Measuring Value, Measuring Outcomes, Advocating for Yourself.

Eddie Cullinane
Manager, Governance Affairs
Babson College (Wellesley, MA)
NAPAHE 2024
Value + Outcomes = Impact
Agenda

1. Opening
2. Measuring Impact
3. Advocating for Yourself
4. Activity
5. Closing
Why are you here?

What do you want to change?
About me...
Get involved!
Disclaimer: I am not an expert.
Measuring Impact
Higher Education is Cyclical
Meaningful performance management and self-advocacy is a year long process.
Do you set goals each year?
Start with Goals or KPIs

- Specific
- Measurable
- Achievable
- Relevant
- Time-Bound
Entrepreneurial Leaders Impacting Communities Everywhere

FY24 Critical Few Objectives

- Strengthen Connection of our Work to Purpose and Values
- Alignment of Resources with Enrollment
- Elevate Technology
- Sustain our Commitment to DEI as a Competitive Advantage
- Expand Lifelong Learning
- Establish Partnerships that Create Scale and Enhance our Value Proposition

President’s CFOs

Cabinet Goals

Your Goals
Do you have a system for recording your performance?
Reminder: Update Monthly Report

Long-Term Projects/Accomplishments
• NECHE Accreditation (Steering Committee, Standards 1, 3, 7)
• Mission/Vision/Values
• Board of Trustees Support
• AICUM Inclusive Leadership Program
• NAPAHE Professional Development
• Commencement Volunteer Coordinator

July
• Onboarding
• Temporary HR Assistance to Lynn McCormick
• Draft Communications: President’s Letter for Annual Report

August
• Temporary HR Assistance (interviewing temps)
• WIT Info (WhoCanHelp) relaunch
• Melanie DeSantis Onboarding
• Commencement Volunteer Coordinator

September
• 9/11 Memorial Ceremony Organization
• Fall Community Forum Planning
• Alumni Golf Tournament Volunteer
• Commencement Debrief
• Trustee Engagement Breakfast/Lunch Meetings

October
• Trustee Finance Training (FARM) with Amy I. and Bob T.
• Community Forum
• Staff Council Reception x2
• BOT Retreat at Omni Hotel

November
• Notary Public Application
• President’s Holiday Cards and Holiday Video Messages
• M/V/V Listening Sessions
• T&G White Paper on Trustee Engagement
Enrollment, General Counsel, Human Resources, Finance, and Diversity & Inclusion.

**Key Accomplishments**

- Organized campus visits for United States Secretary of Labor Martin J. Walsh and Governor of Massachusetts Charles D. Baker involving coordination with scheduling and advance, protective detail, and internal campus constituencies.
- Co-led process to redevelop institutional mission, vision, and strategic pillar statements.
- Developed Wentworth-specific Financial Assessment & Risk Monitoring (FARM) Training for the Board of Trustees to satisfy statutory requirements of the Massachusetts Board of Higher Education with CFO and University Secretary and maintained compliance records.
- Provided effective support and administrative management to several Board committees including Executive, Trusteeship and Governance, and Inclusive Excellence.
DATA
<table>
<thead>
<tr>
<th>QUANTIFY YOUR IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Engage 30+ shared governance stakeholders in FY23 Board of Trustees activities.</strong></td>
</tr>
<tr>
<td>October 2022 BOT Meeting included multiple opportunities for shared governance stakeholders. The May 2023 BOT Meeting had the greatest level of engagement with shared governance stakeholders than ever before. Summer 2023 into FY24 will participate in a Shared Governance Working Group led by Judy McLaughlin.</td>
</tr>
<tr>
<td><strong>Increase # of Board of Trustees learning and development opportunities tied to higher ed, Babson business model, and ENGAGE stakeholders (number invited, percent participating)</strong></td>
</tr>
<tr>
<td>At the October 2022 and May 2023 Learning and Development Sessions, a majority of members participated in the sessions. The meeting model (Thursday afternoon for learning and development, Friday for business meeting) yielded greater attendance on Thursdays rather than Fridays.</td>
</tr>
<tr>
<td><strong>Increase positive BOT engagement and productivity as measured by meeting attendance/participation, giving, volunteerism, brand ambassadorship and external/external Board and Trustee evaluations</strong></td>
</tr>
<tr>
<td>A majority of trustees attended meetings this year.</td>
</tr>
<tr>
<td><strong>Digitize Board of Trustees Minutes and Upload to Board Portal (1945 to Present)</strong></td>
</tr>
<tr>
<td>Scanned archived minutes of the Board of Trustees meetings in house and a new electronic repository of minutes is available as needed.</td>
</tr>
<tr>
<td><strong>October 2022 BOT Meeting included multiple opportunities for shared governance stakeholders. Invitations went out to 54 faculty members, with 16 attending. An additional 2 faculty members and 5 students participated in panel for Entrepreneurial Leadership in Action session. The May 2023 BOT Meeting had the greatest level of engagement with shared governance stakeholders than ever before. 10 Faculty representatives were invited to participate in several of the Board’s activities and events alongside the President’s Council. Summer 2023 into FY24, 6 individuals (2 trustees, 2 faculty, 2 administrators) will participated in a Shared Governance Working Group led by Judy McLaughlin.</strong></td>
</tr>
<tr>
<td><strong>At the October 2022 and May 2023 Learning and Development Sessions, over 40 governance members (Trustees, Emeriti/Honorary Trustees, Presidents Emeriti) participated in the sessions. The meeting model (Thursday afternoon for learning and development, Friday for business meeting) yielded greater attendance by all Governance members (Trustees, Emeriti/Honorary Trustees, Presidents Emeriti) on Thursdays rather than Fridays. October 2022: 45% or 29 people on Thursday vs. 42% or 27 people on Friday; May 2023: 56% or 35 people on Thursday vs. 52% or 32 people on Friday.</strong></td>
</tr>
<tr>
<td><strong>Among all Governance members (Trustees, Emeriti/Honorary Trustees, Presidents Emeriti), a majority (50%) attended BOT meetings (October 2022, February 2023, and May 2023). The October meeting was least attended by all Governance members at 45% and the May meeting was the highest attended at 57%. Of voting trustees, achieved a combined 77% attendance rate for the October 2022, February 2023, and May 2023 meetings. The October meeting was the least attended by voting trustees at 67% with the May meeting the highest attended at 88%.</strong></td>
</tr>
<tr>
<td><strong>At a savings of approximately $6,000 to the College, minutes of the Board of Trustees meetings since 1921 were scanned in house and a new electronic repository of minutes is available as needed.</strong></td>
</tr>
<tr>
<td>Subject</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
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<tr>
<td>BOT Review</td>
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<tr>
<td>FVI SENATE</td>
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<tr>
<td>Senate</td>
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<tr>
<td>Optional virtual “Office Hours” (weekly) w/Kel</td>
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<tr>
<td>Hold</td>
</tr>
<tr>
<td>[EXT] FW: NAPAHE Lynette &amp; Stuart Connecting</td>
</tr>
<tr>
<td>Eddie/Kelly 1:1 (every other week re-occurring)</td>
</tr>
<tr>
<td>Eddie/Chris: Website</td>
</tr>
<tr>
<td>Hanukkah</td>
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<tr>
<td>Colleen’s Holiday Party</td>
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<tr>
<td>[EXT] Invitation: NAPAHE 2024: Know Before Yo</td>
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<tr>
<td>Hanukkah (2nd Day)</td>
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<tr>
<td>Hanukkah (3rd Day)</td>
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<tr>
<td>Optional virtual “Office Hours” (weekly) w/Kel</td>
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<tr>
<td>Hanukkah (4th Day)</td>
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<tr>
<td>Hanukkah (5th Day)</td>
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<tr>
<td>Babson EXCEL: December Session - Open Office</td>
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<tr>
<td>Special DEI Trustee Committee Meeting 12/12/</td>
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<tr>
<td>Academic Affairs Holiday Luncheon</td>
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<tr>
<td>BECC review for BOT May</td>
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<tr>
<td>Hold: Boardvantage Training</td>
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<tr>
<td>[EXT] Nasdaq Boardvantage/Babson College Do</td>
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<tr>
<td>Beaver Achievers Quick Touchbase</td>
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<tr>
<td>Eddie/Kevin-Quick Connect, Steve’s Slides</td>
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<tr>
<td>Hanukkah (6th Day)</td>
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<tr>
<td>Dentist (Orthodontist)</td>
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<tr>
<td>Excel and BGR Project</td>
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<tr>
<td>Send letters to Colleen</td>
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<tr>
<td>Eddie/Kevin</td>
</tr>
<tr>
<td>[EXT] NAPAHE: Annual Conference Planning Co</td>
</tr>
<tr>
<td>Hanukkah (7th Day)</td>
</tr>
</tbody>
</table>
Eddie's Schedule

- BPLG: 5%
- Partnerships: 3%
- NAPAHE: 8%
- Boardvantage: 5%
- Community Events: 8%
- Board Meetings: 13%
- Babson EXCEL: 8%
- BOT Prep: 16%
- Personal: 10%
- Eddie/Kelly One on One: 24%
Advocating for Yourself
Do you 1x1 meetings with your manager?

Ask for them!
Performance Review Time
Prepare for it!

- Compile Data
- Dedicate Time
- Review Monthly Report
- Export Calendar
Ask to review your job description annually during your performance review.
Example:

My Request for Financial Support for Doctoral Program in Higher Education Administration
TO: Kelly Lynch; Senior Vice President
FROM: Edward Cullinane; Manager, Governance Affairs
DATE: June 22, 2023
RE: Request for Financial Support for Doctoral Program in Higher Education Administration

Dear Kelly,

I hope this letter finds you well. I am writing to formally request financial support from Babson College to pursue a Doctor of Education (Ed.D.) program in Higher Education Administration. As a dedicated Babson employee and a young professional who is deeply committed to the growth and success of myself and the institution, I believe pursuing an advanced degree will significantly enhance my ability to contribute to the College’s mission and strategic plan.

A doctoral program in higher education administration will improve my knowledge, prepare me for future leadership opportunities, and expand my understanding of the complexities and challenges facing higher education today. By focusing on leadership, policy analysis, organizational development, and strategic management, this type of program will equip me with the knowledge and skills to pursue a career in the ever-evolving landscape of higher education and contribute to my professional growth at Babson.

Below, please find five key points that highlight the value and benefits of supporting my pursuit of a doctoral degree program:

1. Enhanced Leadership Skills: Ed.D. programs focus on leadership development, enabling me to become a more effective leader at Babson. With coursework focused on leadership theories, change management, and decision-making processes, I will be able to tackle complex issues and provide strategic direction.

2. Applied Research: The program’s emphasis on research will enable me to conduct rigorous studies in higher education. This research will not only contribute to the field but also provide valuable insights and solutions to address challenges. A strong research background will also enhance any assessment or evaluation efforts in my professional work.

3. Improved Decision-making: By gaining a deeper understanding of policy analysis and organizational development, I will be equipped to make informed decisions that align with the College’s strategic goals. This program will provide me with the tools to critically analyze data, evaluate policies, and implement evidence-based practices for the betterment of Babson.

4. Networking Opportunities: Through the Ed.D. program, I will have the opportunity to connect and collaborate with professionals from other institutions across the country. This network will not only broaden my perspective but also provide valuable resources and partnerships that can benefit Babson in many ways, such as sharing best practices and exploring collaborative initiatives.

5. Personal Development: Throughout my time at Babson, I have felt incredibly supported, valued, and myself staying at Babson College for many years to come. Supporting my pursuit of the Ed.D. program, I kindly request that I be considered for assistance for tuition and fees in full.

The Ed.D. programs at the University of Georgia, McKeen Institute of Higher Education, and the University of Pennsylvania Graduate School of Education due to their high costs vary greatly among institutions. The Ed.D. programs at UGA and Penn use a total program cost model.

In Georgia: "The Executive Doctorate program charges a combined tuition and fees, including travel expenses to and from program meeting sites."

In Pennsylvania, additional costs may be incurred. Only if applicable, I kindly request support for:

- Tuition: I currently pay for tuition, and I do not expect any additional costs.
- Travel: Since I am from PA and the program is in-state, I do not expect any travel costs.
- Other: The costs for meals, lodging, and other expenses are being covered by a current employee tuition reimbursement policy.

I have budgeted to completing this program successfully and will provide regular updates to relevant parties as needed to demonstrate the value of your
dedication to professional development through this Ed.D. program, Babson College values and is committed to improved leadership, enhanced decision-making, and a strong culture of collaboration, particularly among faculty and staff. Babson College is committed to supporting the development and growth of its employees, and it is important that the knowledge and skills gained from this program will directly benefit the College and the entire community.

I anticipate that the end of July as the application deadline for the University of Georgia’s Ed.D. program, and I kindly request that final decision to apply to doctoral programs will be dependent upon my current financial status.

Thank you for considering my request. Your support would be a testament to Babson’s commitment to fostering the growth and professional development of its employees. I eagerly look forward to your favorable response. Should you have any questions or would like additional information, please do not hesitate to contact me.

Sincerely,

Edward Cullinane
Manager, Governance Affairs

Cullinane Doctoral Program Request Page 2 of 7
### Appendix A: Connecting Curriculum to Strategy

"Entrepreneurial Leaders Impacting Communities Everywhere"

Babson’s strategic plan is accomplished through four highly integrated initiatives:

- **Entrepreneurial Leadership**: Babson will expand its focus to define, own, and innovate the field of Entrepreneurial Leadership. We will introduce innovative new programming, thought leadership, and networking opportunities designed to propel entrepreneurial leaders through the new Arthur M. Blank School for Entrepreneurial Leadership.

- ** Everywhere Platform**: Creating an “Everywhere Platform” through which online, hybrid, and customized learning pathways are available anywhere, on demand, to support entrepreneurial leaders how and when they want it as they seek to build a variety of skills and credentials.

- **Ecosystems**: Engaging ecosystems to enable us to continuously learn from the edge, while scaling our impact globally.

- **One Babson**: Delivering on this promise as One Babson—a community committed to living its renewed values and working collaboratively, inclusively, and adaptively to fulfill its critically important purpose.

<table>
<thead>
<tr>
<th>Course</th>
<th>Entrepreneurial Leadership</th>
<th>Everywhere Platform</th>
<th>Ecosystems</th>
<th>One Babson</th>
</tr>
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<tbody>
<tr>
<td><strong>Year One</strong></td>
<td></td>
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<tr>
<td>EDHI 8010: Higher Education</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>EDHI 8990: Introduction to</td>
<td>X</td>
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<tr>
<td>Higher Education Research</td>
<td></td>
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<tr>
<td>EDHI 9050: Organization and</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Governance</td>
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<tr>
<td>EDHI 9310: Quantitative</td>
<td></td>
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<tr>
<td>Methods</td>
<td>dependant on research topic</td>
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<tr>
<td>EDHI 9400: Comparative</td>
<td>X</td>
<td>X</td>
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<td>Higher Education</td>
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<tr>
<td>(European-based class)</td>
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<tr>
<td>EDHI 9500: College Access</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>and Success</td>
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<tr>
<td>EDHI 9510: Qualitative</td>
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<tr>
<td>Research</td>
<td>dependant on research topic</td>
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<tr>
<td>EDHI 9000: Doctoral Research</td>
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<tr>
<td></td>
<td>dependant on research topic</td>
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<tr>
<td><strong>Year Two</strong></td>
<td></td>
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<tr>
<td>EDHI 9020: Critical Issues</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>in Higher Education</td>
<td></td>
<td></td>
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<tr>
<td>EDHI 8000: Finance in Higher</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Education</td>
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<tr>
<td>EDHI 8700: State Policies</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>EDHI 9500: Policy Studies</td>
<td>X</td>
<td>X</td>
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<tr>
<td>(Washington DC-based class)</td>
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<tr>
<td>EDHI 8300: Law and Higher</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Education</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>EDHI 9100: Academic Programs</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>EDHI 9300: Doctoral</td>
<td></td>
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<tr>
<td>Dissertation</td>
<td>dependant on research topic</td>
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</table>

### Appendix B: Sample Program Cost

#### University of Georgia

**Fiscal Year 2023-2024 Tuition Rates per Semester**

( Fall 2023 and Spring 2024 )

<table>
<thead>
<tr>
<th></th>
<th>In-State (Resident)</th>
<th>Out-of-State (Non-Resident)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Programs:</td>
<td>Total Program Cost *</td>
<td></td>
</tr>
<tr>
<td>Master in Business</td>
<td>n/a</td>
<td>$74,750</td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td>n/a $74,750</td>
</tr>
<tr>
<td>(Executive MBA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master in Business</td>
<td>n/a $53,700</td>
<td>n/a $53,700</td>
</tr>
<tr>
<td>Administration (Online MBA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master in Business</td>
<td>n/a</td>
<td>$69,300</td>
</tr>
<tr>
<td>Administration (Fast Track Professional MBA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SED in Higher</td>
<td>n/a $56,384</td>
<td>n/a $93,643</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Executive Doctorate program charges a combined tuition and program fee that includes all meals, lodging, course materials, and some domestic/international travel expenses. It does not include travel expenses to-and-from program meeting sites (including domestic/international seminars).

#### University of Pennsylvania

**Fiscal Year 2023-2024 Tuition Rates per Semester**

<table>
<thead>
<tr>
<th>Term</th>
<th>CU</th>
<th>Tuition</th>
<th>Program Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Fall</td>
<td>4</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Spring</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Summer</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Fall*</td>
<td>3.15</td>
<td>$10,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Spring*</td>
<td>3</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td></td>
<td>120,570</td>
<td>$64,272</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5</strong></td>
<td>$18,482</td>
<td></td>
</tr>
</tbody>
</table>

Program fees cover hotel stay and meals while in session, academic materials, and the majority of costs associated with the international trip (flight from Newark airport to host country, visa, some meals, hotel, and transportation while in the host country). It does not include travel expenses to the program from the student’s home location.

Prices reflect charges for incoming cohort. Program is 2 calendar years in length and is divided academically as having four terms in the first ‘year’ of the program and two terms in the second ‘year’ of the program.
Activity:

1. What is something you want to change about your current job?
2. Does it require financial resources?
3. What data could be used to justify this change?
4. Who are your partners in advocacy?
5. What is the timeline?
6. What do you need to do to get started?
Closing
• Say yes

• Fill a need
ChatGPT Prompt: What are some ways to advocate for yourself in the workplace?

• **Understand Your Value:**
  • Clearly identify your skills, accomplishments, and contributions to the organization.
  *Keep a record of your achievements, successful projects, and positive feedback.*

• **Effective Communication:**
  • Clearly articulate your thoughts, ideas, and needs.
  • Practice active listening to understand others and respond appropriately.
  • Use assertive and respectful language to express yourself.

• **Set Clear Goals:**
  *Establish short-term and long-term goals for your career development.*
  *Communicate your goals to your supervisor and discuss how they align with the overall objectives of the organization.*

• **Build Positive Relationships:**
  • Cultivate strong professional relationships with colleagues, supervisors, and mentors.
  • Seek feedback regularly and use it constructively to improve your performance.

**Be Proactive:**
• Take initiative on projects and tasks.
• Volunteer for assignments that align with your skills and interests.
ChatGPT Prompt: What are some ways to advocate for yourself in the workplace?

• **Continuous Learning:**
  - Stay updated on industry trends and advancements.
  - Attend relevant workshops, conferences, or training sessions to enhance your skills.

• **Negotiate Effectively:**
  - *Be prepared and informed* before entering negotiations, whether for a salary increase, promotion, or other benefits.
  - Clearly articulate your value and be open to compromise.

• **Document Achievements:**
  - *Keep a record of your accomplishments and contributions.*
  - Use concrete examples when discussing your achievements during performance reviews or when advocating for yourself.

• **Seek Opportunities for Growth:**
  - Express your interest in professional development opportunities.
  - Inquire about potential advancement paths within the organization.

• **Manage Stress and Work-Life Balance:**
  - Set boundaries to maintain a healthy work-life balance.
  - Communicate openly with your supervisor if you're feeling overwhelmed or if changes are needed in your workload.
ChatGPT Prompt: What are some ways to advocate for yourself in the workplace?

- **Stay Positive and Professional:**
  - Approach challenges with a positive attitude.
  - Maintain a professional demeanor, even during difficult situations.

- **Know Your Rights:**
  - Be aware of your rights and responsibilities in the workplace.
  - Familiarize yourself with company policies and procedures.

Remember, *advocating for yourself is a continuous process*. Regularly assess your goals, seek feedback, and adapt your approach as needed. It's essential to strike a balance between self-advocacy and collaboration with others in the workplace.
Final Step:

Share what you learned from NAPAHE, what sessions you attended, ideas you want to implement, etc.
What is something we did not talk about that you want to discuss?

Questions?
Thank you!

ecullinane@babson.edu
Long-Term Projects/Accomplishments

- NECHE Accreditation (Steering Committee, Standards 1, 3, 7)
- Mission/Vision/Values
- Board of Trustees Support
- AICUM Inclusive Leadership Program
- NAPAHE Professional Development
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November

- Notary Public Application
- President’s Holiday Cards and Holiday Video Messages
- M/V/V Listening Sessions
- T&G White Paper on Trustee Engagement

December (out with COVID)

- President’s Holiday Party
January

- Senior Leadership Team Retreat at Omni Hotel
- T&G White Paper Executive Summary
- M/V/V Listening Sessions

February

- Provost Position Profile (significant updates on Wentworth background)
- BOT T&G Evaluation & Pipeline work
- Draft Communications: Student Affairs Community Email, M/V/V Community Email

March

- BOT Pipeline Work
- BOT Recent Graduate Alumni Role Development
- NAPAHE Conference & follow up- committee work, AICUM, Boston PAs
- NECHE S7
- Employee Recognition Committee
- Customer Service (updating phone directory)

April

- Student Community Forum
- Employee Recognition Committee
- BOT 2022-2023 Calendar
- NECHE Copy Editor Outreach/Interview/Selection
- Provost Search Schedule
- 360 Presidential Evaluation Scheduling

May

- NECHE Standard 3
- Provost Search/Finalist Visits
- Marty Walsh Campus Visit
- MA Science Olympiad

June

- NECHE Preliminary Visit
- BOT Retreat Planning
- BOT Orientation
- AICUM PA Group
- Phone Transition

July

- BOT Retreat Logistics & Planning
- NECHE Site Visit Logistics & Planning
- NAPAHE Summer Conference Planning Committee Meeting
Key accomplishments

Co-led process to redevelop institutional mission, vision, and strategic values statements in alignment with the University's strategic plan by organizing town hall meetings and listening sessions, compiling feedback, and drafting new statements.


Developed Wentworth-specific Financial Assessment & Rick Monitoring (FARM) Training for the Board of Trustees to satisfy statutory requirements by Massachusetts Board of Higher Education with CFO and University Secretary and maintained compliance records.

Provided effective support and administrative management to several Board committees including Executive, Trusteeship and Governance, and Inclusive Excellence.

Organized campus visit for United States Secretary of Labor Martin J. Walsh involving coordination with scheduling and advance, protective detail, and internal campus constituencies.
Dear Kelly,

I hope this letter finds you well. I am writing to formally request financial support from Babson College to pursue a Doctor of Education (Ed.D.) program in Higher Education Administration. As a dedicated Babson employee and a young professional who is deeply committed to the growth and success of myself and the institution, I believe pursuing an advanced degree will significantly enhance my ability to contribute to the College's mission and strategic plan.

A doctoral program in higher education administration will improve my knowledge, prepare me for future leadership opportunities, and expand my understanding of the complexities and challenges facing higher education today. By focusing on leadership, policy analysis, organizational development, and strategic management, this type of program will equip me with the knowledge and skills to pursue a career in the ever-evolving landscape of higher education and contribute to my professional growth at Babson.

Below, please find five key points that highlight the value and benefits of supporting my pursuit of a doctoral degree program:

1. **Enhanced Leadership Skills:** Ed.D. programs focus on leadership development, enabling me to become a more effective leader at Babson. With coursework focused on leadership theories, change management, and decision-making processes, I will be able to tackle complex issues and provide strategic direction.

2. **Applied Research:** The program’s emphasis on research will enable me to conduct rigorous studies in higher education. This research will not only contribute to the field but also provide valuable insights and solutions to address challenges. A strong research background will also enhance any assessment or evaluation efforts in my professional work.

3. **Improved Decision-making:** By gaining a deeper understanding of policy analysis and organizational development, I will be equipped to make informed decisions that align with the College's strategic goals. This program will provide me with the tools to critically analyze data, evaluate policies, and implement evidence-based practices for the betterment of Babson.

4. **Networking Opportunities:** Through the Ed.D. program, I will have the opportunity to connect and collaborate with professionals from other institutions across the country. This network will not only broaden my perspective but also provide valuable resources and partnerships that can benefit Babson in many ways, such as sharing best practices and exploring collaborative initiatives.
5. **Employee Retention**: During my time at Babson, I have felt incredibly supported, valued, and appreciated. I can see myself staying at Babson College for many years to come. Supporting my educational goals will contribute to my sense of belonging and encourage me to remain at Babson through degree completion and longer, rather than having to pursue these goals at another institution or later in my career.

Considering the mutual benefits of supporting my pursuit of the Ed.D. program, I kindly request that Babson College provide financial assistance for **tuition and fees** in full.

Currently, I am most interested in the Ed.D. programs at the University of Georgia McBee Institute of Higher Education and the University of Pennsylvania Graduate School of Education due to their strengths in higher governance.

The total cost of Ed.D. programs vary greatly among institutions. The Ed.D. programs at UGA and Penn cost $93,641 and $184,842 utilizing a total program cost model.

For example, at the University of Georgia: “The Executive Doctorate program charges a combined tuition and program fee that includes all meals, lodging, course materials, and some domestic/international travel expenses. It does not include travel expenses to-and-from program meeting sites (including domestic/international seminars).”

Depending on the program design, additional costs may be incurred. Only if applicable, I kindly request Babson consider providing support for:

- **Study Materials and Resources**: In addition to tuition, there may be expenses related to textbooks, research materials, and access to online resources.
- **Travel Expenses**: The UGA and Penn programs are out of state and would require air travel for attendance at in-person course meetings. Supporting travel expenses would decrease the financial burden of pursuing a doctoral program.

The attached appendixes provide additional information to support this request:

- Appendix A shows the connection between doctoral courses and elements Babson’s strategic plan.
- Appendix B lists the current total cost of the Ed.D. programs at UGA and Penn.
- Appendix C is Babson’s current employee tuition reimbursement policy.
- Appendix D includes IRS guidelines and how education assistance over $5,250 can be tax exempt if it is considered a working condition fringe benefit (if it maintains or improves skills needed in the job).

As you know, I am deeply committed to completing this program successfully and will provide regular progress reports to you and any other relevant parties as needed to demonstrate the value of your investment.
I believe that by investing in my professional development through this Ed.D. program, Babson College will yield significant returns in terms of improved leadership, enhanced decision-making, and a strong employee overall. I am confident that the knowledge and skills gained from this program will directly benefit Babson, its governance, and the entire community.

I kindly request a response by the end of July as the application deadline for the University of Georgia’s program is September 15, 2023. My decision to apply to doctoral programs will be dependent upon financial support.

Thank you for considering this proposal. Your support would be a testament to Babson's commitment to fostering professional growth and ensuring the success of its employees. I eagerly look forward to your response.

Sincerely,
Eddie
Appendix A: Connecting Curriculum to Strategy

“Entrepreneurial Leaders Impacting Communities Everywhere”

Babson’s strategic plan is accomplished through four highly integrated initiatives:

- **Entrepreneurial Leadership**: Babson will expand its focus to define, own, and innovate the field of Entrepreneurial Leadership. We will introduce innovative new programing, thought leadership, and networking opportunities designed to propel entrepreneurial leaders through the new Arthur M. Blank School for Entrepreneurial Leadership.

- **Everywhere Platform**: Creating an “Everywhere Platform” through which online, hybrid, and customized learning pathways are available anywhere, on demand, to support entrepreneurial leaders how and when they want it as they seek to build a variety of skills and credentials.

- **Ecosystems**: Engaging ecosystems to enable us to continuously learn from the edge, while scaling our impact globally.

- **One Babson**: Delivering on this promise as One Babson—a community committed to living its renewed values and working collaboratively, inclusively, and adaptively to fulfill its critically important purpose.

<table>
<thead>
<tr>
<th>Course</th>
<th>Entrepreneurial Leadership</th>
<th>Everywhere Platform</th>
<th>Ecosystems</th>
<th>One Babson</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year One</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDHI 8010: Higher Education in the US</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>EDHI 8990: Introduction to Higher Education Research</td>
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<td></td>
<td></td>
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<tr>
<td>EDHI 9050: Organization and Governance</td>
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<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>EDHI 8910: Quantitative Methods</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>EDHI 9400: Comparative Higher Education (European-based class)</td>
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<td></td>
<td></td>
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<tr>
<td>EDHI 9070: College Access and Success</td>
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<tr>
<td>EDHI 8930: Qualitative Research</td>
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<tr>
<td>EDHI 9000: Doctoral Research</td>
<td></td>
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<td></td>
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<tr>
<td><strong>Year Two</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDHI 9020: Critical Issues in Higher Education</td>
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<td>X</td>
<td>X</td>
</tr>
<tr>
<td>EDHI 8400: Finance in Higher Education</td>
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<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>EDHI 8700: State Policies</td>
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<td></td>
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<tr>
<td>EDHI 9500: Policy Studies (Washington DC-based class)</td>
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<tr>
<td>EDHI 8300: Law and Higher Education</td>
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<td>X</td>
<td>X</td>
</tr>
<tr>
<td>EDHI 9010: Academic Programs</td>
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<td></td>
<td></td>
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<tr>
<td>EDHI 9300: Doctoral Dissertation</td>
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</table>

*dependent on research topic*
Appendix B: Sample Program Cost

University of Georgia
Fiscal Year 2023-2024 Tuition Rates per Semester
(Fall 2023 and Spring 2024)

<table>
<thead>
<tr>
<th>Executive Programs:</th>
<th>Tuition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In-State (Resident)</td>
</tr>
<tr>
<td>Master in Business Administration (Executive MBA)</td>
<td>n/a</td>
</tr>
<tr>
<td>Master in Business Administration (Online MBA)</td>
<td>n/a</td>
</tr>
<tr>
<td>Master in Business Administration (Fast Track Professional MBA)</td>
<td>n/a</td>
</tr>
<tr>
<td>EdD in Higher Education</td>
<td>n/a</td>
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</table>

The Executive Doctorate program charges a combined tuition and program fee that includes all meals, lodging, course materials, and some domestic/international travel expenses. It does not include travel expenses to-and-from program meeting sites (including domestic/international seminars).

University of Pennsylvania
Fiscal Year 2023-2024 Tuition Rates per Semester
Executive Doctorate in Higher Education Management Ed.D.

<table>
<thead>
<tr>
<th>Term</th>
<th>CU</th>
<th>Tuition</th>
<th>Program fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Fall</td>
<td>4</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Spring</td>
<td>5.49</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Summer</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Fall*</td>
<td>3.15</td>
<td>$20,095</td>
<td>$10,712</td>
</tr>
<tr>
<td>Spring*</td>
<td>2</td>
<td>$20,095</td>
<td>$10,712</td>
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<tr>
<td></td>
<td></td>
<td>$120,570</td>
<td>$64,272</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total:</td>
<td>$184,842</td>
</tr>
</tbody>
</table>

Program fees cover hotel stay and meals while in session, academic materials, and the majority of costs associated with the International trip (flight from Newark airport to host country, visas, some meals, hotel, and transportation while in the host country). It does not include travel expenses to the program from the student’s home location.

Prices reflect charges for incoming cohort. Program is 2 calendar years in length and is divided academically as having four terms in the first 'year' of the program and two terms in the second 'year' of the program.
Appendix D: IRS Guidelines

Tax Benefits for Education: Information Center

- **Employer-provided educational assistance**
  - If you receive educational assistance benefits from your employer under an educational assistance program, you can exclude up to $5,250 of those benefits each year. This means your employer should not include the benefits with your wages, tips, and other compensation shown in box 1 of your Form W-2.

- **Benefits over $5,250**
  - If your employer pays more than $5,250 for educational benefits for you during the year, you must generally pay tax on the amount over $5,250. Your employer should include in your wages (Form W-2, box 1) the amount that you must include in income.

- **Working condition fringe benefit**
  - However, if the benefits over $5,250 also qualify as a working condition fringe benefit, your employer does not have to include them in your wages. A working condition fringe benefit is a benefit which, had you paid for it, you could deduct as an employee business expense. For more information on working condition fringe benefits, see Working Condition Benefits in chapter 2 of Publication 15-B, Employer's Tax Guide to Fringe Benefits.


**Education.** Certain job-related education you provide to an employee may qualify for exclusion as a working condition benefit. To qualify, the education must meet the same requirements that would apply for determining whether the employee could deduct the expenses had the employee paid the expenses. Degree programs as a whole don't necessarily qualify as a working condition benefit. Each course in the program must be evaluated individually for qualification as a working condition benefit. The education must meet at least one of the following tests.

- The education is required by the employer or by law for the employee to keep their present salary, status, or job. The required education must serve a bona fide business purpose of the employer.

  - **The education maintains or improves skills needed in the job.**

However, even if the education meets one or both of the above tests, it isn’t qualifying education if it:

- Is needed to meet the minimum educational requirements of the employee's present trade or business, or

- Is part of a program of study that will qualify the employee for a new trade or business.