

MA Board of Higher Education Performance Review

Commissioner Noe Ortega

February, 2025

To: Commissioner Ortega

From: BHE Chair Chris Gabrieli

On behalf of the Massachusetts Board of Higher Education (BHE), I offer the following review of your performance as Commissioner over calendar 2024. We have relied on your self-evaluation submitted in January, 2025 as our starting point.

Last year, we all agreed to a transition plan on how the Board would work with you to set goals for each year and then provide a timely review on that. Going into last year's January retreat, we agreed that the future approach would be far more centered on a handful of vital strategic goals for the Board and Department and your performance on helping meet those goals. The year 2024 was our transition year including the time to accomplish the work needed to agree on the set of top priority strategic goals, starting with draft ones that were discussed at the January, 2024 retreat. This did proceed throughout 2024 culminating in formal Board endorsement of two of them at our January, 2025 retreat. We are very pleased to be on track to complete that changeover for calendar 2025.

While the goals adopted for calendar 2024 were transitional, we are delighted that you could use them to make clear to us the key objectives you sought to accomplish in working with us, the DHE, the 29 public colleges and universities of the MA public higher education system and the many other key stakeholders of our field.

I want to summarize by saying – the Board of Higher Education applauds your excellent work in 2024 both to meet our current goals and to set up the BHE, DHE and public higher education system for future success. Calendar year 2025 will be a pivotal year for further deepening both the capacity of the DHE to meet the ambitious goals we are all setting together, and to weather the many challenges facing higher education while seizing the key opportunities at hand. We see you now after two years here as a well-established leader in our Commonwealth who has demonstrated to us and every stakeholder of our system that you bring a great mix of values, experience, energy, adaptability and urgency to the important ends and means we are pursuing. We are glad you are at our helm!

Looking Back

Following your lead, this section of your review will match up to your four named initial goals.

1. Establish Multi-Year Top Priorities and Near-Term Action Agendas

We are delighted to have three clear strategic goals defined and agreed upon. As you note, the Financial Aid and Student Success goals remain those approved by the Board under the SHEF work approved in December, 2022. The ongoing CHEQA Commission represents our primary locus for working to refine those goals with an expectation of refreshing them in 2025 at the BHE/DHE level.

We are very pleased that the BHE and DHE could agree on two more very important priorities that were endorsed formally at the January, 2025 retreat – specifically, the Innovation and Economic Mobility strategic priorities. We look forward to the Public Good priority coming along in the future. Combining these four strategic priorities – Financial Aid & Student Success; Innovation; Economic Mobility; and Public Good – we can imagine years of important work ahead that should lead to important gains at many levels including towards our overarching Equity Goal.

We are particularly pleased to now have 18-month, near-term goals established for Innovation and Economic Mobility that ought to be central to the DHE and BHE and to your leadership. We believe they are specific enough and important enough to provide clear milestones to be achieved in service of the broader five-year goals for each priority. We know that timing may shift and content of some goals may need refining but we also hope that you, the DHE, and we on the BHE as well, can see these goals as our chosen directions and therefore accountability. We look forward to reviewing substantial achievement of, and progress towards, these by the end of this calendar year. It will be a delight in 2026 to agree on a next group of near-term, annual goals for these as we pass through the initial set of benchmarks.

2. Improve Department Engagement with the Board

BHE members have long expressed their desires to be of greater value to the mission of the Board and Department including through better Board processes. The Chair has stated his own commitment to this and you have embraced that goal as well, for which we are all grateful.

We wholeheartedly agree with you that the addition of the Commissioner's Spotlight as a major element of all BHE meetings and our kickoff segment has really allowed us to better understand your priorities and work. Your inclusion of key DHE staff members has also given us some added collective visibility into them. And your work with the Chair to reduce, as much and appropriately as possible, Board meeting time allocated to the necessary but non-strategic ministerial functions of the BHE is welcome.

The added frequency and style of retreat meetings has also allowed Board members to dig in on the most strategic matters we face collectively.

The effective implementation of Task Forces aligned with the named top strategic priorities will be essential to allowing Board members to participate constructively in the formulation of strategy and the setting and implementation of action items advancing those priorities. This will also allow Board members, to the degree they have time, interest and expertise, to understand key issues better and get to know and work with key senior members of your team.

Informal contact with you as Commissioner is also important and we appreciate your high energy and availability. Multiple BHE members have positively noted your openness, your inclusion of the broader team and your vigorous and effective outreach to the broader stakeholders and community.

3. Improve Efficiencies and Output

While as Board members we are more engaged on the strategic and policy levels, we agree that the “CEO” of the DHE - the Commissioner - should take responsibility for ensuring that the Department is an effective and efficient operating entity. We appreciated in your self-review last year a candid take on the challenges on that dimension of the DHE that you heard about and found on your arrival and are glad to hear that you believe there has been progress.

We encourage you to continue to make this effort and investment even as things like the hiring freeze clearly made that harder for a while. We also wonder whether there are objective metrics such as “net promoter score” 360 style measures that could be captured to help you, your team and us track progress.

4. Raise the Profile of the Board and Department

We agree that at a time of great challenges and needs for effective higher education in our Commonwealth, the DHE and BHE need to be leaders. We cannot have much impact if other stakeholders, opinion leaders and policy and decision makers do not hear us or value our participation. Our work requires a smart balance between consensus building and bold leadership and pioneering as well and that requires trust and confidence both from within and beyond the higher education delivery system.

We commend you on your work to connect the DHE and BHE efforts more frequently and notably with key outside audiences and leaders. The BHE and DHE should be a hub of dialogue and thought leadership and your efforts are bearing fruit. While our duties are to the Commonwealth, we agree that connectivity to national leaders and efforts holds high value to us and also meets our state’s desire to be a leader in this most critical area of higher education.

Looking Ahead

We embrace the goals you lay out and are pleased that they now are mostly focused on the strategic priority areas we have jointly identified and specified. These include clear action item deliverables for 2025 and into 2026 and so we look forward to hearing about progress against those plans as the core part of your calendar 2025 self-review.

Some of the priorities for 2024 (e.g. DHE engagement with BHE and profile of BHE/DHE among civic and governmental leaders) will logically be embedded within the work towards the strategic priorities but we hope you can bear them in mind over the year and report back on those aspects as well.

The coming year may prove especially noisy and challenging in light of early developments around the new federal Administration. The DHE (and where appropriate the BHE) may need to be reactive, adaptive and agile but we must not drop our commitment to the longer-term fundamentals of the Strategic Priorities. We count on you to keep building the team, culture and capacity at the DHE and with us to deliver on our shared ambitious vision of higher education as considerably more effective and equitable in its impact on student participants, communities and the economy and society of our Commonwealth.

Summary

We thank you and congratulate you for another outstanding year of service. The huge gains in financial aid available to our students are a generational advance and accomplishment, and you have played an important role in advancing and stewarding them. You have also patiently and effectively built bonds both within our system from the BHE to the DHE to the campuses and stakeholders as well as outside of our system with civic and governmental leaders. Even in challenging times, you have added significantly to the leadership team and looked at how to best organize for our ambitious future aspirations.

You have brought admirable skill, energy, karma, humor, and values to the work at hand. You are both humble and team-oriented and purposeful and ambitious. You have brought us to a place of high consensus on what we want to achieve and how we want to get there. That now demands high quality work to achieve the goals. We know you relish that and we want to work closely with you and your team to bring these to fruition.

Onward!