

Board of Higher Education Retreat

Following Up on Strategic Priorities Plan

September 16th, 2024

WELCOME!

We've got some new faces joining us



Dr. Nicole Johnson

Director of Educational Equity &
Justice Office of the Commissioner



Megan Galbreath

Senior Policy Fellow for the DHE
(supporting Strategic Priorities Planning)



Niki Nguyen

SAC Chair & BHE Student Member
(UMass)



Thalles De Souza

BHE Segmental Advisor
(Community Colleges)



Imani Barbour

BHE Segmental Advisor
(State Universities)

Agenda

Topic	Timing
Breakfast & Welcoming Remarks	9:00 - 9:15 AM
Overview of Strategic Priorities Plan	9:15 - 9:30 AM
Innovation Priority <ul style="list-style-type: none">• Plan Input• Guiding Principles and Process• Resources and Metrics; Small Group Discussion	9:30 - 11:00 AM
<i>Break</i>	<i>11:00 - 11:15 AM</i>
Financial Aid & Socioeconomic Mobility Priorities <ul style="list-style-type: none">• Preliminary Guiding Principles• Small Group Discussion	11:15 - 12:15 PM
Board Structure & Alignment	12:15 - 1:00 PM

Overview of Strategic Priority Plan

We started discussing our Strategic Priorities Plan in January and are excited to share the latest with you

- As a reminder, we presented and discussed a **first draft** of the priorities at our **January Board Retreat**
- After getting your feedback, we realized we needed more time and capacity to get these right, so we **recruited two Senior Policy Fellows** (Carey Davis & Megan Galbreath) to support during 2024
- Carey has been supporting the development of our **Innovation Priority Plan** since April, and we look forward to sharing the highlights from that work today
- Building on the **ongoing work with the Advisory Councils**, Megan started in August on the **Financial Aid and Socioeconomic Mobility Priority Plans** (we will share preliminary guiding principles today)
- Looking ahead, **we aim to approve the Strategic Priorities Plan at our January 2025 Retreat**, so will continue to engage you in the coming months on these important topics
- As you all know, the Strategic Priorities Plan is an **action-oriented approach to a handful of top priorities** we want to remain disciplined on pursuing

Strategic Priorities Plan: Today we will discuss financial aid, socioeconomic mobility, & innovation priorities

Equity Goal

Reduce by at least half the racial, ethnic, and economic disparities that persist in the provision of postsecondary opportunity and success

Priorities

1

Roll out and sustain a compelling set of clear and consistent state financial commitments to making college affordable for students & well-supported to raise success

2

Significantly increase the socioeconomic mobility benefits of postsecondary participation in Massachusetts

3

Improve alignment between postsecondary education opportunities and Massachusetts workforce and civic needs (*not for discussion today; language to be confirmed*)

4

Expand the role of the Board and Department in facilitating and fostering high-impact innovation among IHEs and our system through advancing new approaches to postsecondary opportunity and success for the full range of potential learners

Innovation Priority

As higher education faces growing pressures and evolving needs, effective innovation will be crucial

BHE and DHE have the opportunity and responsibility to complement campus- and segment- level innovation by fostering constructive and impactful change



BHE's innovation strategy will focus on systems- level and multi- IHE innovations to maximize learner success and increase equity in outcomes across the public system of higher education



Massachusetts would become a national pioneer as the only public system of higher education to stand up and sustain a dedicated innovation function

BHE/DHE will focus on system- level innovation rather than segment- or campus- level innovation



Individual campuses and segments have successful existing innovation efforts. As such, **the BHE/DHE innovation function will not focus innovation efforts at the individual campus- or segment- level.**

Given BHE and DHE's duty to the greater system of public higher education and ability to work across all institutions and segments, BHE/DHE will incubate and promote innovation at the systems- level and with cohorts of multiple IHEs.

The innovation plan builds on BHE and DHE's successful track record of fostering effective innovation

BHE and DHE have previously catalyzed improvements in learner access and success that hinged upon system-level coordination and policy change:

Examples



Early College



Open Educational Resources
(OER)



Developmental Education
Reform

Core BHE/DHE Roles

Launching initial pilots and measuring impact

Building coalitions of the willing interested in piloting new approaches

Setting enabling policy and allocating resources

BHE/DHE Innovation Spotlight: Early College

BHE & DHE played a critical role launching and scaling Early College as a system- level innovation

BHE/DHE's Role



Identified an innovative approach with potential to address system needs

- Initiated by BHE Chair, co-convened groups to explore the potential value of Early College in Massachusetts



Supported piloting with a commitment to measurement

- Co-lead Joint Committee on Early College



Set policy conditions for interested individual institutions to participate in scaling Early College

Impact

8,000 learners served across:

- 13/15 community colleges
- All UMass campuses
- 7/9 state universities
- 8 private colleges

Strong support beyond DHE/BHE, including DESE and Massachusetts executive and legislative branches

Multiple sources of expertise and feedback shaped the draft innovation plan proposal

Stakeholder Engagement

- **BHE** member interviews
- **DHE** leadership interviews
- **Segment representative** briefings

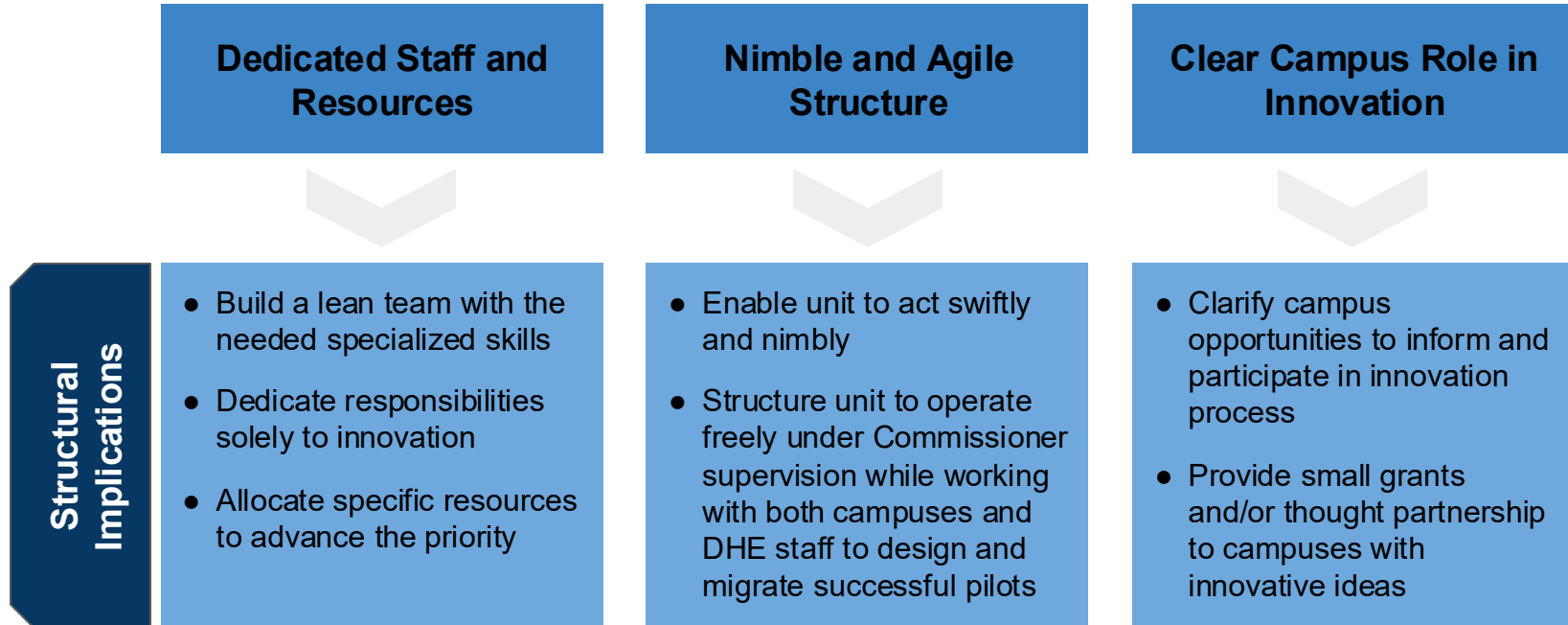
Expert Interviews

- **Expert in university innovation:** Bridget Burns (CEO, University Innovation Alliance)
- **Expert in technology-enabled postsecondary innovation:** Axim Collaborative
- **Expert in state postsecondary policy:** Scott Jenkins (Strategy Director of State Policy, Lumina Foundation)
- **Expert in K12, postsecondary, and workforce pathway alignment:** Matt Gandal (President and CEO, Education Strategy Group)
- **Expert in education innovation strategy:** Barbara Sullivan (VP, Fidelity Foundation)

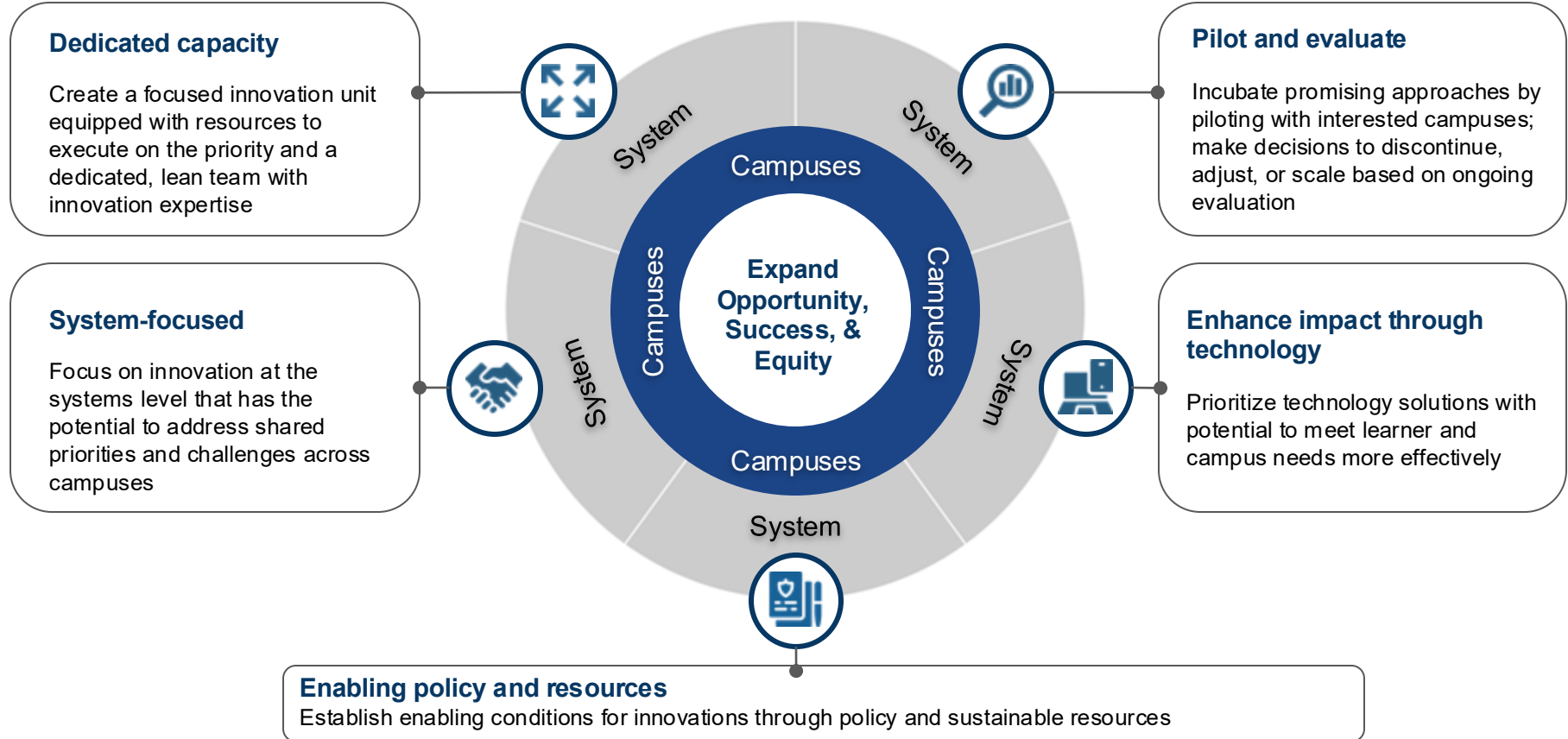
Supplemental Sources

- **State systems** of public higher education strategic plans and coverage of innovation work at the state and IHE level
- Research related to **best practices of establishing innovation functions** and cultivating innovation in government

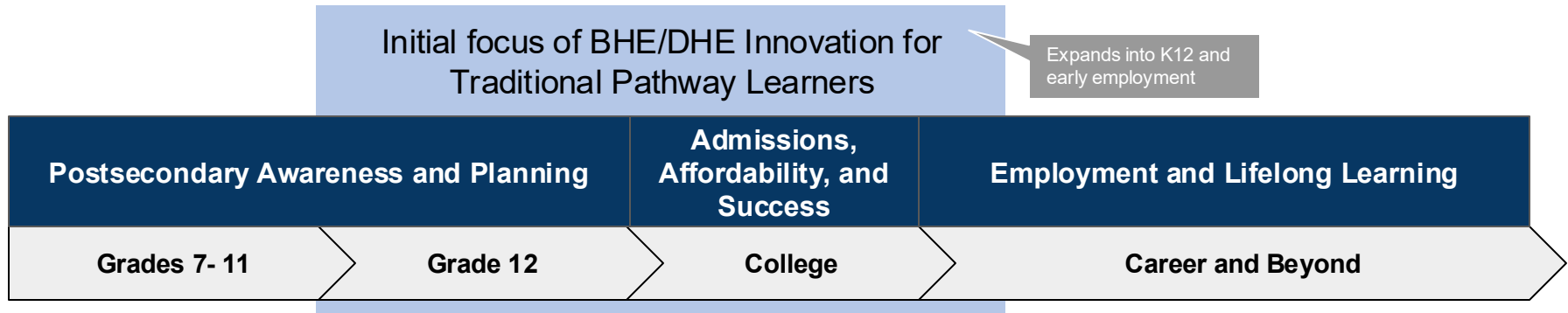
Experts recommended a dedicated, nimble unit and a clear innovation role for campuses



Future innovation would meet guiding principles



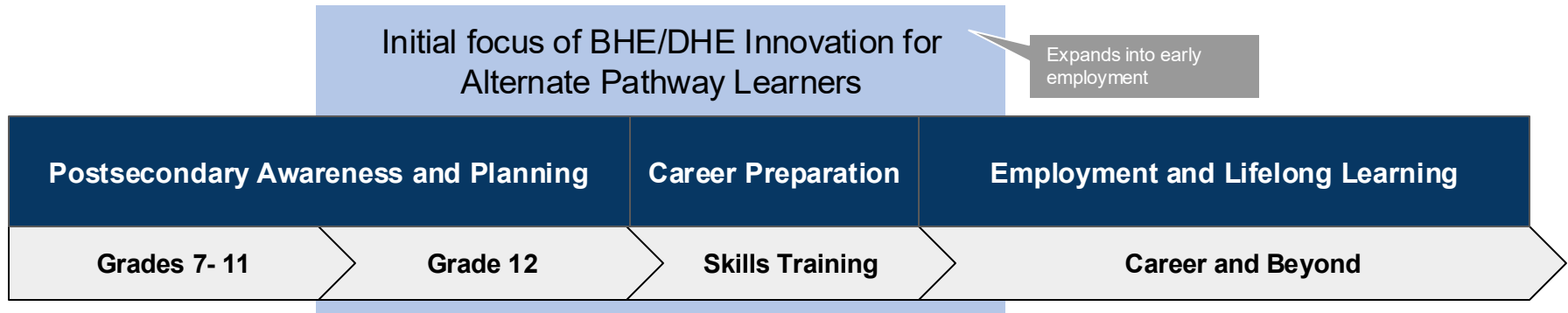
BHE/DHE will initially focus on innovation efforts on key periods during a learner's lifespan



There are critical opportunities for BHE and DHE to harness impact at the system- level during:

- **Postsecondary Awareness and Planning**: Reducing racial, ethnic, and socioeconomic disparities that persist in the provision of postsecondary access and success requires intervention in advance of matriculation
- **Admissions, Affordability, and Success**: System level innovation has the potential to accelerate improvements in admissions, affordability, and learner success
- **Employment**: BHE/DHE will utilize innovation to identify new approaches to supporting learners from college graduation to initial employment, reducing under-employment and promoting socioeconomic mobility

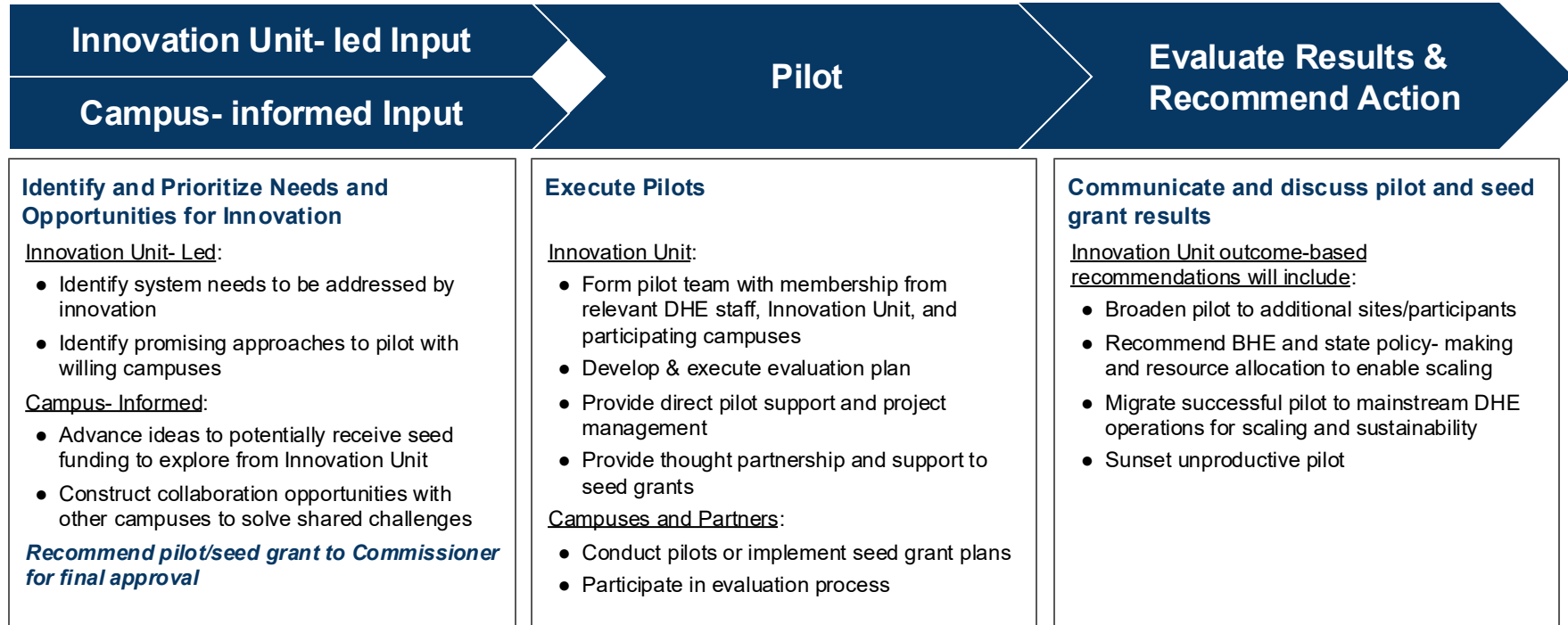
There is also a role for BHE/DHE to utilize innovation to support learners on alternate pathways



There are critical opportunities for BHE and DHE to harness impact at the system- level during:

- **Postsecondary Awareness and Planning:** Learners need access to information about all postsecondary pathways and related skills training, including alternative pathways
- **Career Preparation:** There are opportunities to leverage innovation to improve the quality, affordability, and stackability of high- value credentials that prepare learners for careers
- **Employment:** BHE/DHE may utilize innovation to identify new approaches to connect alternative pathway learners to employment, reducing under-employment and promoting socioeconomic mobility

A proposed innovation unit would lead and execute a regular cycle of piloting, evaluation, and action



Example: Leveraging innovation to improve learner awareness of available financial aid

Despite significant investments in the affordability of Massachusetts public colleges and universities, many Massachusetts high school graduates, particularly low- income graduates, are foregoing college. **Are learners incorrectly assuming public colleges and universities are more expensive than the actual cost to them?**

- Innovation can enable DHE to better understand what information learners are receiving about the cost of attending Massachusetts public institutions of higher education and if improved awareness of the cost would impact learner behavior and lead to increased enrollment through a **pilot and evaluation process**.
- DHE can incorporate the findings, such as what information gaps exist and what messages and methods of outreach impacted learner behavior, to improve financial aid communication **to benefit the system as a whole**.

A successful and sustainable innovation function requires new structures, expertise, and resources

Recommendation: create a new innovation unit and form a new BHE task force focused on the BHE innovation strategic priority

BHE Innovation Task Force

Task force composed of external experts and BHE members focused on providing input on innovation strategy and execution



New Innovation Unit

Dedicated team and resources working across BHE, DHE, and campuses to implement the innovation strategic priority

Launching and sustaining the work would likely require both sustainable public financial support and philanthropy

Plan success would lead to a well-established and productive innovation function in 5 years

5 Year Goals

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

Key 18 Month Actions

	Action Item	Status
Budget and Resources	• Attract sufficient public and/or private resources to launch unit	In Progress
	• Recruit small, agile, & effective team to lead/execute innovation work	In Progress
Board	• Form and convene BHE Innovation Task Force composed of BHE members, external experts, and civic leaders	Not Started
Pilot and Evaluation	• Work with campuses to identify & refine at least two promising campus-identified & collaborative pilots with multiple campus partners	Not Started
	• Identify and refine at least two promising potential pilots building on promising innovations and practices from across the country	In Progress
	• Launch at least two pilots aligned to overall BHE/DHE strategic priority goals	Targeted for AY 24- 25

Board Small Groups: Innovation Recommendations (30 min)

Discussion questions:

- How do you feel about the 18- month actions and 5- year goals?
- What feels most doable? What feels most challenging?

Next Steps

15 Minute Break

Financial Aid and Socioeconomic Mobility Priorities

As you know, financial aid and socioeconomic mobility have been top priorities for the BHE for years



Financial Aid

- **2019:** Approved as a top BHE priority
- **2021:** Launched SHEF effort
- **2022:** Voted on SHEF framework; Fair Share Amendment passage (state referendum vote)
- **2023:** Launched MassReconnect and MASSGrant Plus Expansion
- **2024:** Launching Mass Educate
- **FAAP AC** aligned through this period



Socioeconomic Mobility

- **2018:** Voted to decide on and track a measure of economic mobility
- **2022:** Adopted SPRE
- **2023:** Accepted socioeconomic mobility as a top priority; EBPM AC chose socioeconomic mobility and value/ROI as focus
- **2024:** EBPM AC received advice from experts and is evaluating next steps

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We will continue to build on that progress, deriving our goals and guiding principles from a variety of inputs

Stakeholder Engagement

- **BHE** member interviews
- **DHE** leadership interviews
- **Advisory Council** input
- September **Board Retreat** (today)

Expert Interviews / Input

- **Expert in Economic Mobility:**
Matt Sigelman (President of Burning Glass Institute)
- **Expert in Postsecondary Education & Workforce Data:**
Jon Furr (SVP and Chief Data Ecosystem Officer at Strada)
- **Education Strategy Group**
- *More to come*

Supplemental Sources

- **SHEF framework** (Dec 2022)
- **Suggestions for SMART Goals from BHE/DHE** (led by Deputy Commissioner Dannenberg, Asst. Commissioner Quiroz-Livanis, & Director Giambusso)
- **Secondary reports** from higher ed partners and thought leaders (e.g., Strada, Lumina)
- And more!

Input is still being collected, we look forward to engaging you today and in the coming weeks

Affordability & Quality Task Force: Overview

Legislative context & mandate

Higher Education Quality & Affordability Commission, Section 215 of the FY 24-25 Budget, as enacted, states:

*“The board of higher education shall convene a **task force to study and make recommendations on improving quality and affordability of higher education in the Commonwealth, including state financial assistance programs for students domiciled in the Commonwealth and attending the University of Massachusetts segment or the state university segment.**”*

The task force shall review and evaluate...

- **State assistance programs and funding**, including, but not limited to, aid for tuition, fees, books, supplies and other costs of attendance and make recommendations to ensure the accessibility and affordability of said higher education institutions and how to achieve best outcomes
- **Student costs and debts** during and after attending said universities
- **Programs that improve student success**, including, but not limited to, academic support, career counselling, assistance with applying for state and federal benefits and improvements to facilities
- Improvements needed to **increase the recruitment and retention** of qualified adjunct and full-time faculty and staff
- **Financial assistance program design** and models to efficiently increase state assistance, improve outcomes and reduce student costs

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Affordability & Quality Task Force: Composition

- 2 members of the board of higher education, who shall serve as co-chairs
- The chairs of the joint committee on higher education or their designees
- The secretary of education, or a designee
- 1 member appointed by the minority leader of the house of representatives
- 1 member appointed by the minority leader of the senate
- The commissioner of higher education, or a designee
- The president of the University of Massachusetts, or a designee
- A representative of the state universities
- A representative of the community colleges
- 5 persons appointed by the governor, 2 of whom shall represent faculty or staff working at a university and 2 of whom shall represent students currently enrolled at a public institution of higher education
- The executive director of the Massachusetts Budget and Policy Center, Inc. or a designee
- The executive director of the Massachusetts Taxpayers Foundation, Inc. or a designee
- The executive director of the Massachusetts Business Roundtable, or a designee
- The executive director from the Massachusetts Teachers Association, or a designee
- The executive director of the Massachusetts Business Alliance for Education, Inc.

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One of those critical inputs was SHEF, whose goals remain important moving forward

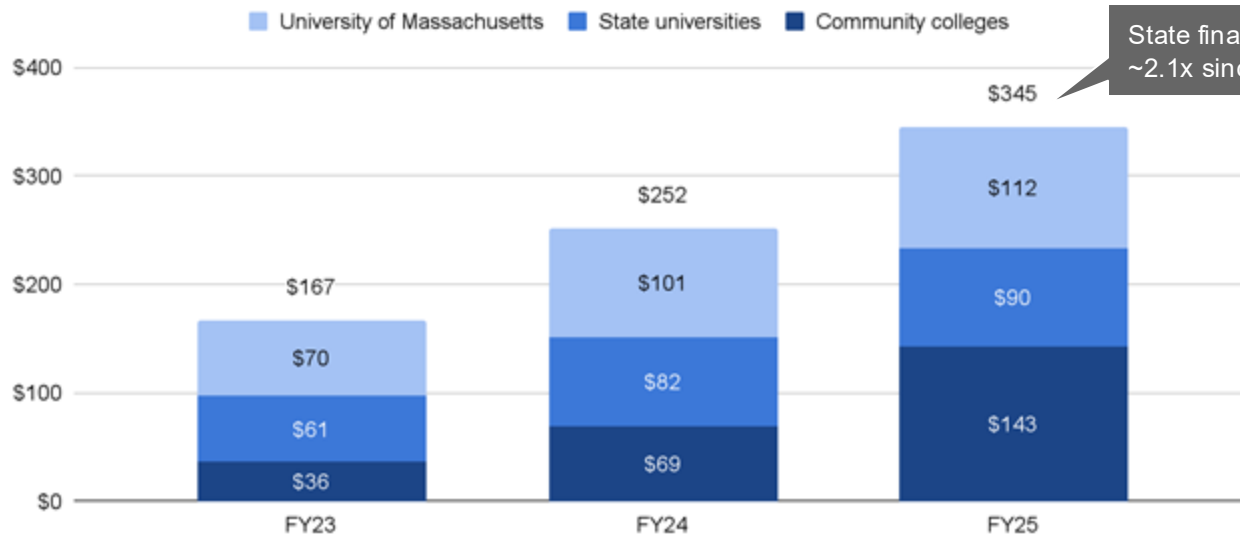
Legend ● High ● Moderate ● Low

SHEF goal	Progress to date	Priority going forward
1 Make college more accessible & affordable for students (1) Address barriers to participation for low-income and part-time students, including adult students (2) Address burdensome debt levels for low- & middle-income students & families	●	●
2 Bolster institution funding to support student success	●	●
3 Ensure system-level capacity to foster innovation & collaboration	●	<i>Addressed by innovation strategic priority</i>
4 Align incentives on cost sharing between the state & campuses	●	<i>Addressed elsewhere</i>
5 Increase simplicity, transparency, and predictability for all	●	●

SHEF spotlight: Notably, the state has doubled financial aid since December 2022

/ AS OF AUG 30, 2024

State financial aid disbursed (FY23) and projected (FY24 & FY25), by segment (in \$M)



State financial aid up
~2.1x since FY23

Note: Fiscal year starts in July of prior calendar year (e.g., December 2022 falls into FY23); FY24 and FY25 is sourced from simulated data and is preliminary.

Source: EY-Parthenon analysis

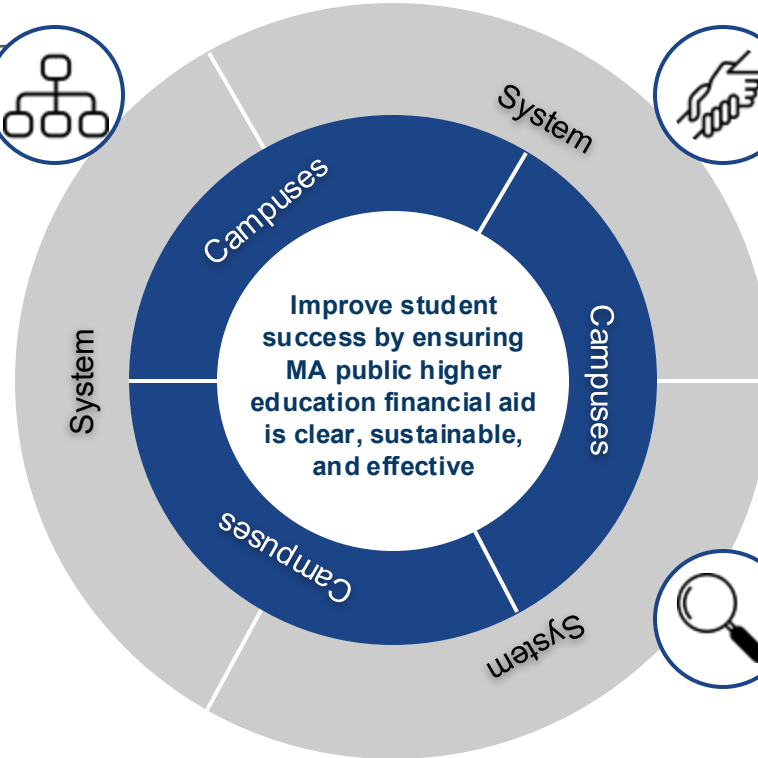
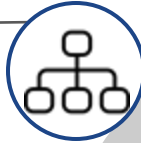
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We propose three principles to guide our Strategic Priority Plan for Financial Aid & Student Success

Mass Higher Ed Financial Redesign

Synthesize and codify legacy and new financial aid strands into a **clear, sustainable, effective, and coordinated** financial aid program and **develop robust approach to fully and effectively communicating** to all potential learners

Explore options to **expand aid further into cost of attendance** (i.e., beyond cost of tuition, fees, and books stipend) and **reduce need to incur debt**



Student Success Initiatives

Develop a **funding approach** that would equitably and effectively support **student success at scale**



Guidance and Clarity on Cost of Attendance

Increase **simplicity, transparency, and predictability** to institutions and students on tuition, fees, and broader cost of attendance



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We propose two key principles to guide our work on Socioeconomic Mobility

Measurement

Decide **what specific measures of economic mobility and ROI to track**, and methodology

Track measures by **student attribute** and at the level of individual **degree pathways**

Determine **how to share** measures with key stakeholders (the public, campuses, policymakers, researchers)



Policy levers

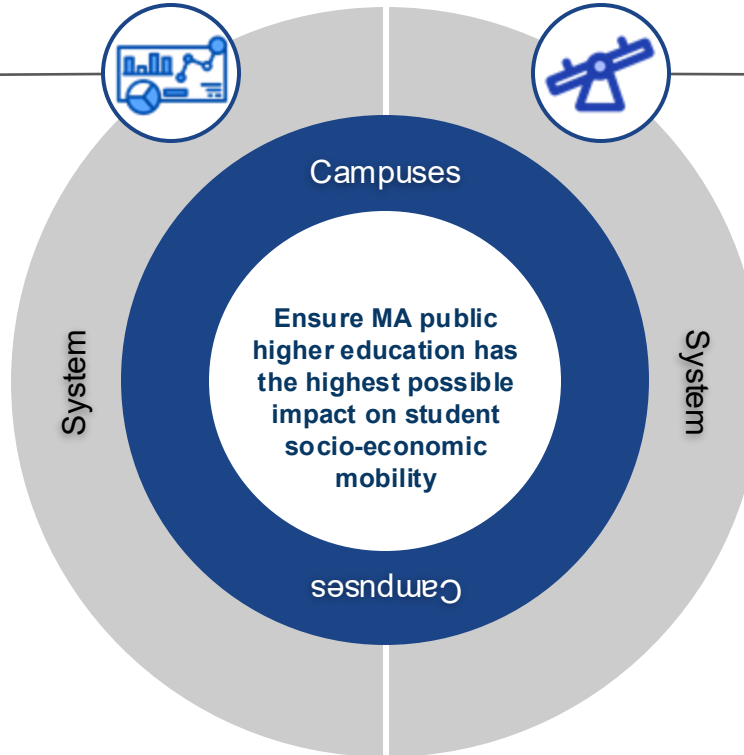
Program approval & review

Campus **strategic planning** & accountability

Financial aid / funding formulas

Work-based learning (e.g., co-ops)

Skills training (e.g., stackable high value certificates)



Board Small Groups: Financial Aid and Socioeconomic Mobility

- What are your reactions to the proposed guiding principles? Are there any you're particularly excited about?
- Is there anything missing from the list of potential focus areas or guiding principles that you would like to see achieved within the next 5 years?

Next Steps

Board Structure & Alignment

By way of background...

- Until relatively recently, the Board was supported by an **Executive Committee** (required under statute), **broad mandate committees** (AAC / FAAP / Strategic Planning committees), and the **occasional task force**
- Committees were long-standing entities with broad mandates; **membership was limited to BHE members** and as such, efforts were at times duplicative, without the desired payoff
- In Fall 2021, we amended our bylaws and **moved from committees to Advisory Councils** in an effort to improve Board governance and functioning - **success has been mixed**, though there is broad consensus that **bringing in external experts** to supplement the BHE's internal perspectives on key strategic topics is **extremely valuable**
- At our January 2024 Board Retreat, we discussed the **strengths and weakness of our current structure**, once again taking a step back to reflect on how we can **more effectively and efficiently function, strategize, and carry out our mission** - we would like to continue that conversation today

At the moment, the BHE is supported by an Executive Committee, Advisory Councils, and ad hoc task forces

Current structure

Executive Committee

Fiscal Affairs & Administrative Policy Advisory Council
co-chaired by
Veronica Conforme
and J.D. LaRock

Evidence-Based Policy Making Advisory Council
chaired by
Alex Cortez

Strategic Planning Advisory Council
co-chaired by
Bill Walczak and
Francesca Purcell

Academic Affairs & Student Success Advisory Council
formerly chaired by
Patty Eppinger

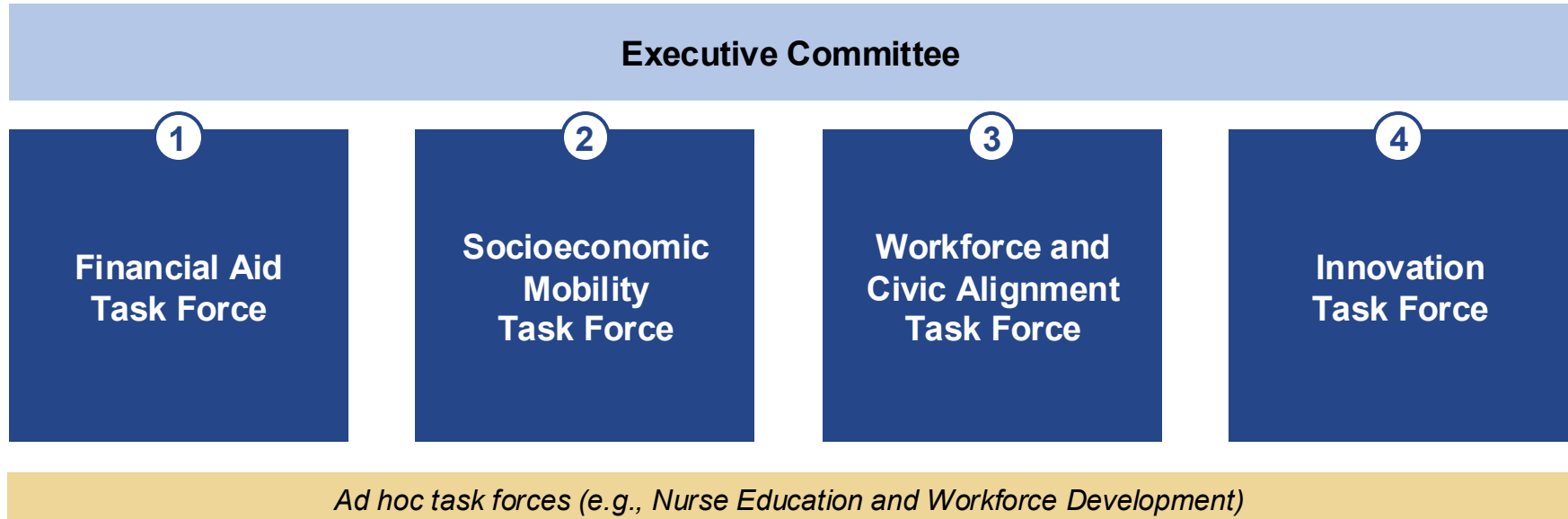
Ad hoc task forces (e.g., Nurse Education and Workforce Development)

Historically, ad hoc task forces have been quite successful

Example of successful ad hoc task forces		
	Campus Safety & Violence Prevention (2016)	THESIS (2019)
Charge	<ul style="list-style-type: none"> Investigated practical, fair, and transparent ways to protect MA campus communities, with a special focus on sexual violence 	<ul style="list-style-type: none"> Identify metrics and processes to help assess the financial viability of MA independent (private) higher education institutions and avert precipitous closures
Key Conclusions & Results	<ul style="list-style-type: none"> Provided best practice recommendations, including communications protocols, and prevention and response recommendations for both public and private higher ed institutions. Acknowledged better governance & protocols are just as important as funding for campus safety Ultimately led to the 2021 Campus Sexual Assault Law, which codified many of the best practice recommendations in the 2016 BHE report 	<ul style="list-style-type: none"> Recommended IHEs undergo annual resource screening, followed by active monitoring if at risk of financial non-viability Proposed colleges prepare contingency plans & inform students and stakeholders upon falling short of an 18-month sustainability threshold Resulted in major new legislation and regulatory role for the DHE

We propose to appoint task forces aligned to the Strategic Priorities Plan (and to sunset ACs)

Proposed structure



The goal of adopting these task forces is to continue to improve Board governance and functioning

From Advisory Councils...

Open-ended, **standing working groups** responsible for broad charges

Majority BHE membership, supplemented by select non-BHE subject matter experts

Meets ~4x/year to review and discuss assigned policy/strategic matters

...To Task Forces

Task-specific, action-oriented, & time-limited teams responsible for narrow strategic plans

Composed of **both BHE members and stakeholders and partners** with academic and industry expertise

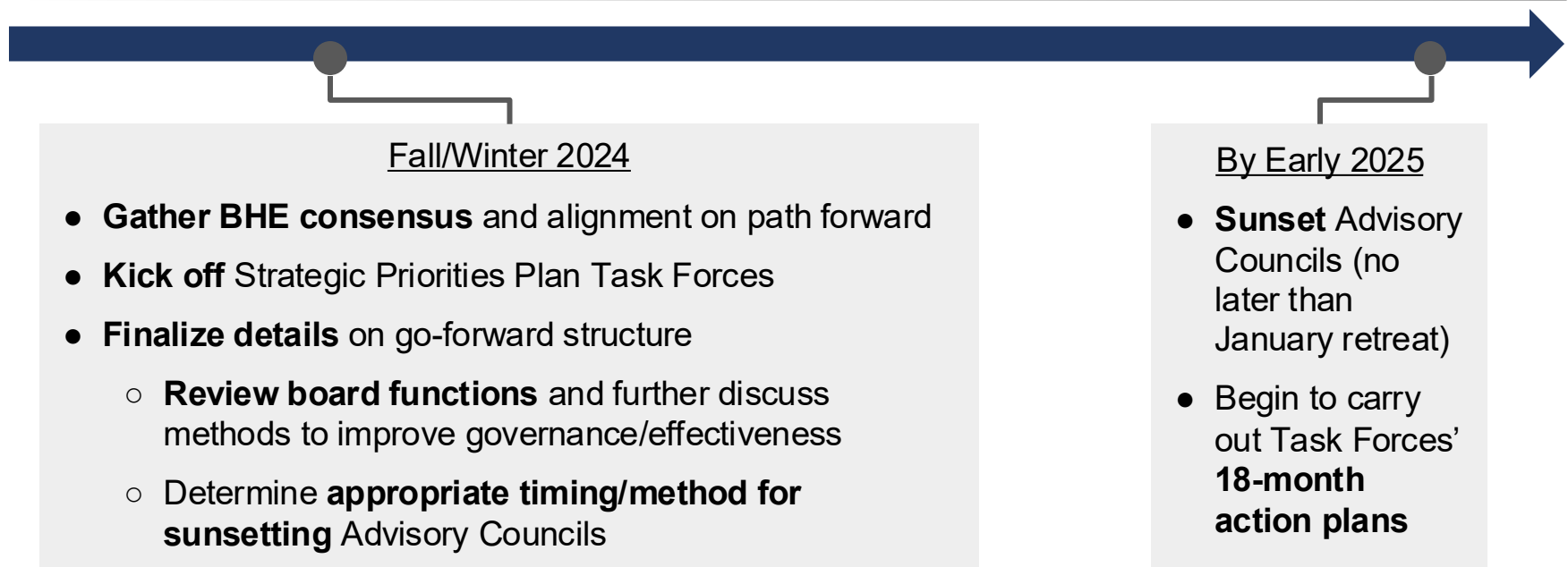
Meets as frequently as 1x/month to plan, examine, & advance strategic solutions



Shifting to task forces will enable the BHE to go deep on critical topics with top experts, stay accountable on priorities, and respond quickly to changing landscapes

Transitioning to task forces will be a gradual process, but one that we can start soon (pending BHE alignment)

There are several things the BHE must do this Fall to make this transition



Strategic Priorities Plan Task Forces: Multi-year efforts tied to individual strategic priorities

Strategic Priorities Plan Task Forces

Financial Aid Task Force

Socioeconomic Mobility Task Force

Workforce and Civic Alignment Task Force

Innovation Task Force

Description & responsibilities

- Multi-year efforts that will **support setting strategy and action plans** for top strategic priorities
- Will **consider, advise, and make strategy and policy recommendations** to the BHE
- Anticipated to meet on an **ad hoc basis, but at least once quarterly** (depends on charge and matters under consideration)

Ad Hoc Task Forces: Timely efforts that will be stood up to drive specific initiatives or to meet legislative requests

Ad Hoc Task Forces

Nurse Education and Workforce Development Task Force (2024)

College in High School Task Force (*new, will be stood up Fall 2024*)

Affordability and Quality Task Force (*legislatively required; initial report due Dec 15, 2024, final report due Mar 31, 2025*)

Description & responsibilities

- Short-term efforts that will **investigate timely, specific, and strategically important** topics
- Will engage a broad array of **BHE/DHE stakeholders and subject matter experts**
- May **recommend solutions, policy changes, & allocation of resources** aligned to academic and industry best practices

Thank You!