

**BOARD OF HIGHER EDUCATION
REQUEST FOR BOARD ACTION**

NO.: BHE 26-41

BOARD DATE: February 10, 2026

APPROVAL OF COMMISSIONER'S ANNUAL PERFORMANCE EVALUATION

MOVED: The Board of Higher Education hereby approves the attached Annual Performance Evaluation of Commissioner Noe Ortega.

The Board commends Commissioner Ortega and his team for their accomplishments and work, and thanks the Commissioner for his service.

VOTED: Motion adopted by the BHE on 2/10/2026.

Authority: Massachusetts General Laws Chapter 15A, Section 6

Contact: Constantia T. Papanikolaou, Chief Legal Counsel

Background

Pursuant to its enabling legislation, the Board of Higher Education (BHE) is authorized to determine the Commissioner's salary, subject to appropriation. See M.G.L. c. 15A, § 6 (stating that "the Commissioner shall, subject to appropriation, receive such salary as the [BHE] may determine"). In executing this statutory responsibility, the BHE's annual performance review of the Commissioner provides the context and supporting justification for any BHE-approved compensation adjustments for each fiscal year.

During its retreat on January 13, 2026, the full Board of Higher Education (Board) met and received a presentation from Commissioner Ortega which included a summary of his accomplishments to date, along with key deliverables going forward, related to the BHE's strategic priorities, as approved in January 2025. See [BHE 25-29](#) and [BHE January 13, 2026 Retreat, Commissioner Presentation](#).

The Commissioner also prepared a written self-evaluation, which was forwarded to the full board on January 24, 2026. [\(Attachment A\)](#). Based on the retreat discussion and all materials received to date, Board Chair Chris Gabrieli prepared a draft performance evaluation [\(Attachment B\)](#) for BHE review and approval. The attached, draft performance evaluation also includes performance expectations for the Commissioner moving forward.

Historically, the Board has set the compensation of the Commissioner after receiving relevant data points, including guidance from the Executive Office for Administration and Finance (ANF) on potential cost of living increases for state employees, including Department of Higher Education staff. To date, ANF has not issued such guidance for FY2026. Accordingly, it is Chair Gabrieli's recommendation to wait for such ANF guidance before recommending a salary adjustment for the Commissioner's performance.

Attachments

26-41a_ Commissioner Ortega Self Evaluation

26-41b_ BHE Draft Annual Performance Evaluation of Commissioner Ortega

COMMISSIONER'S SELF EVALUATION

Overview

In January 2025, the Board of Higher Education (Board or BHE) approved four Strategic Priorities in service of the Department of Higher Education's (Department or Agency) overarching Equity Goal. The development and adoption of these priorities represented a deliberate shift toward a more focused, outcomes-driven approach to statewide higher education leadership. Collectively, the priorities serve as a roadmap for a multi-year, multi-pronged strategy to improve postsecondary access, completion, and career success for learners across the Commonwealth—particularly those who have been historically least well served by public systems of higher education.

The Board's four Strategic Priorities are:

- **Student Success and Financial Aid** — Supporting and advancing student access and success through well-designed, sufficiently funded, clear, and consistent financial aid and student success programs
- **Economic Mobility** — Increasing the economic benefits and upward mobility associated with postsecondary participation
- **Public Good** — Improving alignment between public good outcomes and postsecondary education opportunities
- **Innovation** — Facilitating and fostering high-impact innovation throughout the public higher education system

As Commissioner, I viewed the establishment of these priorities as a critical opportunity to bring greater clarity, direction, and coherence to the Department's work, while also creating more structured opportunities for Board engagement in the agency's ongoing efforts. Rather than pursuing a broad or frequently shifting agenda, we instead committed to a limited number of high-impact focus areas requiring sustained attention over multiple years. This approach reflects a core belief that meaningful systems change—particularly when led by a statewide coordinating agency—requires consistency, empirical grounding, and disciplined execution.

Alongside adoption of the Strategic Priorities, the Board and Department established a shared expectation of annual accountability. While the priorities themselves were not intended to change year to year, the Board and the Department established annual goals and deliverables to ensure momentum, alignment, and clear milestones for progress. It is my intention to provide the Board with regular updates on progress from the prior calendar year and to engage members in setting shared expectations for the year ahead, reinforcing a culture of continuous improvement rather than episodic review.

The sections that follow provide a self-assessment of my progress in advancing the Board-approved Strategic Priorities during the period of January 1, 2025, through December 31, 2025. I have also included an outlook of goals and deliverables for 2026 to inform the Board's evaluation of my performance in the coming year.

Progress Summary for 2025

Since adoption of the Strategic Priorities, the Department has made meaningful progress across multiple focus areas. As reflected in the sections that follow, some initiatives and deliverables reached completion during 2025, others remain actively underway, and a small number were deprioritized as capacity, timing, or external conditions evolved.¹ This variation in progress reflects both the complexity of the work and the Department's effort to balance the Board's Vision with a changing political and legal landscape, as well as competing operational demands. It is also important to note that any adjustments to deliverables during the year were made in consultation with the Chair and the Board to ensure continued alignment, feasibility, and effective use of staff capacity.

Before continuing with this *progress summary*, it is important to call attention to one notable outcome of the inaugural year of the Strategic Priority framework. The Board's explicit focus on a limited number of priorities strengthened the Department's ability to move beyond a primarily compliance-driven posture. The priorities provided a practical framework for pursuing high-impact initiatives while continuing to meet all statutory responsibilities and respond to emerging issues. This balance has been particularly evident under the Board's Innovation priority, which has served as a catalyst for kickstarting small pilot initiatives aimed at informing systemwide improvements. From my perspective, sustaining this balance—between compliance and innovative transformation—remains essential to improving operational stability while advancing longer-term, equity-focused reform.

Economic Mobility

Significant attention was devoted to the Economic Mobility Priority in 2025. This priority reflects a long-term commitment to better understanding—and improving—the economic outcomes associated with postsecondary education for Massachusetts learners. It also provides a structured way for the Board and Department to respond to an ongoing national dialogue regarding the value of higher education and its role in promoting economic upward mobility.

This priority also builds upon work that has been under development at the Department for several years and positions the Commonwealth to more clearly articulate the earnings advantages associated with postsecondary credentials relative to high school attainment alone. Additionally, during this period the Department, through its State Data Governance Committee, devoted a considerable amount of time working with individual campuses to ensure the accuracy of the earnings metrics and identify areas where there may be a need for future improvements as well.

¹ In 2025, the Department paused its work on the Public Good priority due to a limitation in resources and human capital and redirected its efforts to launching and standing up the remaining three board priorities. This work will resume in 2026 pending the acquisition of resources and personnel.

The goals and deliverables approved by the Board sought to strengthen measurement, align policy incentives, and broad departmental infrastructure and capacity to support economic mobility at scale—particularly through work-based learning strategies. **Table 1** provides a summary of progress of the Departments work on the Economic Mobility priority.

Table 1: Economic Mobility Priority	
Measurement and Transparency	A major milestone was the successful integration of earnings metrics into the Performance Measurement and Reporting System (PMRS), fulfilling a long-standing Board objective first adopted in 2018. In addition, the Department published an Earnings Commentary and released it in collaboration with Governor Healey, elevating economic outcomes as a core indicator of postsecondary success and reinforcing public accountability. Work on the Earnings Commentary is ongoing to further document and clarify the underlying methodology to ensure transparency, consistency, and confidence in how earnings outcomes are defined and reported.
Policy Alignment	The Department conducted a comprehensive policy gap analysis to identify opportunities to better align Board and Department policies with the Commonwealth's economic mobility goals. This analysis will also help inform future discussions about how policy levers can more intentionally support workforce-aligned outcomes while preserving institutional mission and access.
Infrastructure and Practice to Advance Economic Mobility	At the practice level, the Department advanced a systemwide analysis of non-degree credential pathways and work-based learning (WBL) opportunities in partnership with several colleges and universities. This work has already produced tangible outcomes, including the expansion of cooperative education as a high-impact experiential learning model. Through partnerships with UMass Lowell and three state universities, the Department supported the development of new cooperative education programs scheduled to launch in 2026, representing concrete progress in strengthening connections between postsecondary education and employment.
Adaptive Governance Approach	While the formal Economic Mobility Task Force was ultimately deprioritized, this decision reflected a strategic assessment of timing and capacity rather than diminished commitment to the work. Instead, the Department engaged external leaders and subject-matter experts informally to inform direction while continuing to advance core deliverables. This adaptive approach allowed progress to continue while preserving flexibility during early implementation.

Summary

Overall, progress under the Economic Mobility Priority has been strongest in establishing durable measurement practices, advancing policy analysis, and launching practice-based initiatives with near-term impact. While additional work remains—particularly in formalizing long-term incentives and expanding economic success metrics—the foundation now in place positions the Department to deepen and scale this work in the years ahead.

Innovation

Although a good share of the work that informed this priority at the start of 2025 was a result of the investment made by a key funder, the Innovation Priority was designed to strengthen the Department’s capacity to respond nimbly to emerging challenges, test new approaches, and accelerate reforms aligned with equity and student success goals. During 2025, the focus was on moving from concept to execution by securing resources, building internal capacity, launching early pilots, and building toward a sustainable system to uphold the work and efforts of the Department on Innovation. **Table 2** provides a summary of progress of the Department’s work on the Innovation priority.

Table 2: Innovation Priority	
Resource and Internal Capacity Building	A major accomplishment was securing a \$2.1 million grant from Axim Collaborative in March 2025. This investment enabled the Department to establish an innovation function and initiate a national search for an inaugural Chief Innovation Officer and Project Director, laying the foundation for a small, agile team capable of executing innovation work at pace.
Launching Early Pilots	The Department launched multiple pilots that seek to provide impact across all four Board priorities, which include initiatives focused on financial aid, cooperative education, and non-degree credentials. These pilots reflect a deliberate strategy to test solutions in areas with strong potential to improve access, affordability, completion, and workforce alignment.
Building Toward a Sustainable System	Work is underway to integrate the innovation function into core Department operations to ensure it complements—rather than operates separately from—existing responsibilities. The Department is also assessing pilot effectiveness and developing a formal process through which institutions may propose innovative programs that diverge from existing regulations but respond to evolving societal, technological, or workforce needs.
Adaptive Governance Approach	As with Economic Mobility, deliberate sequencing was essential. A formal Innovation Task Force was intentionally deferred to allow staff to focus first on capacity-building and pilot implementation.

Summary

The past year represents a successful transition from aspiration to action. With funding secured, pilots launched, leadership recruitment underway, and foundational processes established, the Department is now positioned to evaluate outcomes and identify opportunities to scale effective innovations statewide.

Financial Aid and Student Success

When the Board adopted its Strategic Priority framework one year ago, specific deliverables for the Financial Aid and Student Success priority were not explicitly identified. This was intentional. At the time, the Board was preparing to launch the legislatively mandated Commission on Higher Education Quality and Affordability (CHEQA), which was charged with developing recommendations to inform the future direction of the Commonwealth's financial aid programs. In parallel, the Board had previously adopted the Strategic Public Higher Education Financing (SHEF) Framework in 2022, which established a comprehensive policy foundation to guide affordability, access, and student success efforts.

Together, CHEQA and the SHEF Framework provided the necessary structure for this priority—allowing the Department to proceed thoughtfully rather than prematurely defining deliverables before the policy landscape was fully shaped. As a result, the first year of implementation appropriately focused on alignment, groundwork, and translation of Board policy into actionable strategy.

The SHEF Framework articulates six guiding principles and five high-level goals centered on affordability, equity in outcomes, institutional stability, transparency, and innovation. Throughout 2025, my focus was on moving this framework from policy intent to operational practice—ensuring that financial aid and student success initiatives reflected the Board's long-term vision while positioning the Department to execute effectively as new recommendations and investments emerged. **Table 3** provides a summary of progress of the Department's work on the Financial Aid and Student Success priority.

Table 3: Financial Aid and Student Success

Advancing Affordability and Access	<p>A central objective of the SHEF Framework is to reduce financial barriers to postsecondary participation. In support of this goal, the Department continued implementation of newly enacted financial aid provisions, working closely with the Executive Offices of Education (EOE) and Administration and Finance (A&F) to deploy resources responsibly and effectively.</p> <p>In parallel, the Department expanded statewide public awareness efforts—most notably the College is Possible and Go Higher campaigns—in partnership with EOE. These efforts reflect the understanding that affordability reforms must be paired with clear communication, so students and families are aware of available opportunities.</p>
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Strengthening Student Success Through Institutional Investment	<p>Consistent with the SHEF Framework's emphasis on institutional capacity, the Department advanced student success initiatives grounded in the Board-adopted SHEF goals and aligned with the recommendations of the Commission on Higher Education Quality and Affordability (CHEQA) Report.</p> <p>Building on this foundation, the Department launched SU SUCCESS 2.0, a redesigned initiative informed by lessons learned from earlier efforts. In 2025, the program moved from planning to implementation: a technical assistance provider was secured, grants were awarded, and an independent evaluation was initiated, reinforcing a commitment to evidence-based investment and continuous learning.</p>
Advancing System Alignment and Cross-Sector Collaboration	<p>Recognizing that student success begins well before college entry, the Department prioritized stronger alignment with K-12 partners. This work coincided with the appointment of a new K-12 Commissioner who shared a commitment to ensuring all students have equitable opportunities to pursue postsecondary education.</p> <p>In 2025, the Department launched a strategic review of Early College and convened an Early College Advisory Group composed of college presidents, district superintendents, the Department of Elementary and Secondary Education (DESE), and the Massachusetts Alliance for Early College.</p> <p>The Department also partnered with DESE to advance FAFSA completion within the high school graduation framework, reinforcing early financial planning and reducing barriers to postsecondary transition. A final report is expected in June 2026 and may inform potential legislation during the current session.</p>
Modernizing Systems	<p>To strengthen transparency and improve the user experience, the Department launched efforts to modernize its financial aid platforms. Although this work is ongoing, it lays a critical foundation for clearer communication, stronger data integrity, and increased accessibility for students and families.</p> <p>In addition, recognizing the need to address operational challenges within the office responsible for distributing nearly half a billion dollars annually, the Department appointed Dr. Santos as Interim Deputy for the Office of Financial Aid. This role focuses on resolving key execution and staffing challenges, ultimately establishing the conditions necessary to recruit a permanent Deputy, and positioning the Office of Financial Aid for long-term modernization.</p>

Summary

While meaningful progress has been achieved—much of which includes ensuring efficiencies with the agency’s core function of distributing nearly half a billion dollars in aid to students—several initiatives are intentionally sequenced for future implementation, including expansion of GEAR UP services, establishment of a SUCCESS community of practice, and preparation for anticipated Workforce Pell implementation in 2026.

Overall, my leadership focus under this priority has emphasized alignment with Board policy, disciplined execution, and cross-agency collaboration. Aligning decisions around this with the SHEF Framework has enabled the Department to move toward a more coherent and sustainable financing strategy that supports students and positions institutions to promote access and grown enrollments.

Looking Ahead to 2026

Looking ahead to 2026, the Department’s work will build directly on the foundations established over the past year, with a continued emphasis on scaling effective practices, strengthening alignment across priorities, and sustaining strong execution. This section highlights key areas of focus for 2026; Appendix A provides a more detailed summary of planned deliverables.

Financial Aid and Student Success

The Department will deepen its partnership with the Department of Elementary and Secondary Education (DESE) to expand early outreach and advising related to state financial aid. Efforts will focus on extending GEAR UP collaborations, strengthening postsecondary planning aligned with new K-12 graduation requirements, and expanding Early College participation while reinforcing program quality and consistency.

The Department will also continue implementation of SUCCESS 2.0, redesigning and strengthening persistence and completion strategies through a renewed commitment to evidence-based practices and continuous improvement. Collectively, these initiatives will align closely with anticipated updates to graduation requirements and expanded integration of FAFSA completion, dual enrollment, and Early College pathways.

Economic Mobility

Under the Economic Mobility priority, the Department will continue to disseminate earnings and outcomes data to learners, policymakers, and key stakeholders, while working with institutions of higher education to strengthen and refine these metrics.

Building on recent progress in work-based learning, the Department will pilot cooperative education (“co-op”) initiatives with select institutions and assess the extent to which these and related models produce more effective, career-connected learning experiences.

Public Good

Subject to the availability of planning resources, the Department will advance the Public Good priority through an environmental scan and literature review to establish a shared understanding of the role of public higher education in serving the Commonwealth. This work will inform the development of both near-term objectives and longer-term, five-year goals.

Innovation

Innovation efforts will continue to focus on piloting and scaling solutions aligned with Board priorities. This includes expanding pathways that reduce time to degree; strengthening work-based learning and career-connected experiences, with a particular emphasis on the co-op education model; expanding strategies for adults with some college credit but no credential; and scaling financial aid pilots designed to improve awareness and application completion.

Organizational Capacity

Recognizing that sustained progress depends on strong internal capacity, 2026 will also include a focus on organizational realignment and resource sustainability. The Department must better align staff expertise with Board priorities, strengthen core operational functions, and improve the identification and deployment of resources to support long-term success.

This work includes both the strategic redeployment of existing resources and continued engagement with key external decision-makers to underscore the importance—and high value—of investing in agency-level people and programs.

Taken together, the 2026 work plan represents a disciplined next phase of work—focused on scale, systems-building, and measurable impact—while continuing to advance equity, affordability, and opportunity for learners across the Commonwealth.

Concluding Thoughts

The first year of implementing the Board’s Strategic Priorities has been both formative and instructive. It required balancing ambition with realism and innovation with the Department’s core functions and responsibilities. Throughout 2025, my focus was not only on advancing the Board priorities and specific initiatives, but on establishing a more intentional way of working with the Board—one grounded in clarity, alignment, and sustained follow-through.

This year reinforced an important lesson: meaningful systems change cannot be rushed, particularly when it involves statewide policy, multiple agencies, and institutions serving diverse learners and communities. In several areas, progress required slowing down to focus on building capacity and the right foundation. At the same time, it is also crucial that we recruit more of our colleagues and stakeholders at the state, local and campus levels to accelerate change and embrace innovation as the pressure and need for higher education to raise performance, effectiveness and efficiency has never been higher.

I am encouraged by the progress achieved across the Strategic Priorities, particularly in strengthening measurement and transparency, launching early innovation efforts, and advancing a more coherent approach to financial aid and student success anchored in the Board's frameworks. At the same time, this year underscored the ongoing challenge of leading transformation within a complex public system—one that must remain responsive to emerging issues while staying disciplined in its focus and long-term strategic direction.

Personally, this period has reaffirmed my belief in the value of prioritizing and narrowing focus to make a great impact. The Board's priorities have provided a necessary structure for decision-making, serving as a roadmap to guide work that is intentional, evidence-informed, and aligned with equity-driven outcomes. They have also created more meaningful opportunities for partnership with the Board, allowing governance and implementation to operate in closer conversation.

As we move into 2026, I do so with a clearer understanding of the Department's strengths, its challenges, and a better understanding of what is needed to reconcile the two. The work ahead will demand continued persistence, adaptability, and collaboration—but the foundation established in 2025 positions us to move from planning to scale, and from early progress to long-term impact.

I remain deeply committed to advancing the Board's priorities and to ensuring that the Commonwealth's system of public higher education continues to expand opportunity, promote equity, and deliver real value for learners and communities across the Commonwealth.

APPENDIX A: Looking Ahead in 2026

Financial Aid and Student Success	<ul style="list-style-type: none"> Pre-Collegiate Marketing and Recruitment: Renew and deepen the partnership with DESE to expand proactive outreach and marketing of state financial aid programs to secondary students. Expand GEAR UP Collaborations: Increase financial aid advising and postsecondary guidance by extending GEAR UP partnerships to additional high schools. Early College: Expand student participation while strengthening the foundation, structure, and implementation of Early College programs. High School Graduation Requirements: Align FAFSA completion, Early College, and dual enrollment programs with new high school graduation requirements. SU SUCCESS 2.0: Redesign and improve persistence and completion for students by reinforcing a commitment to evidence-based practices and continuous learning.
Economic Mobility	<ul style="list-style-type: none"> Earnings Metrics and Reporting: Continue to share earnings outcomes with targeted audiences and key stakeholders to better inform learners about economic mobility and postsecondary success. Work-Based Learning: Develop and pilot initiatives to assess the impact of work-based learning models, such as co-ops, on student earnings and employment outcomes.
Public Good	<ul style="list-style-type: none"> Environmental Scan and Literature Review: Build a robust research base to establish a shared definition and strategic framework for the Public Good priority. Goal Setting: Develop both five-year and 18-month goals to guide and measure progress in this area.
Innovation	<ul style="list-style-type: none"> Innovation and Regulation: Support innovative pathways that reduce time to degree while maintaining quality and compliance. Reengage learners with some college credit but no credential to support degree completion. Financial Aid Pilot: Scale a pilot program that increases awareness and understanding of the financial aid application process.
DHE Imperative: Capacity Building and Resource Sustainability	<ul style="list-style-type: none"> Departmental Restructuring: Restructure the department to better leverage our human capital and more effectively deliver on Board priorities and fulfill core departmental functions. Resource Development and Deployment: Strengthen the identification, acquisition, and strategic deployment of resources to support priority initiatives and sustain an Innovation Hub.

DRAFT

2025 Annual Review of DHE Commissioner Noe Ortega

To: Commissioner Noe Ortega

From: The Massachusetts Board of Higher Education

Date: February, 2026

Summary

The Massachusetts Board of Higher Education (BHE) is pleased to share this annual review of your performance for the calendar year 2025. The review is largely structured around the BHE-endorsed Strategic Priorities and related 2025 targeted deliverables, in keeping with the shared commitment the BHE and you have made to centering our work together on these. We have all read your self-review that is aligned to these frameworks, and this review is intended to build upon that.

In short, we commend you for another strong year of progress and tangible outcomes of value. You have now been our Commissioner three years and we see you as clearly fully immersed and engaged with the diverse and invaluable higher education constellation and ecosystem of Massachusetts. You have set out clear priorities, with our full support, and meaningfully and positively impacted higher education in our Commonwealth. You bring a high level of vision, curiosity, sense of humor, innovation and determination that is crucial to the job, and you work in the spirit of openness and collaboration with all parties.

We confirm our enthusiastic support for the shared commitment to the overarching Equity Goal and the clear and focused four Strategic Priorities in its service. We applaud a number of major accomplishments in 2025 towards those goals and on other fronts as well. We support the 2026 proposed set of concrete deliverables towards those Priorities. And we urge you to work with state government partners and outside potential partners to ensure that we have the resources and alignment at the DHE to sustain and accelerate momentum and progress in 2026 and beyond.

We Endorse Our Commitment to the Equity Goal and the Four Strategic Priorities in its Service

This past year represented the culmination of the launch phase of this approach to our collective work. While the overarching Equity Goal—to significantly raise the enrollment, attainment, and long-term success outcomes among underrepresented student population-- dates back further, we have never been more aligned around both that overarching goal or what the top priorities are to advance it. Not only do we have clear longer-term frameworks for three of the four Strategic Priorities, but we just finished the first year where you and the Department set out for us a set of short-term (approximately next 18 months) deliverables to advance these priorities. You have honestly scorecarded your and the Department's progress against them including some major accomplishments, some works in progress, some deliverables goals changed as we learned more and some misses. This approach represents both impact and accountability in action.

We appreciate how you consistently frame issues within the context of the Strategic Priorities, your work in continuing to advance equity, and your approach of starting every regularly scheduled BHE meeting with a “Commissioner’s Spotlight” has allowed us to understand key activities much better and to get to know key members of the team as well. We feel well consulted on these priorities and deliverables - which does not mean every BHE member agrees on every point but that we have real discussions and reach comfortable consensus. And we find the approach suitably ambitious to the moment in which we find ourselves - one where higher/postsecondary education has perhaps never been more important for individuals and society and yet is also under high pressure to change.

We Applaud Major Accomplishments in 2025

We want the DHE and BHE to take on and accomplish significant actions that can enable better outcomes for our students and that can support and foster growth at our colleges and universities. We also prioritize the Strategic Priorities even as we also expect the DHE to effectively handle the main ongoing statutory duties of the Department and Board as well as address the many issues that emerge over the course of each year, especially in tumultuous times.

On the Financial Aid & Students Success Strategic Priority, we note with gratitude and excitement three particular things. First, you kept our eyes on these important issues and celebrated the progress as well as looked ahead. And the DHE continued to work hard to implement the major new investments in student financial aid that are perhaps the single biggest accomplishment of the Commonwealth in advancing equity as well as fundamental affordability for MA residents attending college. Given the central role of the Department in administering financial aid appropriated by the Commonwealth, continuing to strive for excellence in implementation will be crucial.

Second, the DHE staffed the Legislatively mandated Commission on Higher Education Quality and Affordability (CHEQA) throughout the latter part of 2024 and 2025. This 21-member Commission brought together a wide range of key stakeholders including from the Executive and Legislative branches, from our campuses, faculty, students and unions and from civic, policy and business communities. The process was intensive, multi-pronged and transparent and resulted in a major new policy baseline for our Commonwealth on how we can proceed over the years ahead to deliver on higher quality and affordability. At a time where consensus is very hard to achieve in the public square, you and your team delivered.

Third, and in alignment with both the BHE's 2022 Strategic Higher Ed Financing (SHEF) framework and the recommendations of the CHEQA Commission, you and the DHE are leaning into advancing the policy case as well as working on the infrastructure to scale high-quality student success programs. It is the CHEQA recommendation and this Board's view that nothing is higher priority for achieving the Equity Goal than to build and sustain broad-reaching high-quality student success efforts across all of our colleges.

On the Innovation Strategic Priority, you successfully landed the largest philanthropic grant the Department has received in anyone's memory. The \$2.1 million, multi-year grant from the Axim Collaborative underpins the opportunity for the DHE to launch a full-throated effort in Innovation. Supported by those funds, we are now close to hiring our first dedicated staff including a Chief Innovation Officer. We have also launched three significant strands of pilots in partnership with multiple of our campuses and key outside partners, each of which has delivered value and is providing insight as to potential for impact and scale. More broadly, you have reinforced the commitment to fostering innovation alongside providing regulatory function including through efforts such as Early College, the proposed new Innovation regulations, co-op scaling and education strategies for learners with some college with no credential.

On the Economic Mobility Strategic Priority, the DHE rolled out our first major release of data on the economic mobility impact of graduating from our public colleges. This public sharing of the data through the Performance Management Reporting System (PMRS), as well as its summary and framing in the form of the DHE Commentary released at an event headlined by our Governor, represents a new frontier for our DHE and BHE in embracing the importance of economic mobility as a crucial outcome of our public higher education system. Further, the work on career-connected experiences, particularly co-op spread and scaling (also part of the Innovation priority which is meant to support all other Priorities), offers a new way the DHE can help our colleges embrace approaches that complement their core offerings and may catalyze greater career and economic success for our graduates.

We Salute Your Visible Public Leadership and Your Collaborative Approach

We note and appreciate your optimistic and constructive approach to pushing our Commonwealth's higher education vision and work ahead. As the senior official of our system, your presence at many events, your words at those events and your leadership by word and example matter and we need it and want to recognize it.

More specifically, the BHE also wants to note that you engage with us frequently and thoughtfully and your approach to agenda development with us allows us to feel fully engaged and invested in the vision and goals. Segmental representatives note with appreciation your time and recognition of their special context.

Your ability to represent our field well has led to major new alliances. We cite two here. First, the Axim Collaborative partnership represents one of several examples where key outside entities have responded to your leadership by partnering deeply with us. Second, the highly engaged partnership with new DESE Commissioner Pedro Martinez, initially around Early College but going beyond that as well, bodes well for our state's ability to focus on students, not just silos.

We Encourage You to Maximize and Align Department Capacity to Achieve Our Goals

You note this need in your self-review and we agree. The Strategic Priorities are ambitious, and the challenges in advancing our equity work are quite steep. It will take new ways of doing things, new prioritizations of work streams and new internal capacities and external partnerships to really move the needle. We suggest you think in "zero-based" ways about how we do our work so as to optimize for impact.

We Would Like to Work With You to Broaden Your Review Some Next Year

We agree that the CEO of an entity should first and foremost take accountability for the achievement of the entity's goals. And given our shared commitment to the Equity Goal and the four Strategic Priorities, it is fitting that your self-review aligns to that framework. But we see a few other areas where your unique leadership role suggests that both your self-review and our review process should extend. Specifically, we ask you to work with the Chair to generate insights into and cover three additional topics next year: (a) quality and effectiveness of your relationships with the Board and our key stakeholders including within state government, across

public and private higher education and among civic, philanthropic and community leaders; (b) your effectiveness as a spokesman for higher education in Massachusetts; and (c) your effectiveness as a leader and builder of the Department.

Looking Ahead

The BHE appreciates the specificity of the deliverables to which you commit in your self-review, building on the materials you prepared for the Retreat and discussed with us there. They are ambitious and important. They reflect our shared commitment to the four Strategic Priorities, which are all in service to the overarching Equity Goal. We look forward to hearing about progress over the course of the year and to reviewing progress and refreshing plans in January, 2027.