



WittKieffer



**FITCHBURG STATE
UNIVERSITY**

A Partnership to Identify an Impactful President

Ryan Crawford | Greg Duyck

November 3, 2023





Executive Summary

November 3, 2023

Jessica Murdoch
Vice President, Human Resources and Payroll Services
Fitchburg State University
Fitchburg, MA

Via email: jmurdoch@fitchburgstate.edu

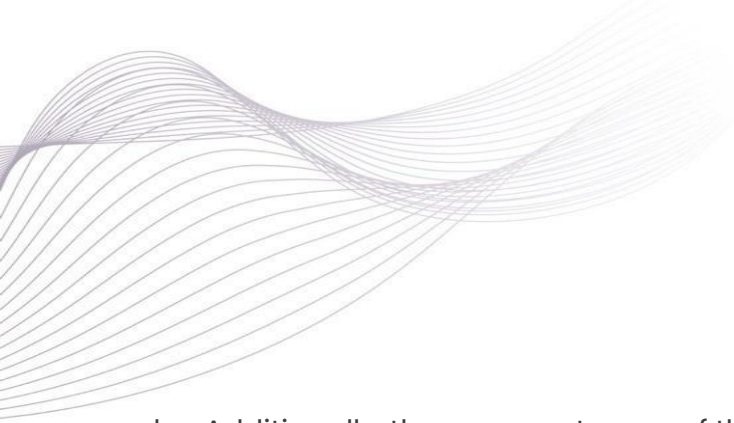
Re: Fitchburg State University Presidential Search

Dear Jessica:

Thank you for inviting WittKieffer to submit our credentials as the university's leadership and Board of Trustees prepare to launch the search for the next president of Fitchburg State University. We are excited by the opportunity to partner with you and your colleagues on a presidential search and transition process that considers the needs of the Fitchburg State faculty, staff, students, alumni, and local community. During his tenure, President Lapidus positioned Fitchburg State to provide a lasting impact on the students and communities it serves. We expect this will be an attractive opportunity to many highly qualified leaders.

As the only top-ten search firm in the country that specializes in serving the higher education and broader nonprofit sector, we conduct more than 350 leadership searches in education each year, more than any other firm. More specific to your needs, we bring a strong history of successfully conducting searches for university presidents. WittKieffer has conducted more than 100 searches for presidents and chancellors in the last five years alone. This includes significant experience supporting searches for institutions similar to Fitchburg State. We understand the dynamics facing comprehensive universities in today's higher education environment, as well as the impact such institutions have on students from diverse backgrounds and local communities. We also understand the landscape of Massachusetts public higher education, having conducted recent presidential searches at Framingham State (2022), Massachusetts College of Art and Design (2021), Westfield State (2021), and Salem State (2017). We conducted the last presidential search at Fitchburg State in 2015. We believe these experiences would position us to conduct an efficient and thorough search that would lead to the appointment of an exceptional president.

The success of our efforts can be measured by the strength and diversity of our candidate pools and in the longevity of our placements. Over the last three years, 64% of WittKieffer's presidential searches in higher education resulted in placements of women and/or people of



color. Additionally, the average tenure of the presidents we have placed is eight years, with three- and five-year retention rates of 97% and 94%, respectively. We are proud of these outcomes, and we would work tirelessly to ensure similar success at Fitchburg State.

As a senior partner at WittKieffer, I will lead the search to build a compelling candidate pool and conduct preliminary interviews to determine the most suitable candidates for your full consideration. I have more than 14 years of experience within higher education search and have conducted more than 250 searches over the course of my career, including more than 25 presidential searches. In recent years, I have led presidential searches at institutions that are similar in size and mission, including Ferris State University, Northern Kentucky University, Prairie View A&M University, Saginaw Valley State University, and Texas A&M University-San Antonio.

Greg Duyck, a senior partner serving the firm's Education Market clients, would partner with me closely throughout the engagement. A former university executive based in North Carolina, Greg previously served the University of North Carolina at Chapel Hill, Oregon Health and Science University, and Stony Brook University. His experience as an executive in multiple institutions provides unique insights as to the essential qualities of talented leaders. As a search consultant, he has led or partnered on a number of presidential searches, including those for Columbia College, Lasell University, St. John's University, SUNY College of Environmental Sciences and Forestry, and Talladega College.

We would be happy to answer any questions and speak with you further about this search. It would be a pleasure and privilege to serve Fitchburg State during this important leadership transition.

Sincerely,



Ryan Crawford
Senior Partner, Education
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Experience and Capabilities

Founded in 1969, our mission remains to deliver outstanding leadership solutions for organizations committed to improving the quality of life. We operate exclusively at the intersection of education, science, and healthcare delivery, and we refer to these convergent sectors as the **Quality of Life Ecosystem**.

Throughout our long history, WittKieffer has cultivated a proven and meaningful approach to executive search services, and we conduct **over 1,550 client engagements per year** on behalf of colleges and universities, related associations and professional societies, health systems and hospitals, academic medical centers, life sciences companies, and community and cultural institutions.

WittKieffer is a 100% employee-owned corporation headquartered in the Chicago metropolitan area, with offices strategically located across the United States and in Europe, serving organizations in North America, Europe, Asia, South America, and the Middle East. The firm employs **150 expert search and advisory consultants** and, in total, **340 exceptional team members** passionately committed to improving quality of life through impactful leadership.

 **54 years**

Serving clients in the
Quality of Life
Ecosystem

 **340+**

Team members

 **1,550+**

Client engagements in
the last twelve months

 **96%**

Client loyalty index

MARKET EXPERTISE

Education
Social Impact and
Nonprofits
Healthcare
Academic Medicine
Life Sciences
Investor-Backed
Healthcare

SOLUTION CAPABILITIES

Talent assessment, selection, and
acquisition
Interim leadership
Board advisory
C-suite succession
Executive and team development
and succession
Team performance and alignment
Culture development

Experience and Capabilities

(continued)

While **educational institutions** share a common core mission, WittKieffer identifies the individualized philosophies, structures, offerings, resources, and imperatives that distinguish one institution from another. Building and developing impactful leadership in education is about understanding these often-nuanced differences. We appreciate that a president's or other leader's talents, experiences, personality, and leadership style can effect a substantial shift in tone and substance for a major area of focus — such as academics or student life — or an entire institution.

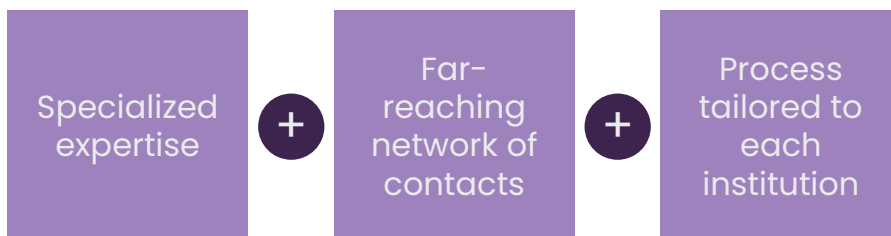
Thus, in **leadership search**, our efforts center on evaluating candidates based on our clients' individualized needs, supported by the powerful lessons learned through thousands of engagements with institutions of all kinds.

Similarly, our **leadership advisory solutions** leverage that same powerful knowledge base, coupled with expert consultants, to develop teams and align cultures that deliver value to the institution and its community. By partnering with ambitious educational institutions, we not only improve Quality of Life for those they serve, but also foster social, scientific, economic, and artistic growth that benefits the world.

We place visionary leaders who effect positive, transformational change.

Our Education Market has a singular focus: identifying leadership for higher education institutions.

Our consultative approach to the education search process includes:



LEADERSHIP ROLES

Presidents

Provosts, deans, and academic leadership

Development and advancement leaders

Athletic directors, administrators, and coaches

Enrollment management executives

Student affairs executives

Experience and Capabilities

(continued)

Following is an abridged list of president/chancellor searches that WittKieffer has conducted over the last five years on behalf of colleges, universities, and institutions of higher education across the country.

President/chancellor searches

| | |
|---|--|
| Adams State University | Langston University (active) |
| Albany Law School | Lebanon Valley College |
| Aurora University | Manhattan College |
| California State University-East Bay | Massachusetts College of Art and Design |
| California State University-Northridge | Millsaps College (active) |
| City University of New York Baruch College | Mitchell Hamline School of Law |
| City University of New York College of Staten Island | Montclair State University |
| City University of New York Herbert H. Lehman College | Mount Mary University |
| City University of New York Queens College | New College of Florida |
| Columbia College | New Mexico State University (active) |
| Connecticut College (active) | Northern Kentucky University |
| Connecticut State Colleges and Universities | Northwestern University |
| Curry College | Old Dominion University |
| Eastern Connecticut State University (active) | Olin College of Engineering |
| Eastern Washington University | Oregon State University |
| Ferris State University | Penn State University Abington College |
| Fordham University | Penn State University Great Valley School of Graduate Professional Studies |
| Framingham State University | Pitzer College |
| Governors State University | Point Park University |
| Idaho State University (active) | Prairie View A&M University |
| Illinois State University | Providence College |
| Johnson C. Smith University | Rensselaer Polytechnic Institute |
| Kansas State University | Robert Morris University |
| La Roche University (active) | Saginaw Valley State University |
| | Saint Mary's College |
| | Santa Clara University |

Experience and Capabilities

(continued)

President/chancellor searches (continued)

| | |
|--|---------------------------------------|
| Seattle University | University of Scranton |
| Southern Illinois University Carbondale | University of St. Thomas |
| Southern Illinois University Edwardsville | University of Tennessee |
| Southern Illinois University System | University of Tennessee at Martin |
| Southern Utah University | University of Utah |
| St. Ambrose University | University of Washington Bothell |
| St. Bonaventure University | University of Washington Tacoma |
| St. John's University | University of West Georgia |
| St. Mary's College of California (active) | University of Wisconsin System Office |
| State University of New York College of Environmental Science and Forestry | University of Wisconsin-Green Bay |
| Stetson University | University of Wisconsin-Platteville |
| Stockton University | University of Wisconsin-Stevens Point |
| Talladega College | University System of Georgia |
| Tennessee Wesleyan University | University System of Maryland |
| Texas A&M University San Antonio | Utah State University |
| The University of Tampa (active) | Valparaiso University |
| The University of the South | Virginia Military Institute |
| University of Akron | Wake Forest University |
| University of California, Berkeley (active) | Walsh College |
| University of Hartford (active) | Wartburg College |
| University of New Haven (active) | Washburn University |
| University of La Verne | Washington College |
| University of Louisville | Wayne State University |
| University of Lynchburg | Western New England University |
| University of Minnesota System (active) | Westfield State University |
| University of Nevada, Reno | Worcester Polytechnic Institute |
| University of New Haven (active) | York College of Pennsylvania |
| University of North Florida | Youngstown State University (active) |

Experience and Capabilities

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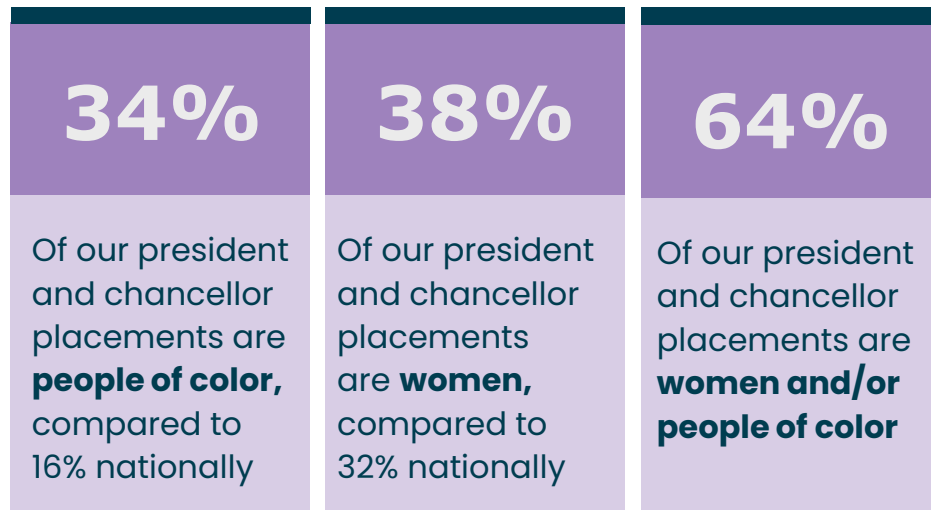
COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

WittKieffer's diversity recruiting and client solutions are designed for organizations, teams, and individual executives to strengthen behaviors, practices, and processes.

Our team is made up of experienced consultants who contribute to thought leadership, DEI certification programs, and impactful results in recruiting diverse talent.

Our approach centers around culture, partnership, and development. We maintain long-standing partnerships with multiple affinity groups.

Over the last three years, the diversity of our placements dramatically exceed national statistics in the presidency, according to CUPA-HR's 2022 survey of higher education



WittKieffer Chancellor/President Candidate Slates in the Past Three Years

97% of our presented and interviewed candidates included women, **89%** included people of color. Combined, **98%** of our presented and interviewed candidates included women and/or people of color.

OUR
PARTNERSHIPS
IN DEI

the
Equity Collective
Empowering future leaders to build careers without limits

The Equity Collaborative

McKinsey
& Company



DREXEL UNIVERSITY
Executive Leadership in Academic Medicine
College of Medicine

ACE American Council on Education



HBCU
Executive Leadership Institute
CLARK ATLANTA UNIVERSITY

...
BLACK LEADERSHIP ACADEMY

Our Approach to Search

Working in close partnership with the Board of Trustees, search committee, and other members of the Fitchburg State community, we will identify the most qualified candidates for the presidency using the comprehensive process below developed over five decades.

Phase 1 – Planning and preparation

We commence each search by meeting with the Board of Trustees, search committee, Fitchburg State leadership, and others, as appropriate. These meetings can be held virtually, and they assist us in gaining an overall perspective of the environment in which the next president will operate and shed light on any sensitive issues that might affect the recruitment strategy. Our findings will also help to benchmark the qualifications essential for the role and serve as the foundation for both the search strategy and the eventual transition for the successful candidate.

We prepare a comprehensive leadership profile that articulates the collective vision, perspectives, and requisite qualifications identified by the board, the search committee, other key leaders, and constituents.

As the search gets underway, we will draw on the leadership profile and upon insights gained during our interactions with the search committee to convey a full and compelling sense of the position to prospective candidates.

Key deliverables

- Provide institutional needs analysis and general consultation.
- Identify critical leadership competencies according to strategic priorities.
- Develop project communication plan and search timeline.
- Develop leadership profile and facilitate search committee approval.
- Propose recruitment strategy based on Fitchburg State's objectives.
- Recommend and implement broad and targeted advertising strategy.

Phase 2 – Candidate sourcing, assessment, and stewardship

A combination of broad and targeted personal outreach enables us to identify exceptional, diverse candidates, including those who would likely go unnoticed by firms that largely rely on candidates from prior searches. We conduct original research for each search as well as curate a list of prospective candidates from our networks based on the information gathered during the planning and preparation phase.

We conduct in-depth behavioral interviews with each promising candidate to assess the seriousness of interest and potential for success in the position. We evaluate all candidates in the same thoughtful, comprehensive manner, treating internal candidates with particular sensitivity.

Key deliverables

- Maintain frequent communication with the search committee chair as desired.
- Engage in proactive outreach to high-quality sources and desirable prospects.
- Acknowledge and process nominations and applications.
- Conduct comprehensive leadership history evaluations prior to presenting candidates.
- Deliver highly qualified candidates and corresponding materials to the search committee.

Our Approach to Search

(continued)

Phase 3 – Interview preparation, support, and coordination

We guide the search committee as it narrows the candidate pool to a select group of individuals who merit additional consideration, then help the committee prepare for and conduct first-round candidate interviews.

At the finalist stage, we will help provide guidance to the university and facilitate engagement with candidates to ensure a smooth process for all parties.

Key deliverables

- Facilitate search committee selection of candidates to interview.
- Support development of rubrics and interview questions.
- Schedule and coordinate logistics of first-round interviews.
- Facilitate committee deliberations and selection of finalist candidates.
- Provide guidance and candidate coordination for campus visits.

Phase 4 – Candidate due diligence

We take extensive measures to mitigate risks inherent in any search process.

As part of our candidate due diligence process, we conduct sophisticated, FCRA-compliant referencing with multiple contacts; comprehensive media and public record reviews; verification of employment history and education credentials; and screening for prior allegations of harassment or discrimination.

In addition, we strongly encourage Fitchburg State as the hiring agent conduct credit, driver's license, and criminal background checks on the finalist(s). We can assist with this if desired.

Key deliverables

- Conduct in-depth referencing.
- Verify candidate credentials and employment.
- Conduct media checks and investigate additional public media sources.
- Screen for prior allegations of harassment or discrimination.
- Administer comprehensive assessments for finalist candidates if desired.

Phase 5 – Decision and appointment

Our team can assist with scheduling for finalist interviews and provide guidance on campus visits and other activities important to candidates and their families.

Fitchburg State maintains complete authority in the selection of semi-finalists, finalists, and the candidate(s) of choice. We can advise on terms, salary, benefits, and relocation based on our experience in negotiating executive compensation packages.

As an element of our partnership, we offer counsel to help clients smoothly transition new leadership.

Key deliverables

- Advise on terms, salary, benefits, and relocation.
- Transition and onboarding support.
- Counsel to support negotiation.
- Support for closing the process.

Our Approach to Search

(continued)

PROSPECTIVE TIMELINE

At the outset of the search, we will develop a detailed timeline and work plan according to your needs and preferences as well as other relevant factors such as the academic calendar, impending holidays and other external factors or constraints. We agree on a search timeline with clearly defined steps. At the same time, we remain nimble and flexible should unexpected institutional or external factors require modulating the schedule or approach. Below is a sample timeline for illustrative purposes, based upon our current understanding of Fitchburg State's expectations.

| Phase | Event/Duration | Description |
|--|---|---|
| Planning and Preparation | Start-up Activities <i>Late November-Early December</i> | WittKieffer engages Fitchburg State's Board of Trustees, search committee, university leadership and others to understand the institution's leadership needs and inform the leadership profile. |
| | Development of Leadership Profile and Recruitment Strategy <i>Mid-December</i> | WittKieffer prepares a draft leadership profile and suggested recruitment strategy. The board and search committee provide input and approval. |
| Candidate Sourcing, Assessment and Stewardship | Recruitment and Candidate Evaluation <i>Mid-December-Early February</i> | WittKieffer engages in strategic national/global recruitment and sourcing; reviews application materials' and conducts screening to identify qualified and preferred candidates. |
| | Candidate Review <i>Mid February</i> | WittKieffer meets with search committee to review candidates and identify semi-finalists for interviews. |
| Interview Preparation, Support and Coordination | Semi-finalist Interviews <i>Late February</i> | WittKieffer prepares search committee for first-round interviews (Zoom or in-person) and assists with the selection of finalists for campus interviews; verifies education, credentials and employment history. |
| | Finalist Interviews <i>Mid-March to Late March</i> | Finalists meet with university constituents during campus visits. WittKieffer conducts in-depth references. Preferred candidate identified and presented to Massachusetts Board of Higher Education. |
| | Finalist Selection and Negotiations <i>April</i> | Preferred candidate meets with Massachusetts Board of Higher Education. WittKieffer will support the Board of Higher Education in negotiations, as needed. |
| Appointment | Search Conclusion <i>April</i> | Final candidate accepts offer. Appointment announced. WittKieffer can assist with and support transition. |

Search Team

Your dedicated search team would be led by **Ryan Crawford**, senior partner, and **Greg Duyck**, senior partner. Additionally, an associate, an executive search coordinator, and a research analyst will be assigned to support this engagement.



Ryan Crawford
Senior Partner,
Education

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[rcrawford@
wittkiewfer.com](mailto:rcrawford@wittkiewfer.com)

Based in Austin, Texas, **Ryan Crawford** is a seasoned executive search professional who approaches his work proactively and creatively. Ryan believes that, while a successful search is based on a measured, comprehensive process, the consulting team must be responsive and adaptive to identify innovative, compelling candidates. He is adept at working with search committees to align goals and recruiting strategies with the expectations of faculty, students, and campus stakeholders.

Ryan brings to his role more than 14 years of executive recruiting experience. Prior to joining WittKieffer, he served as a partner at an education-focused executive search firm where he served as lead consultant on higher education searches for positions including presidents, deans, and administrators in academic affairs, advancement, enrollment management, and finance and administration. Preceding this, Ryan was a principal at an Atlanta-based executive search firm, where he conducted searches in higher education, academic health sciences, and collegiate athletics.

Ryan is dedicated to his own professional development as well as supporting others in their pursuit of career aspirations. He is a regular speaker and participant in professional organizations, seeking to clarify and demystify the way that executive search consultants work with clients and candidates. Most recently he has participated in executive search and leadership panels at the American Conference of Academic Deans and Council of Colleges of Arts and Sciences. He has also completed the eCornell certificate program in Diversity and Inclusion, which focuses on improving employee engagement, counteracting unconscious bias, and fostering an inclusive work climate. Finally, he is a WittKieffer Quality Award winner.

Education

M.B.A., McCombs School of Business, The University of Texas at Austin, Austin, TX

B.A., Journalism and B.A., Political Science (Summa Cum Laude, Phi Beta Kappa), The University of Georgia, Athens, GA

eCornell Certificate in Diversity and Inclusion

Search Team

(continued)



Greg Duyck
Senior Partner
Education

(919) 636-3618

[gduyck@
wittkiewer.com](mailto:gduyck@wittkiewer.com)

Greg Duyck brings an entrepreneurial approach to his work with client institutions, drawing upon two decades as a distinguished fundraising and executive search professional in higher education, academic medicine, and the broader nonprofit sector. His experience recruiting and managing talent at leading colleges and universities allows Greg to closely identify with his clients' leadership challenges in order to outline successful solutions for them.

Greg's experience includes serving as a senior associate vice president at Stony Brook University, where he led development efforts for 11 schools and colleges, managing a team of 30 people. His team accounted for more than \$70 million in fundraising. As vice president for development at the University of North Carolina School of Medicine, Greg helped to close out UNC's \$2.4 billion *Carolina First* campaign. Prior to his 10-year tenure at Carolina, he held fundraising positions at Oregon Health and Sciences University and The Rhode Island Foundation and launched and managed his own consulting firm. Most recently, Greg served as a senior consultant for another national executive search firm, specializing in recruitments in the field of higher education.

Greg is a frequent presenter at conferences ranging from the Council for Advancement and Support of Education to the Council on Foundations and has published several articles and three book chapters related to fundraising. Greg recently completed the eCornell certificate program in Diversity and Inclusion, which focuses on improving employee engagement, counteracting unconscious bias, and fostering an inclusive work climate.

Education

M.F.A., Fiction Writing, Emerson College, Boston, MA

B.A., Creative Writing, Carnegie Mellon University, Pittsburgh, PA

eCornell Certificate in Diversity and Inclusion

Fees and Terms

FEES FOR PRESIDENT SEARCH

- Pursuant to WittKieffer's Master Service Agreement with the University of Massachusetts System (UMASS-2022-0134), the professional fee will be 31% of the president's total cash compensation, inclusive of base salary, target annual incentives, and any guaranteed cash compensation due during or in respect of the president's first full year of employment, with a minimum fee of \$60,000. The final professional fee will abide by the "not to exceed" stipulation set forth in the current Master Service Agreement. Upon finalist's acceptance of offer, we will adjust our fee up or down depending on the compensation arrangement finalized in the accepted offer letter.
- A one-time per project fee of \$5,000 will be billed for data and technology services, WittKieffer's proprietary database of more than 1.2 million leaders, specialized third-party candidate database access, verification and compliance checks, and other search expenses that are not easily segregable for this search assignment.
- Out-of-pocket expenses are charged at cost and generally include staff and candidate travel and accommodations, courier services, advertising, video conferencing, publications, education verification, and outside printing.
- The first billing of 30% of the estimated professional fee and fixed expenses will be submitted at the start of each search engagement. Three additional billings of the professional fee and out-of-pocket expenses will be submitted on the following schedule: 30% at candidate presentation, 20% when finalist candidates are selected, and 20% when the selected candidate accepts the university's offer.
- Separate pricing will be provided for any optional services (e.g., assessment, onboarding support) or additional services scoped following this work.

OUR QUALITY QUARANTEE

If the executive we place with Fitchburg State ceases to be employed by the client in any capacity within one year of the executive's commencement of employment, then WittKieffer will search for a replacement to fill the original position without additional professional fees or fees for data and technology services charged to the client. WittKieffer's guarantee excludes those situations where the placement departs due to organizational realignment, department restructuring, material changes in the position, death, or disability. Additional out-of-pocket expenses associated with the replacement search will be charged in the same manner as the original search.

Fees and Terms

(continued)

OPTIONAL EXECUTIVE ASSESSMENT AND ONBOARDING

As part of our evidence-based approach to recruitment, WittKieffer offers leading selection assessment and post-hire assimilation and early onboarding services. Our approach includes the following activities and deliverables:

Assessment

- Competency based interview between each candidate and a leadership advisory consultant;
- A comprehensive set of online psychometric assessments;
- A debrief session between a leadership advisory consultant and the hiring authority to interpret assessments findings;
- Tailored interview questions and strategies based on assessment findings, as desired.

Onboarding support

- 90-minute assessment feedback session with the placement prior to or at the commencement of their employment;
- Alignment session with a leadership advisory consultant, the placement, and hiring authority 30-days post hire to ensure agreement of goals and develop a strong partnership;
- 100-day check-in meeting between the WittKieffer search consultant, leadership advisory consultant, and the placement to provide continued guidance and support.

The fees for these services are: \$5,000 for a single finalist, an additional \$4,000 for a second finalist candidate, and \$3,000 for each additional candidate.



FITCHBURG STATE UNIVERSITY

Prepare students to lead, serve, and succeed by fostering lifelong learning and civic and global responsibility.

WittKieffer

Improve the quality of life through impactful leadership.