



Board of Trustees

September 8, 2023

2:45 PM

Via Zoom

In accordance with Massachusetts Executive Order Suspending Certain Provisions of the Open Meeting Law, G.L. c. 30A, § 20 dated March 12, 2020

A live stream of the meeting for public viewing will also take place at the following link: <https://www.westfield.ma.edu/live>

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| 1. Call to Order | Chair Salehi |
| 2. Approval of Minutes
Draft Minutes of June 13, 2023
Draft Minutes of July 21, 2023 | Chair Salehi |
| 3. Items for Discussion and Action | |
| a. Presidential Evaluation for 2022-2023 Academic Year | Chair Salehi/Trustee Martin |
| b. Motion – Presidential Evaluation for 2022-2023 Academic Year | Chair Salehi |
| c. Motion – Recommendation for Compensation Adjustment | Chair Salehi |
| d. Governor Healey’s Emergency Declaration for Migrant Housing | President Thompson |

Attachments:

- a. Draft Minutes of June 13, 2023
- b. Draft Minutes of July 21, 2023
- c. Draft Presidential Evaluation for 2022-2023 Academic Year
- d. Motion – Presidential Evaluation for 2022-2023 Academic Year
- e. Motion – Recommendation for Compensation Adjustment



BOARD OF TRUSTEES

June 13, 2023

Minutes

Tilia Fantasia Student Lounge, Woodward Center

A live stream of the meeting for public viewing also took place on YouTube.

MEMBERS PRESENT: Chair Dr. Robert Martin, Vice Chair Ali Salehi, Secretary Dr. Gloria Williams, and Trustees Melissa Alvarado, George Gilmer, Theresa Jasmin, Madeline Landrau, Chris Montemayor, William Reichelt, and Chloe Sanfacon

MEMBERS EXCUSED: Paul Boudreau

Also present and participating were Westfield State University President Dr. Linda Thompson, and cabinet members Maggie Balch, Daniel Forster, Dr. Michael Freeman, Dr. Brian Jennings, Richard Lenfest, Jr., Lisa McMahon, Dr. LaRue Pierce, and Stephen Taksar.

The meeting was called to order at 2:37 PM by Chair Robert Martin. Trustees participating were stated and it was announced that the meeting was being livestreamed and recorded.

MOTION made by Trustee Reichelt, seconded by Trustee Williams, to approve the minutes of the January 27, 2022, March 30, 2022, May 26, 2022, and April 25, 2023, meetings. There being no discussion, **Motion passed unanimously.**

Chair Martin stated that after a good NECHE accreditation visit, it is important to implement their recommendations. The University is a resilient institution, and he sees signs that the campus community is adopting a growth mindset. It is the board's responsibility to evaluate the president and Trustee Salehi and Chair Martin will draft it. Trustees will be asked a set of questions related to the president and her performance over the last year (related to priorities, communication, commitment to diversity) and asked to send their responses to the board assistant. The draft evaluation will be presented to the board in a public meeting.

President's Report. President Thompson shared highlights of how the campus community has put IDEAS into practice through the incorporation of Innovation, Diverse thinking and belonging, Engagement with others, and Advancing the mission of the University. All the programs and efforts shared in her presentation are linked to reinforcing and building upon the stated goals of enrollment growth and economic health.

Special Faculty Honor. Representatives from the Air and Space Force presented the Sentry Educator Award to Dr. Jesse Johnson, who was nominated by student Alek Khomichuk '23. The award is presented to educators who share the Air Force's values of integrity, service, and excellence.

Student Trustee Report. Trustee Chloe Sanfacon provided her last report as student trustee, expressing her gratitude for the opportunity to sit on the board and learn.

Smith Cup Presentation. Mr. Lenfest, Director of Athletics, introduced student athletes Delaney Parker (sophomore/soccer), Olivia Hadla, (junior/basketball and lacrosse), and Ryan Donahue (junior/baseball) who shared with the Board the University's award of the Howard C. Smith Cup for the third year in a row for the best overall athletics program in the Massachusetts State Collegiate Athletic Conference.

Academic Affairs Committee. Committee Chair Dr. Gloria Williams updated the Board on discussions held in the committee meeting on June 6 and presented the following Motions approved by the committee.

MOTION made by Trustee Reichelt, seconded by Trustee Sanfacon, to approve and adopt the Westfield State University Board of Trustees Academic Affairs Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Reichelt, seconded by Trustee Sanfacon, to approve the granting of tenure, effective September 1, 2023, to:

Dr. Joan Kuhnly
Dr. Tracy McLeod

Nursing
Education

To approve the granting of tenure with automatic promotion, effective September 1, 2023, to:

Ms. Jessica Grabowski
Dr. Alina Gross
Ms. Amber Monroe

Health Sciences
Geography, Planning & Sustainability
Library

Discussion: This motion corrects an error in the motion presented at the April 24, 2023, meeting. There being no further discussion, **Motion passed unanimously.**

Governance and Nomination Committee. Committee Chair Melissa Alvarado updated the Board on discussions held in the committee meeting and presented the following Motions, the Committee Charter being approved by the committee.

MOTION made by Trustee Landrau, seconded by Trustee Reichelt, to elect the following slate of officers for the 2023-2024 academic year:

Ali Salehi, Chair
Melissa Alvarado, Vice Chair
Dr. Gloria Williams, Secretary

There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Montemayor, seconded by Trustee Landrau, to approve and adopt the Westfield State University Board of Trustees Governance and Nomination Amended Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

Enrollment Management and Student Affairs Committee. Committee Chair William Reichelt updated the

Board on discussions held in the committee meeting on June 6 and presented the following Motions approved by the committee.

MOTION made by Trustee Alvarado, seconded by Trustee Montemayor, to approve the changes to the Residence Hall Policy (0590) as presented and to approve the change of the policy's name to Housing Policy (0590). There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Sanfacon, seconded by Trustee Alvarado, to approve the changes and accept the newly revised Free Speech, Demonstration and Picketing Policy (3020), as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Landrau, seconded by Trustee Sanfacon, to approve the changes and accept the newly revised Alcohol and Other Drug Policy (4010), as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Landrau, seconded by Trustee Sanfacon, to approve the changes to the Involuntary Medical Withdrawal of Student for Physical or Mental Health Reasons Policy (4060), as presented and to approve the change of the policy's name to Administrative Medical Leave of Absence (4060). There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Sanfacon, seconded by Trustee Gilmer, to approve and adopt the Westfield State University Board of Trustees Enrollment Management and Student Affairs Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

Financial Affairs and Advancement Committee. Committee Chair Ali Salehi updated the Board on discussions held in the committee meeting and presented the following Motions approved by the committee.

MOTION made by Trustee Sanfacon, seconded by Trustee Montemayor, to approve and adopt the Westfield State University Board of Trustees Financial Affairs and Advancement Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Landrau, seconded by Trustee Sanfacon, to approve the FY24 provisional operating budget as presented and to authorize the President to make budget adjustments to these funds. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Landrau, seconded by Trustee Sanfacon, to approve the FY24 proposed capital budget, as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Sanfacon, seconded by Trustee Williams, to approve FY24 expenditures for the vehicle lease/purchase program, as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Landrau, seconded by Trustee Sanfacon, to authorize the University to spend up to \$30,000 in FY24 on sponsorship and/or attendance at community events, consistent with University guidelines for the expenditure of such funds. The University will report all expenditures made under this umbrella approval no later than the

June 2024 meeting of the Board of Trustees. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Sanfacon, seconded by Trustee Montemayor, to approve the changes and accept the newly revised Computer Tracking and Allocation Policy (0610), as presented. There being no discussion, **Motion passed unanimously.**

Audit Committee. Committee Chair Theresa Jasmin updated the Board on discussions held in the committee meeting and presented the following Motion approved by the committee.

MOTION made by Trustee Gilmer, seconded by Trustee Montemayor, to approve and adopt the Westfield State University Board of Trustees amended Audit Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

MOTION made by Trustee Sanfacon, seconded by Trustee Landrau, to engage with The Boston Consortium Group for an audit of grants to begin in the fall semester of 2023. There being no discussion, **Motion passed unanimously.**

Justice, Equity, Diversity, and Inclusion Committee. Committee Chair Madeline Landrau updated the Board on discussions held in the committee meeting and presented the following Motions approved by the committee.

MOTION made by Trustee Reichelt, seconded by Trustee Montemayor, to approve and adopt the Westfield State University Board of Trustees Justice, Equity, Diversity, and Inclusion Committee Charter, as presented. There being no discussion, **Motion passed unanimously.**

Format of Board and Committee Meeting Schedule. Trustee Salehi and President Thompson thanked outgoing board chair Robert Martin, who has spent an enormous amount of time on behalf of the board and University. Trustee Salehi will be in contact with board members about committee seats and chairs. Future board meetings will take place across campus and in the boardroom.

Recognition of Student Trustee Chloe Sanfacon. Trustee Sanfacon was commended for her poise, maturity, and representation of the student body as it could be easy for a student trustee to be intimidated and overwhelmed by the setting and expectation of what trustees are supposed to do. A resolution summarizing her service was read and presented to her.

Recognition of Former Trustee Lydia Martinez-Alvarez. In all her work, Trustee Martinez-Alvarez always reflected on putting students first, especially in her role as chair of the Enrollment Management and Student Affairs committee. She was a passionate advocate for all students and helped create the Enrollment Advisory Committee. A resolution summarizing her service was read and presented to her.

There being no further business, **MOTION** made by Trustee Reichelt, seconded by Trustee Alvarado, to adjourn. There being no discussion, **Motion passed unanimously.**

Meeting adjourned at 4:11 PM.

Attachments presented at this meeting:

- a. Draft Minutes of January 27, 2022
- b. Draft Minutes of March 30, 2022
- c. Draft Minutes of May 26, 2022

- d. Draft Minutes of April 25, 2023
- e. President's Presentation
- f. Smith Cup Presentation

Academic Affairs Committee:

- g. Motion – Approval of Academic Affairs Committee Charter and supporting document
- h. Motion – Tenure (Amended) and supporting documents

Governance and Nomination Committee:

- i. Motion – Election of Board of Trustees Officers for 2023-2024
- j. Motion – Approval of Amended Governance and Nomination Committee Charter and supporting document

Enrollment Management and Student Affairs Committee:

- k. Motion – Residence Hall Policy (0590) and supporting documents
- l. Motion – Free Speech/Demonstration/Picketing Policy (3020) and supporting documents
- m. Motion – Alcohol and Other Drug Policy (4010) and supporting documents
- n. Motion – Involuntary Medical Withdrawal of Students for Physical or Mental Health Reasons (4060) and supporting documents
- o. Motion - Approval of Enrollment Management and Student Affairs Committee Charter and supporting document

Financial Affairs and Advancement Committee:

- p. Motion – Financial Affairs and Advancement Committee Charter and supporting document
- q. Motion – FY24 Provisional Operating Budget and supporting documents
- r. Motion – Capital Budget and supporting documents
- s. Motion – Vehicle Lease/Purchase Program and supporting documents
- t. Motion – FY24 Sponsorships
- u. Motion – Computer Tracking and Allocation Policy (0610) and supporting documents

Audit Committee:

- v. Motion – Approval of Amended Audit Committee Charter and supporting document
- w. Motion – Engage Internal Audit of Grants

Justice, Equity, Diversity, and Inclusion Committee:

- x. Motion – Approval of JEDI Committee Charter and supporting document

Full Board:

- y. Resolution for Student Trustee Chloe Sanfacon
- z. Resolution for Former Trustee Lydia Martinez-Alvarez

Secretary's Certificate

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees meeting held on June 13, 2023.

Dr. Gloria Williams, Secretary

Date



BOARD OF TRUSTEES

July 21, 2023

Minutes

Via Zoom, in accordance with Massachusetts Executive Order Suspending Certain Provisions of the Open Meeting Law, G.L. c. 30A, § 20 dated March 12, 2020.

A live stream of the meeting for public viewing also took place on YouTube.

MEMBERS PARTICIPATING REMOTELY: Chair Ali Salehi, Vice Chair Melissa Alvarado, Secretary Dr. Gloria Williams, and Trustees Paul Boudreau, Daniel Currier, George Gilmer, Theresa Jasmin, Madeline Landrau, Dr. Robert Martin, Chris Montemayor, and William Reichelt

Also participating remotely were Westfield State University President Dr. Linda Thompson and cabinet members Dr. Michael Freeman, Dr. Kevin Hearn, Richard Lenfest, Jr., Lisa McMahon, Dr. LaRue Pierce, and Stephen Taksar.

The meeting was called to order at 10:30 AM by Chair Salehi. A roll call was taken of the Trustees participating as listed above and it was announced that the meeting was being livestreamed and recorded.

Chair Salehi shared the importance of adding a new board committee to help advance the cause of the University through advancement and marketing and taking advantage of current interest rates by transferring funds into a higher-yield account.

Governance and Nomination Committee Chair Alvarado stated that the committee approved updating the bylaws to create a new board committee of Advancement, Marketing, and External Relations and outlined the responsibilities listed in the bylaws.

MOTION made by Trustee Jasmin, seconded by Trustee Landrau, to amend the Westfield State University's Board of Trustees Bylaws as presented.

There being no discussion, ROLL CALL VOTE passed motion unanimously with Trustees voting in the affirmative: Alvarado, Boudreau, Currier, Gilmer, Jasmin, Landrau, Martin, Montemayor, Reichelt, Williams, and Salehi

Trustee Gilmer shared that he and Trustee Jasmin participated in a solid working group from the office of Administration and Finance to investigate preserving capital, and generating additional interest income, in the rising interest rate environment. There was good response to an initial Request for Proposals (RFP) and the committee rated the responses based on the criteria in the RFP. After meeting with the top two firms of Federated Hermes/Massachusetts Municipal Depository Trust and Westfield Bank, they recommend investing in Federated Hermes/MDDT. Important factors included the firm's capability and customer service, the risk mitigation process, and their proposed rate of return. It is being proposed to move \$25 million into a Federated Hermes/MMDT account at the rate of 5.38% less .03% in fees for 5.35%, resulting in projected interest income of \$1.3 million

versus projected interest income from Westfield Bank of \$937,000. Trustee Jasmin continued that it was a very structured, diligent process, and the evaluation criteria was set before the request for bids went out.

Mr. Taksar stated that significant cash reserves were placed with an investment firm several years ago and this is the second part of the plan in placing working capital in low-risk accounts. The proposed motion follows the trust fund policy to seek approval to set up a new account. Time is of the essence since the current market creates an opportunity to earn significant interest income. The Massachusetts Municipal Depository Trust was set up by the state and 500 state entities have contributed to this fund, including sister institutions. Federated Hermes manages the fund on behalf of the state.

Trustees' questions about Federated Hermes/MDDT were answered as follows:

- They are following the federal fund rate and passing the net rate to investors within 30 days.
- Funds can be removed at any time with no penalty.
- Rates are reset daily and can be viewed online. Everyone gets the same rate of return regardless of how much is invested.
- Six vendors met the criteria of the RFP.
- The funds are not federally insured because the account would be over \$250,000.
- There is no rating for the investment manager, but one-third of the portfolio is made of short-term, high-quality investments. The average maturity was 26 days. In 40 years managing this type of fund, they have never had a liquidity issue with the objective of preserving principal. The parent company has an average rating from Morningstar.
- Both finalists presented graphs with the federal funds rate and the rate they have paid over time.
- It was hoped to place the funds in a local bank, but the Board's fiduciary duty required to pursue the best financial solution for the university and its students.

MOTION made by Trustee Gilmer, seconded by Trustee Jasmin, to approve the establishment of a new short-term investment account with Federated Hermes/Massachusetts Municipal Depository Trust (MMDT) as a result of the Cash Reserves Investment Services request for proposal (RFP) process.

To further approve the transfer of \$25,000,000 from existing bank accounts to Federated Hermes/MMDT, to optimize investment income opportunities for Westfield State University.

There being no further discussion, ROLL CALL VOTE passed motion unanimously with Trustees voting in the affirmative: Alvarado, Boudreau, Currier, Gilmer, Jasmin, Landrau, Martin, Montemayor, Reichelt, Williams, and Salehi

There being no further business,

MOTION made by Trustee Jasmin, and seconded by Trustee Williams, to adjourn. **ROLL CALL VOTE** passed motion unanimously with Trustees voting in the affirmative: Alvarado, Boudreau, Currier, Gilmer, Jasmin, Landrau, Martin, Montemayor, Reichelt, Williams, and Salehi

Meeting adjourned at 10:59 AM.

Attachments presented at this meeting:

- a. Motion – Bylaw Amendments
- b. Bylaw Amendments
- c. Motion – Cash Reserves Investment Services Update and Recommendation
- d. Cash Reserves Investment Services Update and Recommendation (Memo 1)
- e. Cash Reserves Investment Services Update and Recommendation (Memo 2)
- f. Cash Reserves Investment Services Update and Recommendation (Analysis)

Secretary's Certificate

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees meeting held on July 21, 2023.

Dr. Gloria Williams, Secretary

Date

DRAFT



Board of Trustees

September 8, 2023

MOTION

To approve the presidential evaluation for the 2022-2023 academic year as presented by the Executive Committee on the above date and the submission of said evaluation to the Commissioner of the Department of Higher Education.

Ali R. Salehi, Chair

Date



Board of Trustees

September 8, 2023

MOTION

Based on the requirements of the *Massachusetts Board of Higher Education Compensation and Evaluation Guidelines and Procedures for State University and Community College Presidents* and the Board of Trustees' evaluation of President Linda Thompson for the 2022-2023 academic year, the Board recommends that President Thompson receive the maximum compensation increase that can be awarded.

Ali R. Salehi, Chair

Date

BOARD OF TRUSTEES

Evaluation of President Linda Thompson for the 2022-23 Academic Year

I. Executive Summary

Having completed her second year as Westfield State's president, Dr. Thompson has shown that she has a clear vision of the future, has communicated it widely, and has had success in setting a new direction for the University. She recognizes that the higher education environment is undergoing substantial and transformative changes, and she is working to position the University to adapt successfully through the identification of potential new student populations and the development of new programs and partnerships. Her themes (building bridges, IDEAS) allow her to effectively communicate her vision to the Board, her cabinet, the faculty, librarians, staff, and the University community. While the University faces some challenges, prominently among them declining enrollment and the resulting financial strain, President Thompson has approached these challenges with an optimistic outlook. She understands that you cannot cut your way to prosperity, and she has been successful in promoting creativity, innovation, and new ideas. As a Board we believe that President Thompson has the vision and energy for Westfield to thrive in the coming environment. Her success will depend on energizing others and converting her vision and ideas into tangible plans and actions. The University Board of Trustees is fully supportive of President Thompson's efforts and looks forward to working with her and the University community in moving the University forward.

II. Description of the Evaluation Process

This evaluation of President Linda Thompson follows the Compensation and Evaluation Guidelines and Procedures for State University and Community College Presidents (June 2013) and DHE Commissioner Ortega's memorandum of January 30, 2023. In evaluating President Thompson, the Board considered President Thompson's accomplishments against her identified priorities and goals as endorsed by the Board at the beginning of the year. The Board focused on President Thompson's performance during the past academic year, but also considered her work during the 2021-22 academic year when President Thompson was not formally evaluated since she had not served a full year in the role.

Materials considered in this evaluation include the self-evaluation which President Thompson submitted (and is an appendix to this document) as well as written comments by individual Board members that were solicited specifically as a part of this evaluation. Trustees were asked to share their written observations by responding to the following suggested prompts: 1) the tone and climate that the president has set for the campus; 2) the president's communication with the campus and with the Board; 3) the president's effectiveness as a manager/leader and ability to develop a team; 4) the president's articulation of an agenda and set of priorities (consistent with the University's Strategic Plan) and the development of clear, identifiable strategies to achieve these; 5) the president's effectiveness as a representative of the University to the broader community; and 6) the

president's effectiveness in supporting BHE system-wide priorities including the equity agenda (issues of affordability, access, closing achievement gaps, wrap-around support services) and post-pandemic response efforts (addressing mental health, response to enrollment challenges, effective use of ARPA funding); and 7) any other observations that a trustee wished to make. The responses of all nine trustees who responded to the prompts are also included as an appendix to this evaluation.

The Board also considered a variety of metrics related to institutional goals and priorities as well as the BHE equity agenda. Data from the DHE performance measurement reporting system (PMRS) and the University's Office of Institutional Research were used to assess the University's progress in addressing issues of affordability and access, student success and efforts to close achievement gaps, educational cost, overall financial health, and fundraising.

Based upon these materials, this evaluation of President Thompson was initially drafted by the chair and vice chair of the Board who worked closely with the president throughout the year, generally holding individual meetings with her every two weeks. The evaluation was then reviewed by the Board executive committee and presented to the full Board for its formal approval and to President Thompson with opportunity to discuss its findings.

III. Success in Meeting University Goals and Priorities

President Thompson's performance in 2022-23 has clearly demonstrated that she has approached her leadership of Westfield State University with a clear understanding of the higher education environment and a vision and set of strategies to move the University forward. In her presentations to the Board as well as to the University community, she articulates compellingly that the University must think about how to reach new populations of students, not just of traditional age, with new programs to attract them and new ways of offering and teaching those programs (not necessarily degree programs). She has been committed to the principle that you cannot cut your way to fiscal and enrollment health but need to innovate. Over time she is bringing more and more University people on board to understand the value and necessity of this approach. Change is often hard in a university setting, but President Thompson definitely approaches her task as a change agent.

Strategic Vision and Priorities. In the last academic year, building upon the University's Strategic Plan, President Thompson introduced the framework concept of IDEAS – Innovation, Diversity, Engagement, Advancement, and Students -- to guide thinking and action. President Thompson's self-evaluation lays out some of the ways in which this framework or theme has been operationalized and some of the results of these efforts. Perhaps the most important outcome from the Board's perspective is convincing sufficient numbers of the University community that change is in fact both necessary and possible and doable. Here are some representative comments from Board members: "I believe that President Thompson has the right mindset for our campus. College students are changing with our culture and their expectations are changing too. Creating programs that cater to not only what our students need but also our region is integral to the future success of the University." "President Thompson's focus on enrollment growth and academic innovation is consistent with the Strategic Plan, although refined given our post-pandemic realities. The president is working closely with multiple administrative leaders, faculty, staff,

and students in developing actionable steps to achieve these aims while at the same time respecting the need for grassroots efforts to develop that will reap positive benefits.”

Several initiatives and accomplishments are particularly noteworthy from the Board's perspective. These include the creation of an innovation fund (supported from investment earnings) to seed innovative ideas that have the potential to yield new students and/or income; an ongoing workshop on design thinking practices for faculty and staff across campus to spur innovative, transformative thinking; a significant increase in external grant funding and the creation of resources and a support structure to seek additional funding. New programmatic efforts have begun, particularly in areas of health (a major theme of President Thompson's presidency), mental and behavioral health, data science, criminal justice, and business. These programmatic initiatives are early in the process, but they are fundamental to President Thompson's priorities.

Enrollment. Enrollment is fundamental to the University's health, and President Thompson has articulated a clear direction and set of strategies that will hopefully reverse the downward trend that we and other similar institutions are experiencing, exacerbated by a demographic decline and the pandemic. One trustee described it this way: “the president has demonstrated the urgency of increasing our enrollment. She has made it clear that increasing enrollment is not just the goal for the Office of Admissions, but all stakeholders -- a message that may not be universally well-received but is certainly needed. Her emphasis on targeting adult learners and online program expansion is the right track to move forward on, and I hope that the wheels will begin to turn faster in this area. Progress has been slow, but steady.” More resources are being directed to marketing and recruitment, the financial aid budget has been increased each of the last two years, the Westfield Promise early college program continues to be well-supported, and new programs and articulations have been established with both Holyoke Community College and Springfield Technical Community College. From the Board's perspective, these are all steps in the right direction. It is too early to tell whether these efforts will change the bottom line, but President Thompson's success will ultimately be judged on the impact her efforts and direction have on enrollment.

Financial Health. While the University is presently enrollment challenged, the president and her administrative team have been able to maintain a strong financial position. This has been reflected in the careful management of personnel positions, largely by not filling most vacant positions (unless there is a critical need) while enrollment has been declining. With this strategy, the careful management of other expenses, and HERF and ARPA funding, the University has been able to operate within its budget and to maintain its reserve position. This is reflected in the University's overall financial position which the Board monitors on a regular basis. Specifically, almost all financial ratios exceed their target which are noted in parentheses (when GASB 68, 75, and 87 and HERF and FEMA funding are excluded): debt ratio at 1.7% (< 5%); viability ratio at 3.2% (> 1%); primary reserve ratio at 57% (> 25%); net operating revenue ratio at 0.3% (> 2%); and composite financial ratio at 4.5% (> 3%). On the other side of the financial ledger, President Thompson has been willing to spend money to seed the development of new programs and initiatives without using reserves or pandemic funding to replace the operating budget. President Thompson and her vice president for Administration and Finance are working with other administrators to develop a multi-year planning budget for planning purposes. This work commenced over a year ago and is also one of the key recommendations from the University's NECHE visit this spring.

Partnerships and Advancement. Engagement and advancement are key pieces of President Thompson's IDEAS agenda. As she notes in her self-evaluation, “creating partnerships through the collaborative process is the

backbone of engagement.” President Thompson has excelled in this area; she is a builder, particularly a “bridge builder” which is a theme of many of her communications. The Board sees her as a tireless advocate for the University and sees partnerships as fundamental to programmatic and advancement efforts. The feedback from community leaders, including community college presidents, municipal leaders, and business, non-profit, and cultural executives has been especially positive. The University is beginning to see important returns on these efforts. Here is how some Board members evaluate these efforts: “Her interactions with stakeholders off-campus, including legislative leaders and potential donors, have brought in or will soon bring in a great deal of money that will support the student experience, whether through scholarships or mental health support.” “The President no one ever heard of when she was appointed President is now well-known in the community of Western Mass. She has worked very hard at reaching out to the leaders of Westfield, both political and business leaders. In addition, she has established herself as a dynamic person in the entire region.” “The president presents as an effective representative of the University as she networks with external community agencies and businesses to garner support for the growth of the University’s programs and opportunities.”

University advancement efforts also showed significant gains in the 2022-23 academic year. President Thompson set out strategically and intentionally to identify, engage, and cultivate alumni and friends to provide increased support, financial and otherwise. The University set a goal of \$2 million and exceeded this goal, surpassing the prior year’s totals by the end of the third quarter. In addition, donor retention rates improved, and the number of first-time donors increased by 55%. Beyond direct dollar support, advancement efforts were directed to engagement and re-engagement of alumni, not only in Massachusetts but also in several other areas where there are significant alumni cohorts (Florida, Connecticut, Washington DC, and New York). President Thompson receives high marks for her energy and enthusiasm and success in reaching out to our alumni and donor groups.

Diversity and Inclusion. President Thompson has demonstrated in countless ways her commitments to the role and value of diversity and inclusion at Westfield State University. One of the ways that this has been reflected is her embrace of the University Efficiency Analysis Advisory Committee (UEAAC) recommendation to create a division of Justice, Equity, Diversity, and Inclusion (JEDI) with a senior-level administrator to oversee the University’s efforts. The portfolio of this division intersects with student recruitment, personnel hiring, and academic and co-curricular programming. President Thompson has made clear that her understanding of diversity encompasses not only diversity of race, ethnicity, and sexual orientation, but an openness and responsiveness to diversity of thought and viewpoint. In addition, feedback from minority students and their organizations indicates that these students feel more welcomed and protected than they have previously. Finally, President Thompson has responded swiftly and strongly to the few instances of harassment and discrimination that have occurred. She has made clear that that kind of behavior has no place at Westfield State University and will not be tolerated.

University Culture. Finally, a major priority for President Thompson and for the Board has been to improve the culture at the University. Westfield has had a history of sometimes contentious relationships between administration, particularly the president, and faculty, staff, and students. President Thompson has worked diligently to change the environment, first by modeling behavior that reflects humility and kindness, an openness to diverse viewpoints, and a genuine interest and investment in others. This has been recognized by almost all constituencies with whom the president has interacted. She also promoted a campus climate survey to the University community which can now be used to benchmark our progress. Other efforts that the president has initiated include charging a University committee to find practical ways to incorporate our values more

prominently in our work and several workshop sessions focused on culture and values, conflict resolution, and trust and team building. Feedback from various constituencies indicates a broad receptivity to her efforts. While there has been resistance in some quarters, principally among some faculty groups, it appears more and more people are coming on board with the president's efforts and are willing to give these a chance. The following comments reflect trustees' perspective: "In a short two years, Dr. Thompson changed the tone and temper of the campus. It is evident that the campus is energized and has a much better environment for all, especially our students. All indications lead us to believe that the students respect and value the energy and time she is spending with them... She is a bridge builder and a uniter. Her initiatives within campus have been positively met by most." "She has set the tone for building bridges and continues to demonstrate this message through her actions."

IV. Management Effectiveness and Leadership Style

From the time of her hire president Thompson has been firmly committed to changing the tone and culture of the University (see above). In this effort she has had the full support of the Board and most University members. Not only has President Thompson communicated this frequently, but she has also modeled this in her own behavior. In the feedback that the Board has received, most respondents mention this as a significant strength of the president. Specifically, they reference the very human face that she presents to others in her interactions, and openness and humility that have been largely welcomed by the University community. In her first year as president, Dr. Thompson was intentional in meeting and listening to a wide variety of stakeholders, both internally and externally, a practice that she has continued in her second year. Her office staff, for example, make note of how busy her daily schedule typically is, meeting with various groups. Here are several representative trustee comments: "President Thompson has clearly worked to establish relationships with all internal and external stakeholders. She goes about her work in a way that encourages participation, is inclusive and mimics the values of the University. She is visible within the campus community." "President Thompson has fostered a climate on campus of being supportive, transparent, and inclusive with all students, faculty, and staff. She began her presidency by participating in a listening tour to hear from many stakeholders including students, faculty, staff, and community leaders."

President Thompson has shown herself to be a strong communicator, most especially with individuals and small groups. In addition, she has more recently within the last year started to send out formal communications to the campus community, updating University members on significant issues and initiatives. President Thompson has also been generally diligent and thorough in keeping the Board informed about campus events and issues. At the same time the Board recommends that the president also needs to widen her communication with campus groups, particularly faculty, and to do so more frequently. As president, she has often used her position to take public positions on issues of importance to the University, notably her regular columns in a Springfield newspaper. We think it would also be helpful for her to send out comparable, regular communication to the University community about initiatives that the University is pursuing. The president has a strong vision, and we would like to see her do more to communicate that directly to the campus community. During our evaluation we heard of at least one instance where a presidential communication needed to be recalled. Unfortunately, while this needed to happen, it created confusion in the University community and the impression that the president was not reliable or could not be trusted in her communication. This underscores the importance and necessity of reviewing every communication before it is sent out.

President Thompson has been a particularly strong visionary leader, and this has been one of her greatest strengths as Westfield's president. It is still early in her tenure as our president, but we are at the stage where we believe the president and her team need to pay more attention to how these ideas and vision can be converted into an action plan. This involves developing plans for how others are brought on board to the vision (that is, selling or creating buy-in), prioritizing and identifying resources for the various initiatives, and identifying responsible individuals and timelines. This approach is particularly critical when it comes to programmatic initiatives and other efforts that cut across campus constituencies. Buy-in and engagement by those who will implement and be affected by the initiatives is vital for them to be sustained.

In the last year, and most especially in the last several months, President Thompson has begun to build and develop a senior management team who are supportive of her efforts and vision. In addition, her identification of individuals to take the lead on initiatives or to assume administrative appointments indicates that she is perceptive of people's talents and potential for leadership roles. At the same time the Board believes that President Thompson should be more explicit in her expectations regarding senior management performance, setting up key performance indicators or other metrics and timelines by which to evaluate these individuals and hold them accountable. These should be shared with the Board on an annual basis.

V. Success in Addressing Post-Pandemic Health, Use of ARPA Funds, and Responsiveness to the BHE Equity Agenda

When President Thompson began her presidency, COVID was on the decline both regionally and locally, and the protocols for dealing with pandemic-related issues at the University were well-established. President Thompson followed these and acted consistent with the memoranda of understanding between the state universities and their bargaining units. She worked hard to facilitate the transition back to in-person instruction and on-campus social life. One of the tasks was to facilitate the challenge that many students had to face in dealing with reinstated expectations regarding academic behavior. With her background in healthcare, President Thompson has been acutely sensitive to, and proactive in dealing with, student mental health issues. She worked regularly and intensively with key constituencies, including student leadership, student affairs staff, the counseling center, and faculty to encourage the use of resources and programs to students identified in need. Her self-evaluation points to several examples of specific resources and programs that have been directed to this issue. These include a four-year partnership with the JED Foundation to develop, implement, and evaluate a comprehensive plan for supporting the mental health of students, beginning with a baseline assessment using the National Healthy Minds Survey. This will lead to a four-year strategic plan, focusing on clinical and programmatic needs. President Thompson also continued a "Fresh Check Day" in collaboration with Jordan Porco Foundation, a mental health promotion event held at the University. In addition, the president supported the addition of MySSP App, a supplemental mental health support phone app that provides 24/7 multilingual talk or text chat options, as well as various mental health and wellness resources. More recently, she has been collaborating with State Senator Velis to develop a community-based approach to dealing with behavioral health issues in western Massachusetts.

The University's COVID-related funds (HEERF, ARPA, and FEMA) were targeted to a variety of needs, including direct aid to students in the form of grants and financial aid (~\$10.98 million), housing and dining credit

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refunds (~\$1.9 million), replacement of lost revenue (~\$12.16 million), COVID expenses such as testing, PPE, and deferred maintenance (~\$4.8 million), technology, faculty training, software and equipment (~\$580 thousand). Each class of expenditures was permitted by federal guidelines and use of these funds has been independently audited in each year.

The BHE's Equity Agenda establishes the higher education system's commitment to maintaining high levels of accessibility and attainment across all segments of the adult population, including those from traditionally underserved backgrounds. President Thompson was hired in part because of her strong commitment to the principle of equity and inclusion. Her behavior as president has continued to underscore and elevate this commitment as an important part of the University's values. Examples of this are seen in her support of the creation of a division of Justice, Equity, Diversity, and Inclusion with the appointment of a cabinet-level individual to initiate, organize, and oversee the University's efforts in this area. In addition, President Thompson has effectively reached out to community colleges, most especially Holyoke and Springfield Technical, to establish pathways and articulation agreements that facilitate the movement of their students in high-demand programs to Westfield. Her self-evaluation provides several examples of these programs. A tireless bridge builder, President Thompson has regularly connected with local governments and human service organizations to connect these groups with Westfield people and programs. Although a previous president began the Westfield Promise program, she has strengthened the program through her connections with local mayors and school superintendents to increase enrollment significantly in these programs. While this program does not necessarily result directly in increased enrollment for the University, it lays the foundation for the involved students to have a successful higher education experience, hopefully at Westfield.

The University has historically had very successful programs that have been targeted to underserved populations, notably the Urban Education program, TRIO, and learning disabilities support. These programs have often had retention and graduation rates on par or exceeding the general student population. President Thompson is working to grow these programs and to extend these support services to larger numbers of students. The University's ability to serve these groups successfully, defined by reducing the achievement gaps between these populations, will depend on growing and strengthening these programs.

In preparing this section of the evaluation that considers President Thompson's performance in addressing the BHE equity agenda, the Board carefully reviewed data from DHE's Performance Measurement Reporting System. While the data are extraordinarily useful in identifying the trajectory and success of the University's effort, the available data go through fall 2021 or fall 2022. In other words, these data do not reflect President Thompson's impact on the equity agenda. In addition to the PMRS data, the Board also examined data from the University's Office of Institutional Research to supplement the PMRS information.

In the context of an overall enrollment decline, Westfield's recruitment of underserved populations is generally moving in the right direction (as a percentage of the total student population). Thus, the percentage of Hispanic/Latinx students grew from 10.6% in fall 2019 to 11.1% in fall 2021. Over time the trend for this group of students has steadily increased. On the other hand, the percentage of Black/African American students has remained largely steady over this period. The University is moving in the right direction, but not nearly fast enough. The Board sees community partnerships and financial aid resources as being essential to future efforts.

The PMRS data on success and completion show that achievement gaps between underserved groups and the overall student population remain stubbornly persistent over time. While we note that these gaps are comparable with the State University segment, this is small comfort and certainly not a reason for complacency. Institutional data reflect that there are special programs within the University that serve these populations with success rates equal to or often greater than the general student population. Specifically, this is the case with both the learning disabilities support program and the TRIO program. For example, in 2021-22 95.6% of TRIO students finished in good academic standing, and 91.6% of the 2015-16 cohort graduated in six or fewer years. Data for 2022-23 are comparable.

The University has had considerably more success in its recruitment of underrepresented faculty and staff. For example, in 2021-22, of 209 full-time faculty, 50 were members of minority groups. Data for 2020-21 and 2019-20 are comparable.

VI. Conclusion

President Thompson is a visionary leader who has been effective in initiating change at the University. She has a clear vision of the future, has communicated it clearly, and has had success in setting a new direction for the University. She has the courage and confidence to take risks and to try new things, while also inspiring her administrative team to do the same. Her themes (building bridges, IDEAS) allow her to effectively communicate her vision to the Board, her cabinet, the faculty, staff, librarians, and the University community.

While the University faces some challenges, prominently among them declining enrollment and the resulting financial strain, President Thompson has approached these challenges with an optimistic outlook. She understands that you cannot cut your way to prosperity, and she has been successful in promoting creativity, innovation, and new ideas. Her innovation fund is just one example of the many ways in which she is encouraging others to adopt this same mindset. The president has been successful in building collaboration both within the University as well as with the broader community. Her commitment to bridge building has improved the standing of the University among many, many external constituencies.

As a Board we believe that President Thompson has the vision and energy for Westfield to thrive in the coming environment. Her success will depend on energizing others and converting her vision and ideas into tangible plans and actions. To do this she needs to communicate frequently and broadly, sharing her vision as often as possible while remaining open to other perspectives. She needs to develop clear, specific expectations for her senior team and to hold them accountable for their roles and carrying the vision forward. The University Board of Trustees is fully supportive of President Thompson's efforts and looks forward to working with her and the University community in moving the University forward.

* DRAFT *

Ali R. Salehi, Chair

Date

Dr. Linda Thompson
President, Westfield State University
Self-evaluation for Board of Trustees
Review period: July 2021 – June 2023

After another year of listening, meeting, presenting, and thinking, it is clear that Westfield State University has an important story and role within the western region of the state, throughout the Commonwealth and New England. As president, I recognize and appreciate the value, diversity, and integrity of our 11-member Board of Trustees. I remain, as always, loyal to their requests and direction. I also appreciate and respect the board's counsel on matters related to higher education and their perspective on maintaining the highest-level personal qualities of leadership needed to effectively lead Westfield State University.

While my role is president and thought leader, guiding the direction, mission, and values of a 21st century institution of higher education, my success ultimately depends on those who make the university function effectively. Faculty, staff, and librarians all play an essential role in making the day-to-day operational decisions that ultimately lead to the success of our most important University community members – our students.

Throughout my career in healthcare, government, and education, I have found effective leading, guiding, and motivating involves reasonable, relevant, measurable, and smart decision-making. But most importantly, to develop and advance staff, management strategy must be combined with compassion, kindness, and fairness.

I began my service as President in July 2021. I have welcomed the opportunity to learn from many individuals who have been generous, offering their time and perspectives to assist in my formative days at the University. I regularly meet with Western Massachusetts business, education, and community leaders including local and regional elected officials, non-profit leaders, parents, students, and champions.

As most new leadership involves an initial “listening tour,” mine has not ended, nor will it. Listening is a crucial component to maintain high standards of communication and develop trust. I will continue to be accessible to all who request my attention.

As I began my presidency, I set out to lay the foundation of my agenda in a highly collaborative manner, thoughtfully seeking buy-in through effective communication with the campus community.

I continue to hold regular open office hours to meet with any individual or group that expresses interest in speaking with me. These sessions have provided value in terms of breaking down any perceived barrier between the President's Office and the campus community. During these sessions, which are first-come-first-served and held in a conference room in the student center, I have learned a great deal about how students, faculty, and staff view my role. A campus climate survey may provide a snapshot of information on community perceptions, but hearing feedback directly and personally from individuals directly involved in our campus is most valuable.

We are continuing to explore our curriculum, understanding trends and educational advancements to build a relevant and necessary educational experience. To serve this end, our public education systems must develop systems of net-casting to find students where they reside. This critical need led to the concept of creating bridges that could restore our collective health.

“Building a Bridge to the Future: Restoring our Health,” the theme of my first year as president, served as a guide to engage the campus community to envision a collective path and direction focused on physical, mental, fiscal, structural, and cultural health. Ensuring the health of students, faculty, and staff, for example, will be imperative as we navigate challenging times in higher education. Given the lingering effects that COVID-19 had on our campus, our families, and our communities, the importance of health has never been more urgent.

While we continue to remain dedicated to addressing the health and vibrancy of our communities, the second year of my presidency focused our purpose and our commitment to maintain the tenets that are required to honor our legacy while focusing squarely on the future of higher education and the needs of a 21st century world.

Our recently formed IDEAS framework complements the future of education.

We are a place of IDEAS

Now that we have moved on from the worst of the pandemic, we will not stop building bridges and making connections. This work will only escalate as we make more inroads at the regional, state, and national levels. But it is a time now to settle into our direction, focus on the work instead of the transitions and to think of our endeavor together as lasting instead of temporary. We are not simply restoring; we are designing something new.

As Westfield State’s current strategic plan ends in 2024, planning for a new strategic plan and a new chapter in Westfield State University’s story has already begun with a cabinet retreat and series of innovation workshops.

At our cabinet retreat in August 2022, I introduced the framework components of Innovation, Diversity, Engagement, Advancement, and Students as a broad concept to guide our thinking.

IDEAS is now the strategic organizing focus and brand to communicate the next-level development of Westfield State University.

Westfield State University is a place of IDEAS. We were born of an IDEA for an equal, just, educated society built on participatory democracy. Our campus is a space for big thinking, for engaging with other thinkers, for learning new things, and rethinking what we already think we know.

IDEAS consist of Innovation, Diversity, Engagement, and Advancement, that all lead to the success of our Students.

We focus on INNOVATION.

We ask what education should look like in the future and seek new ways to teach and learn. We are entrepreneurial in all things, not being content with doing things as we have always done them. We mine our 185-year history of educating students to learn what worked yesterday, adapt for today's student, and drive forward to tomorrow.

We are committed to DIVERSITY.

We celebrate our Diversity of persons, of backgrounds, and Diversity of thoughts and perspectives. We are a place of inclusive excellence where people are welcomed, heard, and supported. We are not content with providing access alone but are committed to engaging with all people on an intellectual and personal level as we learn from each other and grow as a society.

We are ENGAGED.

Our place of Ideas does not just live in our minds. We actively Engage with each other, our students, our alumni, our community, and with our business and government leaders. We challenge our world and ask others to challenge us and the ideas that are holding us back. Higher education is a necessary and integral tool in helping shape critical-thinking skills that lead to life-long learning and eventual success. We must fully Engage with all our stakeholders to help provide resources to assist our students achieve their goals.

We are ADVANCING our world.

Our Ideas must make an impact and Advance our campus, our community, and each other forward. We must Advance our shared ideals that positively influence and shape the leaders of tomorrow with a focus on social justice and inclusion, environmental sustainability, and a commitment to health-based practices. We are actionable in our plans, active in our thoughts, and search for agreement over discord.

We put our STUDENTS at the center of all we do.

Westfield State University exists for our Students, those who are enrolled today and those who will enroll tomorrow. We know that our Students will require more of us, and we are prepared to exceed those expectations to help them prepare for new careers, new social challenges, and new personal goals. We value our Students as unique individuals and celebrate all they offer us as members of a vibrant community.

INNOVATION

We are focusing on Innovation. We are asking what education should be and are seeking new ways to do our work of teaching and learning. We strive to be entrepreneurial in all things, not being content with doing things as we have always done them.

Campus Innovation fund

To grow and embrace change we have developed a University Innovation Fund of \$300,000 from investment income earnings to invest in ideas our faculty and staff may have to make our programs more contemporary and relevant to a changing world.

Innovation funds are being used to expand the use of on-campus facilities and year-round services.

Our FY22 Innovation Fund Committee awarded \$107,151 for the following initiatives:

- **Purchase of a 3D Printer, \$9,200** – A joint effort between the Art and Theater departments, and CURCA, the purchase of a 3-D Printer will attract students by offering an innovative approach to education while helping WSU to remain competitive.
- **Bear Hole Collaborative, \$27,850** – This project is part of the beginning of a long-term partnership with the town of West Springfield. Students in the Environmental Science and Geography, Planning and Sustainability departments will be conducting flora and fauna surveys at the Bear Hole Community Reserve to provide baseline inventories while creating a comprehensive learning experience for our students. Students in Environmental Science 225 are measuring plots following Massachusetts Department of Conservation and Recreation forest inventory protocols as part of their lab project for the semester. This data will serve as a pilot study to determine sample sizes for more intensive inventory this summer that will be conducted by two WSU interns.
- **Inform, Invite, Inspire, \$15,798** – This project aims to reach area high school students who have an interest in media and/or majoring in communication. Students will be inspired to explore the possibilities of the field through visits to schools serving under-represented populations, thus encouraging a more diverse applicant pool. The Communication Department welcomed some 60 area high school students to campus in April. The visit was the culmination of an outreach program called “Inform, Invite, Inspire.” The theme of the April event was “One Degree, Many Career Paths.” Faculty and students from the Communication Department also gave presentations at seven area schools on the career paths in which a Communication degree can lead.
- **Purchase of a Laser Cutter, \$40,250 and related Study, \$3,920** – A joint effort between the Art and Theater departments and CURCA, the purchase of the laser cutter provides modern equipment that will allow the departments to expand their programming and provide a learning experience for students that will bolster future employment opportunities.
- **OER Grant Program, \$8,000** – Part of the Massachusetts Department of Higher Education’s Equity Agenda, the program seeks to expand and secure use of Open Educational Resources (OER). The goal of this initiative is to reduce student textbook costs by replacing commercially published textbooks. In the first semester of implementation, this program will save students approximately \$66,500 in textbook costs and improve the quality of materials used. The grantees represent a wide range of

disciplines and cover a broad array of materials. This is a promising sign for the continued development of an OER culture on campus.

- **Zine Collection, \$2,133** – Creating a zine collection at the library will contribute toward a more inclusive library space and collection while also engaging students. The zine collection has been fully cataloged and is now available for browsing and check out at Ely Library. There was an additional workshop on zine making with the Westfield Athenaeum, and further outreach opportunities are being explored.

The FY23 Innovation Fund Committee awarded \$139,250 for the following initiatives:

- Westfield Emerging Leaders Academy, \$14,250
- Campus & Conferences Creation, \$50,000
- Strategic Recruitment Travel for Targeted Geographical Expansions, \$25,000
- Center for Interdisciplinary Informatics, \$50,000

Meeting with innovation thought leaders

To support and encourage innovative thinking we have invited Bill Digneit, director of The Innovation Institute at Northern Michigan University to lead a retreat with leaders from across campus on the way Design Thinking practices can be transformative. He returned throughout the year to lead workshops on innovation throughout campus and will continue to work with us in the coming year.

Committing resources for the health of our region

Our mission to build our Nursing program to address workforce shortages and help build capacity for the health of our communities has been noticed by Congress as Representative Richard Neal worked to appropriate \$1 million to our Nursing program. Of the \$20,367,800 included in the final 2023 appropriations government funding package for our region, \$1 million will go toward supporting Westfield State University's training capacity for Nursing and Health Science students and providing a space for healthcare practitioners from both academia and practice sectors to explore, design, and prototype solutions to current healthcare gaps.

We also have been working with State Senator John Velis to address the mental health crisis that has impacted our students.

We pledge to stand with Senator Velis, chairman of the Mental Health, Substance Use and Recovery Committee, to assist with program development and resources needed to combat this crisis. The unprecedented challenges with rising behavioral health needs appear to be more complicated than ever recorded and have become more systemic, impacting young and old alike. While the need for increased mental health care is felt across all demographic and socioeconomic groups, the challenge is exacerbated for young people, who come from disadvantaged households, those who have experienced incarceration in their immediate family, those who struggle with addiction, and those who have experienced housing insecurity. Too often, young people in Massachusetts find themselves trapped in a vicious cycle as their behavioral health

needs go unmet, both worsened by and contributing to their socioeconomic, familial, and interpersonal problems.

We have held several meetings with Massachusetts legislators outlining how Westfield State can be a hub for developing solutions for this ongoing crisis. We have also reached out to Senator Velis with a proposal on how Westfield State can offer support. “The Campaign for our Future: A Community-based Approach to Improving Behavioral Health Outcomes in Western Massachusetts,” offers a comprehensive blueprint outlining our approach to ensure the safety and well-being of our citizens. We are determined to be involved in finding solutions and have received positive response from our proposals.

New educational approaches

Global citizenship skills, innovation and creativity skills, technology skills, and interpersonal skills have all been identified as primary needs of learners preparing for the future. To teach them, educators must develop personalized and self-paced learning, accessible and inclusive learning, and problem-based and collaborative learning presented in ways that promote lifelong and student-driven learning. These approaches will be revolutionary, and they will require us to think about the work of educating and learning in entirely new ways.

In January 2023 we attended the Apple Nursing Education Forum organized by Apple in Cupertino, California. At the Forum, industry leaders in nursing schools and healthcare organizations demonstrated how they have integrated Apple technology into their programs that streamlined their work in training, teaching, and patient-healthcare worker relationships. Two follow-up meetings were held in March and April with regional Apple executives to demonstrate the technology to Nursing, Physician Assistant, and Health Sciences faculty and students in Nursing. The goal is to examine if the health professions and other programs are interested in integrating smart Apple technology into their programs.

I also had the opportunity to participate in a groundbreaking method of learning that has the potential to alter the way we present subjects to students.

Dreamscape Learn, headquartered in Culver City, California and co-founded by Arizona State University President Michael M. Crow and Hollywood producer Walter Parkes is an immersive, virtual reality-based system that as Crow says can “unlock new learning realms for students by merging virtual reality – and all that it empowers educationally and socially – with advanced, adaptive educational experiences. Students of all ages can explore completely different worlds and perform complex learning, discovery, and problem-solving tasks that they would not be able to do in a traditional learning environment or lab in a campus setting.”

This technology, already practiced at Arizona State University, will quickly spread to other institutions of higher learning.

In my strategy to position Westfield State University as a relevant and essential institution that addresses the needs of regional and global change, innovation is paramount. While we do not yet have the technology to offer our own version of Dreamscape Learn on our campus, my colleagues and I are developing the pedagogies and techniques that will propel us forward.

External Grants

In 2022 Westfield State secured nearly \$4 million in grants and funding. By utilizing these funds, we can better realize the future and apply contemporary methods to support an ever-changing world. The \$1 million in Community Project Funds secured by Congressman Richard Neal will have a strong impact in strengthening the health of the citizenry. To manage a responsive and comprehensive grants program to encourage, support and enhance faculty and staff programs in all disciplines we have hired a Director of Grants and Sponsored Programs. The University also entered a partnership with the Washington, D.C.-based grant consulting firm McAllister & Quinn to support the University in the effort to secure additional federal funding. Part of the services provided by the firm are informational webinars open to all faculty and staff that are thematic to federal agencies or funding streams within agencies.

New / Continuation Grant Awards

Fund Agency	Dept	P.I.	Amount	New	Continued
National Endowment of the Arts - Visual and Performing artist lecture series and related workshops	Theatre Arts	Sabine Klein	\$20K	X	
Dept. of Justice (DOJ) - Office on Violence Against Women (OVW)	Enrollment Mgmt	Maggie Balch	\$300K	X	
MA Education, Labor and Workforce Development, and Housing and Economic Development - Skilled Capital Grant Fund - Round 2	Nursing / Biology / Chemistry & Physical Sciences	Jess Holden Kelley Anne McKeown Chris Masi	\$250K	X	
Baystate Health, Inc. – Better Together Grant - Pathways for New Healthcare Professionals	Nursing	Jess Holden	\$250K	X	
MA Education, Labor and Workforce Development, and Housing and Economic Development – Skills Capital Grant Fund - Round 1	Nursing	Jess Holden	\$500K	X	
Shannon Grant - Local Action Research Partner (LARP) - Shannon Community Safety Initiative	Criminal Justice	Lisa Barao	\$45K	X	
Dept. of Higher Ed - Public Higher Education Student Behavioral and Mental Health Needs Grant	Counseling Center	Brian Cahillane	\$132K		X
Dept. of Higher Ed - Commonwealth Dual Enrollment Partnership (CDEP)	Continuing Ed	Jessica Tansey	\$40K		X
Dept. of Higher Ed - Pioneer Valley STEM Regional Network	Biology	Kim Berman	\$35K		X
Dept. of Higher Ed - Massachusetts Inclusive Concurrent Enrollment Initiative (MAICEI)	Academic Affairs	Lyndsey Nunes	\$115K		X
Davis Educational Foundation / Reimagining General Education: Tackling Content, Pedagogy, and Assessment to Deliver a Better Student Experience.	Academic Affairs	Megan Kennedy	\$299K	X	
Dept. of Education - TRiO (Student Support Services)	Center for SS&E	Celeste Donovan	\$315K		X
Department of Elementary and Secondary Education (DESE) - Early Literacy	Academic Affairs	Megan Kennedy	\$10K	X	
Dept. of Education - Early College Program (Westfield Promise)	Center for SS&E	Julie Hill-Spivey	\$40K		X
Dept. of Health & Human Services - Behavioral Health Workforce Education and Training	Social Work	Nora Padykula	\$385K		X
		TOTAL	\$2.7M		

Grant Application Submissions

Fund Agency	Dept	P.I.	Amount
Dept. of Education - Centers of Excellence for Veteran Student Success (CEVSS) Program	Veteran & Military Services	Sabine Klein Lisa Ducharme	\$510K
National Science Foundation - Building Research Capacity of New Faculty in Biology	Sport Medicine & Human Performance	Brian Selgrade	\$495K
National Endowment for the Humanities (NEH) - Dialogues on the Experience of War - Stronger Together: The Journey to the Veteran and Military Caregiver Alliance	School of Education, Arts, Communication & Humanities	Sabine Klein	\$71K
Dept. of Health and Human Services - Public Health Scholarship Program (PHSP)	Political Science	Charles DiStefano	\$1.3M
National Science Foundation - Communities for Mathematics Inquiry in Teaching (COMMIT)	Mathematics	Christine Von Renesse	\$220K
Dept. of Mental Health - Behavioral Health Training: The HCBS and Human Services Workforce	Health Sciences	Nora Padykula Jess Holden	\$9.3M
Dept. of Justice / NIJ - Evaluation of OJP Community Based Violence Intervention and Prevention Initiative (CVIPI) Project	Criminal Justice	Lisa Barao	\$451K
National Science Foundation - Improving Undergraduate STEM Education (IUSE)	Biology	Kathryn Weglarz	\$514K
		TOTAL	\$12.9

Parenzo Hall Center for Research and Innovation Partnerships

The Parenzo Center for Research and Innovative Partnerships will become a key incubator space for institutional, community, and national partners offering space for business leaders, field experts and mentors to engage and shape student training and a space to host pitch competitions that facilitate entrepreneurial thinking and interdisciplinary engagements. Importantly, the space facilitates and invites innovative thinking and opportunities to take ideas from the lab to the commercial space. Through research, academics, and collaborations, students, faculty, and staff can research ideas, design and prototype, test, market, and provide opportunities to explore their entrepreneurial spirit. The Center will create endless possibilities for community and corporate engagement, professional training, and regional and national pitch competitions.

DIVERSITY

We are committed to Diversity. Diversity of persons, of backgrounds, of thought. We will be a place of inclusive excellence where people are welcomed, and supported, and heard. Last summer we hired a Vice President for Justice, Equity, Diversity, and Inclusion (JEDI), a new position at Westfield State and formed a JEDI Division. This Division is charged with sustaining and carrying out Westfield State's commitment to diversity by guiding, supporting, and ensuring linkages among student programs, faculty initiatives, and curricular innovations that cultivate a vibrant, multifaceted, inclusive community. It is the central home for new infrastructure and campus-wide initiatives designed to remove barriers, address inequalities, and bring about change.

ENGAGEMENT

Developing systems, committees, and working groups to engage with our campus and area communities are a vital part of advancing our mission. Creating partnerships through the collaborative process is the backbone of engagement.

We must engage with each other, with our students, with our alumni, with our community, and with our business and government leaders.

An example of positive engagement is found in the Discover Westfield Class. This class of first-year Westfield State honors students researched the efficacy of downtown Westfield. Following a survey of 400 participants and weekly interaction with citizens downtown, students developed poster presentations with recommendations to improve the downtown area for students. The students also made presentations to faculty, city officials, University administrators and local non-profits.

Our culture and values

Trish Bonica, associate vice president of Human Resources, has been charged with developing a committee of values-based culture thought partners who have been meeting monthly to think about practical ways we can bring our values more prominently into our work. In September we will be holding a culture and values summit featuring the traveling exhibit, Voices of Resilience, celebrating the intersecting lives of women in Massachusetts and beyond who have changed the course of history. We have also facilitated six sessions with approximately 170 participants campus-wide on three core topics: a) culture and values, b) conflict resolution, and c) trust and team building. We have restructured the Office of Human Resources, Title IX, and Equal Opportunity to create a position dedicated to the development and implementation of a campus-wide training strategy.

President's Council

In order to foster collaboration and maintain a transparent, engaged system of shared governance, I have implemented a President's Council to achieve that end. The aim of the 2022-2023 President's Council is to better identify areas where we can establish and implement goals and objectives that form the primary purpose of our mission – ensuring the success of our students.

The focus of the President's Council is developing an understanding of and responding to the pulse of our University, recognizing and translating information into a blueprint for long-term success. Again, linking to the IDEAS concept is our primary goal.

The President's Council consists of 60 members from a variety of departments. Students are also members.

We intend to use the President's Council to hear from many and diverse voices in order to make improvements to our culture, focusing on innovative methods to engage our community and develop and promote our programs.

Revamp of Marketing and Communication efforts

We have hired a seasoned executive director of communications, marketing and branding and have dedicated resources to tell our story. We are expanding the department to include a marketing

manager to reinforce and build upon our web, print, digital, and social media channels to strategically expand our reach to build community awareness and student enrollment. The director has been charged with:

1. Developing a cohesive Marketing and Communication unit that functions strategically to promote Westfield State University.
2. Implementing a digital-first integrated marketing and communication plan for the University as a whole.
3. Developing a strong brand identity that is supported by the University community and meets stakeholder needs for marketing projects and communications.
4. Measuring and increasing earned media and public relations efforts.

Internal and external outreach

For Westfield State University to keep with the pulse of the community, we must work with those in our surrounding communities and within our region. There is an interest from the public and individuals with an affiliation to Westfield State to engage on our campus facilities. We are working to ensure our campus and services are part of the fabric of the community. By sharing and offering our facilities to the public, we show we are good neighbors.

We are working to provide better access to our indoor and outdoor tracks, more heavily promoting our cultural events, and making it easier and more appealing to grab a meal in our dining commons. We are continuing to share our athletic fields with the Massachusetts Interscholastic Athletic Association's regional baseball and softball playoffs attracting hundreds of fans to campus. This summer we will have a variety of organizations on campus and will see a 400-percent increase in campus visitors from last year. Guests include the Massachusetts Foreign Language Association, George N. Parks Drum Major Academy, Human Adventure Corporation, Heaven Chamber Music Group, the Northeast Regional Law Enforcement Education Association cadet training program, and Change Summer, an organization that provides students from under-resourced communities with a camp experience that increases independence, curiosity, confidence, and responsibility.

We continue to hold events and workshops on campus. We recently hosted a group of girls from Springfield Public Schools to highlight opportunities in STEAM – Science, Technology, Engineering, Art, and Math. We organized a full day of events including tours of athletic facilities, the nurse simulation center, television studio, a panel discussion on pathways to success, and a demonstration of augmented reality from our Art department. We are strategically reaching out to display our offerings. These workshops will reach students that live in urban areas that may not have considered Westfield State as education choice. We will continue to make connections with these students.

I frequently meet with Westfield Mayor Mike McCabe and plan on continuing our series of conversations directed toward a strong town-gown relationship. We have consistently opened up the Woodward Athletic Center for career fairs for Westfield Public schools and have served as a

platform for two mayoral election debates in partnership with local media and area organizations. We have developed a more event-driven homecoming schedule, over a series of days, which offers programs that not only celebrate alumni, but the community at large. State Senator John Velis and Westfield Mayor Mike McCabe have served as co-chairs.

Community building

Related to Westfield State University participating in topics of community building, in my first year, I moderated four “Community Conversations,” live panel-type presentations utilizing our television studio and our technical facilities with production work done by students. Topics were:

- a focus on health disparities and creating greater health equity;
- exploring diversity in the arts and culture;
- economic and entrepreneurial equity; and
- a segment on governing and its impact on how western Massachusetts demographics have impacted our representation at the municipal, regional, and state level.

All panel shows featured state and local elected officials and experts in economics, art, culture, and medicine.

Earlier this spring, Political Science Professor Charles DiStefano took over the project and developed “Local Government Career Opportunities and Challenges,” with a panel including business and municipal leaders.

Developing partnerships to achieve common goals

We continue to have solid, productive, working relationships with our sister institutions. We have formed an agreement with Holyoke Community College to streamline the application process with our Nursing programs. The concurrent Nursing program with HCC will help address the nursing shortage by increasing the number of students who can get into a Bachelor of Science Nursing program allowing them to earn their degree much faster. We are also working with Springfield Technical Community College to partner in developing an early college pathway for health careers. Together, with STCC, we have been awarded \$600,000 in state funding to support this endeavor.

Leadership sharing concepts, ideas

To create better understandings on how area business, healthcare systems and non-profits can align and partner with Westfield State, I serve on the board of Baystate Health, Goddard House, The Public Health Institute of Western Massachusetts and our neighbor, Stanley Park. We also have a strong working relationship with The Caring Health Center, a community-based urban healthcare system in Springfield. I also serve on committees for the Massachusetts Economic Development Council.

I have developed professional relationships and mutual connections with members of these organizations and petitioned their expertise to realize our shared goals.

ADVANCEMENT

FY23 has been a year of strategically and intentionally identifying, engaging, and cultivating our alumni and friends in an effort to provide increased support. We have worked to deliver the campus story and share the University's vision to a broader audience.

This year we set a robust goal to raise \$2 million. As of mid-June, we are at \$1.95 million with all indications showing we will reach the \$2 million target.

Engagement with the Cabinet and Deans along with our three volunteer boards in engaging our outside constituents has led to an increase this year in the number of donors who support us, surpassing our FY22 year-end totals by the end of our third quarter. Our donor retention rates continue to improve, and the number of "first time" donors increased by 55 percent while the dollars raised to-date have surpassed last year's totals (FY22 \$1.5 million vs. FY23 \$1.9 million and counting).

Our commitment to creating a culture of philanthropy had our Senior Annual Giving Coordinator launch a new student philanthropy program with much success, over 80 members of the senior class took part.

As we close out the fiscal year, we are proud to report that 100 percent of all three volunteer boards and Cabinet have given this year. This will be important to our new Director of Corporate and Foundation Grants, as we expand our partnerships and increase our resources from a broad number of foundations and corporations.

We look forward to FY24. Following up on a number of confirmed cultivation opportunities while creating new ones, we will continue our focus on engagement, and reengagement, as we cultivate alumni and donors in Michigan, Georgia, Connecticut, Boston, Central Mass, Cape Cod, Washington, D.C., and New York.

New Leadership

In August 2022, the Divisions of Enrollment Management and Student Affairs merged to form the Division of Student Enrollment, Engagement, and Development. In order to begin the joining of these two areas, a newly formed mission statement was created:

The Division of Student Enrollment, Engagement, and Development focuses on students first. We are committed to the personal and holistic growth of every individual from prospective student to alumni. The Division works collaboratively to provide opportunities that build and foster inclusive communities on campus and beyond.

We have hired a new vice president to run this division. Dr. Kevin Hearn will be joining Westfield State on July 3. Dr. Hearn's dedication as an experienced steward of higher education will play an important role as we advance our concept of IDEAS.

I believe that to move our University forward we must have leadership that practices inclusivity through creative collaboration and has the ability to effectively motivate staff through positive, fair, and accurate feedback.

Continuing our structural leadership realignment, as we begin our search for a permanent provost, Dr. David Caruso will become Temporary Provost and Vice President of Academic Affairs on August 1.

Program review

I have charged two campus leaders with reviewing our current graduate degree programs and proposing ideas for the future. Westfield State faculty members Dr. Robert Hayes, and Dr. Kimberly Tobin will organize a committee to review our current programs and bring their collective experience to this work to address development in this area.

We have engaged education technology consultant Collegis for an Enrollment Growth and Technology/Process Assessment to better understand how these components align with our institutional strategies and enrollment growth objectives. It is clear from their observations that we have work to do, and we are beginning to make adjustments based on recommendations.

Westfield Worldwide

A new initiative, Westfield Worldwide, is planned to launch in Fall of 2023 in response to impending demographic shifts and the need to create long-term solutions for sustained revenue growth through leveraging national and international markets. Further, the University is building an organizational structure to support adult learners, early college partnerships, and more robust online undergraduate and graduate programming. Westfield Worldwide will be responsible for creating partnerships with area high schools for early college programs focused on the health sciences and providing certifications that will support workforce development and pathways to the University. In addition, Westfield Worldwide will use online technology to connect to adult learners wishing to return to college to complete degrees or upskill to move forward in their careers. Investment in a new Customer Relations Manager system, SLATE, will assist in targeted marketing efforts for this adult population, as will continued support for focused, responsive digital outreach.

Expanding offerings

In addition to a concentration on traditional, college-age students, the University will also focus on populations interested in certificate programs, credit for prior learning, alternative and flexible start dates, and shorter completion times for academic programs. Establishing strong partnerships with area school districts, community colleges, and local businesses to support initiatives that are connected to the needs of the region will be hallmarks of the success of Westfield Worldwide.

STUDENTS

Students are at the center of everything we do. Spending time speaking and engaging with our students is very important to me. Student organizations and clubs often invite me to pizza parties

or other social events, and I always do my best to attend. These interactions build factors of trust and camaraderie. Our students are smart, funny, and curious and I am consistently impressed with their knowledge of the world. In these settings we learn from each other in casual, relaxed environments. Sharing stories and experiences with our students reminds me why we are all here. While continuing to fortify systems and programs to advance their education is always in the forefront, I realize we must, of course, continually focus of their health and well-being.

Healthy minds

In order to create a holistic approach to mental health on campus we have partnered with the JED Foundation. JED is a collaborator with institutions of higher education to help to develop, implement, and evaluate a comprehensive plan for supporting the mental health of students. In year one of this four-year commitment, we completed a campus-wide baseline assessment and had 468 (11.5 percent) of our student population complete the National Healthy Minds Survey. This survey is administered out of the University of Michigan's Counseling and Psychological Services and provides us with national comparisons of college students' mental health with all colleges and universities that completed the survey during that year. With the information from the baseline assessment and the Healthy Minds Survey, we will work with JED to create a four-year strategic plan that will help us to evaluate clinical and programming needs.

Fresh Check and suicide prevention

Fresh Check Day is a creation of the Jordan Porco Foundation. The Foundation describes Fresh Check Day as "an engaging and uplifting mental health promotion event for colleges that features interactive booths, a festive social atmosphere, and exciting prizes and giveaways." Nearly 200 volunteers were trained and engaged at Fresh Check Day, and approximately 320 people were in total attendance. Fresh Check Day also engages area vendors, which gives the greater community an opportunity to witness our students becoming leaders and engaged citizens. We continue to build and make enhancements to this important event.

Early education/Westfield Promise

The importance of early exposure to college curricula cannot be overstated. Data has consistently shown the value of investing in early education programs. According to state statistics, in 2019, approximately 76 percent of early college students enrolled in college after graduation compared to 55 percent of their peers who did not participate in early college.

Forty-eight students from Westfield High School and 48 additional students from Westfield Technical Academy (WTA) signed up for the Westfield Promise early college program this year, double last year's amount. Many of these students are the first in their families to attend college. Governor Maura Healey's and Lt. Governor Kim Driscoll's FY24 budget proposal includes nearly \$47 million for Early College and Innovation Pathways, a \$14.4 million increase from FY23. We will continue to work to fortify and expand this relevant, necessary, and important program.

Enrollment

The Office of Admission had some successes this year in meeting our FY23 goals. To start, the incoming class for Spring 2023 exceeded our total goal of 90 students, with 24 first-year students and 74 Transfer students joining the class. While not overly large, it was our largest Spring cohort since before the pandemic.

We are currently on track to see the incoming transfer class enroll at a rate of 33 percent diverse students. This would match our total from last year. Additionally, our current transfer student numbers show that 12 percent are coming from out of state, up from last year.

Our new first-year student target is dramatically lower than where we planned to be. Applications were lower than last year, which was expected. With efforts focused on summer melt, we are hoping to land around 740 students by the time we get to census. October 2023 would result in the lowest enrolled first-year class in more than twenty years.

I have established enrollment growth as one of our highest priorities for the institution as we begin preparations for a new strategic plan.

In February I charged the Presidential Advisory Committee for Enrollment Management to create a new charter that charged the Committee with developing a four-year plan. The new Strategic Enrollment Management Plan includes objectives:

- *Develop a comprehensive four-year plan for admission, enrollment, and retention for undergraduate and graduate students.*
- *Support the University's efforts to enroll a diverse population of students by assisting in the creation of an enrollment plan and defining key metrics for success.*
- *Outline strategies to improve access and affordability at Westfield State University.*
- *Review and provide recommendations for guidelines on student billing, student holds, and communication.*
- *Develop effective enrollment forecasting models for the University and centralize enrollment data.*
- *Recommend strategies and modalities for academic programs.*
- *Continue to review all relevant policies related to recruitment and retention.*

NECHE CAMPUS VISIT

We have provided an institutional response to the final report of the Evaluation Team prepared for the New England Commission of Higher Education. We have identified areas of improvement from our self-study and have started making improvements in specific areas.

Strengths identified in the final report include:

- A student commitment to the success of the campus and their continued desire to be involved in all aspects of the campus life;
- Faculty and staff genuinely care for the institution and students;
- Westfield State is financially accessible;
- Unique academic programs are offered, including Physician's Assistant, Music Therapy, Sports Medicine, and others;
- A clear focus on teaching and advising and admirable retention and graduation rates;
- A long-time commitment to providing opportunities for students in the local urban areas to access Westfield State (Westfield Promise Program, Urban Education Program);
- A transparent budget process and sound financial management; and
- Increasingly effective civic relations with the City of Westfield and across the region.

The team also identified several areas for improvement, many consistent with weaknesses recognized in the University's Self-Study. These include:

Concern related to release of our new general curriculum in the fall of 2024.

While General Education Reform has been slow on campus, in the past two years, the Special Committee for Reforming General Education (SCORE) has accomplished more than any other attempt at this work at the University. SCORE has successfully seen a general education statement, broad learning goals, a structured integrative model of general education, and learning outcomes approved by campus. The campus is ready and energized by the work of SCORE, and SCORE has proposed a comprehensive timeline to demonstrate how we will achieve a fall 2024 rollout of the program.

Assessment of Student Learning.

The Office of Assessment and Accreditation (OAA) and the Director of Assessment and Accreditation position were created to further provide dedicated support. With the creation of a new office with a dedicated budget and a director whose primary job responsibility involves moving the institution forward in terms of assessment of learning outcomes, we are confident that progress will be made. Recent work of that office has yielded updated formats for annual reports for academic department and academic support services, which have more emphasis regarding learning outcomes, corresponding assessment plans, and progress on execution.

OAA will be a source of counsel, resources, and information for all areas of the University with respect to accreditation, supporting both programmatic and institutional accreditation.

Recognizing there are many non-accredited programs on campus, OAA will also support them in regular program review and improvement efforts

Student Success Achievement Gap

The visiting team's alert about an increasing gap in achievement between students of color and white students is of considerable concern to Westfield State University. Recent changes in enrollment impacted by the pandemic and turnover, will necessitate a new approach to monitoring serving students of color populations. I have appointed a new Temporary Provost and Vice President for Academic Affairs and a new Vice President for Enrollment Management and Student Affairs. These two roles will partner to seamlessly coordinate academic and social support networks on the campus. For example, long-standing programs such as Urban Education and TRIO will be tasked to coordinate data and programming with Academic Advising, CARE (Office of Retention), and functional areas in Student Affairs. We recognize that an increase in health-related issues for students and barriers with financing an education persists. The use of data, assigned advisor groups, and regular case reviews will be important in addressing the achievement gap issue.

CONCLUSION

The pandemic has peeled back layers of society to reveal inequities in many components of our culture. While the damage from the pandemic is still not completely understood, our students will take on roles of foundation builders, addressing the future needs of an ever-changing and evolving socioeconomic climate.

It is our role as educators to help guide these individuals to effectively tackle this critical task. Our future depends on students who will become leaders and decision makers.

The next stage of growth at Westfield State University requires strong community engagement and developing close relationships with external constituents. Pursuing this goal through educational innovations, collaborative partnerships, and translational research will be critical toward making Westfield State University an economically solid partner in the community and offer more resources to our students.

For Westfield State to grow and contribute as a community anchor, we must maintain our strong advocacy for the value of public higher education and work towards goals that lead to our relevancy and reinforce our legacy. These focal points include:

■ Increasing enrollments:

- Strongly engaging our students with timely, relevant curricula and extracurricular opportunities for personal growth;
- Improving faculty, staff, librarian outreach engagement; and
- Building on innovative methods for delivering a 21st century educational experience.

■ **Preserving and growing our economic health:**

- Engaging in outreach off campus;
- Making cultural improvements.

Advancing these priorities to ensure the success of Westfield State University requires the engagement and collaboration of all of us – the boards, faculty, librarians, staff, and our students. As president of Westfield State University, I am confident that by using effective motivational techniques, smart staffing decisions, and fair, consistent, clear, and direct leadership our team will ultimately achieve our goals.

President Thompson FY23 Evaluation
Input from Board Members

I. The tone or climate that the President has set for the campus.

- President Thompson has made clear that we must move beyond a sense of complacency and wishful thinking when it comes to ensuring that our campus not only survives amidst growing challenges but thrive in the face of it. Her focus on IDEAS (innovation, diversity, engagement, and advancement), commitment to changing our enrollment strategy to focus on growth opportunities (such as adult and online learners), and emphasis on collaboration across divisional boundaries ensures that Westfield State University can succeed in the years ahead utilizing the resources, thinking, and expertise that already exists on our campus. The campus is now fully aware that we must either ‘get on the bus or get off the bus’ if we wish to continue serving students for another 185 years in the future. The message may not be well-received by all, but it is necessary in order to fulfill our mission.
- Based upon my personal interface with students and some campus members, feedback has been mixed; however, students, in general seem to speak respectfully of the climate set by the president. There have been some comments from students indicating minimal contact with the president, and therefore, are unable to identify her in person even though her media and picture images are available. The president's inaugural year was spirited and held promise for exciting new opportunities for WSU; however, it appears that there have been messages of discord among staff, faculty, and the president that perhaps are leading to an unnecessary campus change (from positive to negative).
- President Thompson has clearly worked to establish relationships with all internal and external stakeholders. She goes about her work in a way that encourages participation, is inclusive and mimics the values of the University. She is visible within the campus community.
- The President has clearly demonstrated that she will be making changes to all aspects of the University based on input from all academic departments. The President has informed everyone at Westfield University that she will address all of the issues that the University is dealing with and that changes will occur during her tenure.
- President Thompson has fostered a climate on campus of being supportive, transparent, and inclusive with all Students, Faculty, and Staff. She began her presidency by participating in a listening tour to hear from many stakeholders including Students, Faculty, Staff, and Community Leaders.
- The campus atmosphere has also improved, from my limited experience, under President Thompson. She has worked to build an inclusive environment on campus, and I feel it has been accepted by our students and benefited their educational experience. While there have been unfortunate incidents surrounding student relations and bullying, I do believe President Thompson has handled the response well and improved trust from students with the administration.

II. The President's communication with the campus and with the Board.

- The President's communications are routine and robust across the campus community. Whether through email, video, public presentation, or other means, the President's message is succinct and welcomed by faculty, staff, and students. Her communications and interactions with organizations on campus, such as the Student Government Association, have been robust and cordial. She is always willing to welcome feedback on major proposals and attend SGA meetings. The President also interacts through natural conversations with faculty, staff, and students regardless of their position or title, whether at student-run events, in the Dining Commons, or in the hallways. She wants to hear directly from each of these groups to learn more about their experiences, find out information she may not be aware of, and determine how best to support each individual. Her visibility on-campus has won her admiration from many students and staff, often jokingly mentioning that you can spot the President in the crowd with her 'sparkly blue hat.'
- Communication with the Board has been mainly through the Chair of the Board. However, the president does provide a president's report during formal board meetings. Communication with the campus community is frequent and keeps the campus community informed of issues and positive strides in her efforts.
- Appreciate President Thompson's tone with the board. She gives space for the board to do its own research and analysis and is open to the board's findings and direction
- President Thompson has activated or continued many forums to engage the campus community in important strategic work like: Innovation Fund Committee, Committee of values-based thought partners and the Presidents Council.
- The President has communicated with the entire college community and has been active in meeting with the students. The President has informed the Board of Trustees with respect to her agenda. She has reached out to every department with her thoughts as to changes she is contemplating.
- President Thompson has effectively and efficiently communicated with the campus community including the Board of Trustees. She is very visible and makes herself accessible to communicate and collaborate among the campus community.
- President Thompson is an excellent communicator to both the campus and Board. I always feel that I know what's happening on campus and, from the communications we receive, I feel that the campus community does as well. I think it's critically important to keep all stakeholders informed and I believe the President does well in this regard.

III. The President's effectiveness as a manager/leader and ability to develop a team.

- Over the past two years, the President has begun to surround herself with more people who are willing to accept her IDEAS framework for the campus. It has certainly not been easy, with some administrators unwilling to support the President in her quest to improve the campus. Such conflicts over the University's future direction have been seen publicly by faculty, staff, and students, and are negatively impacting the campus community. With forthcoming leadership changes and a growing number of faculty and staff buying into the President's agenda, we can expect the President's team to be fully behind her. As such, the President will be able to effectively lead the Cabinet and have robust dialogue. The President also recognizes (as any leader should) when mistakes have been made and corrections need to be discussed. Although she accepted a UEAAC recommendation to merge the day and graduate divisions of the campus, she noted in a Board meeting that although this plan seemed great on paper, it deserved to be revisited given some of the challenges that have arisen since that time.
- More transparency on the criteria and methods utilized to develop specific "teams" would better allow for an informed response to this question.
- There have been some significant challenges in this area. Appropriately she engaged the board in critical matters. A critical component of a leader is evaluating the leadership team and making strategic changes to drive performance and execution. Critical hires - Temp hire of Dr David Caruso and hiring of Dr Kevin Hearn
- The President has demonstrated that she is a leader and manager of the University. In addition, she is developing a team that will address issues that the University has not dealt with. The President is actively hiring additional qualified professionals to assume these responsibilities.
- President Thompson brings a wealth of knowledge and experience as a leader and has demonstrated to be a proven leader as she collaboratively working with her cabinet and staff developed the strategic vision of "Building a Bridge to the Future by Restoring our Health" which supported the entire Westfield State University community during the COVID-19 pandemic. She had the foresight to understand and navigate through those challenging times.

IV. The President's articulation of an agenda and set of priorities (consistent with the University's Strategic Plan) and the development of clear, identifiable strategies to achieve these.

- The President's agenda over the past year has been marked with her signature IDEAS framework (innovation, diversity, engagement, and advancement – aspects that lead to student success). This simple acronym has helped to shape our University's future and allow University administrators, faculty, staff, and students to develop programs that adhere to these pillars. Her desire for grassroots ideas (i.e. via the Innovation Fund) and shared responsibility for aspects of her vision (i.e. enrollment is "everyone's job," not just admissions) is admirable and necessary for our continued success. President Thompson's focus on enrollment growth and academic innovation is consistent with the Strategic Plan, although refined given our post-pandemic realities. The President is working closely with multiple administrative leaders, faculty, staff, and students in developing actionable steps to achieve these aims while at the same time respecting the need for grassroots efforts to develop that will reap positive benefits. Over the past year, numerous proposals developed by faculty, staff, and students have been created without intricate planning by the President herself, but all have been inspired by her strong emphasis on innovative thinking.
- The president clearly articulates an agenda that is aligned the priorities consistent with the university's current strategic plan. It's my expectation that she has given thought to the development of an updated strategic plan that is reflective of her thought process.
- There are many initiatives underway that are an articulation of the President's strategic priorities to increase enrollment, address the findings in the NECHE report and increase engagement with alumni. In my opinion it is early as many of these initiatives are in planning stages or initially underway. I do think these are the correct activities and actions. We are early to see the results.
- The President has been very clear on what her agenda is. The President has set out her plans to make the necessary changes with the hiring of personnel that addresses the issues that the college is facing and is consistent with the University's strategic plan.
- Under President Thompson's leadership working in collaboration with her cabinet and staff have done in outstanding job of providing timely, accurate clear agendas and priorities in addressing the key factors of managing a university and have identified strategies in enrollment and budgeting as opportunities to increase enrollment and funding.
- I believe that President Thompson has the right mindset for our campus. College students are changing with our culture and their expectations are changing too. Creating programs that cater to not only what our students need but also our region (speaking as a municipal recruiter) is integral to the future success of the university.

V. The President's effectiveness as a representative of the University to the broader community.

- The President has effectively served as a representative for Westfield State University externally. She is well-respected by political, higher education, business, healthcare, and other professionals in New England and across the country for her efforts to positively impact the student experience and 'buck the trend' of enrollment declines at regional public universities like Westfield State. Her interactions with stakeholders off-campus, including legislative leaders and potential donors, have brought in or will soon bring in a great deal of money that will support the student experience, whether through scholarships or mental health support. Her routine op-eds in The Republican and interactions with the press (i.e., collaboration on nursing with HCC) have given us great coverage and has allowed us to turn the page on years of past leadership struggles and scandals.
- The president presents as an effective represent of the university as she networks with external community agencies and businesses to garner support for the growth of the university's programs and opportunities.
- The president has done an excellent job building relationships with stakeholders in the local community. Her work with Holyoke Community College and Springfield Technical Community College are valuable links to the community that will pay dividends. President Thompson has also continued to reinforce a solid working relationship with our sister colleges. Her participation on local boards has also increased her visibility and leadership presence within the community.
- The President that no one ever heard of when she was appointed President is now well known in the community of Western Mass. She has worked very hard at reaching out to the leaders of Westfield, both political and business leaders. In addition, she has established herself as a dynamic person in the entire region.
- President Thompson is highly respected in the community, across the Commonwealth, and across the country. She is very motivated and enthusiastic about the University; its mission and we are so fortunate to have a President with her expertise in higher education representing this University.
- Both in my own personal interactions as well as hearing from other community leaders in the region. Highlighting that positive feedback is her intentional tour and bridge building with different organizations around Western Mass following her start with the University.

VI. The President's effectiveness in supporting BHE system-wide priorities including the Equity Agenda (issues of affordability, access, closing achievement gaps, wraparound support services) and post-pandemic response efforts (addressing mental health, response to enrollment challenges, effective use of ARPA funding).

- The President is keenly aware of the challenges facing students post-pandemic and has engaged with internal and external stakeholders to fulfill the Equity Agenda as prescribed by the Board of Higher Education. Her partnerships with internal groups to put on events such as the STEAM Workshop in early June 2023 with Springfield Public Schools students as attendees demonstrates her willingness to assist in recruiting non-traditional populations. Given her previous experience working in healthcare and being a health policy leader, President Thompson has been instrumental in working to improve the mental health of students at Westfield State. She has engaged with State Senator John Velis to present a robust proposal for mental health support both at the University and the Commonwealth at-large. She continues to work diligently on improving mental health services on-campus pending greater financial support from the Commonwealth. Finally, the President has demonstrated the urgency of increasing our enrollment. She has made it clear that increasing enrollment is not just the goal for the Office of Admissions, but all stakeholders – a message that may not be universally well-received but is certainly needed. Her emphasis (in tandem with former Vice President of Enrollment Management & Student Affairs Dan Forster) on targeting adult learners and online program expansion is the right track to move forward on, and I hope that the wheels will begin to turn faster in this area. Progression has been slow, but steady.
- There remain challenges that must still be met to fully effectively support all areas of the BHE equity agenda. WSU's affordability and access stand out as a strong feature of the effectiveness of one of the BHE's equity agenda. WSU/president have placed great emphasis in this area in an attempt to increase enrollment of a cross-section of students, making higher education opportunities accessible. However, there is much more work to be done to realize the president's effectiveness in closing the achievement gap, retention and graduation rate of white students as compared to other students of color. The president's post-pandemic response efforts and communication the crisis is to be commended.
- My answer here is similar to the comment made regarding articulation of priorities and an agenda. Many initiatives are underway. I believe they are the correct actions, and she has interjected them with significant energy and enthusiasm. I also believe she is allocating the appropriate resources to these efforts. It is early to see the impact of these initiatives.
- The President is addressing all of the B.H.E. priorities as it relates to mental health, equity agenda i.e.: affordability by increasing student aid, access based on diversity, closing achievement gaps and wraparound support services. Enrollment challenges have been a priority of the President and has been on every one's radar screen in her administration.
- President Thompson and her cabinet have done a wonderful job in addressing all the areas listed above by working together to find practical solutions to the many challenges that were faced over the last 2 years.

Other comments:

- Overall, I believe President Thompson is leading a turnaround. The enrollment issue is a national issue. It requires significant efforts in a number of areas. From my vantage point President Thompson recognizes this and is leading the University in the correct direction. I have faith in what I have seen thus far. She is doing a better-than-expected job at this time.
- She has set the tone for building bridges and continues to demonstrate this message through her actions. President Thompson has strong communication and listening skills. She puts a lot of effort into meeting with various constituents (both internal and external) and listens to what they have to say. Whether it's through open office hours, town halls or 1 on 1 meetings, President Thompson's strengths lie in her ability to listen and relate to people at all levels. One area of opportunity is to encourage others to do the same. Encourage more open dialogue from all levels of leadership (whether coffee/chat sessions, open office hours, etc.) so that as a community, others are seeking and hearing the feedback more regularly and we can continue to create a culture of transparency and open dialogue across the campus. President Thompson shows courage when faced with difficult situations and leans in to address them. We've seen this demonstrated several times over the past year whether it be student, strategic or staffing related. She asks difficult questions, but more importantly, listens and makes decisions based on facts versus popular opinion.
- In her short tenure at WSU, President Thompson has made measurable progress on nearly every of the areas where we were asked to provide feedback. Her successes are many. For that reason, I will highlight only a few of the areas where I feel she has been exceptionally effective:
 - President Thompson is a **visionary leader**, who has been effective in initiating change at the University. She has a **clear vision** of the future, has **communicated** it clearly, and has had success in **setting a new direction** for the organization. She has the **courage and confidence to take risks** and try new things, while also **inspiring** the team to do the same. Her themes (building bridges, IDEAS) allow her to effectively communicate her vision to the Board; her cabinet; the faculty, staff, and librarians; and the university community as a whole.
 - While the University faces some challenges (prominently among them declining enrollment and the resulting financial strain), President Thompson has approached these challenges with an **optimistic outlook**. You cannot cut your way to prosperity, and President Thompson has been successful in **promoting creativity, innovation, and new ideas**. Her Innovation Fund is just one example of the many ways she has encouraged others to adopt this same mindset.
 - The President has been successful in **building collaborations** both within the University, and as well with the broader community. The examples of this are too numerous to mention, but I believe that the time and energy that she has personally committed to "bridge building" has improved the standing of the University among many, many constituencies.
- President Thompson's job performance has been exceptional as she has had to reconstitute the University, by taking the time to listen to stakeholders, guiding the

direction of the mission and vision for the University working collaboratively with our Faculty and Staff to ensure the success of our student body.

- Overall, my experience with President Thompson is extremely positive. I am excited for the opportunity to work with her and look forward to seeing what the future brings.

Dr. Linda Thompson Evaluation: A Leader and Visionary

In a short two years, Doctor Thompson changed the tone and temper of the campus. It is evident that the campus is energized and has a much better environment for all, especially our students. All indications lead us to believe that the students respect and value the energy and time she is spending with them. She is present throughout the campus, whether it is through athletic events or a variety of student activities. She is known and recognized by students. Her free and open office hours where students, faculty, and campus staff can come in, sit with her, and express their concerns, ideas, and challenges to her freely. Doctor Thompson has done the same externally. She is known throughout the community in Westfield and surrounding areas. Her trips to DC, Florida, California, and other locations all have been with a singular purpose: to promote Westfield State University and its potential. She has initiated team building programs such as the one at The Ranch last summer. She is a bridge builder and a uniter. Her initiatives within campus have been positively met by most. She has not been able to please all but has done so for a significant portion of the campus, unions, students, and faculty. Certainly, there are pockets that have disagreed with her and her vision. That is very natural and expected. Change is difficult. Doctor Thompson has recognized and demonstrated this by presenting to the campus initiatives such as IDEAS and INNOVATION FUND. Doctor Thompson has shown a path to secure more grants, initiate new programs, and certainly, the possibility of downsizing or eliminating programs that do not attract today's students. She recognizes that in addition to our 18–22-year-old traditional students, there are other non-traditional students that can join our university for new and innovating programs. She realizes our values and traditions yet sees the need to expand concentration on STEM and Health Sciences. That is a sign of a visionary leader.

Doctor Thompson has followed up with most of the UEAAC initiatives. Although that platform was not shaped under her leadership, she has followed through with actions. Formation of JEDI and hiring a Vice President for that division is a clear example of her commitment. Doctor Thompson faced the enrollment challenge head on. That is the number one priority for the campus. She realized that enrollment is not a singular division responsibility, rather, a team effort. Hence, increased participation from all walks of life on campus. She recognizes that sports, art, music, and theater have a significant part in today's learning environment. Additionally, having the AD on cabinet was a significant decision on her part.

Has Doctor Thompson faced challenges? Absolutely. However, she has not walked away from them, rather, she faced them head on. Doctor Thompson communicated the state of mental health on campus. Both on the student side and faculty/staff side. She has dealt with these matters effectively. This is one area that Doctor Thompson has been most effective and her leadership evident. Doctor Thompson demonstrated that she is a team builder. She recognizes people's strengths and weaknesses. She works with them. She gives them the opportunity to express themselves freely and without fear of retribution. However, she has had pushbacks in one particular area, and she is dealing with that effectively.

Has Doctor Thompson done what BHE expects? Doctor Thompson worked hard and deftly to advance that cause as well. Keeping the university affordable and equitable is very evident. Her encouragement of staff and others to attract a diverse student body is apparent. As the state is looking more and more toward performance-based funding, the university must turn its financial and diversity fortunes around.

Doctor Thompson communicates with the board well. She participates in all committee meetings and meets with board leadership regularly. She respects the board as an overseeing authority and follows through with decisions. She articulates her vision and priorities well for the board.

Change was needed. Change was the only way Westfield State University would survive and Doctor Thompson has tried to communicate that. Doctor Thompson is the catalyst we needed for that change.

Opportunity for Improvement:

Doctor Thompson articulates her vision well. She has ideas; she is a visionary. These are all great traits for a strong and effective leader. However, great leaders can continually expand their horizons. One area that I would recommend growth in is communication. One cannot communicate enough. My recommendation for OFI (Opportunity for Improvement) is more regular and direct communication with the campus as a whole and the Academic Departments. I fully recognize the challenges she faced with the previous Interim Provost. I think Doctor Thompson might want to consider participating in more of those settings as well. The Academic Departments need to hear from her directly. I am sure that with a new Temporary Vice President in place, this will happen with greater ease and frequency.

I highly recommend formation of a think tank or using president's council or a similar fashion to set the initiatives for new programs to consider funding, space availability, feasibility study, student interest and other related issues including a forecasted budget.

My other recommendation would be for Doctor Thompson to set priorities and personal (University Wide) goals for each of her direct reports and track progress toward achieving those goals. Some may need more development and nurturing than others. Some younger and maybe less experienced leaders would benefit greatly from that type of coaching and counseling. I have seen Doctor Thompson recognize talent quickly and nurture that talent to bring them to their full potential. I encourage her to do more of that.

I respect Doctor Thompson's work ethic, vision, diligence, intellect, and efforts. She is exactly what we needed as a leader of this campus after many challenging years. She has transformed the campus. She is hard at work to advance the cause of this university. She is a healer that is building a strong team around herself. People who she can trust and ask for advice. She has faced challenges. She has listened to the oral audit reports on the university and taken action to resolve those issues. Data based decisions, multi-year financial planning, eliminating uses of reserves, institutional research, achievement gaps and data gathering, having a permanent Provost and VP of Academic Affairs are all part of those recommendations. Doctor Thompson is hard at work to address these issues. I could not be prouder of the fact that we have Doctor Thompson as the President of Westfield State University and will do all in my power to help her succeed.