 has been raised this fiscal year for the Student Emergency Fund. So far, this fiscal year, over \$8,000 has been given to 30 students to assist with the purchase of books, laptops, food and bills.
- The scholarship award and internship support are on track to exceed \$800,000 for the sixth year in a row.
- Departments have utilized approximately \$350,000 of foundation funds to use as part of their budgets in FY25. Many of the expenses were to offset budget cuts. It allowed for items such as the purchase of audiology equipment, continued coverage of MTEL costs, hiring of additional student staff, speakers for class lectures, classroom materials, laboratory supplies, software licenses, items for student events, and student/faculty travel.
- The President's Office and Provost were given an additional \$80,000 during FY25 for specific initiatives. Some of these initiatives include Greater Worcester Land Trust agreement to serve DEEP, class trips to WAM and Worcester Historical Museum, sponsoring student conference presentations and allowing faculty the ability to attend needed conferences, covering travel from federal grants which were terminated.
- In FY25, the Worcester State Foundation has so far granted over \$600,000 in scholarships and awards to 397 recipients. Generous donations of over \$10,000 were received to sponsor an endowed fund that will provide an annual stipend to Thea's Pantry, our on-campus student food pantry.

Challenges/Opportunities:

- Completing campaign readiness is necessary prior to launch.
- Successfully onboarding a new hire, the Alumni Coordinator, is a priority.
- We will learn from best practices on remote alumni and donor engagement.
- Revamping alumni/donor trips to strategically align with priorities is necessary.
- Finishing Phase One of the May Street property renovation – razing of current structure – and resolving the associated cell tower easement is a need.

10. Campus Climate

(Numeric Rating 4)

The 2024–2025 academic year—particularly the spring semester—has brought with it a range of challenges that have impacted both performance and wellbeing across Worcester State University. Compared to previous years, these challenges have emerged with greater urgency and intensity. Anecdotally, the cumulative effect has been disruptive, affecting our collective capacity to operate at our fullest potential. Many of these pressures stem from external forces beyond the university’s immediate control, yet they nonetheless shape the context in which we teach, learn, and serve.

Strategic Goals

1. Recruitment and retention of students and employees from historically marginalized identities.
2. Development of an inclusive belonging and anti-racist climate.
3. Empowerment of employees and students from historically marginalized identities.
4. Enhancement of accountability and communication.

Highlights (also see Appendix D):

- The Bias Incident Response Team pursued updating the committee's charge which reads:
 - BIRT is responsible for assessing the institutional response to incidents of bias that impact the university's mission, core values, civility policies, Policy of Nondiscrimination, and efforts toward improving campus climate.
 - Approved new language on 5/23/25 after meeting with the campus steering committee.
- The LGBTQIA+ Advisory Group has continued work on the Campus Pride Index, which examines resources and policies relating to LGBTQIA+ concerns on college campuses.
- In part because a WSU climate survey showed that 30% of WSU’s students identify as part of the LGBTQIA+ community, we prioritized this area. WSU scored a 4.5 out of 5 stars in our efforts to improve the campus experience for our LGBTQIA+ members. Specific work included:
 - Creation of more academic courses with LGBTQIA+ subject matter.
 - Furthering the LGBTQIA+ housing initiative, via collaboration among the Inclusive Excellence & Belonging Office, the LGBTQIA+ Community Center, and Residence Life and Housing.
 - Providing accessible gender-inclusive restrooms in every campus building so that the WSU community and visitors can use restrooms that don’t have binary gender labels.
 - Continuing to ensure compliance with Title IX and university policies.
- **Unity Day** has been maintained and expanded and is being embedded as an all-university annual event. Participation is growing, becoming a must-attend event for students and the entire campus.
- The first year of [NASPA’s Culture of Respect Initiative](#), led by the Office of Title IX and the Counseling Center, has been completed. The effort is aimed at ending campus sexual violence. This two-year program is supported by a Student Behavioral and Mental Health Grant award.

- **Multicultural mental health outreach has been another area of emphasis**, playing a crucial role in fostering students' mental well-being. Particularly in predominantly white institutions, racial and ethnic representation greatly impacts identity and development. By seeing themselves reflected in others, students receive validation that they belong and can succeed. This year, WSU's Counseling Services led a NASPA Student Affairs Administrator **Culture of Respect Cohort 7 Evaluation** in an effort to provide WSU with a baseline evaluation and develop a pathway forward helping the institution address sexual violence on campus. The work brought in outside evaluators to review WSU's policies and procedures associated with dealing with sexual violence. Additionally, WSU maintained its JED **campus status and mental health telehealth platform**
- Three additional Inclusive Excellence and Belonging (IEB) Committees have been created:
 - Accessibility Subcommittee
 - Military and Veterans Affairs (MAV) Advisory Committee
 - Anti-Racism Subcommittee

Challenges/Opportunities:

- We will strive to maintain and set metrics to measure employee morale during challenging times for higher education.
- Closing achievement gaps for ALANA/BIPOC students remains a high priority.
- Development of plans to become a Hispanic Serving Institution (HSI) is necessary, even if the federal designation is non-existent in the future. The institution has to be prepared to help members of one of the few growing demographic populations.
- We will increase our emphasis on data and transparency, especially for student outcomes, by race, by major.

11. External Relationships/Leadership in the Community

(Numeric Rating 4)

During my fourteenth year on the job, I continue to prioritize developing external relationships. Over nights and weekends, during breakfasts, lunches, or dinners, I attended countless community events, meeting leaders, listening to stakeholders, and trumpeting Worcester State's stories. I am supported in this effort by my family. My wife Laura has agreed to serve on my behalf when asked to by groups, and my children happily engage with alumni, students, visitors, and other stakeholders to assist in our efforts at fostering good relationships. **I find it valuable to listen to stakeholders and community representatives and take advantage of these opportunities to tell Worcester State's stories to the external world.**

Highlights:

- I was recognized as Worcester Business Journal's Large Business leader of the Year and, for the second straight year, listed as the publications Power 100 group of influential business leaders in Central MA.
- Service learning and community engagement – including internships and research experiences, as well as volunteerism – remain mission-critical functions for the university. We were successfully reapproved by the Carnegie Foundation as a community-engaged campus, with 35-40 percent of students volunteering or otherwise engaged in service every year, and well more than a hundred students running more than 40 organizations. Leadership training is provided for them.
- WSU established a formal partnership agreement with the Worcester Guardian online newspaper. This partnership creates internship opportunities for students, coincides with a newly established Journalism minor and expands local news coverage for the community.
- I continue to serve on the boards of Saint Vincent Hospital, Worcester Regional Research Bureau, the Greater Worcester Community Foundation, and was recently selected to serve on the Worcester Art Museum board.
- I attended a Latino Education Institute legislative luncheon, participated in HECCMA (Higher Education Consortium of Central MA) legislative meetings holding federal- and state-level conversations, to advocate for the Worcester community, and participated on several state university Council of Presidents delegation visits to Beacon Hill and Washington, DC.

Challenges/Opportunities include:

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

12. Affordability / Access

(Numeric Rating 4)

Worcester State University's instructional commitment is grounded in the principle that access to high-quality education must remain affordable for all students, especially those whose families are not high wage earners or who hail from historically underserved backgrounds. Throughout the evaluation period, and since I arrived in 2011, I, along with the Board, have prioritized academic excellence while implementing strategies that contain costs and enhance value. By investing in student-centered teaching, expanding high-impact practices, and leveraging innovative delivery models—including online and hybrid instruction—we have reinforced our mission as a public university dedicated to affordability, opportunity, and social mobility. This section outlines the key initiatives and outcomes that demonstrate our ongoing commitment to delivering exceptional instruction without placing undue financial burden on our students.

Highlights:

- To address prospective student and family concerns about the affordability of a higher education, in November 2024, WSU debuted **ValuePlus**, which brings together a range of financial resources that reduce or eliminate obstacles so that economically-disadvantaged student can attend Worcester State for free if they are Massachusetts residents, planning to commute, and Pell eligible (adjusted gross income of \$75,000 or less). Those who qualify have tuition and fees covered by a combination of federal, state, and institutional aid. In addition, Worcester State University continues to provide generous financial aid and robust merit scholarships for other students. (See my op ed promoting Value Plus [here](#).)
- **Early College** is strong and growing, and is benefitting highly diverse populations within Worcester, especially. We hosted a professional development day for Worcester Public Schools middle- and high-school counselors focused on Early College.
- \$247,000 has been raised for the Student Emergency Fund, which has supported 363 students facing financial hardship. Additional external grant funding has helped address food insecurity on campus.
- In a December 2024 report from WSU's Urban Action Institute, data indicated that nearly 40% of students experienced some level of food insecurity. In January 2025, **Thea's Pantry** was relocated to a newly designed and expanded space on the first floor of the Student Center. This project was a collaboration between the Facilities Department and Student Affairs Division. The new central location is a key driver to increase awareness, access, and visibility for the campus community. The pantry provides students with food, personal care items, allergen-friendly offerings, and school supplies at no cost

2024-25 Statistics:

- 6,828 lbs. of food were contributed to the pantry through donations, sponsorship, the Worcester County Food Bank, and grant-funded purchases.
- There were 927 student visits to the pantry this year.
- 55% residents vs. 45% commuters utilized the pantry.

Challenges/Opportunities

- **Maintain Affordability!!!!**

Appendix A: Beyond 150 Mid-Cycle Progress Report

[Download Document](#)

BEYOND 150

Mid-Cycle Progress Report
2023-2024



Our Place.
Our Purpose.

WORCESTER STATE
UNIVERSITY

Appendix B: The 2020-2027 Strategic Plan, “Beyond 150: Lead, Succeed, Engage”

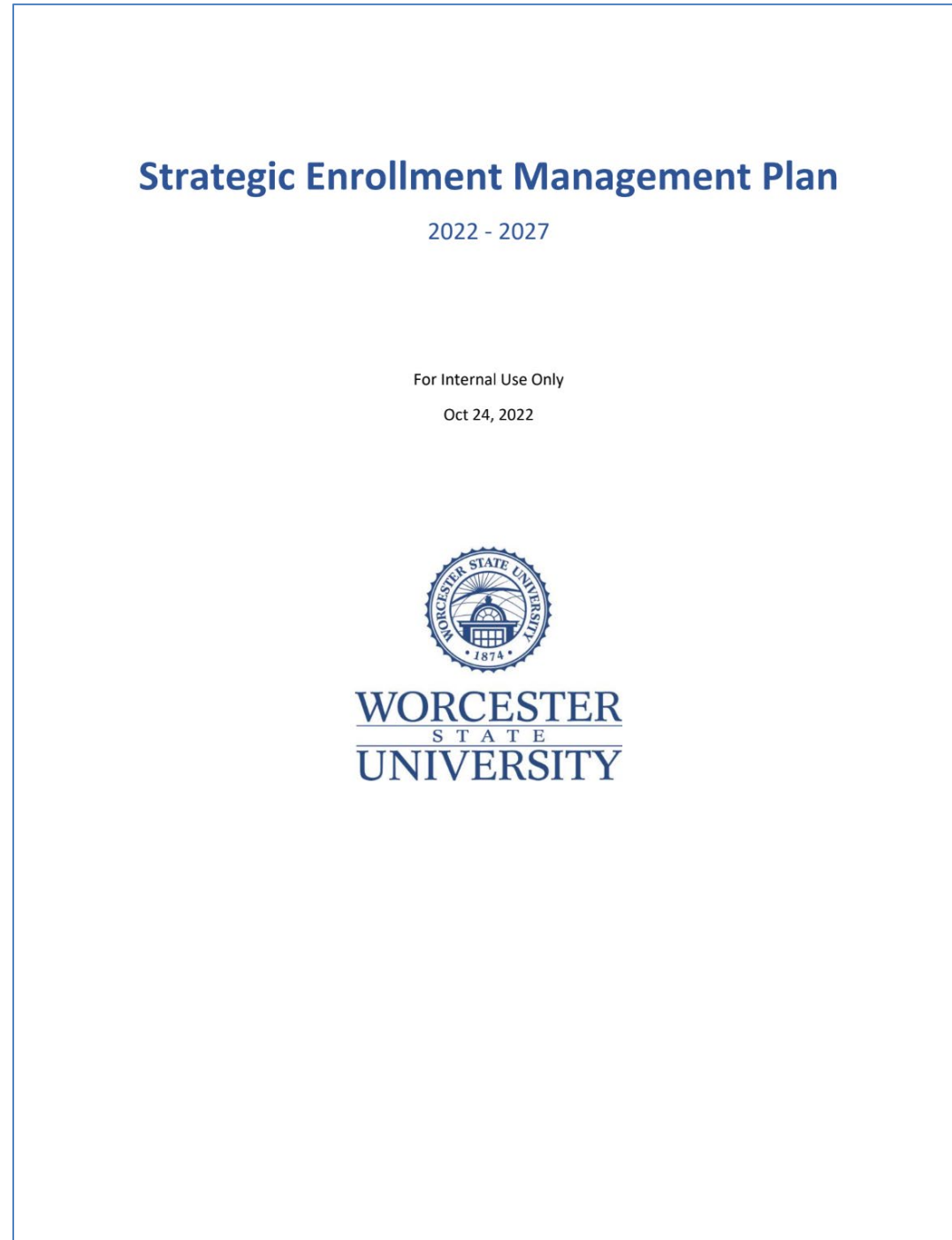
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Appendix C: WSU Strategic Enrollment Management Plan

Access to the Strategic Enrollment Management Plan is restricted and requires login with WSU username and password.

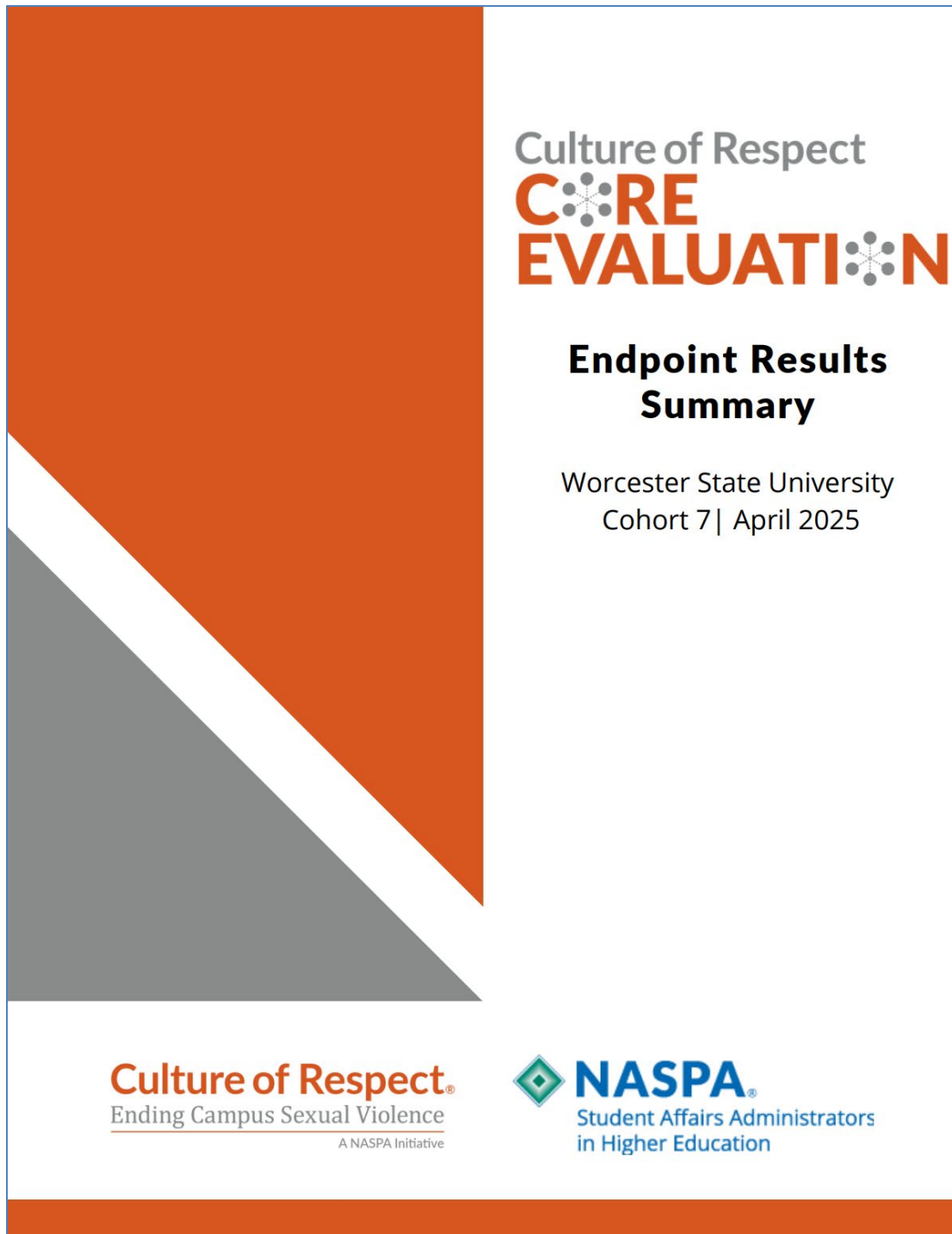
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Appendix D: Culture of Respect Report – WSU Results

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

[Download Document](#)



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Noe Ortega
Commissioner
Chris Gabrieli
Board Chair

MEMORANDUM

TO: Community College Board Chairs
State University Board Chairs

FROM: Noe Ortega, Commissioner

CC: Community College Presidents
State University Presidents

DATE: April 25, 2025

SUBJECT: **FY2025 and FY2026 Presidential Evaluations – Statewide Priorities and Procedures for Annual Reviews**

Dear Board Chairs,

As we enter the presidential evaluation cycle, I want to begin by expressing deep gratitude for your leadership and steadfast commitment to fostering safe, inclusive campus environments and advancing student success. I also want to extend my sincerest thanks to our presidents, whose steady guidance continues to be critical in the face of persistent uncertainty at the federal level. The evolving policy landscape and funding outlook demand not only strategic thinking, but also a great deal of responsiveness and resilience. As you continue to evaluate your respective institutional leaders, I want to encourage you to assess them through a broader lens—one that recognizes their extraordinary efforts to sustain institutional progress while managing uncertainty and immediate challenges.

As stewards of your institutions, you hold critical statutory and fiduciary responsibilities. These include overseeing and assessing the performance of your campus president. The purpose of this memo is to provide you with the following:

- An overview of the BHE's statewide (system-level) priorities for academic year 2024–2025 (FY2025);

- A timeline and procedural guidance for conducting presidential evaluations; and
- A preview of systemwide priorities for academic year 2025-2026 (FY2026).

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

Statewide Priorities for FY2025

As the Department continues to evolve its work, I would like to confirm that the FY2025 statewide system-level priorities remain unchanged from the previous academic year and focused on improving enrollment, attainment, and long-term success for equity populations. As such, the Department requests that each Chair of the local Board of Trustees submit **3 to 5 examples** of how your president has helped to advance the state's priorities and make your institution more **learner-ready and equity-minded**. Please support your examples with relevant quantitative or qualitative data, particularly in these areas:

- **Affordability:** Addressing college costs and implementing financial aid initiatives
- **Access:** Expanding admissions opportunities, early college programs, or similar efforts
- **Student Success:** Scaling access and support services, including wraparound supports

As you identify examples and continue to advance this important work, you may find the following resources helpful:

- [Post SFFA Overview and Guidance September 2024](#)
- [Updated SFFA Guidance February 2025](#)

These examples will help us better understand the strategies and successes taking place across our campuses and guide our statewide support efforts.

Looking Ahead: Statewide Priorities for FY2026

At its January 2025 retreat, the Board of Higher Education (BHE) adopted four strategic priorities to guide work across the public higher education system. The four priorities are stated as follows:

1. ***Student Success and Financial Aid-*** Supporting and advancing student access and success through well-designed, sufficiently funded, clear and consistent financial aid and success program funding
2. ***Economic Mobility-*** Increasing the Economic Mobility Benefits of Postsecondary Participation
3. ***Public Good-*** Improving Alignment Between Public Good Outcomes and Postsecondary Higher Education Opportunities

4. ***Innovation- Facilitating and Fostering High-Impact Innovation Throughout the Public Higher Education System***

These priorities support the BHE's overarching equity goal: to expand access, enrollment, attainment, and long-term outcomes for underrepresented students. A link to the BHE motion approving these goals is accessible here: [BHE 25-29 Approval of BHE Strategic Priorities and Endorsement of Innovation and Economic Mobility Strategic Priorities Framework Plans.pdf](#)

As these priorities evolve, the Department will continue to provide more guidance. However, in an effort to help you prepare for FY2026, we want to signal that next year's presidential evaluations will emphasize the following key areas:

- Promoting **affordability and access**;
- Advancing **student success**;
- Increasing **economic mobility**; and
- **Timeliness** in submission of **reporting data** requirements to the Department.

At this time, evaluation of the **Public Good** and **Innovation** priorities is optional, pending further development by the BHE. We expect to provide additional detail after the BHE's fall 2025 retreat.

In addition, we want to acknowledge the broader context in which our campus leaders are operating. Ongoing uncertainty at the federal level – including shifting policy directions and potential changes to funding – continues to demand significant attention and adaptability. In light of these challenges, it is important to recognize that our presidents are required to dedicate considerable time and energy to urgent response efforts that ensure institutional stability and student support. We ask that these circumstances be thoughtfully considered within the evaluation process, understanding that effective leadership in times of uncertainty often requires a strategic shift in priorities and an extraordinary level of responsiveness. With this in mind, we invite you, at your option, to share examples of how your respective presidents may have demonstrated leadership and resilience in managing change and uncertainty.

Procedural Guidance: Academic Year 2024-2025 Presidential Evaluation Submissions

Process for Submitting Evaluations

Please submit a **brief executive summary** of your president's evaluation. This should include:

- A description of your board's review process
- Data and evidence used in your assessment
- Any recommended compensation adjustments
- A summary of performance at both the institutional level and the statewide level

Attach the president's self-evaluation to your submission. Additional documents may be included only if directly relevant to your executive summary.

Performance Measurement and Data Tools

The BHE Presidential Compensation and Evaluation Guidelines, require that evaluations include institutional data aligned with statewide goals and metrics (see Section III.B). To support this, DHE launched the Performance Measurement Reporting System (PMRS), in 2019—a public-facing dashboard that tracks key performance indicators and disparities across student groups (i.e., race/ethnicity, gender, income). The Department's PMRS dashboards were refreshed in early April and each of your Institutional Research Directors also have access to year-round data via the Higher Education Information Resource System (HEIRS) through Tableau.

Timeline

Consistent with prior years, the **deadline** for completion and submission of presidential evaluations for FY2025 performance **is September 30, 2025**. We recognize, however, that the timing of your presidential evaluation committee meetings, local board schedules, and other competing priorities may make it challenging to complete this important work within this timeframe. We invite you to contact Alex Demou, Director of Legislative and Trustee Relations, if you have any additional questions or requests, including whether you need an extension of time to prepare and submit the presidential evaluation in alignment with your board meeting schedule or otherwise.

Closing Thoughts

In the ensuing months we hope to convene the members of the Office of Trustee Relations (OTR) Advisory Committee to inform and strengthen our presidential evaluation processes. Your voice will be essential in shaping a system that supports collaboration and innovation across institutions.

Thank you for your leadership and continued partnership in strengthening our public higher education system.