Board of Higher Education Retreat

January 13, 2026

Background & Context Setting

Background

- **In January 2025, BHE approved four Strategic Priorities** in service of our overall Equity Goal.
- **The Strategic Priorities are meant to be multi-year, multi-pronged efforts** to address big levers that we believe can make important differences for student success, especially among those least well served historically.
- **We do not aim to revisit the Priority list unless circumstances or outcomes force change:** Higher Ed change efforts, especially as initiated by a statewide umbrella agency, take years to reach fruition and drive results.
- **We do intend to have annual deliverable goals to ensure progress** and to align the BHE and DHE on accountability for us moving ahead on these Priorities.
- **We aim to annually update the Board on DHE progress** against the previous calendar year's goals and to synch up on the coming year's goals.

Framing our progress and next steps

- **We have made significant progress across our Priorities:** The following materials summarize some of this progress, though it should be noted they are far from comprehensive of all work at the agency.
- **We are focused on going big with a shortlist of focus areas:** The BHE's Strategic Priorities continue to give the agency the clarity and focus required to drive strong outcomes, beyond our "routine" set of activities.
- **Progress varies by initiative:** Some deliverables under each Priority have been completed, some remain in progress, and others are pending (and/or have been deprioritized).
- **We will continue using our Strategic Priority Frameworks to guide the agency's priorities and work** while also continuing to execute across all baseline, statutorily defined obligations and any issues that emerge during the year.
- **We will continue seeking BHE inputs** to ensure expertise is leveraged as the agency works across key initiatives.

The following Strategic Priorities have guided DHE's work since the January 2025 Retreat

Equity Goal

To significantly raise the enrollment, attainment and long-term success outcomes among under-represented student populations

Priorities

1

Student Success and Financial Aid:
Supporting and advancing student access and success through well-designed, sufficiently funded, clear and consistent financial aid and success program funding

2

Economic Mobility:
Increasing the economic benefits of postsecondary participation

3

Public Good:
Improving alignment between public good outcomes and postsecondary higher education opportunities

4

Innovation:
Facilitating and fostering high-impact innovation throughout the public higher education system

Our work across our Priorities is highly interconnected in support of our Equity Goal

Equity Goal

To significantly raise the enrollment, attainment and long-term success outcomes among under-represented student populations

Enrollment/Matriculation ⇄ *Completion* ⇄ *Career Success*

Priorities

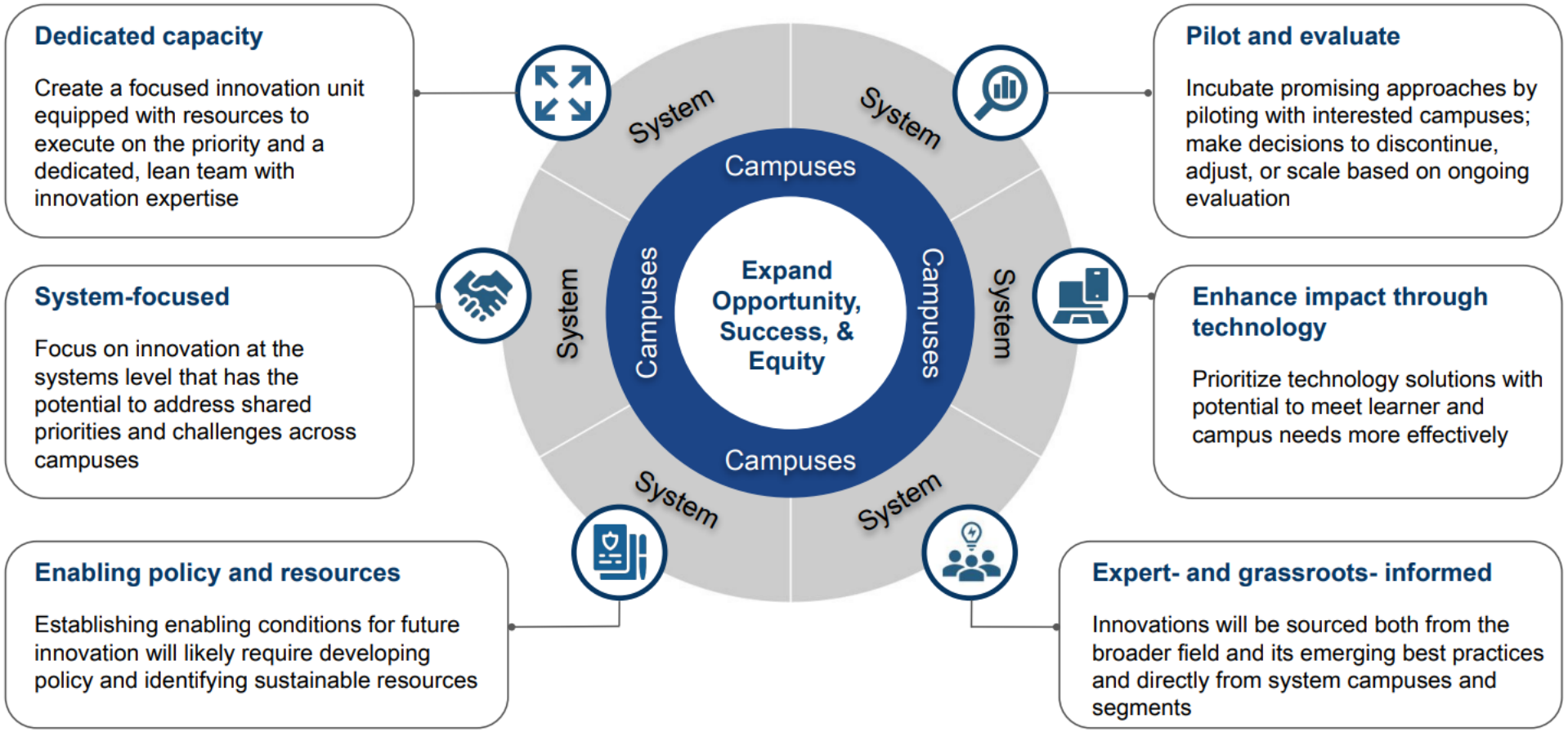
Innovation: Facilitating and fostering high-impact innovation throughout the public higher education system

Student Success and Financial Aid
Supporting and advancing student access and success through well-designed, sufficiently funded, clear and consistent financial aid and success program funding

Economic Mobility
Increasing the economic mobility benefits of postsecondary participation

Public Good
Improving alignment between public good outcomes and postsecondary higher education opportunities

An innovation mindset continues to undergird our efforts



Important Note: Our Strategic Priorities guide DHE's work, but DHE efforts extend far beyond the Priorities alone

DHE handles four primary types of work

(1)

Intentional goals of the Strategic Priorities

Examples from 2025 include securing funding for an Innovation Hub to enable our Innovation Priority, and delivering Economic Mobility data in our PMRS and as a Commentary from DHE

(2)

Strategic opportunities that align with our Priorities and require significant focus

Examples from 2025 include an Early College strategic review as aligned to Student Success & Financial Aid, and consideration of a regulatory pathway for innovative degree programs aligned with student and workforce needs.

(3)

Routine, statutorily required work of the Department

Examples include review of campus Strategic Plans, program approvals and much more

**These are critical activities but will not be discussed at the Retreat*

(4)

Special Emergent Issues

Examples from 2025 include developments in the federal landscape that have generated both opportunity (Workforce Pell) and challenges (hence our voting to sign on to AAC&U letter)

Further Unpacking Our Equity Goal

Path to Our Equity Goal

Enrollment

Enrollment rates have been stabilizing and even improving in recent years, but they remain down as compared to prior highs with substantial disparities across demographic groups

Completion

In most cases, students across racial/ethnic groups remain below the completion goal for all students, with multiple cases of declining rates in recent years and disparities between groups

Career Success

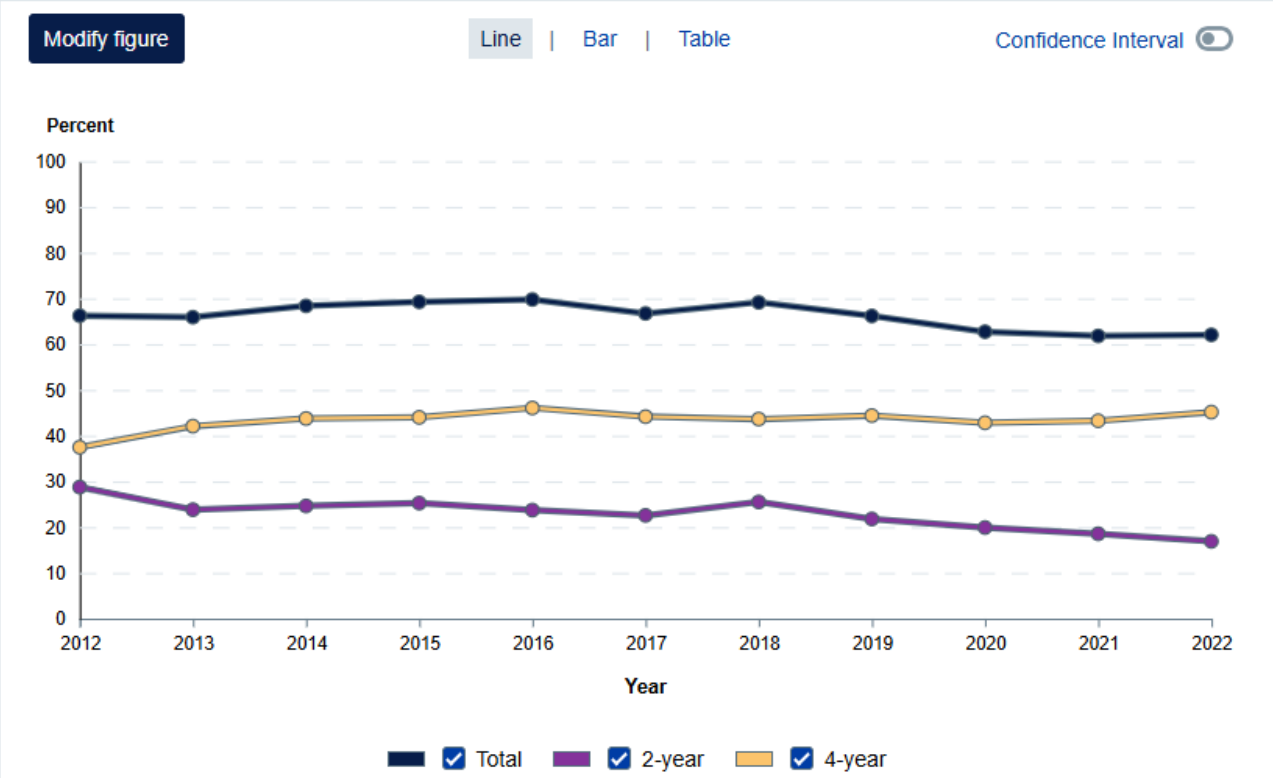
Disparities in access and completion lead to disparities in outcomes across demographic groups, and there is also wide variation in outcomes among graduates (e.g., by field)

<u>Goal:</u> Improved outcomes for all students, including significantly raising outcomes among under-represented student populations

Enrollment

Nationally, 62% of HS completers enrolled in 2022, down from 66% in 2012

Figure 1. Immediate college enrollment rate of high school completers, by level of institution: 2012 through 2022

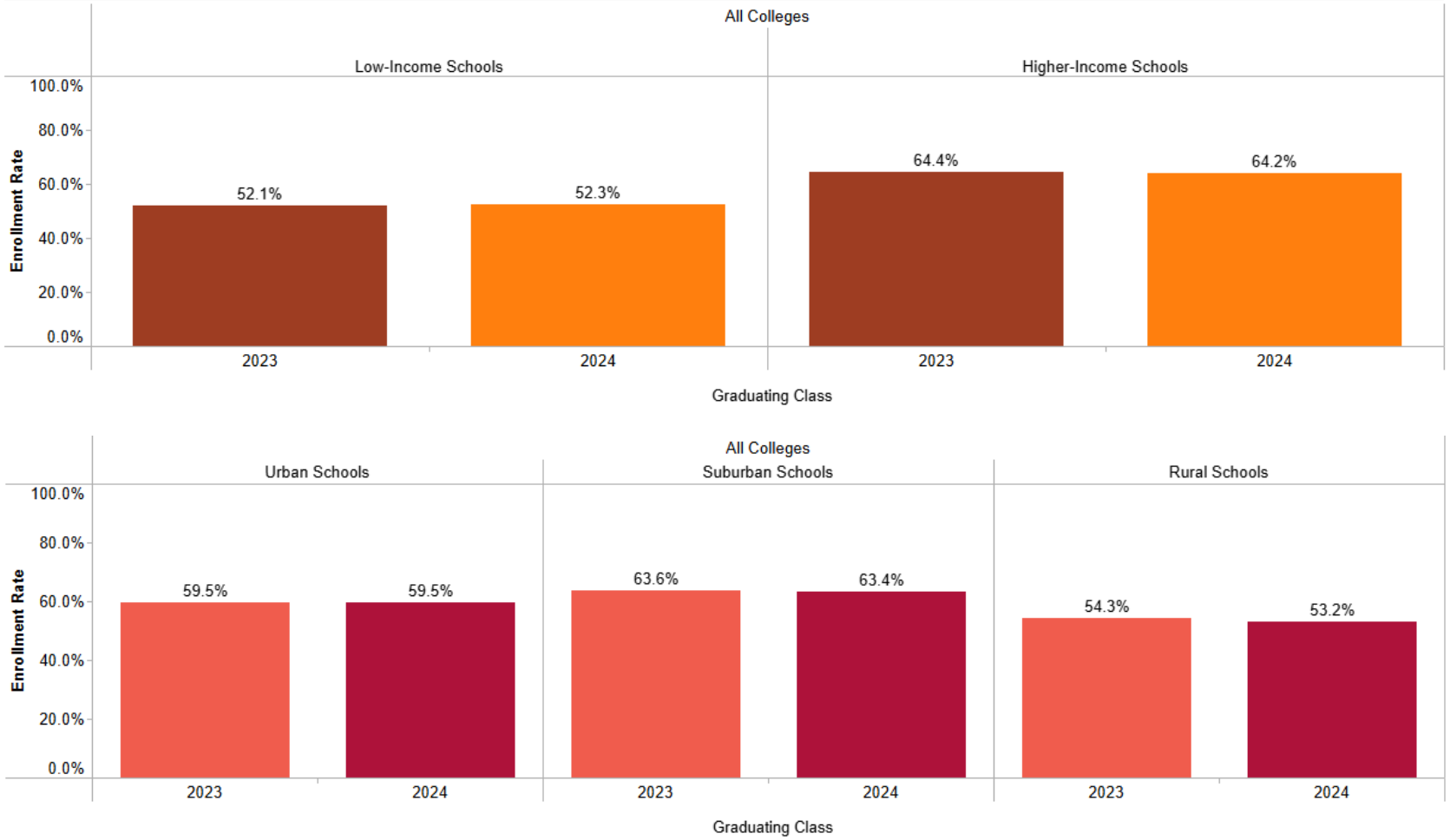


NOTE: *Immediate college enrollment rate* is defined as the annual percentage of high school completers who are enrolled in 2- or 4-year institutions in the October immediately following high school completion. High school completers include 16- to 24-year-olds who graduated with a high school diploma as well as those who completed a GED or other high school equivalency credential. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), October Supplement, 2012 through 2022. See *Digest of Education Statistics 2023*, table 302.10.

Recent data from the National Student Clearinghouse indicates that enrollment rates have fallen below 60% since 2022

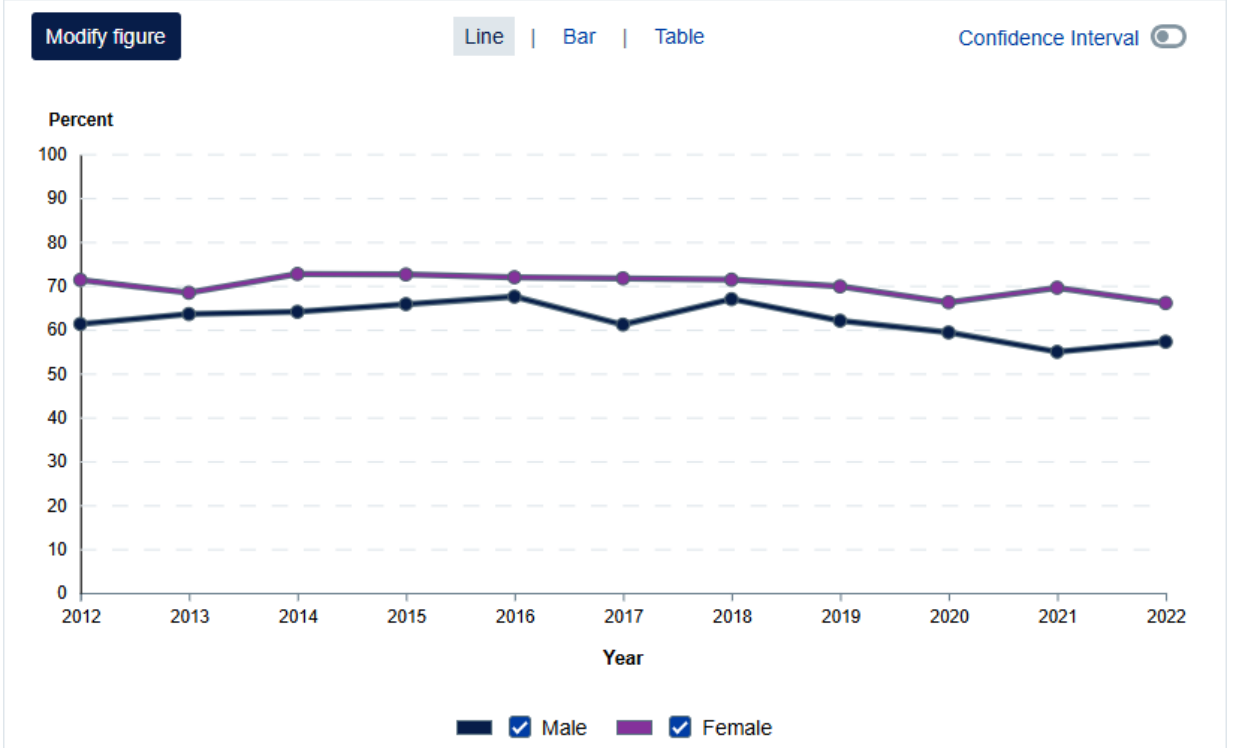
Figure 1.1 First Fall (Immediate) Enrollment Rate by Graduating Class



Weighted averages based on student counts indicate enrollment rates of ***59.8% and 59.4% in 2023 and 2024, respectively***

Nationally, women are more likely to enroll (66%) as compared to men (57%)

Figure 2. Immediate college enrollment rate of high school completers, by sex: 2012 through 2022



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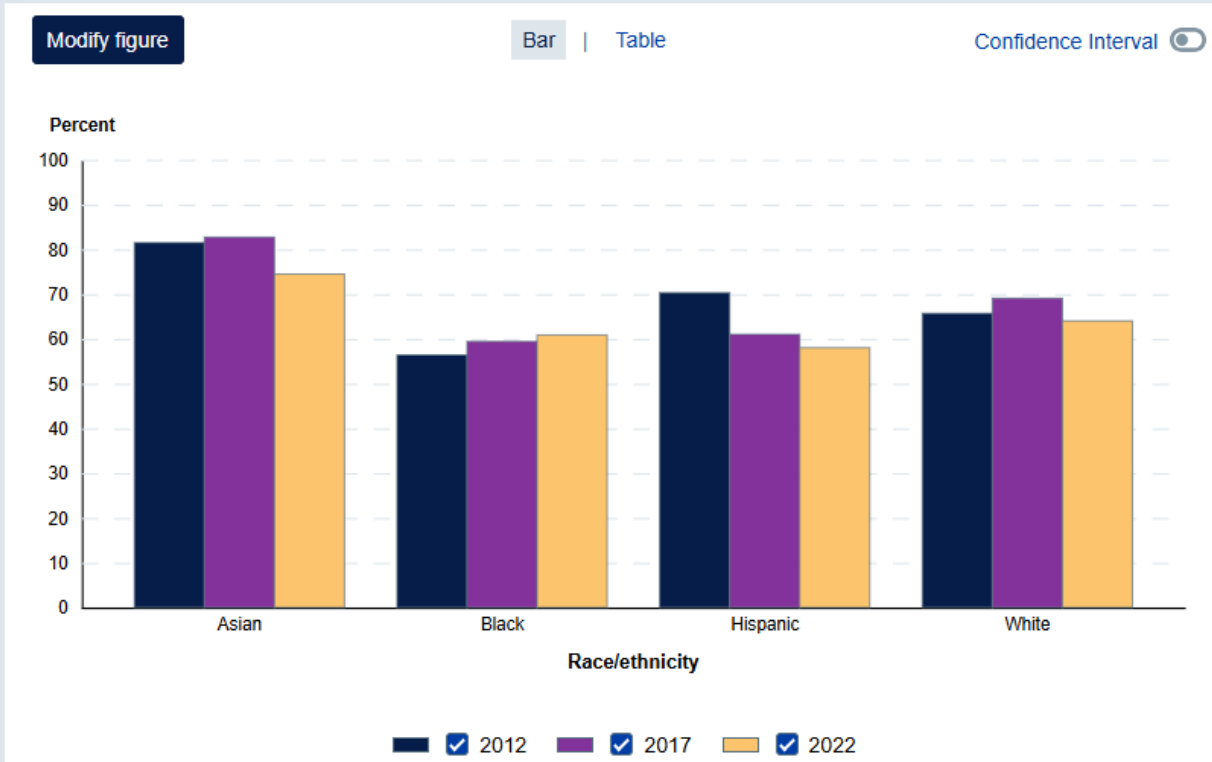
SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), October Supplement, 2012 through 2022. See *Digest of Education Statistics 2023*, table 302.10.

Nationally, Asian HS completers have the highest immediate enrollment rate (74%) followed by White HS completers (64%), Black (61%), and Hispanic (58%)

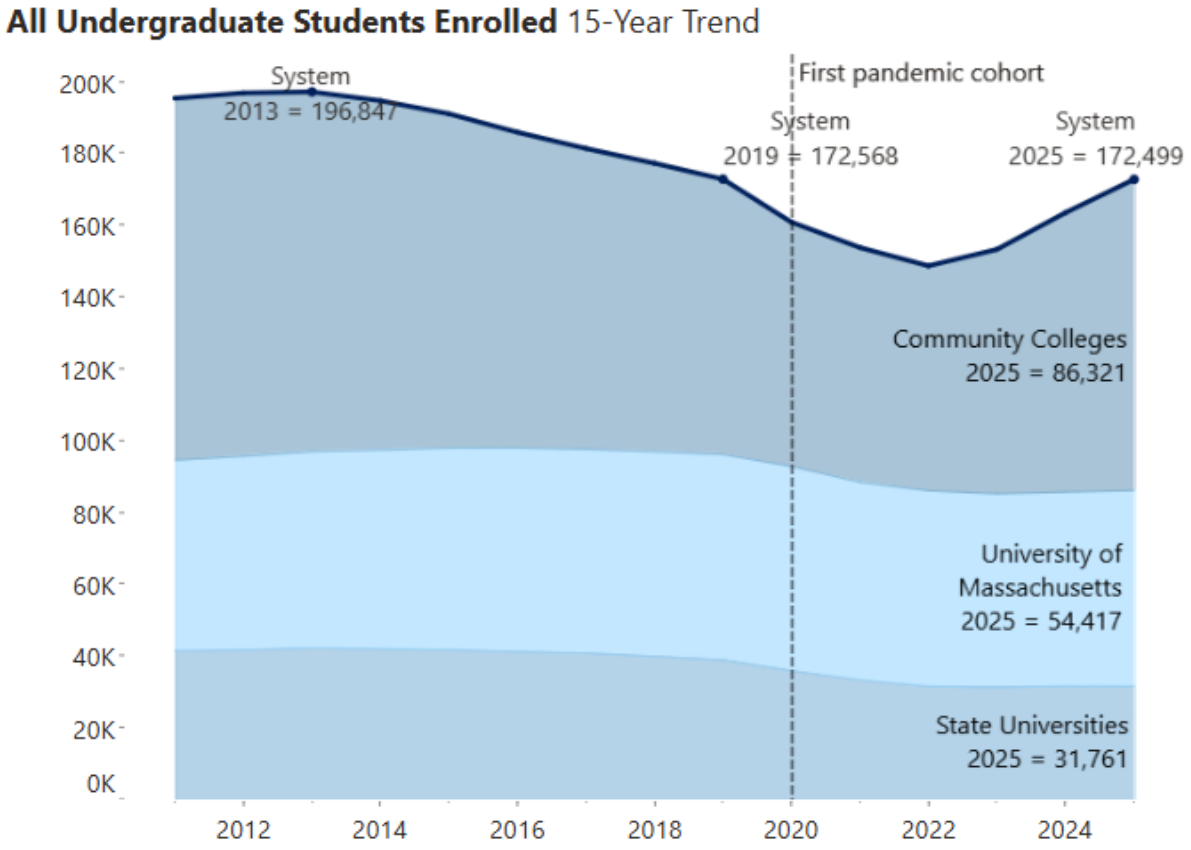
Figure 3. Immediate college enrollment rate of high school completers, by race/ethnicity: 2012, 2017, and 2022

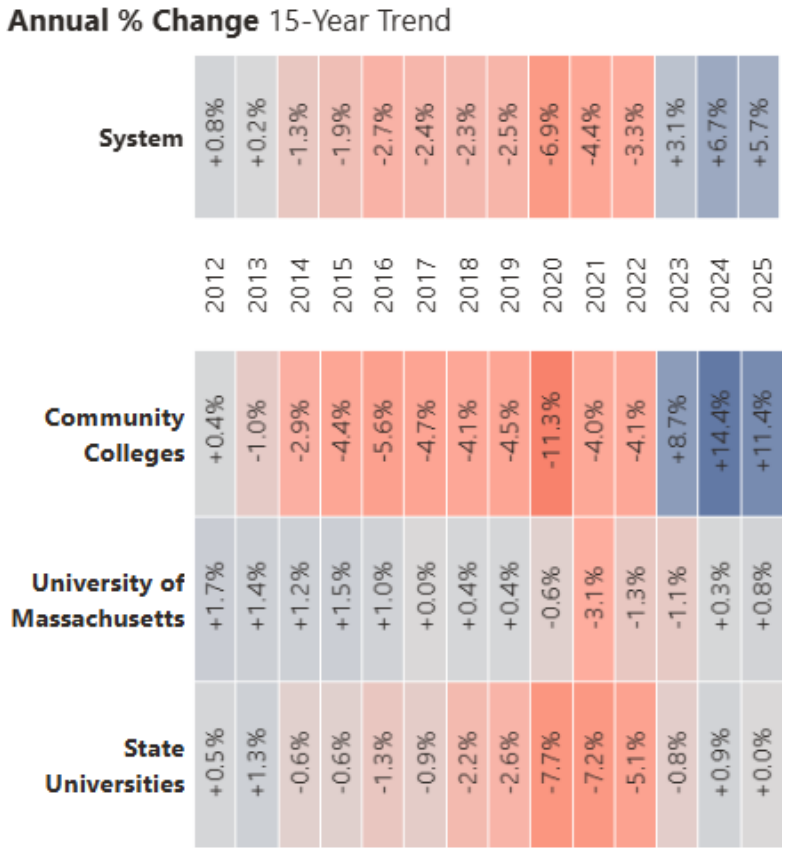


NOTE: *Immediate college enrollment rate* is defined as the annual percentage of high school completers who are enrolled in 2- or 4-year institutions in the October immediately following high school completion. High school completers include 16- to 24-year-olds who graduated with a high school diploma as well as those who completed a GED or other high school equivalency credential. Race categories exclude persons of Hispanic ethnicity. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), October Supplement, 2012, 2017, and 2022. See *Digest of Education Statistics 2023*, table 302.20.

At the system level in MA, undergraduate enrollment has returned to pre-pandemic levels





Introduction of free community college for adults 25 and older in fall 2023, which was expanded to students of all ages in fall 2024

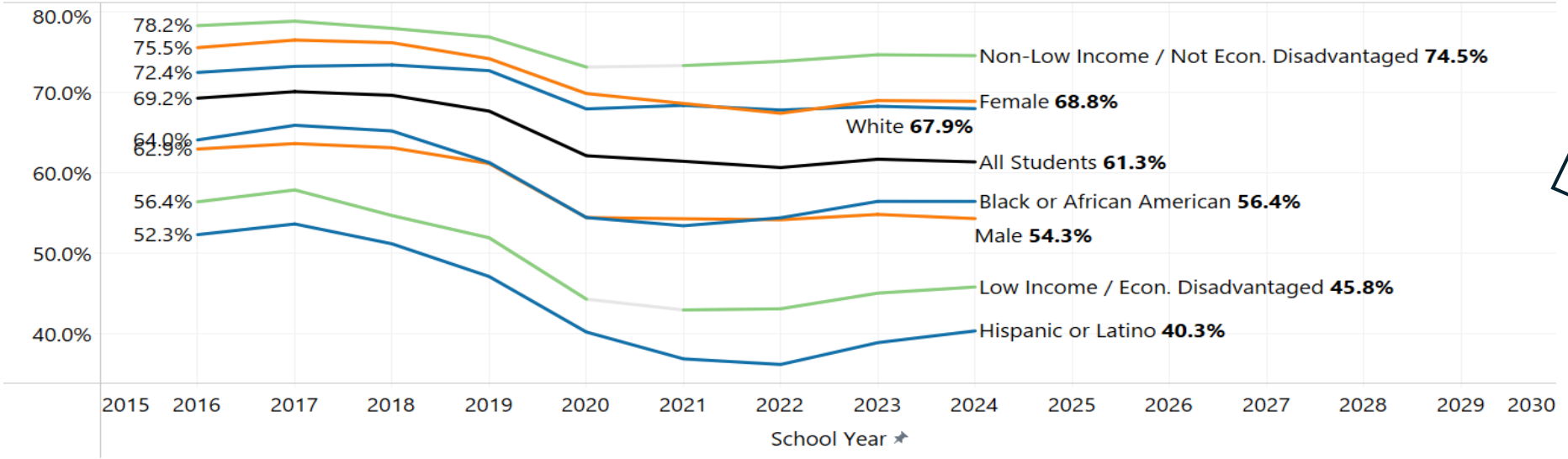
Data displayed are headcount of undergraduate students enrolled for credit in Massachusetts public higher education each fall, including dual enrolled and early college students. Fall 2025 data are estimates prior to final fall data collection at the end of the term and exclude any students who enrolled later in fall (in late-start, mini-session, etc. courses). Source: Massachusetts Department of Higher Education.

However, MA has lost significant ground on the college going rate of high school students over the past decade even as overall college enrollment rates have stabilized in recent years

College-going rates have been stabilizing or improving in recent years, still down from prior highs with substantial disparities

MA Public High School Graduate College-Going Rate

% of ninth graders who enrolled in postsecondary in the immediate fall after HS graduation



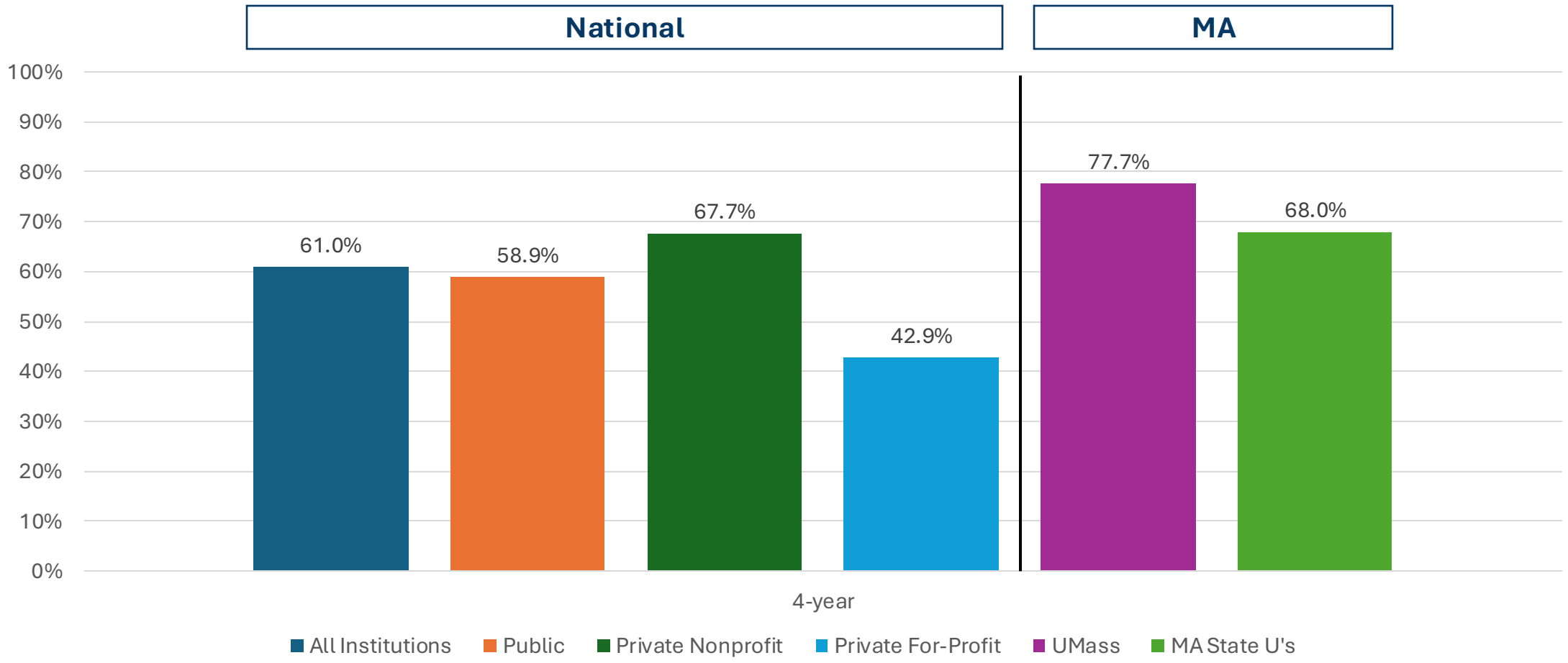
Source: Mass. Dept. of Elementary & Secondary Education, District Analysis and Review Tools (DART) Success After High School Report. Note: "School Year" is the student's high school graduation date or expected graduation date based on the year in which they were in ninth grade. The breaks in the Non-Low Income and Low Income lines indicate changes in DESE methodology to define socioeconomic status.* DHE calculated Not Economically Disadvantaged rates using DESE data for school years 2016–2018.

From 2016–2020, students were categorized as "Economically Disadvantaged" if they participated in the Supplemental Nutrition Assistance Program (SNAP); the Transitional Assistance for Families with Dependent Children (TAFDC); the Department of Children and Families' (DCF) foster care program; and/or MassHealth (Medicaid). Beginning in 2021, students were categorized as "Low Income" if they met the 2016–2020 criteria and/or had family income up to 85% of the Federal Poverty Level (FPL), were certified as low income through the new supplemental data collection process, or were reported by a district as homeless.

College enrollment can increase even if high school college going rates decrease given that student over 25 tend to return or start college, while 18 years olds do so less often

Completion

UMass and MA State Universities outperform national averages for 6-year completion

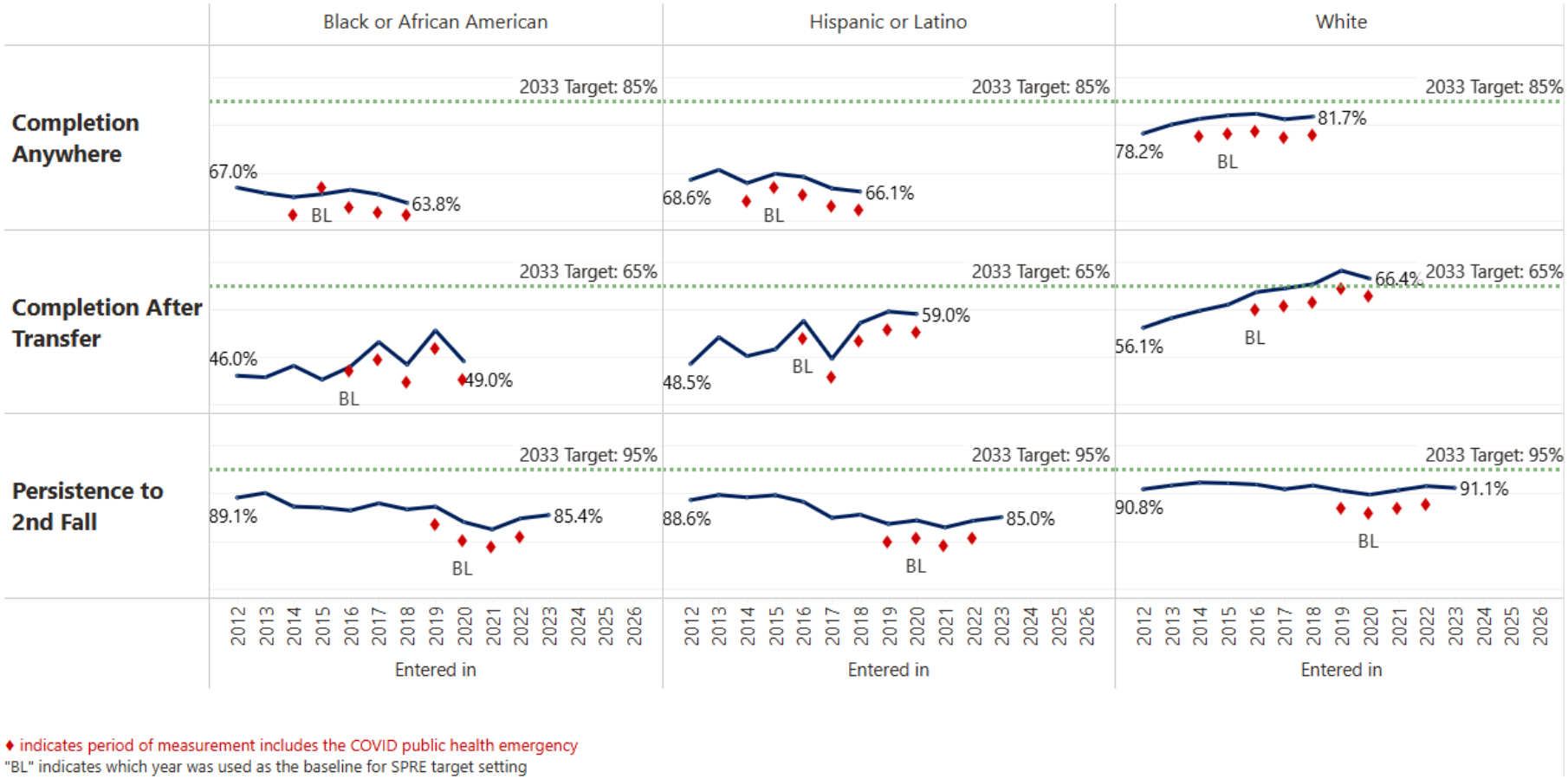


National completion rates at 4-year institutions are highest at private nonprofit institutions (67.7%)

Table 2. Number of full-time, first-time degree/certificate-seeking undergraduate students in the adjusted cohort, number receiving an award, and graduation rate within 150 percent of normal program completion time at Title IV institutions, by control of institution, level of institution, and type of aid received: United States, cohort years 2018 and 2021

	All institutions			Public			Private					
							Nonprofit			For-profit		
Level of institution and type of aid received	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate
4-year institutions (cohort year 2018)												
All students	1,825,647	1,112,922	61.0	1,266,427	746,339	58.9	510,260	345,569	67.7	48,960	21,014	42.9
Received Pell Grant	661,340	324,890	49.1	472,609	226,470	47.9	156,784	85,335	54.4	31,947	13,085	41.0
Received Direct Subsidized Loan, but not a Pell Grant	300,337	195,050	64.9	179,468	112,190	62.5	116,034	80,188	69.1	4,835	2,672	55.3
Received neither a Pell Grant nor a Direct Subsidized Loan	863,970	592,982	68.6	614,350	407,679	66.4	237,442	180,046	75.8	12,178	5,257	43.2

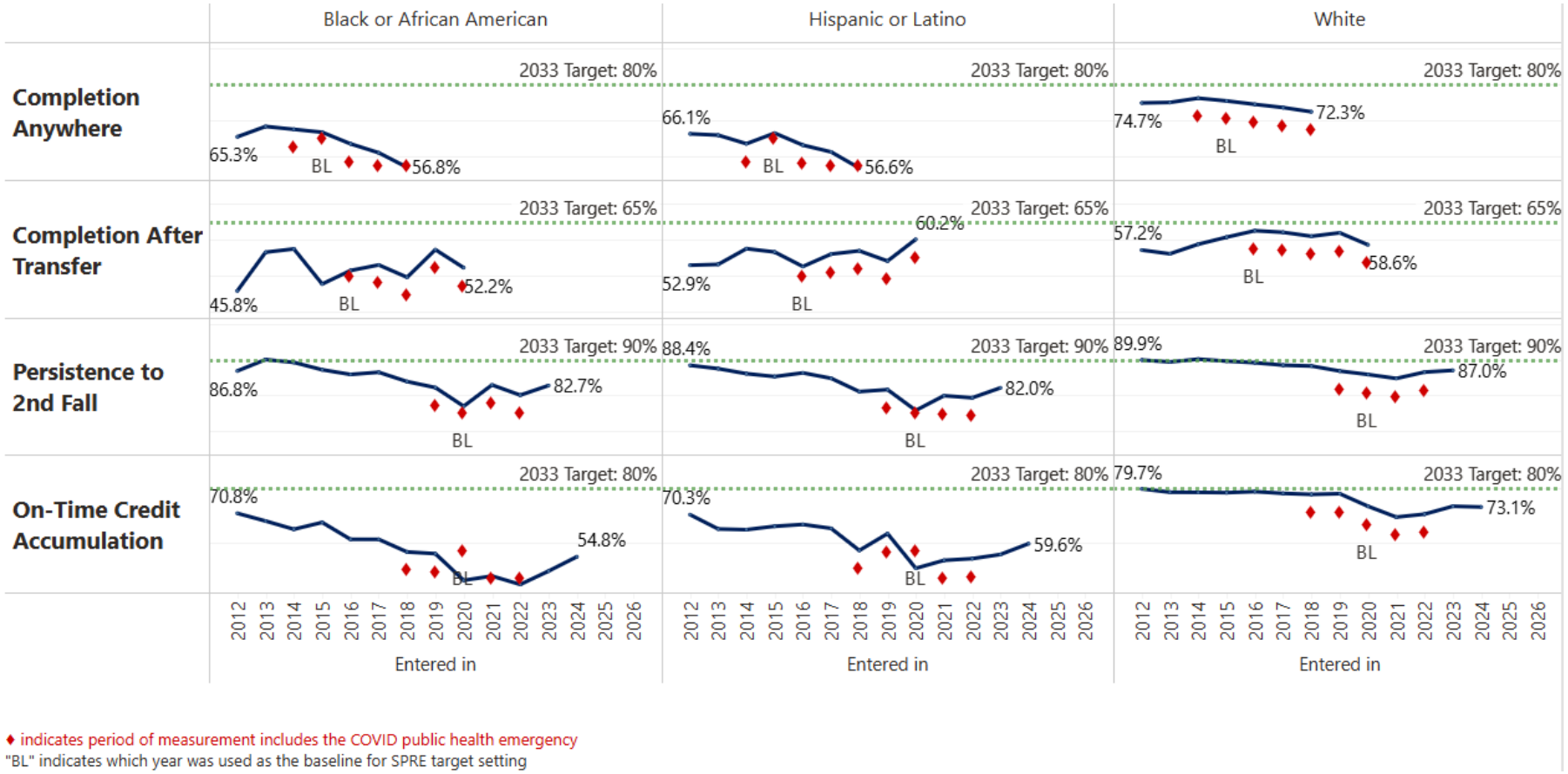
Undergraduate completion rates at UMass vary meaningfully across demographic groups



♦ indicates period of measurement includes the COVID public health emergency
"BL" indicates which year was used as the baseline for SPRE target setting

- More work is needed to meet the 2033 targets, across groups
- Completion after transfer is up overall for all three cohorts, though the year-to-year trend lines differ (with a more consistent positive trajectory for White students)

Completion rates at MA State Universities also vary meaningfully across demographic groups



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"BL" indicates which year was used as the baseline for SPRE target setting

- More work is needed to meet the 2033 targets, across groups
- Completion rate declines are more dramatic for Black/African-American and Hispanic/Latino students than White students

MA has the 6th lowest completion rate in the country among students who start at public 2-year programs

Change from Previous Year in Six-Year Completion Rate by State

State	Previous Year Completion Rate	Selected Year Completion Rate	Difference
South Dakota	72.5%	72.4%	-0.1%
Multi-State	53.9%	59.9%	6.0%
Iowa	56.0%	56.3%	0.3%
Mississippi	54.5%	55.2%	0.7%
Georgia	53.7%	54.0%	0.3%
Minnesota	54.2%	54.0%	-0.3%
Wyoming	53.4%	53.1%	-0.3%
Kentucky	51.0%	52.8%	1.8%
North Dakota	54.3%	52.0%	-2.4%
Virginia	52.7%	51.7%	-1.0%
Wisconsin	52.0%	51.6%	-0.3%
Kansas	48.0%	51.1%	3.1%
Illinois	50.6%	51.0%	0.5%
Idaho	49.4%	51.0%	1.6%
Montana	52.7%	51.0%	-1.8%
North Carolina	50.0%	49.7%	-0.3%
Missouri	46.9%	48.7%	1.8%
South Carolina	45.2%	46.5%	1.3%
Nebraska	46.2%	46.4%	0.3%
New Hampshire	44.4%	46.3%	1.8%
Hawaii	44.6%	46.0%	1.5%
New Mexico	47.5%	45.6%	-1.9%
Washington	45.1%	44.9%	-0.2%
Maryland	42.8%	44.4%	1.6%
Ohio	43.6%	44.3%	0.7%
Arkansas	44.5%	43.8%	-0.7%
Utah	39.8%	43.6%	3.8%
Alabama	43.1%	43.1%	-0.0%
Indiana	43.7%	43.1%	-0.6%
New Jersey	43.2%	42.4%	-0.8%
Texas	42.2%	42.4%	0.1%

Change from Previous Year in Six-Year Completion Rate by State

State	Previous Year Completion Rate	Selected Year Completion Rate	Difference
Vermont	40.5%	42.2%	1.7%
Florida	46.5%	42.1%	-4.4%
West Virginia	42.3%	41.9%	-0.4%
New York	42.8%	41.7%	-1.1%
Michigan	41.8%	41.6%	-0.3%
Tennessee	44.8%	41.3%	-3.4%
Colorado	42.6%	41.2%	-1.5%
Oklahoma	39.9%	41.0%	1.1%
Pennsylvania	41.4%	40.5%	-0.9%
California	39.4%	39.8%	0.4%
Maine	45.7%	38.6%	-7.1%
Massachusetts	39.2%	37.5%	-1.7%
Rhode Island	38.8%	36.6%	-2.3%
Louisiana	35.9%	36.3%	0.3%
Oregon	37.5%	36.0%	-1.4%
Arizona	34.9%	35.1%	0.2%
Connecticut	29.0%	29.4%	0.3%

Sorted in descending order based on completion rates of the 2019 cohort of students who started at public 2-year institutions

Source: National Student Clearinghouse Research Center

National completion rates at 2-year institutions are highest at private for-profit institutions (64.6%)

Table 2. Number of full-time, first-time degree/certificate-seeking undergraduate students in the adjusted cohort, number receiving an award, and graduation rate within 150 percent of normal program completion time at Title IV institutions, by control of institution, level of institution, and type of aid received: United States, cohort years 2018 and 2021

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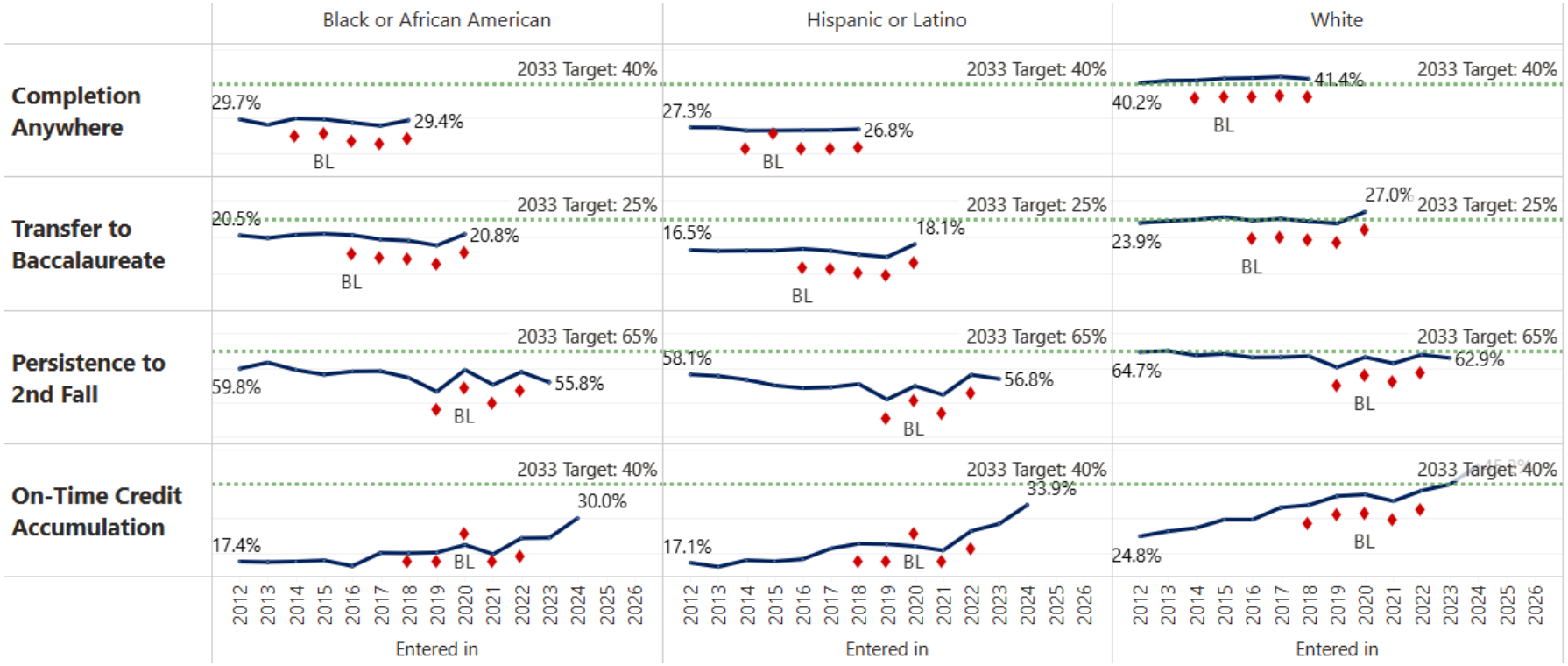
Level of institution and type of aid received	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate	Adjusted cohort	Received an award	Graduation rate
2-year institutions (cohort year 2021)												
All students	546,417	233,174	42.7	426,093	156,443	36.7	19,178	11,368	59.3	101,146	65,363	64.6
Received Pell Grant	288,623	119,979	41.6	205,180	68,030	33.2	14,521	8,721	60.1	68,922	43,228	62.7
Received Direct Subsidized Loan, but not a Pell Grant	30,828	16,354	53.0	17,594	6,556	37.3	1,352	940	69.5	11,882	8,858	74.5
Received neither a Pell Grant nor a Direct Subsidized Loan	226,966	96,841	42.7	203,319	81,857	40.3	3,305	1,707	51.6	20,342	13,277	65.3

Completion rates at MA community colleges vary meaningfully across demographic groups

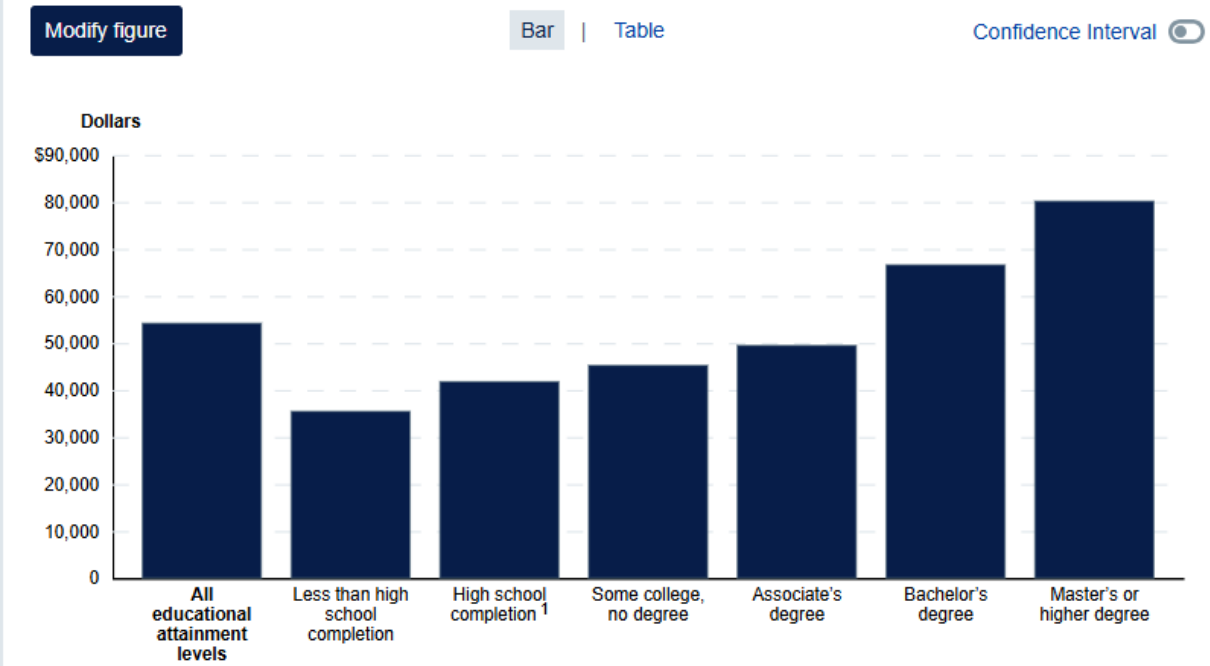


- Trend lines are similar across groups
- Outcomes for White students are currently near or exceeding the 2033 targets
- Significant increases are needed to meet the same targets for Black/African-American and Hispanic/Latino outcomes

Career Success

Nationally, median earnings increase with increasing levels of educational attainment

Figure 2. Median annual earnings of full-time, year-round workers ages 25–34, by educational attainment: 2022

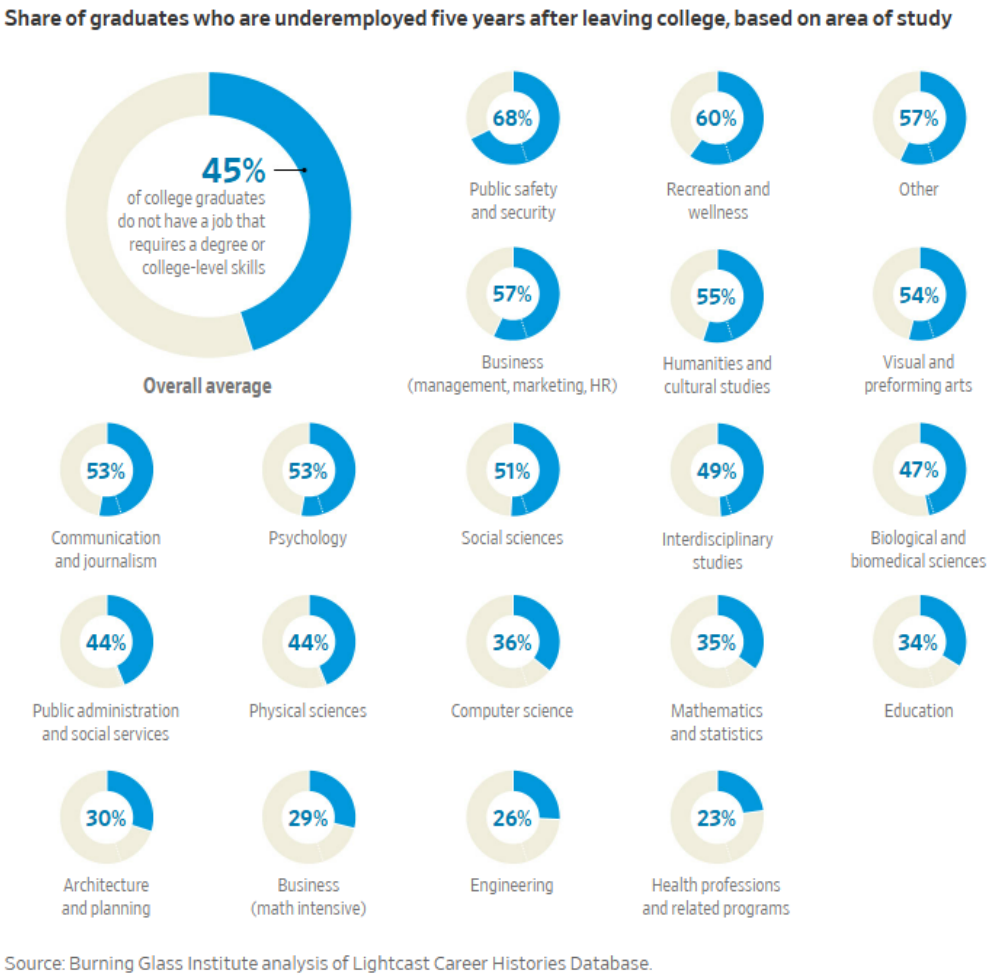


[1] Includes equivalency credentials, such as the GED.

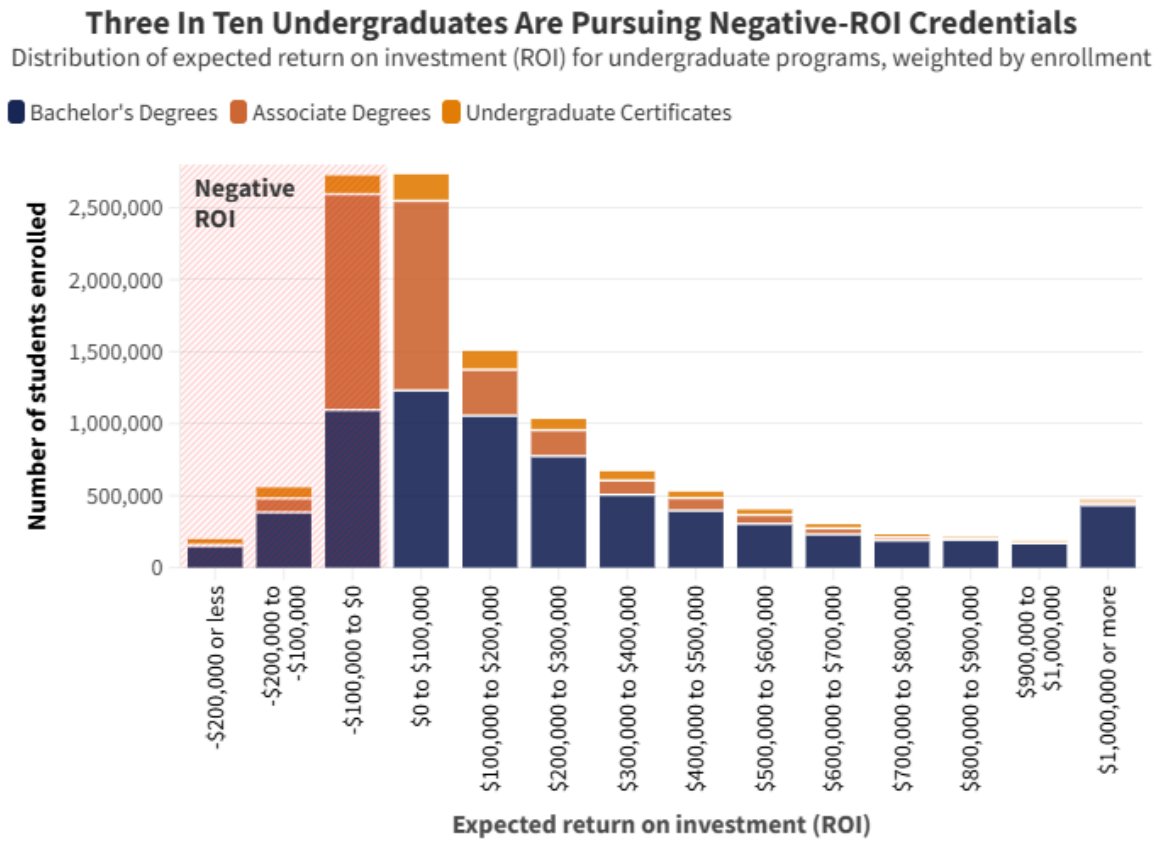
NOTE: Data are based on sample surveys of the noninstitutionalized population, which excludes persons living in institutions (e.g., prisons or nursing facilities) and military barracks. *Full-time, year-round* workers are those who worked 35 or more hours per week for 50 or more weeks per year. For information about the impact of the coronavirus pandemic on the Current Population Survey Annual Social and Economic Supplement data collection, please see https://www2.census.gov/programs-surveys/cps/techdocs/cpsmar23.pdf. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 2023. See *Digest of Education Statistics 2023*, table 502.30.

Still, 45% of students nationally are underemployed coming out of college



Some estimates suggest that as many as 3 in 10 undergraduates nationally pursue negative-ROI credentials

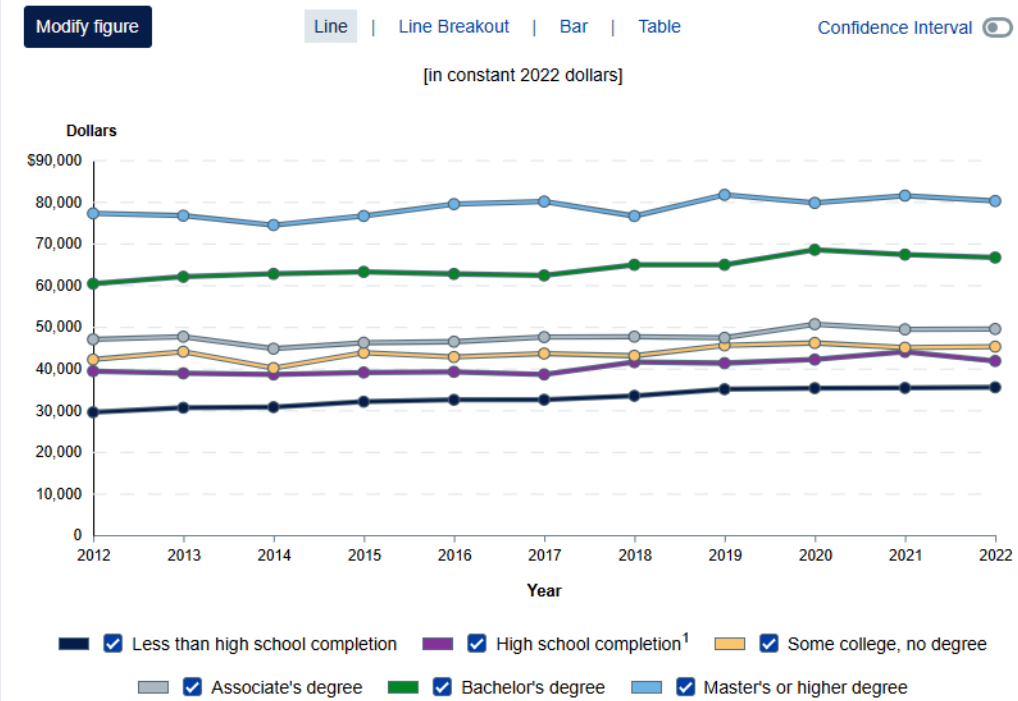


Source: The Foundation for Research on Equal Opportunity
Graphic: Preston Cooper

FREOPP.org

Differences in median earnings across levels of attainment have remained similar over time

Figure 3. Median annual earnings of full-time, year-round workers ages 25–34, by educational attainment: 2012 through 2022



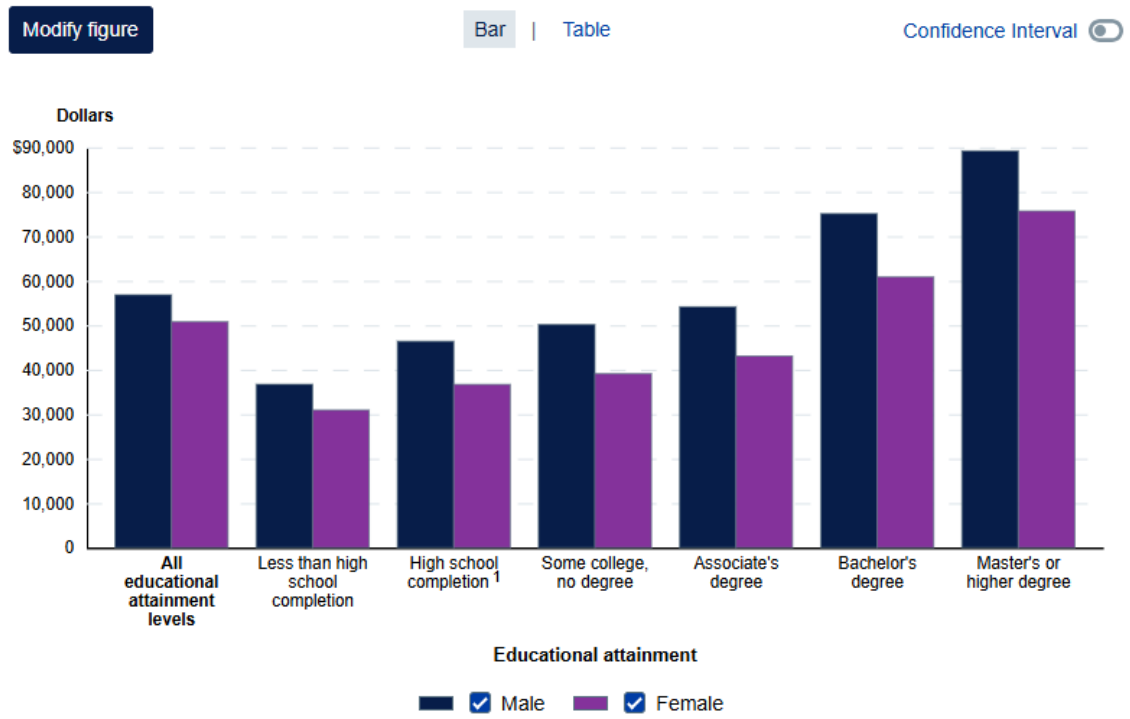
[1] Includes equivalency credentials, such as the GED.

NOTE: Data are based on sample surveys of the noninstitutionalized population, which excludes persons living in institutions (e.g., prisons or nursing facilities) and military barracks. *Full-time, year-round* workers are those who worked 35 or more hours per week for 50 or more weeks per year. Constant dollars are based on the Consumer Price Index, prepared by the Bureau of Labor Statistics, U.S. Department of Labor. Caution should be used when comparing 2019, 2020, and 2021 estimates with those of earlier years due to the impact that the coronavirus pandemic had on interviewing and response rates. For additional information about the impact of the coronavirus pandemic on the Current Population Survey Annual Social and Economic Supplement data collection, please see https://www2.census.gov/programs-surveys/cps/techdocs/cpsmar23.pdf. Figures are plotted based on unrounded data.

SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 2013 through 2023. See *Digest of Education Statistics 2023*, table 502.30.

Men have higher median earnings than women across levels of attainment

Figure 4. Median annual earnings of full-time, year-round workers ages 25–34, by educational attainment and sex: 2022



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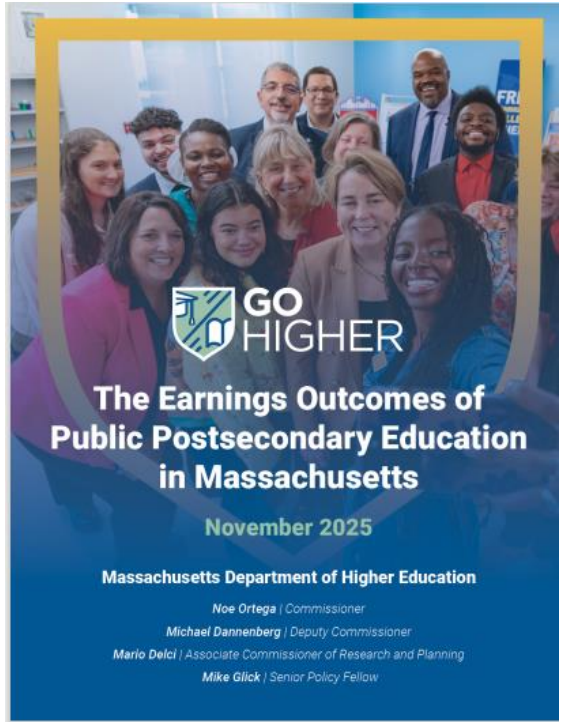
SOURCE: U.S. Department of Commerce, Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement, 2023. See *Digest of Education Statistics 2023*, table 502.30.

New MA report on earnings released in November: In general, the more you learn, the more you earn

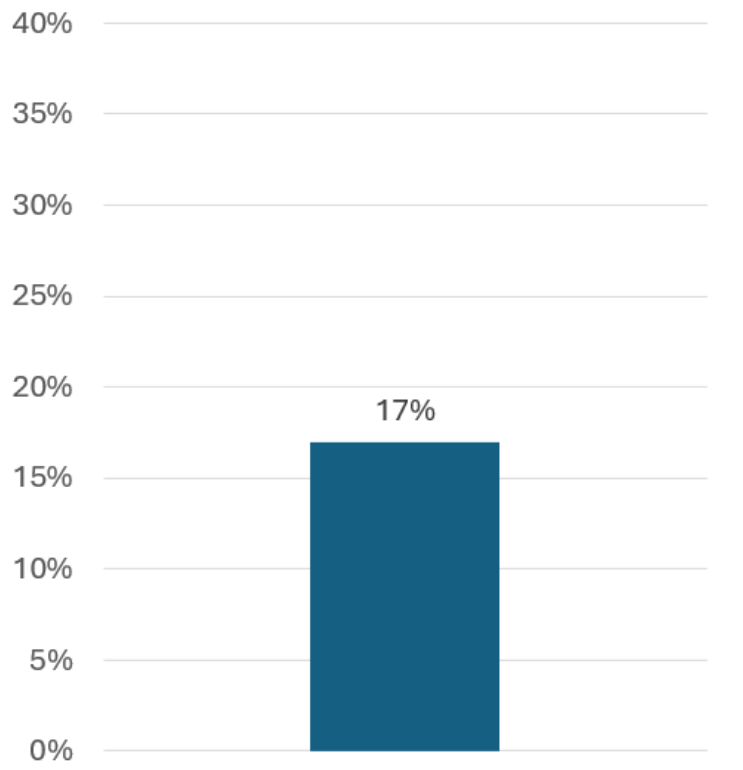


www.mass.edu/earnings

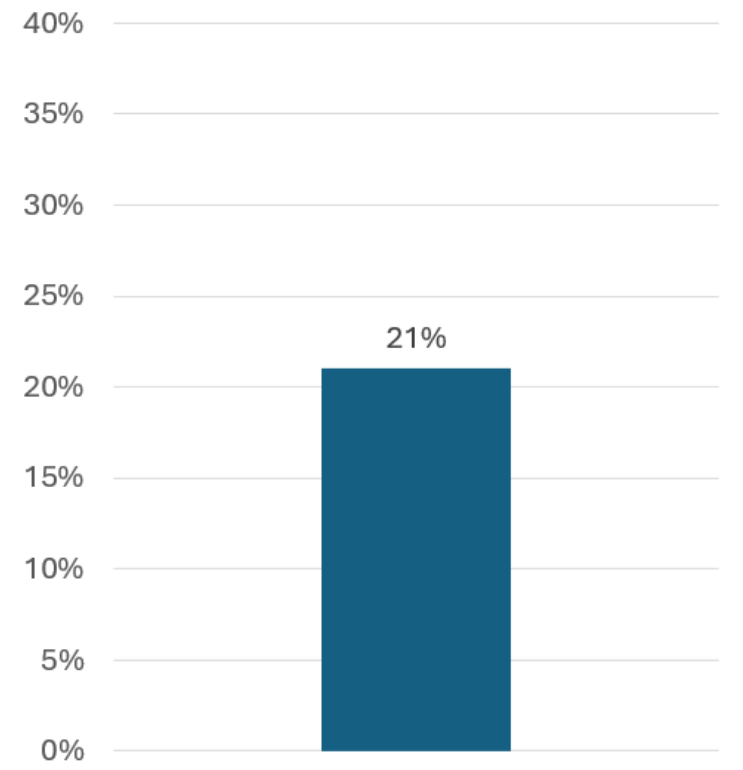
Degree Completers Earn Significantly More than Those who "Stop-Out"

Postsecondary enrollment alone is not sufficient to drive meaningful earning gains

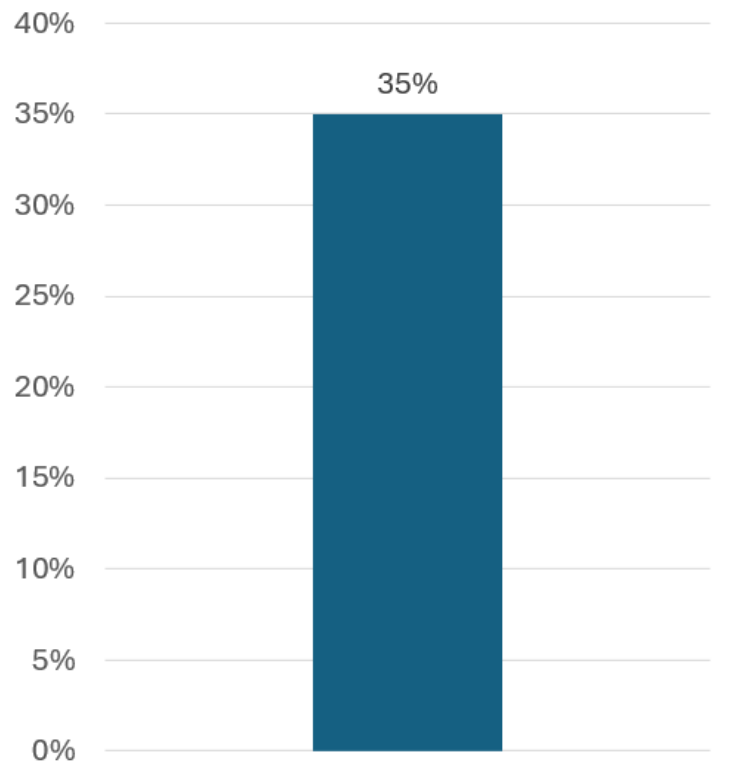
Median earnings comparison:
% completion premium
Associate degree completers vs stop-outs



Median earnings comparison:
% completion premium
Bachelor's degree completers vs stop-outs (non-UMass)

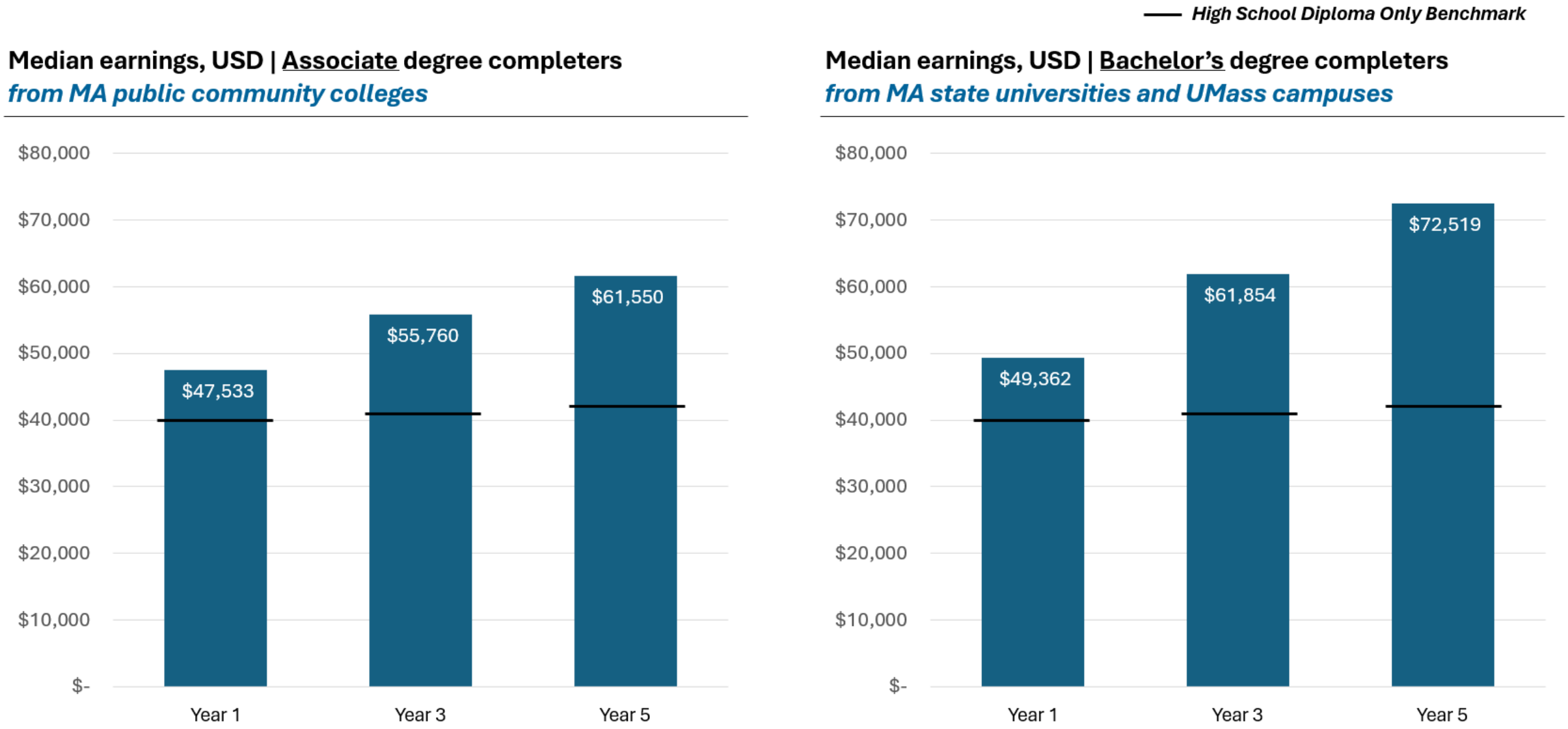


Median earnings comparison:
% completion premium
Bachelor's degree completers vs stop-outs (UMass)



Notes: 1) Earnings are inflation-adjusted to 2023 dollars; 2) Displaying data for graduates and stop-outs from 2014-2018, five years after exit. Source: Department of Unemployment Assistance earnings data.

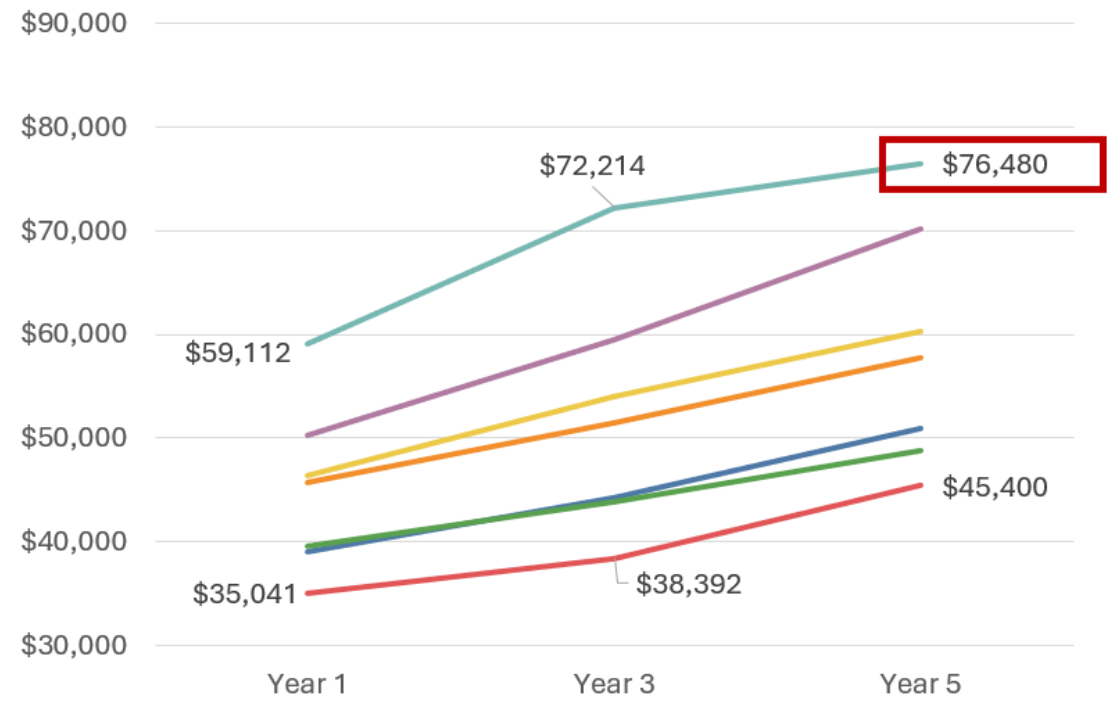
Postsecondary Degree Completion is Associated with Higher Earnings -- Associate and bachelor's degree completers have higher median earnings than those with a HS diploma as their highest credential



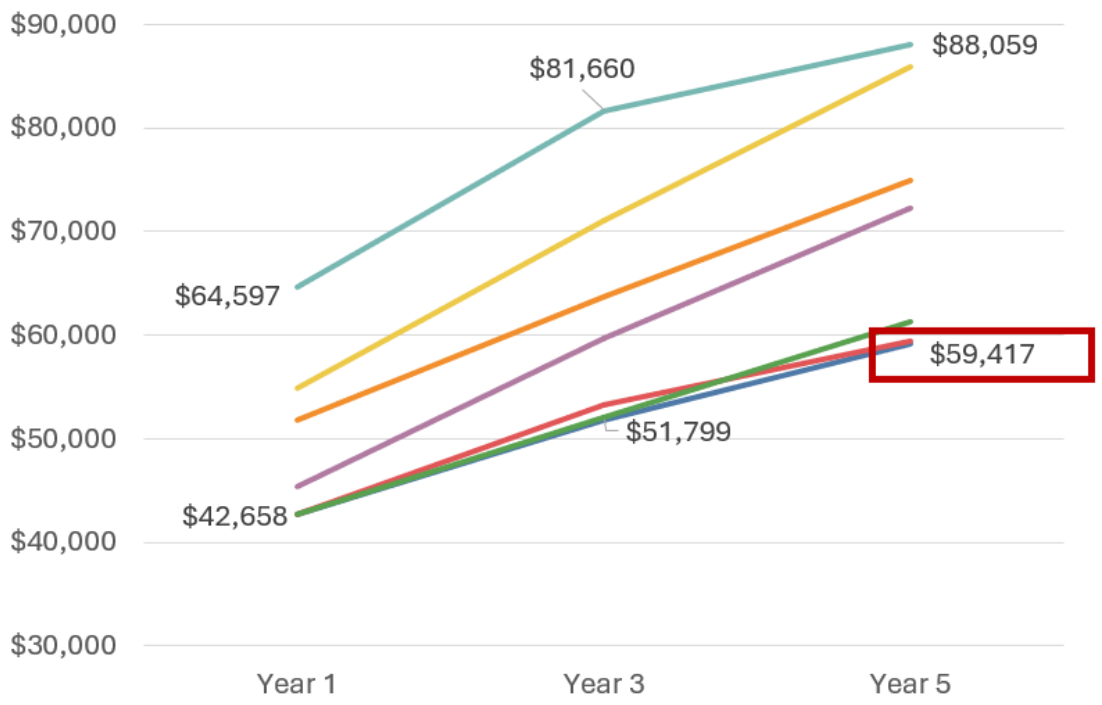
Notes: 1) Earnings are inflation-adjusted to 2023 dollars; 2) Displaying data for graduates from 2014-2018; 3) High school benchmarks based on 2023 ACS data for those aged 18-25, living and working in Massachusetts, employed with earnings above minimum wage for the year, with a high school diploma or GED as their highest credential, and not currently in school. Year 1 value leverages earnings of those 18-20 years old; Year 3 value, 21-22; Year 5, 23-25; outcomes calculated separately by gender, with average taken across genders. Source: Department of Unemployment Assistance earnings data; Census American Community Survey (ACS) 5-Year Estimates Public Use Microdata Sample.

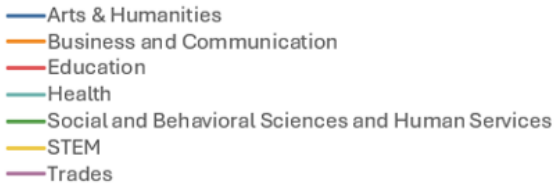
What You Study Matters -- The highest earnings are often associated with degrees in Health Sciences, STEM & Trades; some associate degrees lead to higher median earnings than bachelor's degrees

Median earnings, USD | Associate degree completers
from MA public community colleges



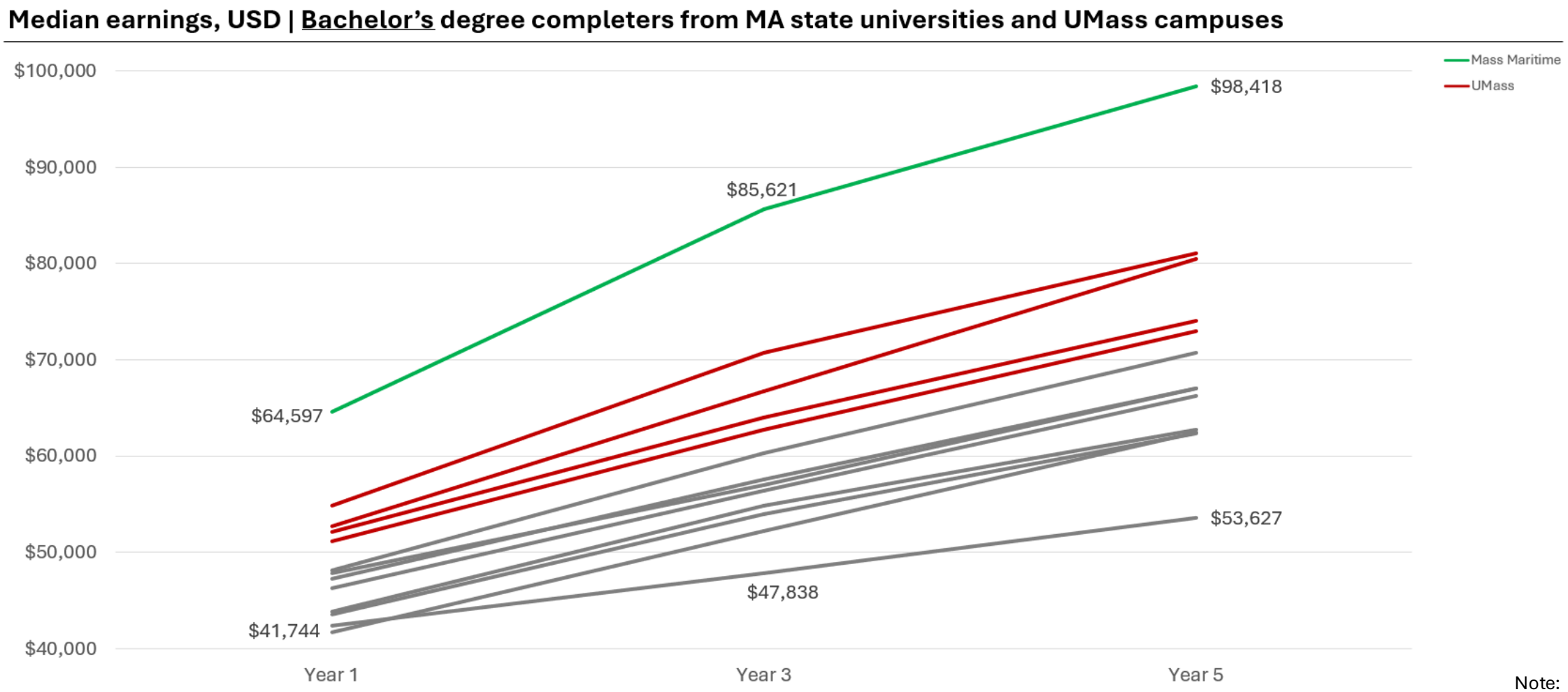
Median earnings, USD | Bachelor's degree completers
from MA state universities and UMass campuses





Notes: 1) Earnings are inflation-adjusted to 2023 dollars; 2) Displaying data for graduates from 2014-2018. Source: Department of Unemployment Assistance earnings data.

Full-Time Median Earnings Vary Across Individual Institutions -- Aggregating across programs, there is meaningful variance in outcomes

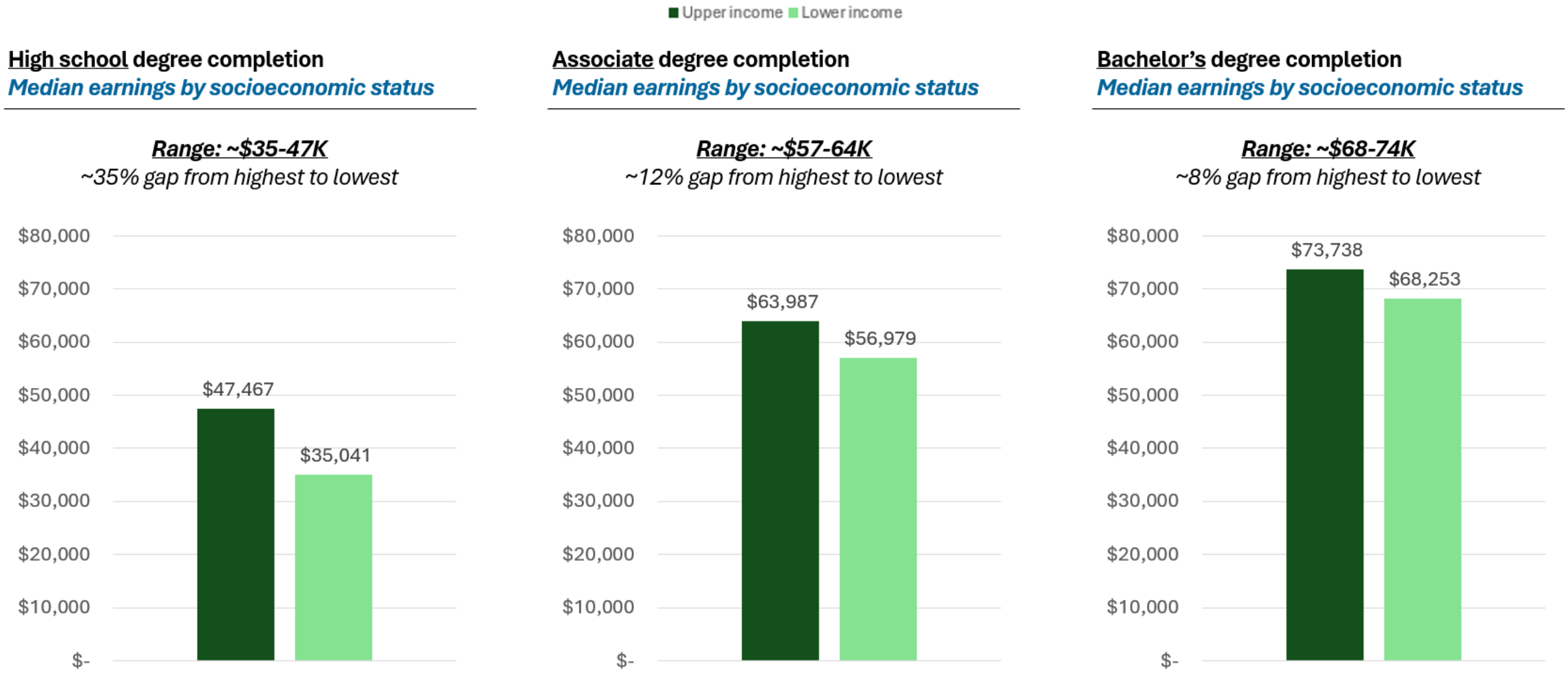


Note:
State Universities are reflected in the grey lines

Notes: 1) Earnings are inflation-adjusted to 2023 dollars; 2) Displayed data for 2014-2018 graduates. Source: Department of Unemployment Assistance earnings data.
Gray lines reflect all Massachusetts state universities other than Massachusetts Maritime Academy

Higher Levels of Educational Attainment, Reduced Income Gap Across Lines of SES

Postsecondary pathways may play a role in reducing income gaps across some demographic lines



Notes: 1) Eligibility for free/reduced lunch determines upper- vs lower-income classification for HS degree completers; Pell status determines upper- vs lower-income classification for associate degree and bachelor's degree completers; 2) Leveraging 10-year earnings outcomes for 2012 high school graduates in Connecticut who did not attend college as a proxy for differences by income levels in Massachusetts, given similar overall ranges; 3) Earnings are inflation-adjusted to 2023 dollars (2022 in the case of HS comparison point, based on data available); 4) Displaying data for 2014-18 graduates, 5 years after exit, for associate degree and bachelor's degree completers. Source: Department of Unemployment Assistance earnings data; EdSight Connecticut.

Higher Levels of Educational Attainment, Reduced Income Gap Across Lines of Race/Ethnicity

Postsecondary pathways may play a role in reducing income gaps across some demographic lines

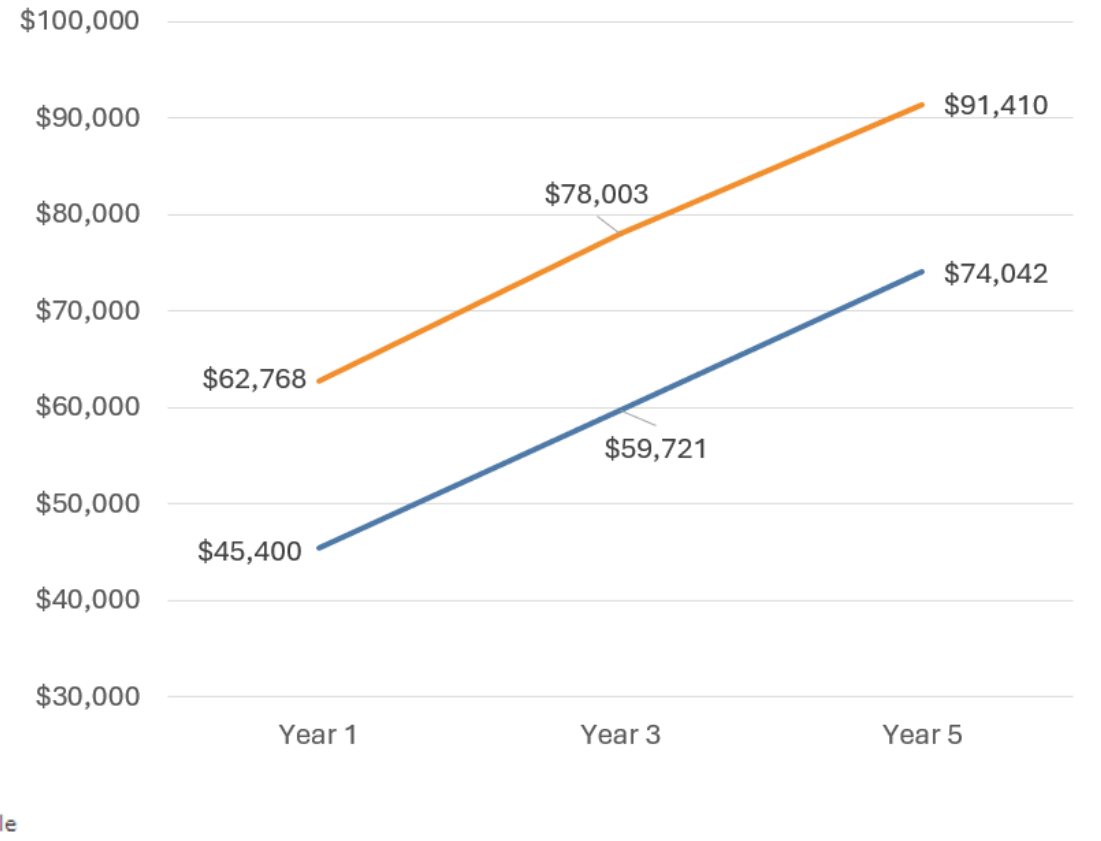
Notes: 1) Leveraging 2019-23 ACS data for those aged 23-25, living and working in Massachusetts, employed with earnings above minimum wage for the year, with a high school diploma or GED as their highest credential earned, and not currently in school for differences for HS degree completers by race/ethnicity; 2) Earnings are inflation-adjusted to 2023 dollars; 3) Displaying data for 2014-18 graduates, 5 years after exit, for associate degree and bachelor's degree completers. Source: Department of Unemployment Assistance earnings data; ACS.

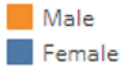
Relevant Differences in STEM Earning Outcomes by Gender Remain -- Five years after graduation, median earnings for female degree earners trail earnings of male peers by more than 20% in STEM fields

STEM

Median earnings, USD | Associate degree completers *from MA public community colleges*

Median earnings, USD | Bachelor's degree completers *from MA state universities and UMass campuses*





Notes: 1) Earnings are inflation-adjusted to 2023 dollars; 2) Displaying data for graduates from 2014-2018. Source: Department of Unemployment Assistance earnings data.

BHE Priorities:
Progress and Update

Note: In January 2025, the BHE established goals and deliverables for two of the BHE Priorities: Economic Mobility and Innovation.

Economic Mobility

5-year goals set last year

- Adopt and effectively report on rigorous postsecondary economic success measures
- Align Board and Department policies with the postsecondary economic success measures to incentivize and support campuses in improving economic mobility
- Identify, prioritize, and invest in complementary efforts that, at scale, will make significant differences in economic opportunity

18-month goals set last year

Governance & Resources	• Form and convene BHE Economic Mobility Task Force composed of BHE members, external experts, and civic leaders • Determine and secure sufficient internal and external resources to progress on economic mobility goals in a timely manner
Goal 1: Measurement	• Begin to report earnings outcomes previously adopted in 2018 • Task Force puts forward a recommendation for additional economic success measure(s) • Task Force puts forward recommendations for how to use additional economic success measures, plus key "business rules" to define them and the resources necessary to report them • Begin to effectively report at least one of the additional economic success measures
Goal 2: Policy	• Launch policy gap analysis to identify opportunities for alignment with the state's goals for economic mobility • Complete policy gap analysis and put forward findings to BHE
Goal 3: Practice	• Launch system-level analysis of opportunities to strengthen non-degree credential pathways and work-based learning opportunities • Complete and put forward to the BHE a white paper on recommendations for possible pilots or policy actions to support non-degree credential pathways and work-based learning opportunities

18-month goals set last year

Governance & Resources	• Form and convene BHE Economic Mobility Task Force composed of BHE members, external experts, and civic leaders (formal Task Force deprioritized; engaged leaders in the field informally) • Determine and secure sufficient internal and external resources to progress on economic mobility goals in a timely manner (on schedule)
Goal 1: Measurement	• Begin to report earnings outcomes previously adopted in 2018 (accomplished) • Task Force puts forward a recommendation for additional economic success measure(s) (no Task Force yet) • Task Force puts forward recommendations for how to use additional economic success measures, plus key "business rules" to define them and the resources necessary to report them (no Task Force yet) • Begin to effectively report at least one of the additional economic success measures (on schedule)
Goal 2: Policy	• Launch policy gap analysis to identify opportunities for alignment with the state's goals for economic mobility (accomplished) • Complete policy gap analysis and put forward findings to BHE (on schedule)
Goal 3: Practice	• Launch system-level analysis of opportunities to strengthen non-degree credential pathways and work-based learning opportunities (accomplished) • Complete and put forward to the BHE a white paper on recommendations for possible pilots or policy actions to support non-degree credential pathways and work-based learning opportunities (on schedule)

Progress updates

Completed

- Earnings metrics incorporated into PMRS.
- Earnings Commentary published in collaboration with Governor Healey
- Landscape analysis / policy gaps / opportunities to support work-based learning and non-degree credentials
- Co-op form of Work-Based Learning advanced through (a) Partnership with UMass-Lowell; (b) support for doubling UMass-Lowell co-op; and (c) partnering with three State Universities to launch new co-op programs in 2026.

In progress

- Develop a supplemental document with a detailed description of the methodology used for the analysis.
- Assessing the need for the development of work-based learning policy

Innovation

5-year goals set last year

- Demonstrate ability to launch innovations that contribute to overall equity and success goals for learners
- Launch and sustain a dedicated innovation function unit with the ability to respond quickly and nimbly
- Attract and grow multi-year funding from both public and philanthropic sources
- Launch at least 10 pilots that have the potential to make a meaningful impact on BHE strategic priorities if scaled
- Demonstrate positive outcomes & then substantially scale at least 2 pilots to reach a much broader group of learners
- Foster a growing network of campus partners as well as nonprofit and academic allies and partners to develop pilots and achieve goals

18-month deliverable goals set last year

Governance & Resources	• Form and convene BHE Innovation Task Force composed of BHE members, external experts, and civic leaders • Attract sufficient public and/or private resources to launch innovation unit • Recruit small, agile, & effective team to lead/execute innovation work
Pilot & Evaluation	• Work with campuses to identify & refine at least two promising campus-identified & collaborative pilots with multiple campus partners • Identify and refine at least two promising potential pilots building on promising innovations and practices from across the country • Launch at least two pilots aligned to overall BHE/DHE strategic priority goals

18-month goals set last year

Governance & Resources	• Form and convene BHE Innovation Task Force composed of BHE members, external experts, and civic leaders (intentionally deprioritized) • Attract sufficient public and/or private resources to launch innovation unit (accomplished) • Recruit small, agile, & effective team to lead/execute innovation work (on schedule)
Pilot & Evaluation	• Work with campuses to identify & refine at least two promising campus-identified & collaborative pilots with multiple campus partners (on schedule) • Identify and refine at least two promising potential pilots building on promising innovations and practices from across the country (on schedule) • Launch at least two pilots aligned to overall BHE/DHE strategic priority goals (on schedule)

Progress updates

Completed	In progress	Pending
• Initial $2.1M grant from Axim Collaborative received in March 2025 • Launched as search for an inaugural Chief Innovation Officer (CIO) and Project Director for our innovations work • Launched key innovation pilots in the areas of financial aid, cooperative education, and non-degree credentials	• Fully integrate and operationalize innovation function within DHE • Assess the efficacy of current/completed pilots • Establish a process for institutions to propose pilot programs that might be inconsistent with current BHE rules/regulations that are responsive to societal changes, technological advancements, or documented needs • Working to identify new pilots.	• N/A

Student Success & Financial Aid

Note: To date, the work advanced for the priorities of Financial Aid and Student Succes have been informed by the SHEF Framework (adopted by BHE in 2022)

In December 2022, a framework for Strategic Public Higher Education Financing was established (1/3)

The system for financing public higher education in the Commonwealth must fully support the following six key principles:

1. The System works for both students and institutions
2. The System advances student participation in high quality, affordable education: The system supports students from all backgrounds in participating in and affording high quality higher education
3. The System promotes equity in student outcomes: The system supports bridging gaps in retention, graduation, and postgraduate outcomes (e.g., student success and employment) by student subgroup
4. The System is transparent and rooted in providing stakeholders with sufficient ability to plan: The drivers of state funding are clear and well understood by institutions, students, parents and policymakers, allowing them to plan based on known parameters
5. The System recognizes institutional context: The System takes into account institutional mission, contexts, and regional geography, including diversity of student populations and district needs
6. The System recognizes and invests in innovation and collaboration: The System fosters innovation and collaboration to meet student success goals, including collaboration within segments, regions, and with outside stakeholders such as K-12 and industry

In December 2022, a framework for Strategic Public Higher Education Financing was established (2/3)

The system for financing public higher education in the Commonwealth must address the following five high-level goals:

1. Make college more accessible and affordable for students.
    i. Address barriers to participation for low-income and part-time students, including adult students.
    ii. Address burdensome debt levels for low- and middle-income students and families.
2. Bolster institution funding to support student success.
3. Ensure system-level capacity to foster innovation and collaboration.
4. Align incentives on cost sharing between the state and campuses.
5. Increase simplicity, transparency, and predictability for all.

In December 2022, a framework for Strategic Public Higher Education Financing was established (3/3)

The BHE endorses five key design elements for the future of public higher education financing in the Commonwealth:

1. Increase financial aid, by at least doubling the current annual budgetary financial aid level, in ways that: make college truly accessible for our lowest-income students; require less debt for our moderate- and middle-income students; and draw back working adults to gain credentials they need.
2. Make and sustain a major new investment into our institutions' annual state appropriations focused on providing institutions with more resources to support low-income students through a weighted-enrollment approach that provides additional funding for each of their low-income students.
3. Significantly expand of the Department's funding capacity to catalyze innovation and collaboration in partnership with our institutions through the Higher Education Innovation Fund.
4. Codify the commitment to funding all three years of salary increases for each new collective bargaining agreement (CBA) and develop a fair and workable plan to better align incentives and cost-sharing between the Commonwealth and public higher education institutions on fringe benefit costs.
5. Provide more transparency, predictability and balanced guardrails on total charges to students by both allowing all campuses to retain all tuition and fees, while also requiring that tuition be the primary component of student charges.

Progress updates

Completed

- Commission on Higher Education Quality and Affordability (CHEQA) recommendations
- SU SUCCESS 2.0: new policy developed, technical assistance provider secured, awards made, independent evaluation underway*
- Continued to implement new Financial Aid provisions including collaboration with A&F to use funds from supplementary budget
- Public Awareness campaigns: "College is Possible" and "Go Higher" ad campaigns in partnership with EOE.

In progress

- Launched Early College Working Group strategic review and Early College Advisory Group with Presidents, Superintendents, DESE, and Massachusetts Alliance for Early College*
- Working with DESE to promote FAFSA submission as part of the HS graduation framework
- Final HS graduation requirement report due in June 2026, followed by potential legislation this session
- Platform / tech modernization for financial aid.*

Pending

- SUCCESS community of practice
- Leverage GEAR UP services to benefit other MA school districts not currently served by the program
- Preparation for the coming of Workforce Pell in spring/summer 2026

*See **Appendix A** for additional information on these initiatives.

Next Steps for 2026

Key Deliverables for 2026

Financial Aid and Student Success

- **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.

Economic Mobility

- **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:** Support launch of multiple new co-op programs with State Universities and foster emerging ecosystem with UMass-Lowell as a partner including data structures to track student earnings and employment outcomes.

Public Good (*subject to access to planning resources and additional staffing*)

- **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

- **Innovation and Regulation:** Support innovative pathways that reduce time to degree while maintaining quality and compliance.
- **ReUp Education:** 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 for Success

One additional Key Deliverable for the DHE in 2026 is as follows:

Capacity Building and Resource Sustainability

- **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.

Reconciling our Deliverables with our Equity Goal (2026)

Enrollment/Matriculation

- Proactive marketing and recruitment state aid campaigns
  Deep-dive: DESE Collaboration
- Streamline / modernize the application and financial aid processes
  Deep-dive: Financial Aid Awareness Pilot in EC and GEAR UP*
- Reengage those who started and never completed
  Deep-dive: ReUp Education Partnership Pilot

Completion

- Address the critical barriers preventing completion
  Deep-dive: SUCCESS 2.0*
- *Strengthen foundations, structure of EC*
  Deep-dive: Early College*
- Align early college and dual enrollment with grad requirements
  Deep-dive: HS Graduation Requirements
- Support innovative pathways
  Deep-dive: Innovation Regulations *(Pending BHE Approval)*

Career Success

- Continue to share student earnings outcomes
  Deep-dive: Earnings Metrics
- Supplement classroom learning with work-based learning
  Deep-dive: Co-op*

*See **Appendix A** for additional information on these initiatives.

Public Good

Note: This BHE Priority is in need of further development and is a focus of the BHE Retreat.

Progress updates

Completed

- Conference on Civic Discourse in Action: Advancing Debate, Dialogue, and Deliberation in Massachusetts Higher Education (including with Harvard, Northeastern, Fitchburg, and others)

Proposed/In Progress

- Research base / landscape analysis
- Public Good definition
- Public Good strategic framework development

Pending

- N/A

Next Possible Steps for 2026 (for consideration)

Subject to access to planning resources and additional staff capacity, in 2026 the Department will advance the following deliverables:

- Further develop Public Good research base
- Finalize Public Good definition and strategic framework
- Develop 5-year and 18-month goals for the Public Good Priority

Public Good Breakout Sessions

Preliminary, work-in-progress Public Good Strategic framework

Public Good priority

Improve alignment between postsecondary education opportunities and Massachusetts public good

Public Good definition *(Draft)*

The social and civic benefits that extend beyond individual achievement and contribute to the health and prosperity of the Commonwealth

Core pillars

Civic learning

Service-learning

Preparation and support for careers in public service

Key enablers

- Clear goals and metrics
- Robust data tracking and measurement
- Broad-based stakeholder engagement (incl. DHE, IHEs, external partners)
- Policy and funding alignment

Breakout Discussion Questions

A. State Role and Governance Boundaries

1. What is most appropriate for a **state-level agency or board** to take on versus other entities (such as institutions, systems, or external partners)?

2. Where does statewide coordination clearly add value, and where might it risk overreach?

B. Academic Direction and State Influence

1. What role, if any, should the state play in setting or signaling **academic competencies** or **curricular expectations**, particularly as they relate to the public good?

2. How can the Board support alignment around **civic learning, service learning**, or **public service pathways** without prescribing curriculum?

Breakout Discussion Questions

C. Learning from Examples

1. Are there **national, regional, or local examples** – from higher education other sectors – that help illuminate how public-good priorities can be advanced effectively?

2. What lessons (positive or cautionary) stand out from those examples?

D. Near-Term Focus

1. Given where the Board is today, what feels most important to **pay attention to or understand better** in the near term?

2. What questions should the Board continue to explore before considering future action?

Appendix A:
Summary of a Few Key Initiatives

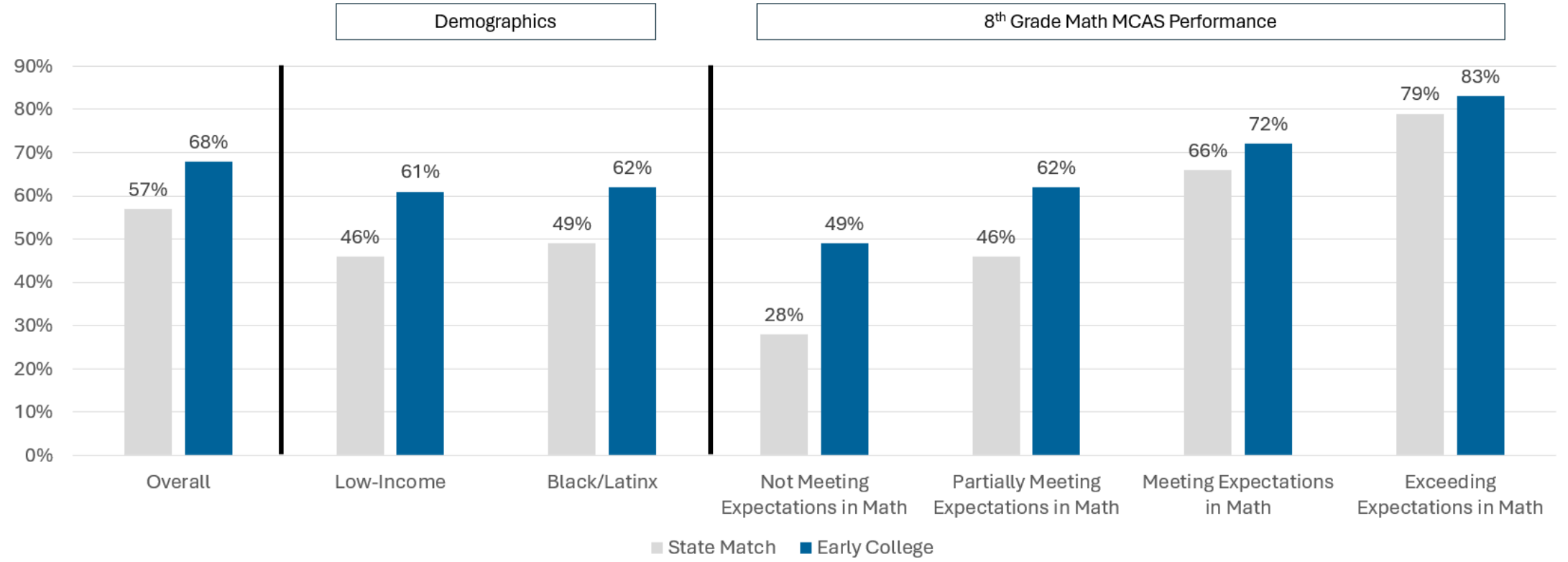
Early College

Key Messages

- Early College represents a key lever to drive enrollment, persistence, and completion
- During the Commissioner's Spotlight in June 2025, we highlighted nine focus areas that would guide our work to support the growth and vitality of Early College / Dual Enrollment
- Since then, our team has conducted a strategic review of Early College to explore key opportunities to strengthen the foundation of the state approach to Early College
- DHE is operating in lock-step with the DESE team, with a high degree of collaboration up through the Commissioner level
- This joint effort is critical to set and meet ambitious goals for Early College growth

Early College graduates in Massachusetts are more likely to enroll in postsecondary pathways: overall, across demographics and across academic readiness levels

Percentage of Students Enrolled in Postsecondary Pathways

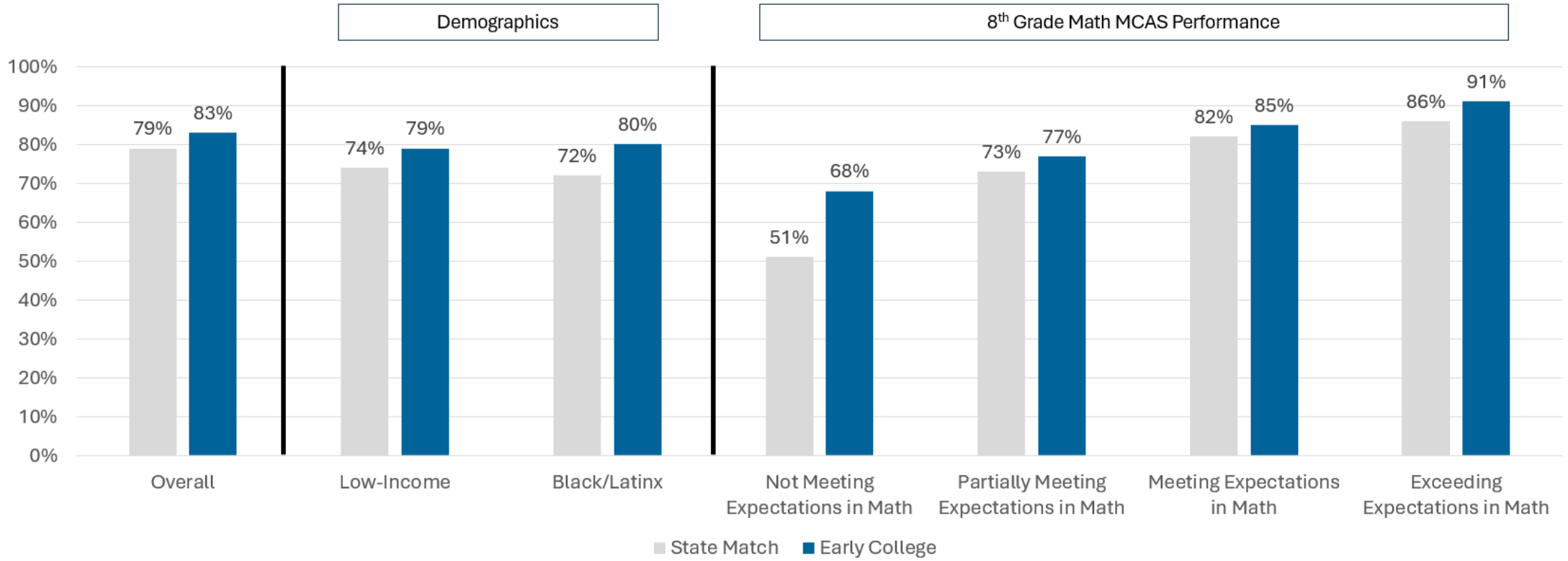


Note: All comparisons shown are statistically significant, with p-value < .01 for all comparisons except for students exceeding expectations in math (p-value < .05). These data are for 12th graders from graduating classes of 2019, 2020, 2021, and 2022. Thus, the results as shown do not include the outcomes of students who have participated in Early College in more recent years

Source: MA Department of Elementary and Secondary Education, Early College Joint Committee, March 2023

Early College graduates in Massachusetts are also more likely to persist to a 2nd year of college: overall, across demographics and across academic readiness levels

Percentage of Enrolled Students that Persist to a 2nd Year of College

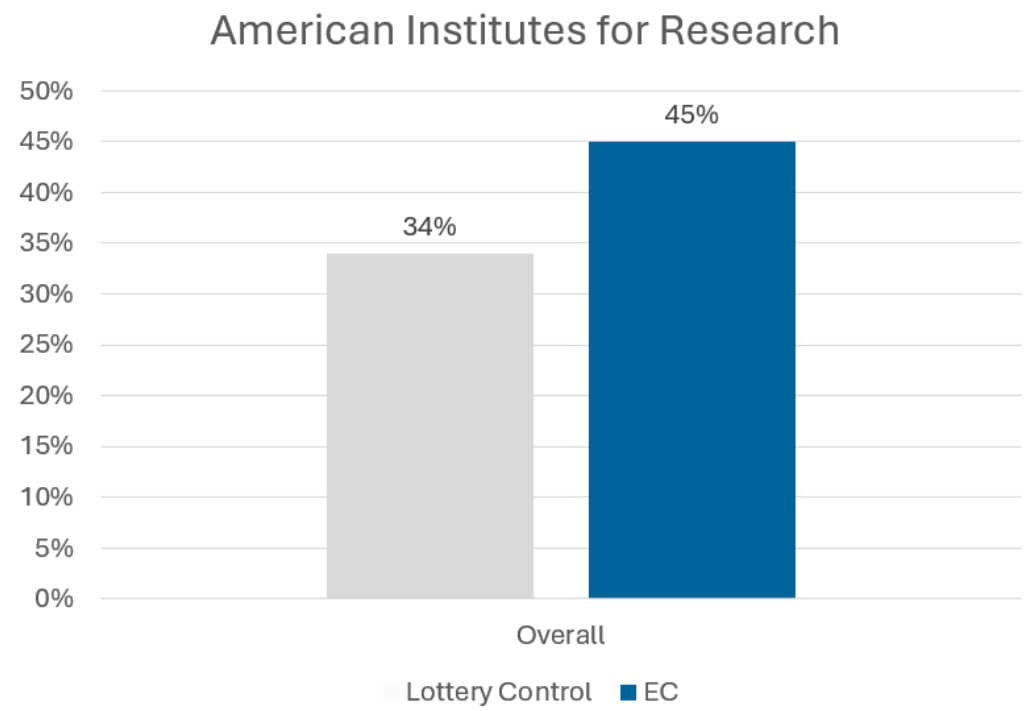


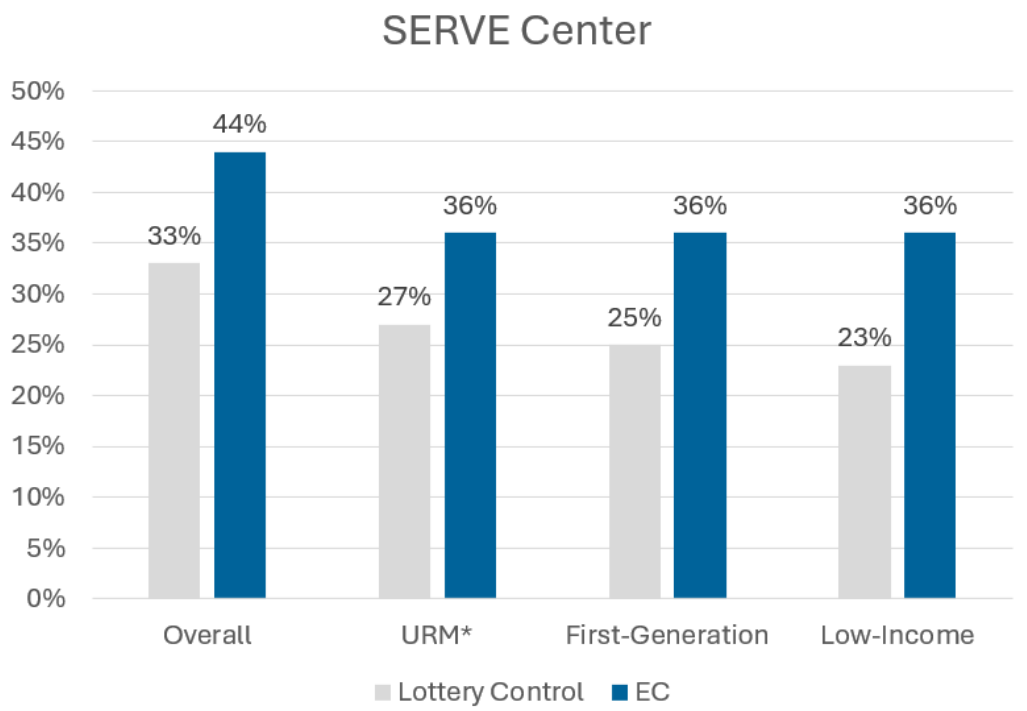
Note: Most differences are statistically significant, with p-value < .01 overall and for Black/Latinx students and with p-value < .05 for Low-Income students, those not meeting expectations in math, and those exceeding expectations in math. Results were not statistically significant, however, for those partially meeting expectations in math nor for those meeting expectations in math. These data are for 12th graders from graduating classes of 2019, 2020, and 2021. Thus, the results as shown do not include the outcomes of students who have participated in Early College in more recent years

Source: MA Department of Elementary and Secondary Education, Early College Joint Committee, March 2023

Beyond enrollment and persistence gains, national gold standard RCT evaluations show that Early College improves postsecondary degree outcomes

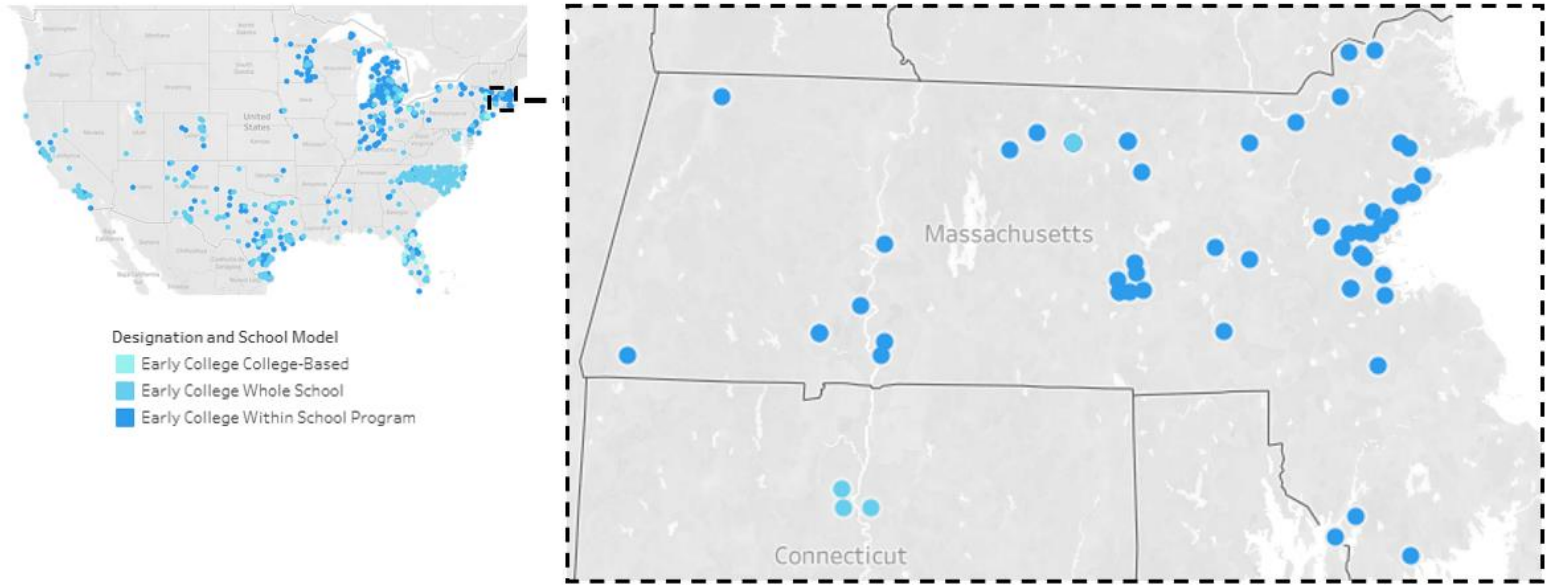
Percentage of Students Earning Any Postsecondary Degree





Note: *Leverages the nomenclature of the study, which does not match the latest nomenclature used in Massachusetts. Figures shown are 6 years after high school graduation. The AIR sample for both the original impact study and the follow-up study included 10 ECs that (1) enrolled students in Grades 9–12, (2) had high school graduates by 2011, (3) used lotteries in their admission processes for at least one of three incoming student cohorts (i.e., students who entered ninth grade in 2005–06, 2006–07, or 2007–08), (4) retained the lottery records, and (5) implemented the EC as a whole-school program. Eight of these ECs partnered with 2-year colleges, and two partnered with 4-year colleges. The SERVE sample includes students who applied to 19 early colleges over a series of 6 years. The first cohort was in ninth grade in 2005–2006 and the final cohort was in ninth grade in 2010–2011. The early colleges in the sample span rural and urban settings in all regions of North Carolina. Schools in the study had to agree to use a lottery to select their students.
Source: AIR, Early College Continued Success: Longer Term Impact of Early College High Schools, 2019 (N = 2,458; 1,044 EC, 1,414 control); Julie Edmunds, "What Happens When You Combine High School and College? The Impact of the Early College Model on Postsecondary Performance and Completion," 2020 (N = 4,054)

MA has a growing concentration of programs across regions of the commonwealth, part of national growth of over 1,400 EC programs spanning most US States



55 programs, with 20 more recommended for designation this year.

Programs from 20 MA public higher education institutions (3 more recommended for designation this year), 1 municipal community college, and 7 private IHE's (1 more recommended to be designated this year).

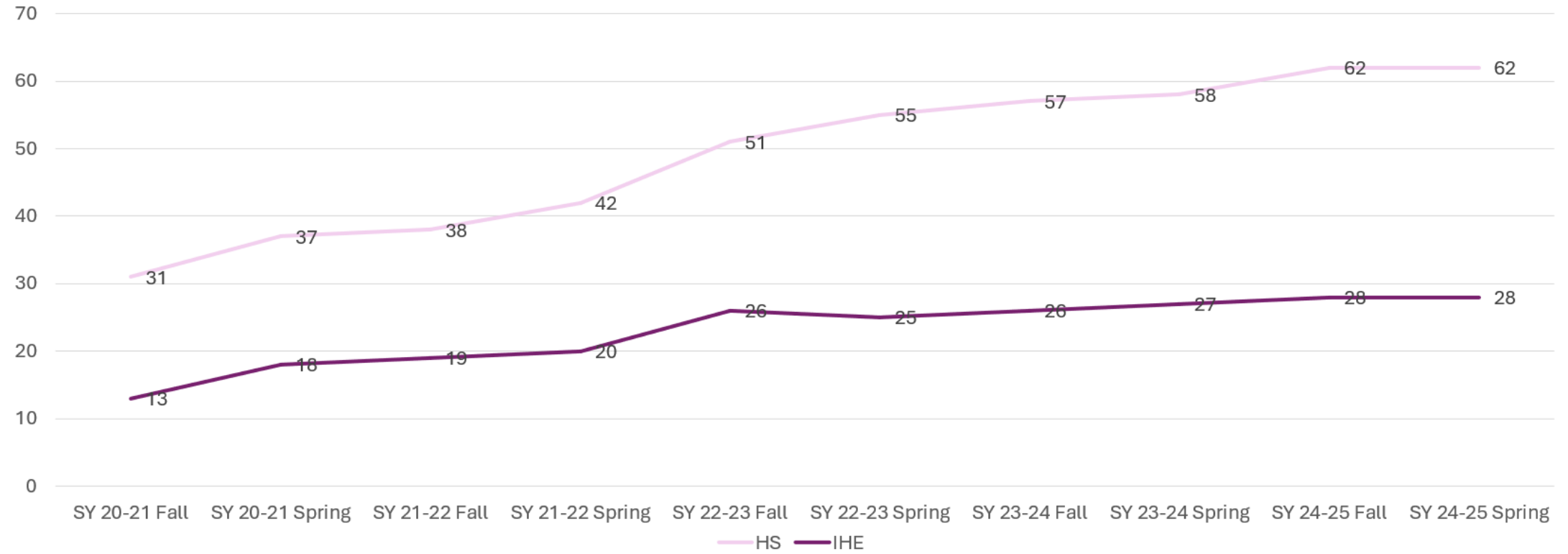
62 high schools participating, with ongoing growth in HS count.

Early College has expanded to 18 of 26 gateway cities, 2 more recommended for designation this year.

Note: AIR continuously updates the programs included in its interactive map, but no information was found with the specific date of the last update. Screen capture taken on June 4, 2025. Visualization does not show programs in Hawaii and Alaska for visualization purposes. Schools are color-coded based on their designation and school model – Early College, College-Based: Early College program that is based out of a college campus and does not have a physical high school location. Students participating in college-based programs may come from multiple high schools; Early College, Whole School: Early College program that serves all students within a school; Early College, Within School: Early College program that is housed within a traditional high school and does not serve all students within the school.
Source: American Institutes for Research (AIR)

Early College has steadily expanded to new high schools and IHEs in MA in recent years

Number of HS and IHE partners by semester



Note: The Early College Data Dashboard was created as a collaboration led by the Massachusetts Education-to-Career Research and Data Hub, a joint endeavor of the Department of Elementary and Secondary Education, Department of Higher Education, and Department of Early Education and Care.
Source: Massachusetts Early College Dashboard, 2025 (to be released publicly in the upcoming months)

Dual Enrollment and Early College represent two “flavors” of various similar offerings

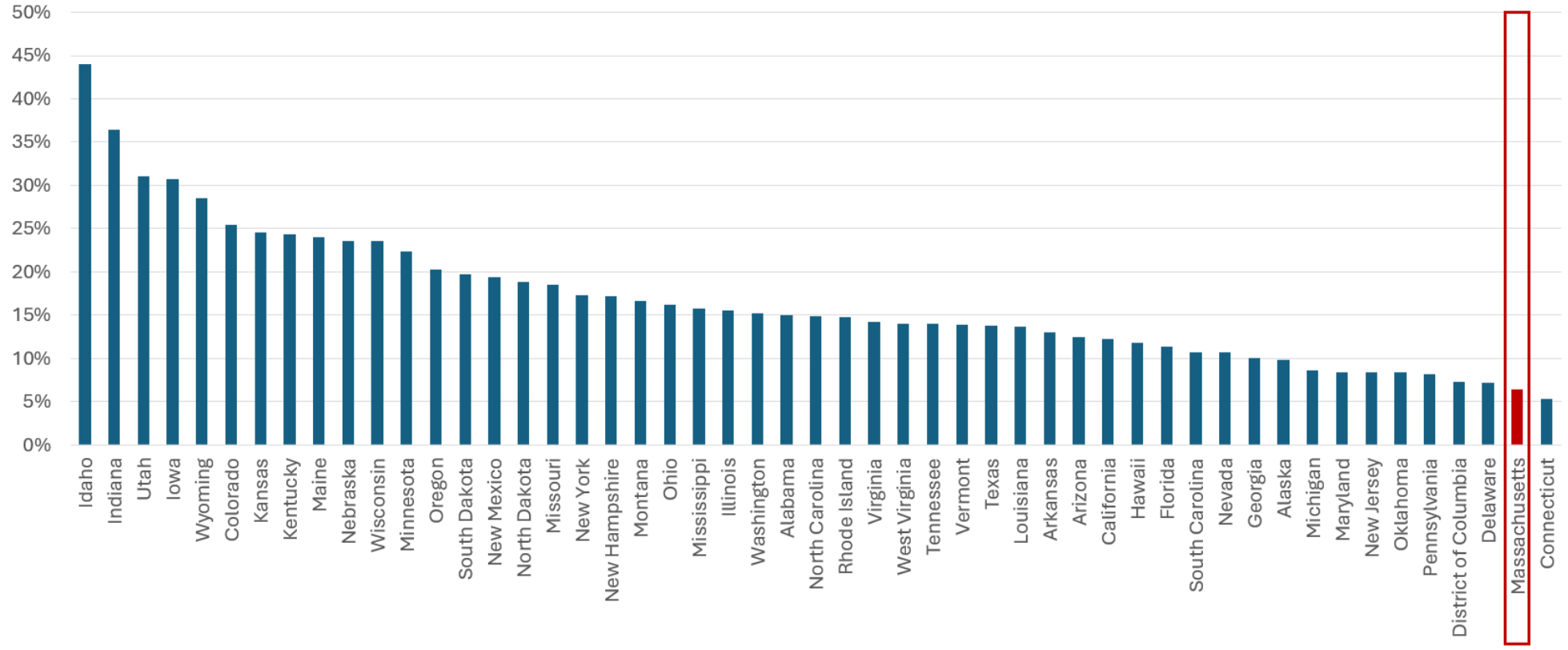
Dual Enrollment	A student is enrolled in college and high school at the same time
Dual Credit	One course offers credit for both high school and college
Concurrent Enrollment	The one course for dual credit is taught by a high school teacher who has been approved to do so by a partnering institution of higher education
Early College	A comprehensive program with 5 main features: (1) targets primarily students who have historically fared poorly in our systems; (2) offers intentional sequences of college courses leading towards majors and careers; (3) offers added guidance and academic support; (4) is free of charge to students; and (5) has its basis in an MOU and partnership between K12 and an IHE

Source: Literature review

Yet, while dual enrollment represents a meaningful percentage of overall high school enrollment across many states, Massachusetts is among the lowest at 6%

Note: Includes both DE and EC participants

Dual enrollment as a % of total high school enrollment

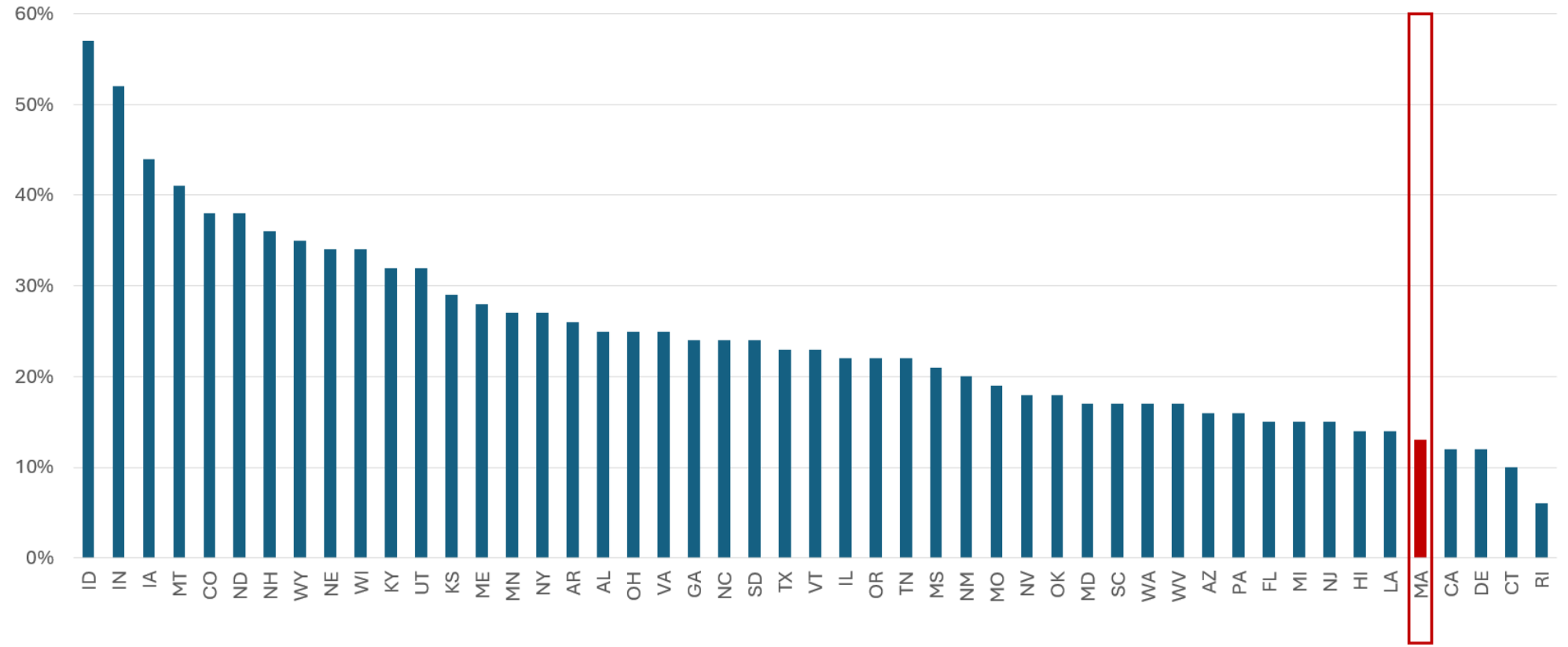


Note: A student is considered a dual enrollee when their high school diploma date is after their start date at the postsecondary institution; if high school diploma information is not available, DE status is based on the student's age at the start date of the term – that is, if the student is younger than 17.7, they are considered a dual enrollee. Calculations merge data on DE counts with publicly available data, by state, on public and private school student counts. Source: Community College Research Center; IPEDS; NCES

Dual enrollment represents a meaningful percent of community college headcount across many states, though Massachusetts is among the lowest at 13%

Note: Includes both DE and EC participants

Dual enrollment as a % of community college headcount



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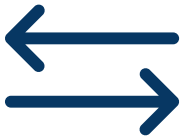
The Commissioner's Spotlight in June 2025 highlighted nine focus areas that have guided our work to support the growth and vitality of Early College / Dual Enrollment

Create the conditions → **Reach more students** → **Improve outcomes**

HS-College student pipeline

Course sequences, offerings & capacity

Credit expansion



Transferability & applicability

Instruction quality & delivery modalities

Innovative models

Funding models

Broader Dual Enrollment policies

DHE support for IHE's in the ecosystem

Financial Aid Pilot

Key Messages

- There are significant opportunities in helping students understand the actual cost of college with aid factored in; ensuring awareness of the steps of applying for financial aid; and ensuring access to trusted adults to help complete the steps from application to enrollment
- We are working with a partner to pilot new, innovative solutions to address these opportunities
- A wide range of districts across the Commonwealth have been engaged: Boston, Chelsea, Fall River, Gardner, Holyoke, Lawrence, Lowell, Lynn, New Bedford, and Westfield
- Early outcomes are promising: Statewide FAFSA completion grew 16.3% YoY, pilot districts with layered support (e.g., Gardner, Lynn Classical) saw more substantial gains, and MASFA submissions increased nearly fivefold statewide (though uptake varied by district)
- Work to date has affirmed the value of equity-centered design combining tech, relationships, and implementation support

Focus groups across 70+ students demonstrated a strong desire to pursue a college degree but also concerns about value for cost

> I was always thinking about college, I would be first generation on both my mom and dad's side, so it's always felt like 'you were born in this country, you have no excuse' it's always been instilled in me, and I knew it would be important for reaching my goal to be a doctor. - **HS Student**

> My parents both work a lot and they have lots of bills to pay. Medical bills, rent. Growing up, I didn't really have much. My main motivation is to have a sustainable income. I want to be able to look after me and my family. - **EC Student**

> I believe a degree is very valuable thing. If you have a degree, it shows signs of professionalism. Even though it doesn't secure a job, you can do a lot. I hear a lot of people have gotten degrees and they struggle to get a financially stable job for their degree, unless it's like engineering or in the doctor field where you're pretty much guaranteed a job. - **EC Student**

> I think it is a scam because it's over-priced. If you're going into a good career and can pay off your debt, that's fine. But, if you're just taking courses but you don't know what you're doing, that's a waste. BCC is great because it's free but other colleges it is a lot of money and a lot of debt. - **HS Student**

EC = Early college Senior; HS = Non-early college senior

Focus groups reveal major gaps across all 3 areas of need

Student & family need	Current state	Illustrative quotes
To **understand the actual cost of college** with aid factored in	**Poor**	● *"I don't know if I would be eligible" - EC Student* ● *"I've heard of scholarships, but not other financial aid." - EC Student* ● *"I don't know how much college costs, but I've heard Free Community College is an option" - HS Student*
Awareness of the steps of applying for financial aid	**Poor**	● *"I don't know what FAFSA is."* - EC Student ● *"I'm still really confused and don't know how to apply for FAFSA. I understand how FAFSA works but I don't understand how to apply."* - EC Student ● *"We should be learning about this in sophomore year... it feels rushed when we start in senior year"* - EC student ● *"My guidance counselor will send some stuff out. I don't open it, i just see the message like, "open flyer"* - EC Student ● *"We got provided with info on how to apply but there's a lot of layers to actually completing it. Layers as in the process itself. It's all just thrown at us, everything all at once."* - EC Student
Access to **trusted adults** to help them **complete the steps from application to matriculation**	**Poor, with exceptions***	● *"I haven't talked to my guidance counselor at all [in 4 years]"* - EC Student ● *"I'd like support in smaller groups, in seminars it's hard to get your questions answered, would like more 1:1 time to discuss my specific situation."* - EC Student

* The exceptions are students receiving direct 1:1 support from College Access Organizations (e.g., OneGoal, UAspire, La Vida , BottomLine), EC Admins

The information gaps also applied to guidance counselors

Student & family need	Current state	Illustrative quotes
To **understand the actual cost of college** with aid factored in	**Poor**	● *"I didn't know these existed [state financial aid programs] and I would love to learn more. We have a great in-house scholarship program and I feel proficient in that."* - Guidance counselor ● *"I tell the students I don't really know about this [financial aid]."* - Guidance counselor
Awareness of the steps of applying for financial aid	**Poor**	● *I don't think there's any piece that I feel ultra confident about."* - Guidance counselor ● *"I tell all my kids all the time, my mom helped me with my FAFSA, I didn't even know how to do FAFSA."* - Guidance counselor ● *"I need education on the process in general. It's really hard for us to do that when we have so many seniors to work with at once and getting everyone through the college process. Education on FAFSA, MASFA, all of those things. Everything is changing every year. It was a crazy year last year. Education for the adults and for the students."* - Guidance counselor
Access to **trusted adults** to help them **complete the steps from application to matriculation**	**Poor, with exceptions***	● *"A lot of the time, I ask them if they've met with their TRIO counselor. TRIO will sit down with student/parent and do it step by step and i don't feel comfortable doing that."* - Guidance counselor ● *"We could easily hire another counselor that would be just as busy with mental health and college needs. Feels like you're having to pick and choose between addressing needs."* - Guidance counselor

* Universally, the Guidance Counselors shared that time/capacity prevented them from supporting students through the steps. In some cases the schools had college access partners that guidance counselors could refer students to in order to complete the steps. Whether these organizations provided sufficient capacity and scale to serve all referred students could not be verified.

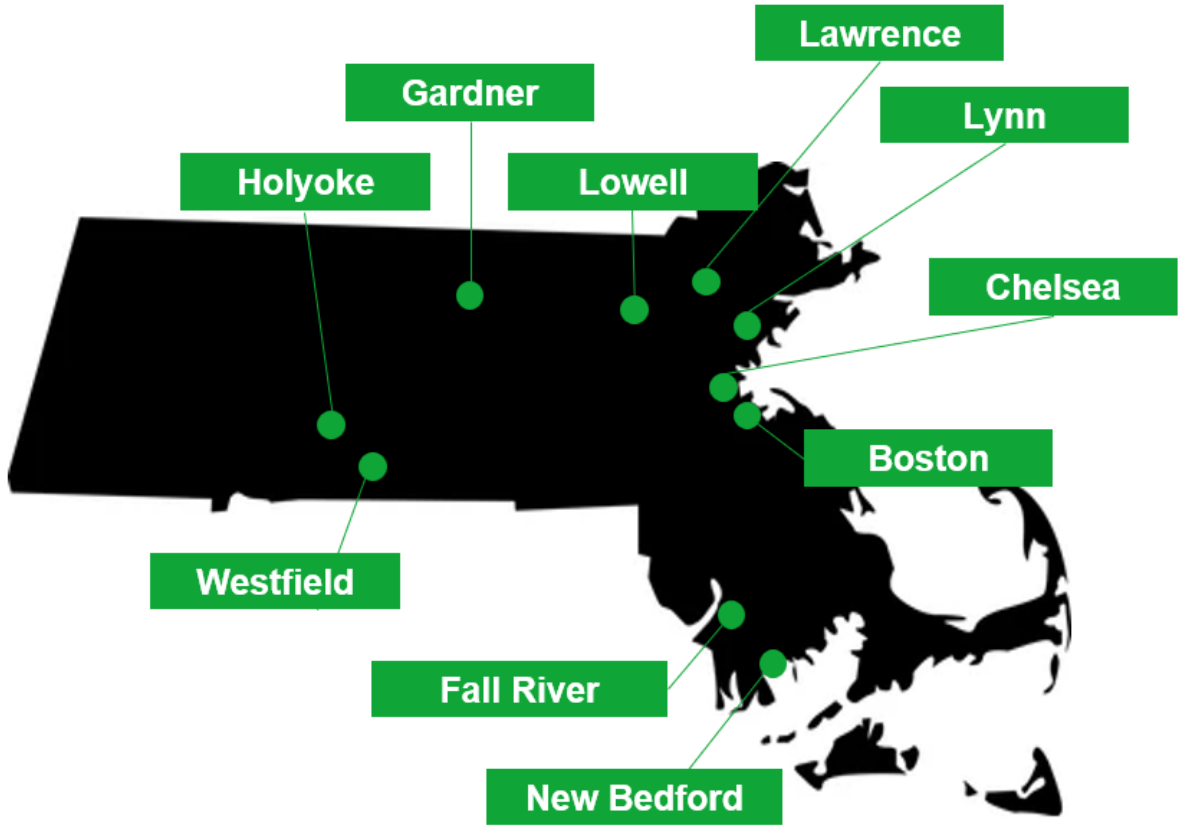
EC FAFSA/Admissions Pilot Background

- **Learn:** Engage with students and counselors in select Early College programs to understand drivers of college decision-making, including information about financial aid
- **Pilot**: Target interventions with Early College seniors and study impact on college enrollment and financial aid application. Interventions include the creation of student- and counselor-friendly resources and the implementation of tech-enabled solutions
- **Scale**: Apply gained insights to a broader audience for increased impact

We will assess success based on (1) marked growth in financial aid uptake and college matriculation in pilot districts and (2) ability to apply learnings in both awareness and tech-enabled solutions

Pilot Districts

The communities represented have participated in either year 1 (2024-25) or year 2 (2025-26) of the EC College Matriculation pilot



Across 2 years, we have collaborated with MA4EC to pilot a ChatBot

Tech selection has been driven by our primary needs, including:

- **Capabilities:** Our AI ChatBot must be able to:
  - Read students' questions in a variety of formats and languages
  - Share accurate information in student-friendly language
  - Continuously learn in order to respond to unique questions and scenarios
  - Provide differentiated depth and content of answer based on the audience
- **Capacity:** After initial information sharing, the AI tool must be "smart enough" so that project leads can update content knowledge, manage campaigns, and analyze progress without substantial capacity

Our goal is to determine whether to "buy or build" a platform that could scale statewide

Initial learnings and next steps

Tool Learnings

- The AskTheo ChatBot generated engagement but lacked accuracy and depth (86% accuracy, 9% opt-out rate).
- Nudges worked better than open Q&A; keyword bots could not meet nuanced needs.

Early Outcomes

- Statewide FAFSA completion grew 16.3% YoY; pilot districts with layered support (e.g., Gardner, Lynn Classical) saw more substantial gains.
- MASFA submissions increased nearly fivefold statewide, though uptake varied by district.
- Experience affirmed the value of equity-centered design combining tech, relationships, and implementation support.

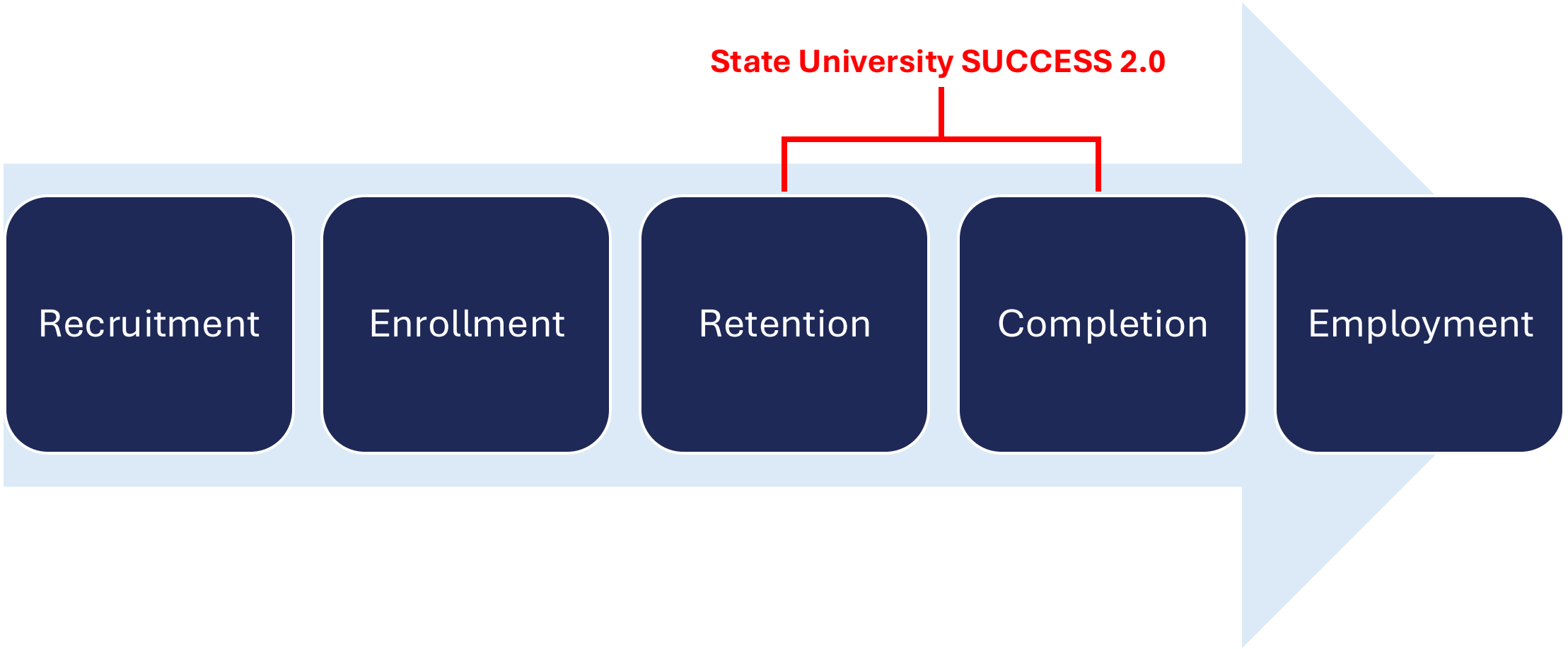
Year 2 will assess the impact of AskTheo on a new platform (Element451) and will roll learnings into recommendations for statewide scale

SUCCESS

Key Messages

- CHEQA identified college success programs as the top priority
  "To complement the significant expansion in college access recently implemented through growth in Massachusetts state financial aid for higher education, the Commonwealth should invest further, first and foremost, in funding large scale implementation of effective (based on evidence and ongoing evaluation) student success programs."
- The Commonwealth has made a start on this through several years of investments in SUCCESS for CCs and now for SUs, though not yet for UMass
- CHEQA estimates that a $100 million investment on top of funding for Massachusetts' current SUCCESS program would be needed to provide individually tailored success support services to every working class and low-income (i.e., Pell-eligible) student in the Commonwealth
- Key priorities moving forward include: 1) support the rollout of the State U efforts in partnership with NISS and as discussed at our last Board meeting; 2) to build out support for success funding as a priority for future state funding; and 3) explore the data systems needed centrally to ensure efficient and effective deployment even as our system's campus autonomy philosophy requires balancing DHE role with local roles

Student Throughline



FY26 Legislative Language (1596-2439)

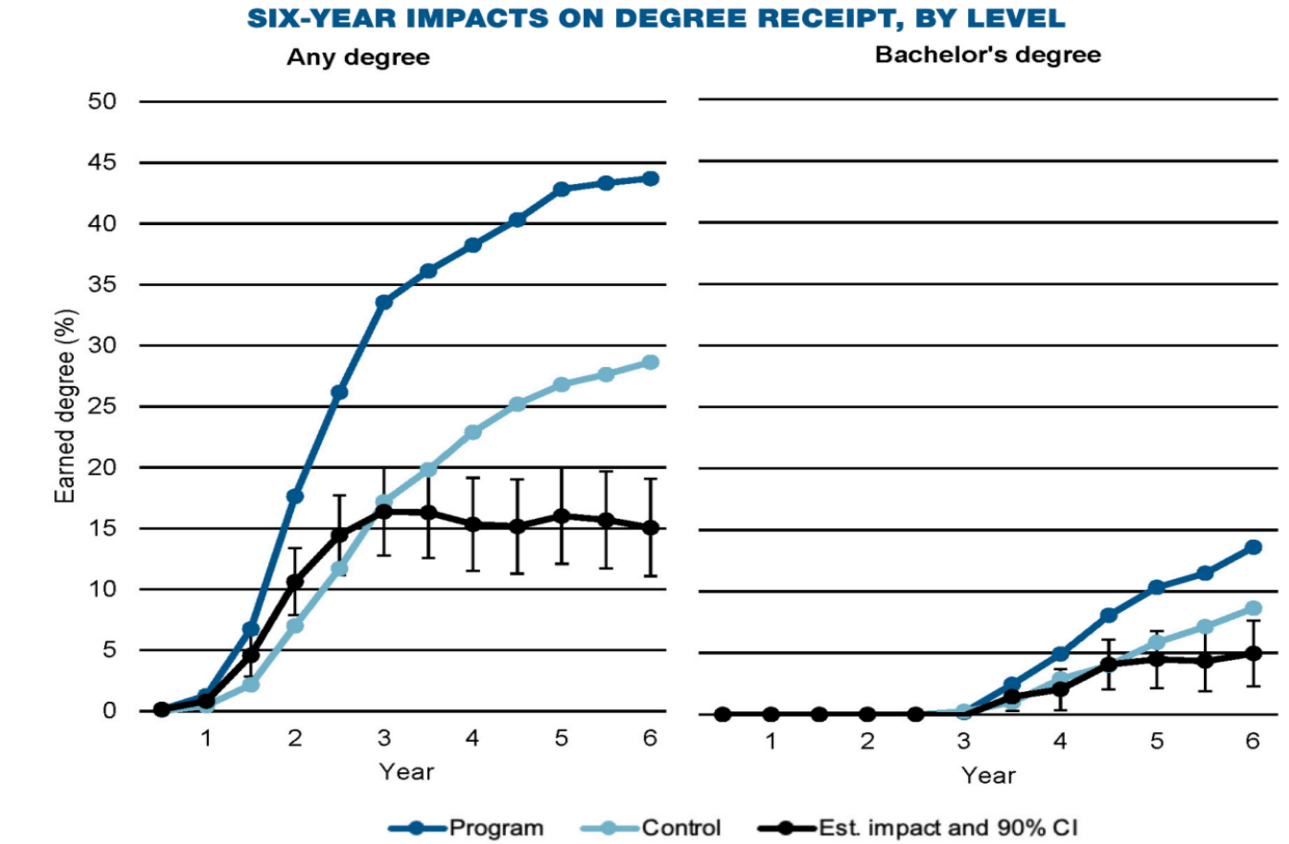
"For state university cohort counseling to ensure student success (SUCCESS) grants to state universities ***to provide wraparound supports and services*** *to improve outcomes for their* ***most vulnerable populations*** *including, but not limited to, low--income, first--generation, minority and disabled students and lesbian, gay, bisexual, transgender, queer and questioning students; provided, that funds shall be disbursed based on a formula and criteria developed by the department of higher education; provided further, that eligible* ***wraparound support activities*** *shall include, but not be limited to, peer mentors, academic skills workshops and targeted academic, career and scholarship advising; provided further, that appropriated funds may be expended for programs or activities during the summer months; provided further, that all funds distributed may be spent solely on personnel costs at the discretion of the universities; and provided further, that not later than March 3, 2026, the department shall report to the house and senate committees on ways and means on the progress made on implementing and funding this program, including any regulations, guidelines or criteria used to distribute the funds and on the final distribution of funds to campuses"*

Georgia State: "Predictive Analytics" Model

	Graduates 2009-2010	Graduates 2019-2020	Numerical Change	Percent Change
Black	1,001	2,199	+1,198	**+120%**
Pell	1,298	3,554	+2,256	**+174%**
Hispanic	196	632	+436	**+222%**

Source: Introduction to the NISS Diagnostic & Playbook and Implementation (2024)

CUNY ASAP/SUNY ACE: "Case Management" Evidence-Based Model



SOURCE: MDRC calculations using data from the National Student Clearinghouse.

SU SUCCESS 2.0 Program Design

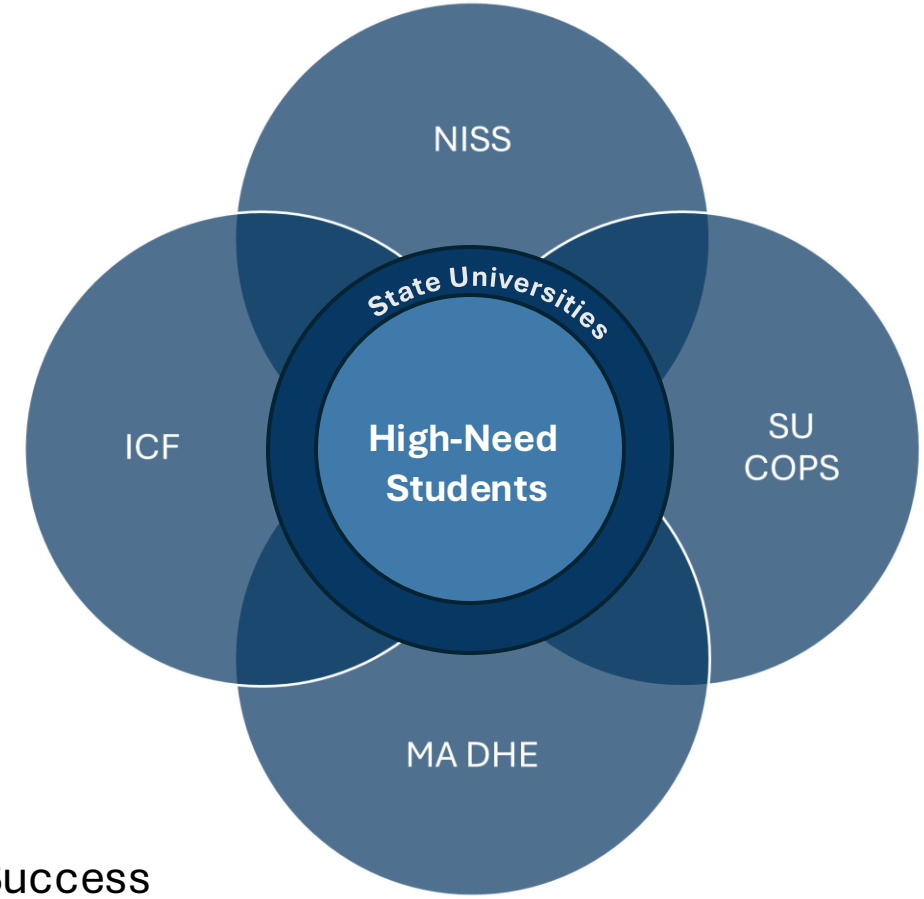
Needs Analysis

- Case management
- Financial wraparound supports
- Academic momentum

Implementation

	Needs Assessment	Number of students served	Case manage. services	Direct financial supports	Free student transportation	Academic moment. reform	OER	Data systems	Other
Bridgewater State	Gardener Institute	7,000	X	X	X	X		X	
Fitchburg State	NISS	600	X	X		X			
Framingham State	NISS	650	X	X	X	X		X	
MassArt	NISS	385	X	X		X		X	
MCLA	NISS	205	X	X					
Mass Maritime	NISS	290	X	X		X	X	X	
Salem State	NISS	6,000	X	X		X	X		
Westfield State	NISS	337	X	X		X	X	X	Curric. Innovat.
Worcester State	NISS	800	X	X	X	X	X	X	
Totals		16,267	9	9	3	8	4	5	1

SU SUCCESS Partners: An ecosystem of support



NISS: National Institute for Student Success
SU COPS: State University Council of Presidents

Georgia State University: National Institute for Student Success (NISS)

- 3.5 year commitment to participating universities
  - Diagnostic → Predictive Analytics
    - HEIRS and IPEDS data
  - Personalized playbook
  - Implementation support

- Co-creation approach
  - 4-5 month investment to develop recommendations
  - Start with the campus context

External Evaluation Services: ICF

- **Impact and Equity**
  - **EQ1:** Impact on overall student outcomes
  - **EQ2:** Impact on student subgroups
- **Implementation and Context**
  - **EQ3:** Fidelity to model
  - **EQ4:** Stakeholder perception on factors influencing impact
  - **EQ5:** Institutional context and program outcomes
- **Economic Value**
  - **EQ6:** Economic return on investment (ROI)

Co-Op

Key Messages

In 2025, BHE/DHE designated cooperative education (co-op) as one of three priority innovation areas in its strategic priority plan, recognizing its potential to advance economic mobility and student success while closing equity gaps. In the past year, we have laid the following foundation to meaningfully advance co-op as an innovation area statewide:

- **Developed a practitioner playbook** for institutions seeking to launch programs
- **Cultivated institutional demand** among public 4-year institutions, with seven of the nine state universities raising their hands as 'first movers' and the remaining two signaling interest in becoming 'fast followers'
- Established an **agency partnership with UMass Lowell** to scale the UMass Lowell co-op program, expand co-op at public universities across the state, and contribute to the field at the national level
- Funded **three selected 'first mover' institutions** to plan and design co-op pilots as part of an inaugural cohort, providing coaching and technical assistance as well as a cohort
- Partnered with UMass Lowell on **two key scaling initiatives**: 1) faculty engagement study to inform academic integration strategies for scaling co-op; 2) development of an advisor and student tool that maps majors, career-connected experiences (such as co-op), and careers
- Authored a **white paper on co-op** in Massachusetts, profiling co-op programs across the Commonwealth and positioning the state as a leader in co-op given its legacy and current innovation/statewide efforts

Co-op is one of many work-based learning (WBL) models; it is often compared to an internship, another WBL model

Example WBL models	*Description*
Co-op	Four to eight-month, full-time, paid work experience (extremely rarely do students take classes while on co-op); completed by ~10% of students[1]
Internship	Short-term, entry-level work experience that can be paid or unpaid; completed by ~60% of students[1], typically over the summer
Practicum	Highly structured programs embedded within the curriculum that provide hands-on learning; most common in nursing and education
Apprenticeship	Hands-on training in skilled trades, often lasting 1-4 years
Job shadowing	Typically one-time (though sometimes repeat) experiences that allow students to observe the day-to-day workings of a profession

Note: [1] Per Strada analysis of U.S. Department of Education & National Center for Education Statistics' *Baccalaureate and Beyond* longitudinal survey (class of 2016), n=19,490.
Source: Strada's *The Power of Work-Based Learning* (2022)

Research shows that students who do co-op have strong employment, earnings, and career satisfaction outcomes

Employment	Earnings	Satisfaction
Graduates who do a co-op or internship are **49% less likely to be underemployed** out of college[1]	Three years after graduation, co-op participants **earn $2-4k more annually** vs. matched peers[3]	Co-op participants are **56% more likely** to have their **first job be related** to their field of study[2]
Co-op participants are **~40% more likely to be employed full-time** three years after graduation[2]	Eight years after graduation, co-op participants can **earn up to $20k more annually** vs. matched peers[4]	Work-based learning experiences **increase career satisfaction by 7ppt** in the five years post-graduation[5]

Note: Earnings benefits vary by major; some evidence suggest that earnings benefits are mixed or negligible for business, arts, and social sciences graduates.
Source: [1] Burning Glass Institute and Strada (2024); [2] Wyonch (2019); [3] Wyonch (2020); [4] Finnie and Miyairi (2017); [5] Strada (2022)

Co-op also confers many qualitative benefits, not just for students, but for employers and the state too

Example qualitative benefits

Students are able to **explore and test potential career options**

Employers can **build local talent pipelines** and train future full-time employees

State get a more experienced entry-level workforce with **fewer skill gaps**

Source: Expert interviews

The co-op model is one that can work across a variety of four-year institutions

Not Exhaustive

Technical and vocational universities

Research universities

Public universities

Private universities

To build successful co-op programs, institutions should do four key things

1. Identify **co-op champions** and **pilot program** in a willing and interested department
2. Integrate program into key **academic & institutional structures** to ensure adoption
3. Build local employer pipeline and **develop anchor employer relationships** early
4. **Invest in staff capacity** to sufficiently and effectively start, scale, and sustain co-ops

DHE Innovation Hub will support participating institutions via initial start-up funding and ongoing technical assistance

Planning grant funding

Subgrants toward related planning and design expenditures, such as:

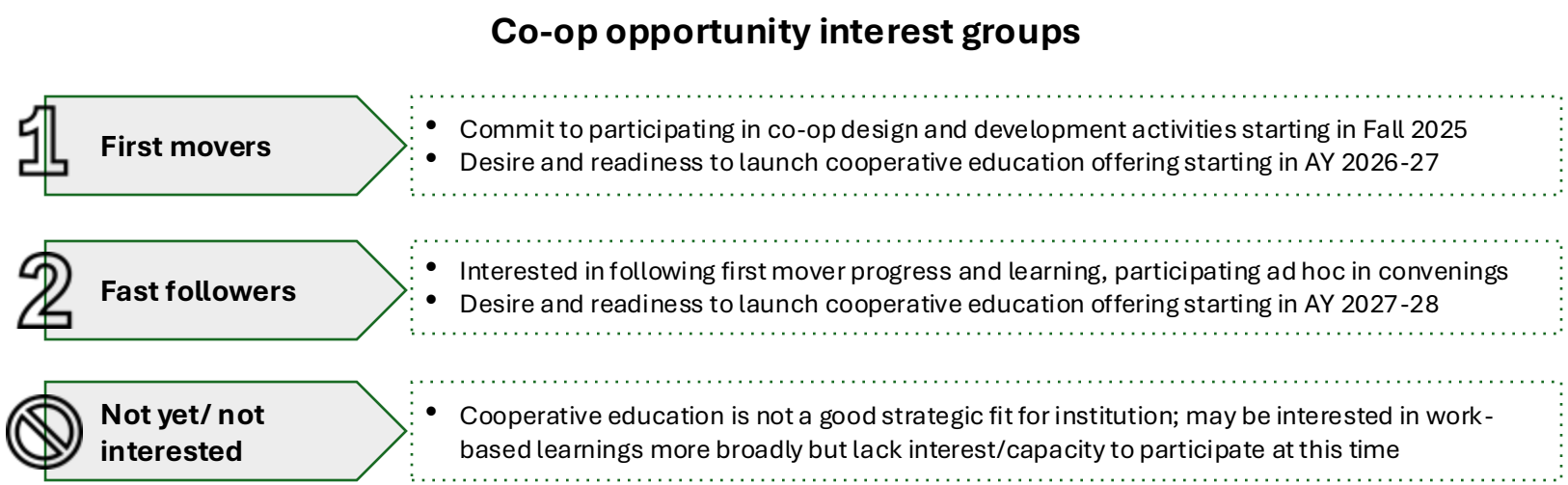
- ✓ Faculty stipends and/or course release funds
- ✓ Staff stipends and/or reimbursement for staff time related to support of pilot
- ✓ Professional development for faculty/staff on relevant topics
- ✓ Materials/supplies (e.g., software, data)

Technical assistance

Participants will receive the following non-monetary supports:

- ✓ Recurring workshops for campuses around key design and implementation elements
- ✓ Direct coaching support for participants
- ✓ Playbook for co-op start-up based on national and state model primary and secondary research

We intend to work with each group to build on proven models across MA and US, aligning to campus context



Possible deliverables and Next Steps (1/2)

In 2026, building on the momentum from the last year and public commitments made as well as the addition of key innovation staff, we will advance co-op innovation through the following strategies:

1. Strengthening UMass Lowell Co-op Leadership

- **UML co-op scaling:** The co-op innovation program manager will manage scaling initiatives for UML's co-op program, including ongoing academic integration, data infrastructure development, and continuous program improvement

- **National center development:** The co-op innovation program manager will staff national center development in partnership with DHE to position UML as a resource and thought leader and to build capacity for statewide expansion

2. Expanding Co-op to new Public Institutions

- **'First mover' pilot implementation:** the three institutions will move forward with their implementation plans and operationalize 1-3 co-op pilots at each institution with an expectation of AY2026-27 launch, supported by $15K grants.

- **Community of practice:** first mover institutions have agreed to participate in 2-3 community of practice meetings in spring 2026 where topics will focus on unaddressed areas such as technology, multi-campus collaboration, and data infrastructure

- **'Fast follower' co-op planning and design:** three to four institutions will be awarded $30K planning and design grants with an anticipated summer 2026 start; 'fast follower' institutions will design co-op pilots to launch in 2027

Possible deliverables and Next Steps (1/2)

In 2026, building on the momentum from the last year and public commitments made as well as the addition of key innovation staff, we will advance co-op innovation through the following strategies:

3. Field leadership and evidence building

- **Event on Co-op Innovation:** a March/April 2026 event will mark the one-year anniversary of the Innovation Hub's announced launch and will bring together a statewide (and beyond) network of co-op and work-based learning partners

- **Co-op in MA white paper:** a white paper capturing the latest research on co-op's impact as well as the legacy and current landscape of co-op in MA will be published in advance of the event to establish the state's leadership

- **Data infrastructure development:** standardized data collection mechanisms will be established across co-op institutions to build capacity in the area of work-based learning data collection and to contribute to longitudinal data analysis

- **Impact evaluation:** co-op impact on student outcomes will be rigorously evaluated across participating institutions, ideally in partnership with Northeastern and UC Irvine, in order to drive evidence-based decisions at the state level and advance the field