

## BOARD OF HIGHER EDUCATION

### REQUEST FOR BOARD ACTION

**NO.:** BHE 25-29

**BOARD DATE:** January 29, 2025

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#### **Approval of Board of Higher Education Strategic Priorities and Endorsement of Innovation and Economic Mobility Strategic Priorities Framework Plans**

**MOVED:** The Board of Higher Education (BHE) acknowledges the research, analyses, and summary policy proposals presented during its January 18, 2024, September 16, 2024, and January 29, 2025 retreats in development of BHE Strategic Priorities. The documents that comprise the research, analyses, and summary policy proposals, as presented to the BHE, are referenced, linked in, or attached to the Background Statement.

The Board approves the following four Strategic Priorities in service of our overall Equity Goal:

- *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.*
- *Innovation- Facilitating and Fostering High-Impact Innovation Throughout the Public Higher Education System.*

The BHE affirms the high priority of these Strategic Priorities and the approach of adopting frameworks, including guiding principles, five-year goals, and near-term goals for each Priority. These frameworks, once adopted, should allow the BHE and the

Department of Higher Education (Department) to remain highly aligned on top priorities and accountable for significant progress towards achieving the goals over the stated time periods.

- The BHE further endorses the frameworks (i.e., guiding principles, criteria, and goals) as set forth in the attached Background Statement for the *Economic Mobility and Innovation* Strategic Priorities, subject to BHE review of future and potential proposed further refinements from priority-aligned Task Forces; and
- acknowledges that more work is to be done to develop the frameworks (i.e., guiding principles, criteria, and goals) for the *Public Good and Student Success and Financial Aid* Strategic Priorities.

The BHE charges the Commissioner to prioritize and align necessary resources of the Department to achieving these strategic priority goals, and to work with priority-aligned BHE Task Forces and stakeholders, including institutional leaders, policy makers, and others to refine and enhance implementation frameworks for the stated goals.

The Commissioner shall periodically report back to the BHE. Said reports shall include any refinements or enhancements to the implementation frameworks.

Motion adopted by the BHE on 01/29/2025

**VOTED**

**Authority:** M.G.L. c. 15A, §1, 6 and 9

**Contact:** Noe Ortega, Commissioner

## Background

The Board of Higher Education (Board or BHE) is the Commonwealth's state higher education authority with, among other things, specific coordination, advocacy, and accountability responsibilities over the Commonwealth's entire public higher education system. M.G.L. c. 15A, §1 *et seq.*

A fundamental responsibility of the Board is to provide overall direction to the state's system of public higher education. The Board enacts this responsibility by establishing statewide goals and regularly measuring and reporting progress toward these goals. Examples of the Board's statutory mandates to coordinate and provide direction to the Commonwealth's public higher education system include:

- defining the mission of and coordinating the Commonwealth's system of public higher education and its institutions, M.G.L. c. 15A, § 1;
- analyzing the present and future needs and requirements of public higher education and establishing goals to achieve a well-coordinated quality system, M.G.L. c. 15A, § 9(c);
- developing a performance measurement system for institutions to certify achievement of public higher education accountability objectives, M.G.L. c. 15A, § 7A;
- establishing, where appropriate, coordination between and among post-secondary institutions and resolving conflicts of policies or operations, M.G.L. c.15A,9(u);
- fostering coordination between and among public and private institutions; , M.G.L. c. 15A, § 1; and
- administering state financial aid and providing financial aid services and information to students, M.G.L. c. 15A, §§ 16 and 19.

As the needs and expectations of the Commonwealth continue to grow, the Board remains committed to creating the conditions that position the public higher education system as a whole, and each public institution individually at the local level, to meet these evolving expectations.

To that end, the Board seeks to establish Strategic Priorities for the purpose of better aligning and prioritizing the work of the Board and Department to the

needs and expectations of the students, families we serve, and the workforce and societal needs of the Commonwealth, while also helping coordinate and support the work at the individual campus level.

The Board of Higher Education held the following three dedicated sessions (retreats) over the past several months to discuss, develop, and establish a focused set of Strategic Priorities:

- January 18, 2024
- September 16, 2024
- January 29, 2025

The materials shared and reviewed at each of those sessions included report outs from one or more Advisory Councils, including and especially report outs from the Evidence Based Policy Making Advisory Council.

During the Board's preliminary session on January 18, 2024, the following guiding principles related to the process for establishing Strategic Priorities were presented, with the Board noting that such priorities should be:

- (i) strategically critical,
- (ii) feasible for the BHE and the Department to significantly drive, and
- (iii) include specific enough deliverables over at least the next year to 18 months to collectively hold ourselves accountable for progress against them.

## **I. Approval of Strategic Priorities**

Based on the Board's retreat sessions, and building on the body of work established by the Board over the past couple of years (see Chair Gabrieli's January 8, 2024 "Retreat Kick off" memorandum to BHE), the following four key, strategic priorities are before the BHE for approval:

- *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.*
- *Innovation- Facilitating and Fostering High-Impact Innovation Throughout the Public Higher Education.*

As set forth in greater detail in the January 29, 2025 PowerPoint presentation to the BHE, all four strategic priorities are intended to work in service to our overall equity goal, and are intended to help focus, drive and inform the BHE's work, including policy and budget work.

In addition, the Board commits to continuing to engage in advancing all four Strategic Priorities, (subject to the initial approvals in Section II below), by establishing guiding principles, criteria, and goals (action items) for each priority, with the assistance of priority-aligned Task Forces and regular updates and final recommendations from said Task Forces to the full BHE. These frameworks, once adopted, should allow the BHE and the Department to remain highly aligned on top priorities and accountable for significant progress towards achieving the goals over the stated time periods.

## **II. Endorsement of Frameworks for the *Economic Mobility* and *Innovation* Strategic Priorities**

Based on the BHE's FY24-FY25 retreat sessions, and as set forth in greater detail in the January 29, 2025 PowerPoint presentation to the BHE, the following frameworks (i.e., guiding principles, criteria, and goals (action items)) for the Economic Mobility and Innovation strategic priorities are before the BHE for endorsement, subject to BHE review of future and potential proposed further refinements:

### **A. Economic Mobility- *Increasing the Economic Mobility Benefits of Postsecondary Participation.***

1. Guiding Principles: Ensuring that Massachusetts public higher education has the highest possible impact on student economic mobility requires establishing measures and harnessing policy and programmatic levers.

## 2. Five Year Goals

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

## 3. 18-Month Goals

### a. Governance and Resources

- Form and convene a BHE Economic Mobility Task Force comprised of BHE members, academics and others with policy expertise, civic leaders, and other stakeholders by April 30, 2025 to develop recommendations for BHE approval.
- Determine and secure sufficient internal and external resources to progress on economic mobility goals in a timely manner.

### b. Goal 1- Measurement

- Begin to report earnings outcomes previously adopted in 2018 by June 30, 2025.
- Economic Mobility Task Force puts forward recommendations for additional economic success measure(s) by September 30, 2025.
- Economic Mobility 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 by December 31, 2025.
- Begin to effectively report at least one of the additional economic success measures by April 30, 2026.

### c. Goal 2- Policy

- Launch policy gap analysis to identify opportunities for alignment with the state’s goal for economic mobility by June 30, 2025.
- Complete policy gap analysis and put forward finding to BHE by June 2026.

### d. Goal 3- Practice

- Launch system-level analysis of opportunities to strengthen non-degree credential pathways and work-based learning opportunities by March 31, 2025.
- Complete and put forward to the BHE recommendations for possible pilots or policy actions to support non-degree credential pathways and work-based learning opportunities by December 31, 2025.

**B. Innovation Priority- *Facilitating and Fostering High-Impact Innovation Throughout the Public Higher Education System.***

1. Guiding Principles: Key Elements of Future Innovation to Expand Opportunity, Success, and Equity
  - a. Dedicated Capacity: create focused innovation unit equipped with resources to execute on the priority and a dedicated team with innovation expertise.
  - b. System-Focused: focus on innovation at the systems level that has the potential to address shared priorities and challenges across public higher education institutions.
  - c. Enabling Policy and Resources: establishing enabling conditions for future innovation will likely require developing policy and identifying sustainable resources.
  - d. Pilot and Innovation: Incubate promising approaches by piloting with interested institutions; make decisions to discontinue, adjust, or scale based on ongoing evaluation.
  - e. Enhance Impact Through Technology: prioritize technology solutions with potential to meet learner and campus needs more effectively.
  - f. Expert- and Grassroots-Informed: Innovations will be sourced both from the broader field and its emerging best practices and directly from institutions within the system and segments.
2. Five-Year Goals
  - a. Demonstrate ability to launch innovations that contribute to overall equity and success goals for learners.
  - b. Launch and sustain a dedicated innovation function unit with the ability to respond quickly and efficiently.
  - c. Attract and grow multi-year funding from both public and philanthropic sources.

- d. Launch at least ten (10) pilots that have the potential to make a meaningful impact on BHE strategic priorities if scaled.
  - e. Demonstrate positive outcomes and then substantially scale at least two (2) pilots to reach a much broader group of learners.
  - f. Foster a growing network of institution partners, as well as individuals from mission-aligned nonprofit organizations, academics and others with policy expertise, and other partners and stakeholders to develop pilots and achieve goals.
3. 18-Month Goals- a proposed initial set of deliverables to be completed in the next 12 to 18 months)
- a. *Governance and Resources*
    - i. Form and convene a BHE Innovation Task Force comprised of BHE members, academics and others with policy expertise, civic leaders and other stakeholders to develop recommendations for BHE approval.
    - ii. Attract sufficient public and/or private resources to launch innovation unit.
    - iii. Recruit a dedicated team to lead and efficiently execute innovation work.
  - b. *Pilot and Innovation*
    - i. Work with public institutions to identify and refine at least two (2) promising campus-identified and collaborative pilots, with multiple campus partners.
    - ii. Identify and refine at least two (2) promising potential pilots building on promising innovations and practices from across the country.

#### Charge to the Commissioner

The Commissioner shall:

- prioritize and align necessary resources of the Department to achieve these strategic priority goals;
- work with priority aligned BHE-Task Forces and stakeholders, including institutional leaders, policy makers, and others, to refine and enhance implementation of the frameworks for the stated goals; and
- report periodically to the Board on the Department's progress in this regard. Said reports shall include any refinements or enhancements to the implementation frameworks.