

Commission on Higher Education Quality and Affordability (CHEQA)

Final Report – Executive Summary & Recommendations

December 2025

Executive Summary

The Massachusetts Fiscal Year 2025 budget tasked the State Board of Higher Education with convening a Commission on Higher Education Quality and Affordability (hereinafter referred to as either the “Commission” or “CHEQA”). As per Section 215 of that budget, a 21-member group of higher education, business, civil rights, and other stakeholders was charged with reviewing, evaluating, and making recommendations on:

- State higher education assistance programs and funding, including, but not limited to, aid for tuition, fees, books, supplies and other costs of attendance to ensure the accessibility and affordability of public higher education institutions and 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; and
- Financial assistance program design and models to efficiently increase state assistance, improve outcomes and reduce student costs

Commission members include:

- Chris Gabrieli, Board of Higher Education Chair & Commission Co-Chair
- Veronica Conforme, Board of Higher Education Member & Commission Co-Chair
- Viviana Abreu-Hernández, Executive Director, Massachusetts Budget and Policy Center
- Claudine Barnes, Faculty Member, Cape Cod Community College
- Joseph Bonilla, Student Government President, Westfield State University
- JD Chesloff, Executive Director, Massachusetts Business Roundtable
- Senator Jo Comerford, Co-Chair, Joint Committee on Higher Education
- Doug Howgate, Executive Director, Massachusetts Taxpayers Foundation
- Ed Lambert, Executive Director, Massachusetts Business Alliance for Education
- Nate Mackinnon, Executive Director, Massachusetts Association of Community Colleges
- Mary Jo Marion, Associate Vice President, Worcester State University
- President Marty Meehan, University of Massachusetts
- Niki Nguyen, Board of Higher Education Member & Student, University of Massachusetts at Boston
- President Nancy Niemi, Framingham State University

- Commissioner Noe Ortega, Massachusetts Department of Higher Education
- Max Page, President, Massachusetts Teachers Association
- Representative Kelly Pease, Ranking Minority Member, Joint Committee on Higher Education
- President David Podell, Massachusetts Bay Community College
- Representative Dave Rogers, Co-Chair, Joint Committee on Higher Education
- Femi Stoltz, Director of Policy, uAspire
- Secretary Patrick Tutwiler, Executive Office of Education

The Commission divided its work into three key areas – student success, financial aid, and higher education human resources (Appendix, page 1). The views, insights, and recommendations expressed in this report were prepared by the Commission and informed by research conducted by Ernst & Young LLP (EY-Parthenon). The Commission also invited Massachusetts-based and national experts to present their perspectives and experiences in each of these areas and held five public meetings on the topics. All associated materials, including meeting minutes, presentations, and recordings were made and remain available on the Massachusetts Department of Higher Education website at:

<https://www.mass.edu/strategic/cheqa.asp>

The Commission makes the following key recommendations:

- 1. 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.** Investments in student success programs have been shown to significantly raise student persistence and graduation rates, especially for students least well-served historically and currently, including low-income and first-generation college goers.
- 2. It is essential for the Commonwealth to codify its financial aid commitment to students, families and institutions of higher education in a manner that establishes clear, consistent multi-year support on which they can rely.** Consistent with the MassEducate and MassReconnect commitment to free community college in the Commonwealth, a long-term commitment for students across the system should be not only codified but prioritized. For example, this could be accomplished in the form of a “promise program” alongside other streamlined student aid programs that express simply and clearly the financial support upon which students and families can rely.
- 3. The Commonwealth should continue to expand financial aid and other complementary public benefit programs over time for students in two primary**

directions: first, to support meeting the basic need expenses (e.g. housing, food, child care, and mental as well as physical health care) of low-income students to enable them to take full advantage of tuition and fee-free college access opportunities; and second, to reduce on a sliding scale the burdensome debt that low- and moderate-income families must take on to meet their full cost of attendance. Options and cost estimates for meeting these goals were laid out for review, including one that pursues both directions at once.

4. **Because recruiting and retaining high-quality staff and faculty is a critical enabler for a high-quality higher education system, the Commonwealth needs to and should pursue a timely comprehensive review of faculty and staff remunerative and non-remunerative structures, policies, and practices complete with recommendations and an implementation plan.** Such a review should involve: (i) a relative assessment of faculty and staff job classifications and associated compensation levels across the Commonwealth's public higher education system relative to similar positions in other states and in the private sector for employees with similar qualifications incorporating the nuanced context of the cost of living across the various regions of Massachusetts; and (ii) a study of the necessity and feasibility of differential compensation by field for certain high-needs fields with especially high challenges for recruiting and retaining college faculty. The Commission's preliminary research shows significant gaps between compensation levels and cost of living measures and particular challenges with faculty and staff recruitment, especially in certain fields and with regard to entry-level compensation.
5. To meet these goals and all of higher education's funding needs, **the Commonwealth needs to rely both on sustained general budget appropriations and complementary additional investment from Fair Share funds. To ensure adequacy, predictability and sustainability, the Commonwealth should commit a fixed, meaningful share of annual Fair Share Education and Transportation proceeds to support a range of higher education uses.** This would be consistent with the Massachusetts Transportation Funding Task Force's recommendation that 50 percent of Fair Share Education and Transportation funds be dedicated to public transportation needs over time.

Further, a significant number of Commission members (but not a consensus) wished to strongly urge:

(1) that it be the goal of the Commonwealth to offer the financial aid needed to provide a high-quality, debt-free public higher education for all, irrespective of family income; and

(2) that the Commonwealth commit to dedicating at least 25% of Fair Share Education and Transportation proceeds in support of that and other higher education goals.

Ranges of Opinions on the Commission

In the interest of representing both the broad consensus (as above) and the range of individual perspectives on some key issues, the section below lays out some key areas of variation among members on these top issues. A range of opinions was present among Commission members on each of the main areas studied, including overall budgeting, student success initiatives, financial aid, and faculty and staff recruitment and retention.

Opinions on reserving a specific share of Fair Share funds ranged from many who embraced a specific recommendation of 25% for higher education, to some who felt that even 25% was too low a share and should be at most a minimum, to others who supported a fixed share but did not feel we should recommend a specific figure. Opinions include, for example, the view that higher education should receive, at minimum, “a proportionate share” of Education and Transportation funds total revenue. The share of the Fair Share funds allocated to higher education have declined from inception. Within the last year, however, as part of its FY26 budget recommendations, the Massachusetts Board of Higher Education recommended a 25% minimum share.

Support for expanding success programs was broad-based and strong. Some members expressed the view that further investments in the Commonwealth’s college success programs should more closely replicate the City University of New York (CUNY) Accelerated Study in Associate Program (ASAP) which has gold standard, randomized trial evidence showing high impact and has been successfully replicated in multiple locations. Others argued for expanding funding for the existing Massachusetts SUCCESS program design that provides public institutions of higher education greater flexibility in operation and includes fewer required elements. While the Commission agreed (recommendation number one above) that success programs are a critical next element to improve higher education quality and affordability, some felt that faculty and

staff compensation should be a top priority for the Commonwealth as well and argued that investments there also contribute to student success. Other Commission members stressed the importance of including transfer rates as a measure of institution of higher education success, noting that the ASAP program in New York prioritizes finishing an associate rather than a bachelor's degree. Some members warned that structured pathways might limit student exploration and the breadth of their educational experience with concerns that pathways can restrict students from understanding broader career possibilities. Suggestions included tying SUCCESS funding directly to hiring case management workers to advise students in general and help students access additional state social service benefits in particular. Members argued that project-based learning and apprenticeships are necessary aspects of student success. One member emphasized that mental health is an essential aspect of student success.

With respect to financial aid, some members argued that state financial aid should be increased over time sufficient to guarantee all students a debt-free public higher education. Members advocated that UMass receive similar aid as other segments, so as not to be penalized because of the institutional aid it currently provides to students as part of financial aid packages. The important role of independent institutions of higher education in the Commonwealth and need to extend financial aid to low-income students at under resourced non-profit institutions was likewise highlighted. While support for codification was broad, others noted that streamlining and simplification of financial aid programs are crucial aspects to providing stability and predictability for students and institutions. Some Commission members emphasized the importance of Early College programs as a form of financial aid, noting that participating students currently do not receive support from the MassEducate and MassReconnect state financial aid programs.¹ They also highlighted that there is a lack of financial aid for skill-based/non-degree credential/certificate programs and urged greater support for such going forward. Concerns were noted that focusing on the neediest students might overshadow the needs of middle-income students.

Finally, strong opinions were registered on the matter of faculty and staff compensation, including that they should be broadly heightened to reflect the elevated cost of living experienced in Massachusetts. Members noted that State University of New York (SUNY) and CUNY pay two- and four-year faculty the same salary, based on qualifications, and questioned why Massachusetts cannot adopt a similar model. They highlighted that in Massachusetts there is a difference in salaries between those at community colleges and four-year institutions. Despite similar instructional responsibilities, community college faculty face higher workloads and lower pay, making it difficult to hire and retain qualified faculty. Some members advocated for “thriving” wages, as opposed to a “livable” wage, that would allow faculty to save for retirement

¹ Early College High School students do not pay out-of-pocket for associated courses that carry postsecondary education credit. Those courses are financed through a separate state line-item appropriation.

and live comfortably after dedicating their careers to education. Members raised work environment factors, such as the number of classes taught, weekly preparation requirements, student-to-faculty ratios, and availability of classroom resources such as labs, materials, and library services as significantly impacting faculty satisfaction. They emphasized the importance of considering these comprehensive factors to create a supportive and sustainable work environment for faculty across both two- and four-year institutions. Others, however, felt that the analyses were insufficient to reach clear conclusions and that discussions on wages and conditions should be confined to the collective bargaining process. Several members noted that solutions could be more efficiently focused on the fields where recruitment is most challenging and asked whether structural patterns need to also be addressed.

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Commission on Higher Education Quality and Affordability (CHEQA)

Final Report - Supporting Discussions (Addendum A)

December 2025

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Discussion

The objective of this Addendum of the final CHEQA Commission Final Report, consistent with the Fiscal Year 2025 budget Section 215 mandate, see Appendix, is to summarize findings from research developed for the Commission on student success, student financial aid, and faculty and staff recruitment and retention in the Commonwealth, as well as content that has been discussed during Commission meetings, and present a narrative describing recommendation options presented for consideration during the course of the work of the Commission.

The views, insights, and recommendations expressed in this report were prepared by the staff of the Commission and informed by research conducted by Ernst & Young LLP (EY-Parthenon). For the quantitative analyses presented, a combination of publicly available data, primarily sourced from the federal Integrated Postsecondary Education Data System (IPEDS), and internal Department of Higher Education (DHE) data was utilized. Any internal DHE student-level data was anonymized. These administrative datasets were supplemented with a tailored survey of community college and state university leadership for insights into faculty and staff recruitment and retention challenges. The survey was anonymous, though responses were identifiable by sector. In addition, secondary research and public information, including state websites and published reports, were leveraged to supplement and contextualize the findings in the broader landscape.

Student Success

The Commission's first meeting (CHEQA Meeting #1) focused on student success and took place on November 7, 2024. Commission members reviewed the state of the student success landscape in Massachusetts, including a description of the current Supporting Urgent Community College Equity through Student Services (SUCCESS) line item-funded program, leading practices in other states, and potential options for the Commonwealth to consider going forward. The Commission discussion included a focus on incentives and provisions for full-time versus part-time student enrollment and key considerations for scaling successful programs. What follows in the subsections below is a narrative description of the presentations received by CHEQA members during Meeting # 1.

Student Success Context

Across the country, earning a postsecondary degree dramatically improves economic outcomes. Bachelor's degree holders, for example, earn an average of ~\$1 million more over their lifetimes compared to those with only a high school diploma.¹

Yet, in Massachusetts and nationally, there are significant shortfalls in degree completion, especially for historically underserved populations. Approximately 34% of all students, including

¹ Georgetown University Center on Education and the Workforce

first-time, returning, full-time, and part-time students, who start at a Massachusetts community college, complete a degree anywhere in the country within six years of initial enrollment. Approximately 70% of all students, including first-time, returning, and part-time students, who start at a Massachusetts public four-year university, complete a degree anywhere in the country within six years of initial enrollment.² On-time credit accumulation, which is an early indicator of completion, is rising at the community college level, but declining at the state university level (Addendum B, page 2).

Pell Grant recipients, a group typically considered to be students with the greatest economic need, graduate at consistently lower rates than non-recipients across all institution types in Massachusetts (Addendum B, page 2). Graduation rates for transfer students in the four-year segment have been increasing over time, though the transfer rates from Massachusetts community colleges to four-year institutions are declining (Addendum B, page 5). Whereas nationally some 80% of community college students express a desire to earn a bachelor's degree, approximately 20% of Massachusetts community college students go on to transfer to a bachelor's degree-granting institution (Addendum B, page 5).

Massachusetts SUCCESS Program Overview

To address concerns drawn from this context and with the leadership of the community college sector, Massachusetts has invested in multiple student success initiatives. For example, the SUCCESS program, launched in 2021, addresses barriers faced by underserved students at community colleges. The initiative supports wraparound services—such as peer mentorship, career exploration, and personalized academic advising—that help both full-time and part-time students navigate challenges and stay on track toward certificate and degree completion. Since its inception, legislative funding for the program has doubled, from \$7 million in Fiscal Year 2021 to \$14 million in Fiscal Year 2024, allowing participating institutions to employ over 460 total personnel (Fiscal Year 2022) and serve approximately 8,000 students annually at community colleges.³ Starting in Fiscal Year 2025, program funding has been expanded to include an additional \$14 million for a similar approach at state universities. Program results as reported to date are promising, with retention rates ten percentage points higher than non-participants.⁴ At a cost of \$1,500 to \$2,000 per student annually, SUCCESS appears to represent a relatively efficient investment for meaningful results, particularly for populations that face systemic inequities in higher education (Addendum B, page 6).

Leading Practices in Other States

Other states have implemented student success programs that could offer valuable lessons for Massachusetts. In New York, the City University of New York (CUNY) Accelerated Study in

² IPEDS, MA DHE internal data

³ SUCCESS Fund Initiative 2022 Final Report (MACC)

⁴ Ibid.

Associate Programs (ASAP) model for community colleges and the State University of New York (SUNY) Accelerate, Complete, Engage (ACE) model for four-year colleges have been especially successful in reducing many barriers to timely degree completion. A 2020 randomized controlled trial of ASAP found that by integrating financial support (e.g., free transportation, textbook stipends, and emergency grant aid), structured academic pathways, and high-touch advising, participants earned an average of 8.5 more credits than counterparts who did not receive the same types of support, were 16 percentage points more likely to graduate, and were six percentage points more likely to enroll in a four-year college or university over a three-year period. The ASAP three-year graduation rate (53%), drawn from eight cohorts spanning 2007 to 2014, surpassed the 25% rate observed in a historically matched statistical comparison group from the CUNY randomized controlled trial.⁵

Costs to implement the CUNY ASAP program range from \$1,850 to \$3,400 per student, depending on the regional context, scale, and services provided, and the program has been replicated successfully. Notably, the ASAP and ACE have been scaled, replicated and sustained across a growing number of New York state campuses as well as in six other states (Addendum B, page 7). Donna Linderman, a founder of the ASAP and ACE programs at CUNY and now the leader of a state-funded expansion to 25 more SUNY campuses across the state, spoke to the Commission.

Similarly, the National Institute for Student Success (NISS) at Georgia State University (GSU) has pioneered innovative strategies to improve student outcomes, particularly for low-income and first-generation students. Through predictive analytics, retention grants, and first-year support programs, GSU has increased its four-year graduation rate by 14 percentage points since 2012, from 41% to 55% in Fiscal Year 2023. Costs range from \$800 to \$2,500 per student, based on size of retention grant provided (Addendum B, page 8).

Recommendations

Analysis of existing, peer-reviewed research on student success shows that well-defined programs, such as CUNY ASAP and SUNY ACE and the student success efforts at the NISS at GSU, can deliver consistent improvements in student persistence to graduation; thus, success programming is a compelling area of further investment for Massachusetts. 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.⁶

Future student success initiatives in Massachusetts should support evidence-based practices for: (i) improving persistence and completion (e.g., case management advising, structured academic

⁵“CUNY Accelerated Study in Associate Programs”, Results for America

⁶ Cost estimate based on allocating an average of \$1,750 to ~59,000 Pell eligible students in Massachusetts

pathways), (ii) reducing financial barriers to full-time enrollment, and (iii) improving transitions from two-year to four-year institutions.

During Meeting #3, CHEQA members ranked support for design elements of success initiatives on a 1-5 scale, with a score of 1 representing that the feature is minimally important and a score of 5 representing that it is critically important to the design of these initiatives. On average, Commission members assigned the following scores to various design features:

- 4.6 for support to extend to full-time students
- 4.5 to proactive, “high touch” student advising
- 4.4 for support to extend to part-time students
- 4.2 to structured academic pathways
- 4.2 to support for living expenses
- 4.1 for success initiatives to extend to both two- and four-year institutions
- 4.0 for centralized statewide success administration and data collection, and
- 3.7 to block scheduling.

Accordingly, the Commission staff submitted for Commission discussion that Massachusetts should consider the following range of options for structuring its future student success investment (Addendum B, page 9):

1. **Expansion of Existing Funding Model (the SUCCESS and SU SUCCESS programs):** Each institution (all two- and four-year public institutions) is allocated program funds via a block grant, giving institution leadership discretion over how to invest in student success initiatives (\$1,500 - \$2,000 per eligible student). This model offers flexibility, allowing institutions to address their specific needs and priorities, and provides immediate access to funding each year for implementation of initiatives. However, it does not provide structured program guidelines, which may result in investments that are either not evidence-based or uneven in design and lead to inconsistent outcomes due to variation in implementation.
2. **Creation of a new, universal Department of Higher Education (DHE)-Supported Success Program:** A new program modeled on replicating elements of both the MA SUCCESS program and the CUNY ASAP and SUNY ACE programs is constituted that allocates funds (\$1,800 - \$2,000 per eligible student)⁷ with design implementation requirements for participating institutions. This program would emphasize proactive case management support, high-touch engagement, data tracking, centralized statewide support, and adoption of evidence-based strategies to receive program funding. With

⁷ Current MA SUCCESS program allocates ~\$1,500-\$2,000 per student; Ohio ASAP/ACE replication allocated ~\$1,850 per student

greater centralized guidance and parameters, this program is likely to yield more standard outcomes across the board given less variation in implementation. However, the model also requires additional capacity and training to ensure implementation adherence.

3. **Support of a Voluntary, Evidence-Based Program:** In another potential scenario, institutions would be encouraged to access a set-aside, statewide pool of funds, representing \$1,500 - \$2,000 per eligible student, by demonstrating commitment to implementing an evidence-based student success program design. Participation would be voluntary. This model incentivizes compliance with evidence-based practices but does not implement a universal requirement.

Student Financial Aid

The second Commission meeting (CHEQA Meeting #2) focused on state financial aid. The Commission first reviewed the history of financial aid in Massachusetts, including a summary of financial aid processes and the concept of “total cost of attendance” before discussing leading national financial aid practices and potential options for the Commonwealth. The discussion focused on codifying financial aid efforts and improving affordability beyond the costs of tuition, fees, books, and supplies across public higher education segments in Massachusetts as well as increasing support for middle-income students who take on debt. What follows in the subsections below is a narrative description of the presentations received by CHEQA members during Meeting # 2.

Financial aid landscape in Massachusetts

For students at Massachusetts community colleges, the *direct* costs associated with attendance (e.g., tuition, fees, books, and supplies) are currently covered fully by existing, recently codified (MassReconnect and MassEducate) financial aid programs. At the Commonwealth’s four-year universities, the same support level, though uncoded, is currently funded for eligible low-income students. However, for all students, the total cost of attendance also includes *indirect* costs such as housing, food, transportation, and child care, which remain a significant financial barrier for many students and create unmet financial need and the need to borrow money for many. The share of cost of attendance that is attributable to indirect costs can be substantial, and in some cases, exceeds in sum that of direct costs, underscoring the importance of considering the financial picture beyond tuition, fees, books, and supplies necessary for students to enroll full-time (Addendum B, page 10).

In recent years, Massachusetts has increased its commitment to financial aid across all three public higher education segments in the Commonwealth (Addendum B, page 11). In fact, the Commonwealth has more than doubled state financial aid during the Healey-Driscoll administration. Among states nationally, we have catapulted from 26th in state financial aid per

full-time equivalent student to 13th and rest in the top five if considered in terms of need-based aid. New financial aid programs like MassReconnect (Fiscal Year 2024) and MassEducate (Fiscal Year 2025) have helped mitigate direct costs for community college students, contributing to a 24% increase in enrollment since its implementation in 2023. Similarly, University of Massachusetts has begun marketing statewide financial aid initiatives including MassGrant Plus Expansion as "free tuition guarantees" for low-income students, suggesting an increasing need for comprehensive, simple, clear and sustainable statewide financial aid commitments.

Despite these advancements, however, critical gaps persist. For example, low- and middle-income students in Massachusetts still have insufficient resources to meet total cost of attendance needs. Additionally, the state lacks codified aid policies, meaning that the appropriations made each year may fluctuate, creating uncertainty in financial aid awards for students, families, and institutions. Finally, the financial aid system as a whole is challenging to navigate, with a plethora of programs and sometimes overlapping eligibility criteria.

The Challenge

Fundamentally, Massachusetts confronts three base challenges with respect to state financial aid:

First, unmet financial need remains widespread. Many low-income students confront costs that exceed what is covered by current federal, state, and institutional financial aid programs, particularly with respect to living expenses, transportation, and child care needs. Students in the lowest income group (Annual Gross Income (AGI) < \$48,000) confront between about \$11,000 - \$14,000 a year in unmet costs of attendance need beyond what financial aid currently covers. Middle-income students, who often do not qualify for need-based aid, also confront significant affordability barriers. Typically, unmet need results in students assuming potentially onerous debt, working considerable hours outside of school, or dropping to part-time status – all of which markedly reduce likelihood of certificate and degree completion (Addendum B, page 12).

Second, current financial aid policies are not codified in law. Unlike other states with a legislatively guaranteed amount of support for student aid tied to commitments to outcomes such as an assurance that no tuition and fees will be charged to low-income or even all students, Massachusetts relies on annual appropriations, which builds in annual uncertainty for students and families planning for higher education and for institutions trying to communicate current year and multi-year availability of financial aid. By contrast, many states have adopted “promise programs” that set out the state’s commitment, e.g., guaranteed, multi-year free tuition and aid for all low-income students at all public colleges (Addendum B, pages 15-17). The recent MassEducate program represents a step in the direction of a Massachusetts state promise. However, it lacks a permanent, codified source of funding to support an ensured appropriation over time. One noteworthy example of a fully codified state commitment that could serve as a

model aid policy – and currently exists in Massachusetts – is the K-12 school building assistance fund, whereby a dedicated one percentage point of Massachusetts sales tax revenue funds K-12 infrastructure expenses.

Third, the state’s financial aid system is highly fragmented. With over 50 separate programs—many serving small populations with small dollar amounts—stakeholders often struggle to navigate the complex and uncoordinated system. Critical groups like Early College participants and non-degree program certificate seekers are excluded from current MassEducate, MassReconnect, and MassGrant state financial aid program eligibility. **Of note, Early College courses, however, are free to participating students.** Consolidating various financial aid grants and scholarships into a narrower framework would streamline processes for:

- The Massachusetts Department of Higher Education (MA DHE): Simplifying implementation and oversight of the allocation of funds to institutions
- Students: Facilitating easier navigation of financial options
- Institutions: Improving the predictability of financial flows and simplifying the financial aid packaging processes that are resource and time intensive for institutions

Leading Practices in Other States

Other states have effectively reduced barriers for students navigating the financial aid process by providing clear and predictable guarantees that enable students and families to plan effectively for college costs. The examples below illustrate how New Mexico, Tennessee, and Michigan have successfully simplified, streamlined, and codified financial aid systems to ensure students receive the support they need. These reforms have increased enrollment and retention, making them models for Massachusetts to consider:

- *New Mexico Opportunity & Lottery Scholarships*: Offers free tuition and supports additional full-time enrollment cost of attendance needs for students from all income levels and leverages a trust fund to guarantee program longevity.
- *Tennessee Promise*: A last-dollar scholarship program that guarantees free tuition for community college students, funded by a state lottery endowment. This program has significantly improved graduation rates and simplified access to aid.
- *Michigan Achievement Scholarship*: Combines multiple aid streams into a single program with broad eligibility, targeting both tuition and living expenses. Codified in law, this program ensures sustained funding and clarity for students.

These examples highlight exemplar models for codifying aid policies into state law, simplifying financial aid systems, and addressing total cost of attendance. Programs in these states have

increased enrollment, improved retention, and provided clarity for students and families making decisions about higher education (Addendum B, pages 15-17).

Recommendations

The Commission staff recommended that the CHEQA Commission consider several options for financial aid reform and enhancement to address fundamental challenges with college affordability. Measures included codification of current financial aid programs as well as the expansion of programs to cover expenses beyond direct costs to assist families in meeting the total cost of attendance associated with full-time college enrollment and success and the expansion of financial aid coverage to moderate-income families to reduce their burden of debt.

During Meeting #3, CHEQA members ranked their support for financial aid initiatives on a 1-5 scale, with one indicating that the feature is minimally important, and five that it is critically important. In aggregate, Commission members assigned the following scores to various design features:

- 4.7 for aid to prioritize neediest students
- 4.7 to simplified messaging around state aid programs
- 4.6 for aid to extend to full-time students
- 4.3 for aid to extend to part-time students
- 4.2 to supporting total cost of attendance
- 4.2 to reducing debt for middle income students
- 4.1 to codification of funding streams
- 3.9 for aid to be consistent across two- and four- years
- 3.4 to fund non-degree credentialing programs
- 3.1 to support Early College and high school students

CHEQA members considered four main options for financial aid redesign and expansion.

Selected options balance competing priorities from previously established guiding principles for financial aid redesign. They aim to be simple, transparent programs that prioritize the neediest students wherever possible, promote affordability, and therefore advance program completion by all students. Parity across segments and associated costs were also important design dimensions (Addendum B, pages 18-20). Fiscal Year 2025 cost estimates for these options for all three segments – community colleges, state universities, and the University of Massachusetts – were simulated using enrollment, FAFSA, and Pell Grant recipient growth trends, and were based on Fiscal Year 2023 anonymized student level data provided by the DHE, which included amounts disbursed as Pell Grant aid, non-Pell Grant federal aid, institutional aid, MassGrant aid, MassGrant Plus aid, MassGrant Plus Expansion aid, and all other state higher education financial aid funding streams.

Cost calculations for each scenario reflect incremental spending above and beyond current financial aid disbursed, on a per-student basis, disaggregated by income band. Though calculations are based on current Massachusetts financial aid guidelines, the implementation of MassEducate in the Fall of 2024 was an iterative effort, resulting in updates to process, guidelines, and ultimately the aid awarded to students. Therefore, community college estimates that were produced in the Fall of 2024 were updated as of Spring 2025 based on new guidelines and actual aid disbursed. To produce updated Fiscal Year 2025 estimates, the analysis triangulated Fall allocations data (at the institution level) as well as updated simulated data (at the student level), which was produced based on new, known guidelines. Costs cited in this report are directional estimates and may not represent amounts actually disbursed across the full Fiscal Year 2025 as this data was neither collected nor available at the time of this analysis.

Note that cost of attendance (COA) refers to the sum of direct and indirect costs. Direct costs refer to tuition and fees and books and supplies, while indirect costs refer to room and board and other living expenses. Expected Family Contribution (EFC) was a measure historically used by the federal government to determine the amount a family could afford to contribute to higher education costs. Beginning in the 2024-2025 school year, the government transitioned to using the Student Aid Index (SAI), a formula-based index number to indicate a family's financial need. Cost approximations for the four selected options are based on Fiscal Year 2023 student level data, grossed up based on updated enrollment estimates.⁸ Note that this data set includes EFC, but not SAI, as that metric was not yet launched.

The first option, a “Basic Needs Stipend,” would provide heightened financial aid for additional need costs beyond tuition and fees for low-income students. As per this option, the Commonwealth would cover direct tuition and fees expenses, plus a fixed amount (~10% of COA) toward remaining cost of attendance needs for approximately ~30,000 Pell-eligible students at four-year institutions. The Basic Needs Stipend option would incrementally cost the Commonwealth approximately \$114 million per year with approximately \$41 million conferred to state university students and \$73 million to University of Massachusetts students; there is no incremental cost for community colleges as current programming already includes a combination of stipends beyond support for tuition and fees through MassEducate and MassGrant Plus that, taken together, represent 10% of average COA (\$2,400) at those institutions. Critical benefits of a basic needs stipend include that it is targeted to low-income students and that messaging is easily understood by students; a drawback is that basic needs are generally conceived as similar across segments, whereas in reality coverage of 10% of COA provides different amounts to students by segment. For example, 10% of the approximate \$33,000 cost of attendance at Massachusetts four-year public institutions equals \$3,300 for students attending those institutions, but only \$2,400 at a Massachusetts community college.

⁸ Factored enrollment growth for community colleges is 8% in Fiscal Year 2024 and 15% in Fiscal Year 2025; for state universities and UMass, it was -0.5% in Fiscal Year 2024 and 0% in Fiscal Year 2025.

The second option, a “Pell Grant Match,” would effectively create a state “Double Pell” award for low- and middle-income students. Matching the federal Pell Grant Award with a single state financial aid program is a progressive approach to providing additional need-based aid, since the Pell Grant itself is awarded on a sliding scale. This option would create an additional annual cost to the Commonwealth, estimated at \$139 million with approximately \$47 million conferred to community colleges students, \$34 million to state university students, and \$58 million to University of Massachusetts students.⁹ Benefits of this option include its targeted approach to disbursing aid to lower income students and that students in both two- and four-year segments would receive similar supplemental aid awards, based on their Pell Grant award levels. However, aid awarded through the program is neither simple nor transparent for students—a phenomenon that reflects the lack of visibility into anticipated Pell award dollars during a student’s application journey.

The third option, a “Pell Match with a Basic Needs Guarantee” would provide extra aid to low-income and middle-income students by integrating the scaled approach already inherent in Pell Grant awards with a state match, while also providing a stipend based on the number of credits a student takes. This option would cost the Commonwealth an additional estimated \$150 million with \$47 million conferred to community college students, \$39 million to state university students, and \$66 million to University of Massachusetts students. Benefits of this option include comparable support across segments for the total cost of attendance expenses for low- and middle-income students in addition to those from a state double Pell program. Drawbacks include that aid awarded through the program is neither simple nor transparent for students.

The final option, a “Debt-Free” commitment, would expand aid to allow all students with unmet need (need remaining after all sources of grant aid and expected family contribution have been applied) to attend public institutions without taking on an additional loan burden. Students would receive the portion of their cost of attendance not covered by all sources of existing aid, expected family contribution, and \$5,000 in wages earned from a work-study program. This option would cost the Commonwealth an additional estimated \$457 million annually with \$193 million conferred to community college students, \$111 million to state university students, and \$153 million to University of Massachusetts students, inclusive of current programming expenses. Benefits of this option include simple and transparent messaging and that aid is targeted to students with demonstrated needs. The major drawback of this option is its higher cost relative to other options.

⁹ Proposed Pell Match award is inclusive of all existing state aid disbursed amongst different programs

Faculty and Staff Recruitment and Retention

CHEQA Meeting #4 focused on faculty and staff recruitment and retention. The Commission discussed the current state of faculty composition, faculty compensation, and faculty benefits in Massachusetts compared to other states, based on an analysis of publicly available data from the Integrated Postsecondary Data System (IPEDS). The Commission also reviewed survey results from state university and community college leadership that highlighted recruitment as a particularly salient challenge, especially in areas such as health and medical fields, computer science, and technology. Guest speakers from Executive Office for Administration and Finance (A&F) provided context on the collective bargaining process, while guest speakers from the Massachusetts Teachers Association (MTA) offered faculty and staff perspectives on the hardships associated with current compensation. The discussion primarily focused on challenges with compensation but also covered non-compensation-related solutions like increased flexibility with work schedules, improvements to human resources practices, and enhanced support for research (at four-year institutions). Finally, the meeting emphasized the need for further research to refine recommendations as they related to faculty and staff recruitment and retention in Massachusetts. What follows in the subsections below is a narrative description of the presentations received by CHEQA members during Meeting # 4.

Faculty and Staff Recruitment and Retention

The Commission focused its work on the role of faculty and staff recruitment and retention by seeking to receive and analyze data about the nature and scale of the problem. Sources consulted included surveys and testimony from the Massachusetts Teachers Association (MTA), a survey conducted by the DHE as staff to CHEQA, and analyses and comparisons developed by consultant to the DHE staff of the Commission.

The Commission's survey of state university and community college leadership probed their perspectives on recruitment and retention challenges. Survey results were reported in aggregate and by sector, allowing differentiated analysis of state university and community college responses (University of Massachusetts campuses did not participate). Across public two- and four-year institutions segments as well as by faculty and staff, respondents emphasized recruitment as a more prevalent challenge compared to retention (Addendum B, pages 21-24). Responses showed compensation disparities relative to both academic and non-academic career opportunities and the high cost of living in Massachusetts to be a key challenge across subgroups; compensation-related factors were particularly challenging for recruitment of faculty in specialized areas, such as health and medical, computer science, and technology in both the state university and community college segments (Addendum B, pages 25-29). Survey responses included a range of potential non-compensation-related solutions from offering more flexible work schedules to enhanced support for research (Addendum B, pages 29-32).

The Massachusetts Teachers Association (MTA) reported to the Commission complementary survey results of more than 2,800 public college faculty and staff members questioned during the Winter of 2025. Among all respondents, reflecting a return rate of 28 percent of those solicited for opinions, inadequate wages during the prior three years resulted in:

- Monitoring utility usage to keep home temperatures lower than comfortable (56 percent);
- Rationing food (27 percent);
- Moving to lower cost housing (17 percent);
- Using public assistance programs (11 percent); and
- Visiting a food pantry (10 percent).

Among adjunct faculty responding to the MTA survey, inadequate wages during the prior three years resulted in:

- Monitoring utility usage to keep home temperatures lower than comfortable (46 percent);
- Rationing food (29 percent);
- Using public assistance programs (22 percent);
- Visiting a food pantry (18 percent); and
- Moving to lower cost housing (14 percent).

Faculty-related analysis also explored the composition of faculty in Massachusetts public institutions, segmented by two- and four-year institutions, in relation to comparison states, and specifically the share of full-time vs. part-time faculty, share of tenure-track versus non-tenure track faculty, and student to faculty ratios. These are all foundational data points when considering the statewide policy landscape for recruitment and retention:

- *Mix of full- and part-time faculty.* Analysis of publicly available IPEDS data suggests that the composition of faculty at public four-year institutions in Massachusetts is slightly more full-time while the faculty at Massachusetts public two-year institutions is slightly more part-time than faculty in comparison states (Addendum B, pages 33-34).
- *Distribution of tenure and non-tenure track faculty.* The faculty mix at Massachusetts public two- and four-year institutions skews slightly more tenure-track relative to comparison states (Addendum B, pages 35-36).¹⁰
- *Student-to-faculty ratios.* On this metric, Massachusetts is about average when compared to peer state set; Massachusetts student-to-faculty ratios are 20:1 for public four-year institutions and 27:1 for public two-year (Addendum B, pages 37-38).

¹⁰ Comparison states chosen following Massachusetts Taxpayer Foundation Competitiveness Index Report; Geographic competitors include CT, ME, NH, RI, VT and economic competitors include CA, FL, NY, NC, and TX, data sourced from IPEDS

The Commission contracted with EY-Parthenon to conduct a study of faculty base pay relative to comparison states by assessing nine-month salaries reported in IPEDS by segment. The methodology adjusted for state policy contexts to generate both take-home pay estimates as well as cost of living adjusted estimates of take-home pay. Take-home pay was calculated by subtracting federally allowed faculty deductions, state mandated pension contribution, FICA tax, federal income tax, and state income tax from average base pay (Addendum B, page 39). Regarding base and take-home salaries, the analysis indicated that faculty compensation for public two- and four-year institutions in Massachusetts is about average compared to geographic and economic competitor states (Addendum B, pages 40-43). However, cost-of-living adjustments suggest that Massachusetts lags peer states substantially after considering our state's overall higher cost of living (Addendum B, pages 44-47).

Cost-of-living adjustments were based on a state-level index sourced from the World Population Review. This Cost-of-Living Index (COLI) compiles metrics from six categories (housing, utilities, groceries, transportation, and miscellaneous goods and services) into a single value for each state. The COLI is relative to the national average household cost-of-living for a family of four, which is \$61k for 12 months, or \$46k for nine months. The provided COLI for Massachusetts for 2024 according to the World Population Review is 148.4, meaning that the state's cost-of-living is 48.4% higher than the national average. Thus, the nine-month cost-of-living in Massachusetts is approximately \$68k. This analysis applies the national average household COLI for a family of four to estimate the cost-of-living expenses for Massachusetts; actual expenses may differ based on the size of the household and the region of the state where the faculty member lives (Addendum B, page 48).

There are several limitations to the analysis conducted:

- It relies on publicly available data of full-time faculty, aggregated by rank and institution, which doesn't allow for differentiation by discipline, years of experience, or other relevant factors.
- The cost-of-living estimate for Massachusetts is calculated relative to the national average household cost of living and represents a statewide metric, which does not account for the differences in living expenses across the state.
- Finally, analysis of staff salaries was not performed given that IPEDS data is spottier in this area, and therefore this represents an area of potential future research.

Given these limitations, further compensation study was recommended by EY-Parthenon staff, which would consider the cost of labor in target metropolitan statistical areas (MSAs) and leverage market leading survey sources such as Association to Advance Collegiate Schools of Business (AACSB), American Association of University Professors (AAUP), College and University Professional Association for Human Resources (CUPA-HR) instead of IPEDs data which is reported in aggregate. A more rigorous current state assessment of the compensation

landscape can also be conducted through engagement with campuses who may have conducted their own studies and through stakeholder interviews with institution leadership, faculty and staff, and the state Department of Higher Education (Addendum B, page 49).

Faculty benefits

The analysis of faculty benefits across a number of dimensions suggests the following:

- *Pension plans.* Comparison of plan features such as state mandated employee contribution percentage, vesting period, presence of cost-of-living adjustments, and maximum pension payout for Massachusetts and comparison states indicates that Massachusetts' pension plan payout is more generous than economic competitor states, but in line with geographic (New England) adjacent states.
- *Vacation and paid time off.* Across public two-year and four-year institutions in Massachusetts, vacation and paid time off policy is in line with comparison states.
- *Paid parental leave and child care benefits.* These benefits appear more generous at public four-year institutions in Massachusetts compared to other states and in line with other states at Massachusetts two-year institutions (Addendum B, page 50).

This benefit analysis, too, is subject to substantial limitations. The current findings are restricted to information found in publicly accessible collective bargaining agreements, some of which may not be up-to-date, and state documentation. Additional research should be conducted with the most recent artifacts and through interviews with critical stakeholders to achieve a more refined benefits benchmarking analysis.

Recommendations

Survey data of leadership at Massachusetts public institutions regarding the current state of faculty and staff recruitment and retention, as well as publicly available data on faculty composition, compensation, and benefits, yielded preliminary perspectives on actions the state could take to improve faculty and staff recruitment and retention; however, more research is required to design specific next steps. Recommended elements for further recruitment and retention research include both compensation-related and non-compensation-related factors.

It should be noted that while the Commission staff recommendations, building on the data generated for review, provided insights into the current challenges as well as input into further research needed, Commission members also discussed the need for timeliness and even urgency in proceeding to implementation of future changes. Discussion also included a focus on the central role of collective bargaining in determining many aspects of these arrangements.

Comprehensive compensation benchmarking for market pricing analysis could consist of the following key activities and should be replicated for both faculty and staff amongst all state institutions:

- Refine peer sets based on an institution-specific set of criteria: engage with institutions and the DHE to develop and identify peer groups based on institution or segment (e.g., separate peers for community colleges, state universities, and University of Massachusetts)
- Formulate the unit of analysis for cost-of-labor adjustments: analyze the cost-of-labor, leveraging data that considers supply-demand dynamics by relevant geographic sub-region such as by zip code or metropolitan statistical areas for Massachusetts and comparison states, to isolate more targeted comparisons of faculty and staff compensation across various levels of disciplines
- Leverage leading survey sources for compensation benchmarks: perform survey evaluation and selection – using market leading survey sources instead of publicly available data, as it is reported in aggregate
- Conduct a current state assessment of the compensation landscape: perform stakeholder interviews with faculty and staff, institution leadership, and the DHE to gather insights on institutional needs and priorities, as well as any non-compensation-related activities or benefits to support faculty and staff recruitment and retention

Further study of non-compensation-related factors affecting faculty and staff recruitment and retention in the Commonwealth may include benefits benchmarking and analysis. The preliminary analysis showed that state benefits, such as parental leave and pension plans offer a comparative advantage to working in Massachusetts, though further study is required to confirm and market this information. Other non-compensation factors to be further explored may include healthcare, flexible work arrangements, and workload balancing among others.

Appendix

SECTION 215 of Chapter 140 of the Acts of 2024.

(a) 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 as defined under section 5 of chapter 15A of the General Laws.

The task force shall review and evaluate: (i) 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; (ii) student costs and debts during and after attending said universities; (iii) programs that improve student success, including, but not limited to, academic support, career counseling, assistance with applying for state and federal benefits and improvements to facilities; (iv) improvements needed to increase the recruitment and retention of qualified adjunct and full-time faculty and staff; and (v) financial assistance program design and models to efficiently increase state assistance, improve outcomes and reduce student costs. The task force shall consider financial, logistical, cultural and other barriers affecting students, the financial resources of the state, the financial resources of students attending university and make recommendations to reduce barriers and increase access to high-quality higher education. The department of higher education may provide staff and research support to assist the task force.

(b) The task force shall consist of: 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; and the executive director of the Massachusetts Business Alliance for Education, Inc.

(c) The commission shall submit an initial report to the clerks of the senate and house of representatives and the house and senate committee on ways and means not later than December 15, 2024. The commission shall submit a final report to the clerks of the senate

and house of representatives and the house and senate committee on ways and means not later than March 31, 2025.

Commission on Higher Education Quality and Affordability (CHEQA)

Final Report: Addendum B



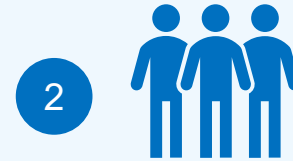
MASSACHUSETTS
Department of
Higher Education

The proposed North Star for CHEQA task force is a set of recommendations to...

A Comprehensive Massachusetts Program



...advance student
success



...promote access
and affordability



... support faculty
recruitment and
retention

Goals

Promote student success, including retention, graduation, and post-graduate outcomes

Increase access to higher education and reduce student debt by making it more affordable

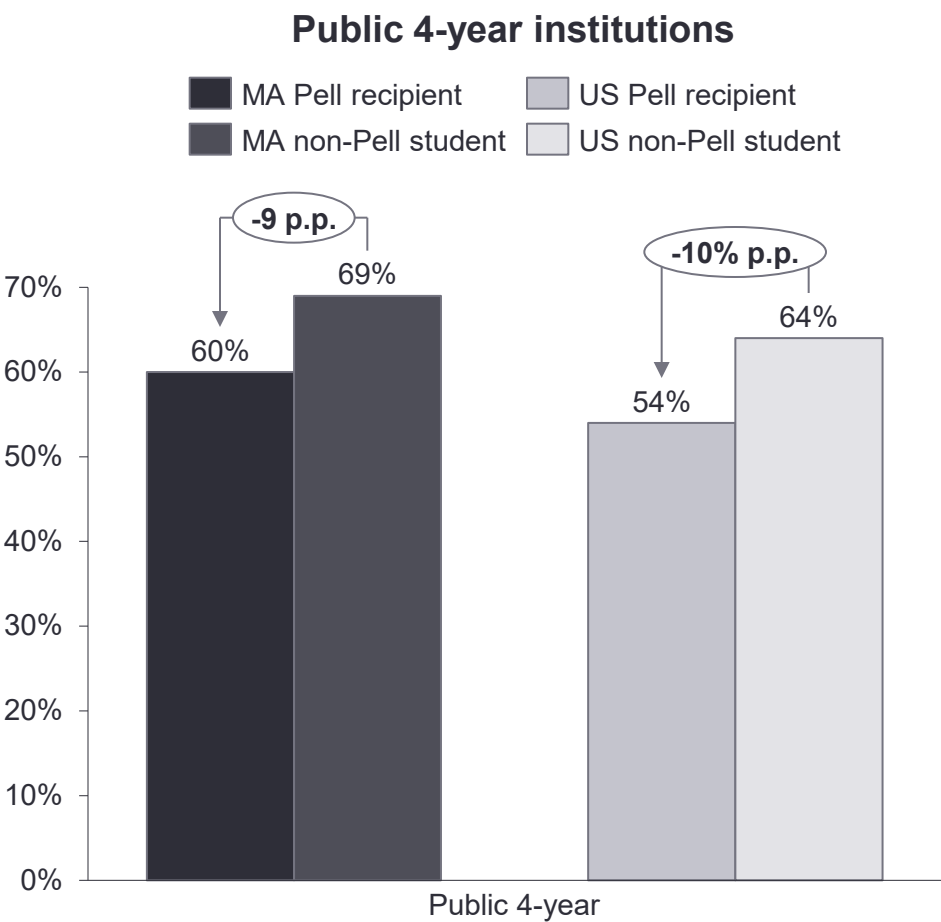
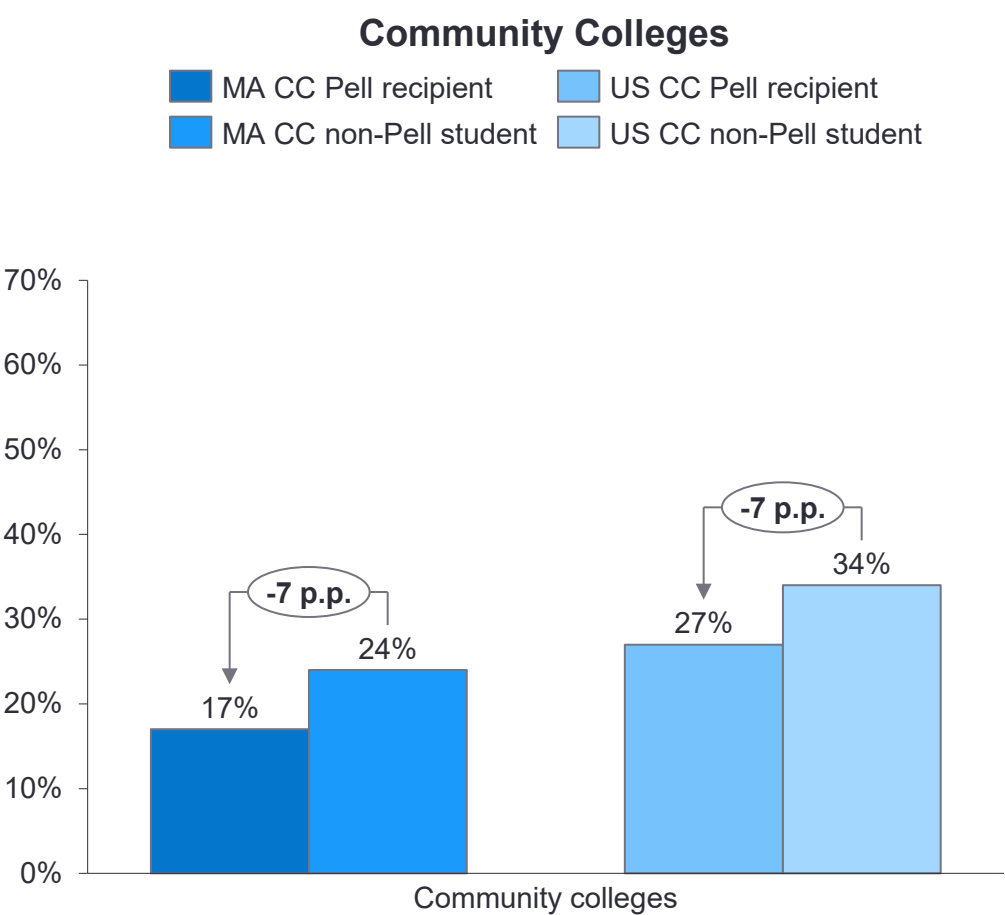
Invest in professionals to deliver the highest quality education to MA students

Guiding principles for program design

- Student-centered
- Prioritizes the neediest students
- Raises student success
- Simple and transparent
- Predictable and reliable for families and colleges
- Incentivizes recruitment and retention of faculty

Graduation rates for Pell Grant recipients are lower than non-Pell recipients in Massachusetts and nationally across institution types

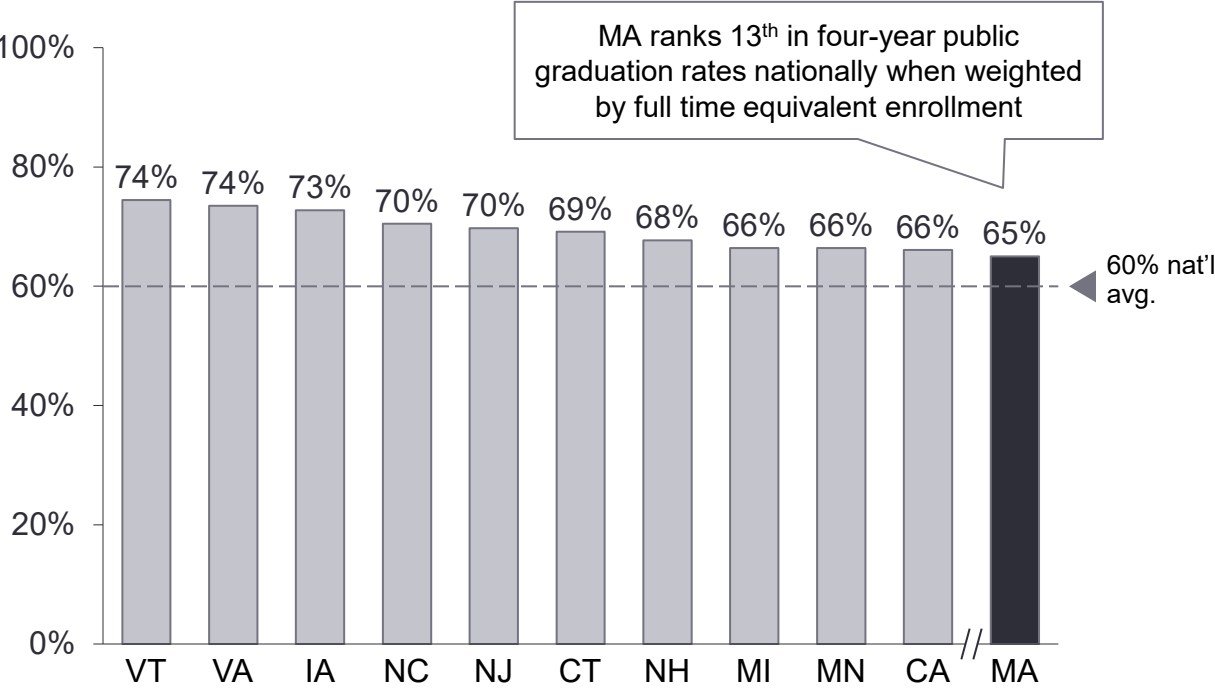
Pell recipient graduation rates¹ compared to average by institution segment, FY22



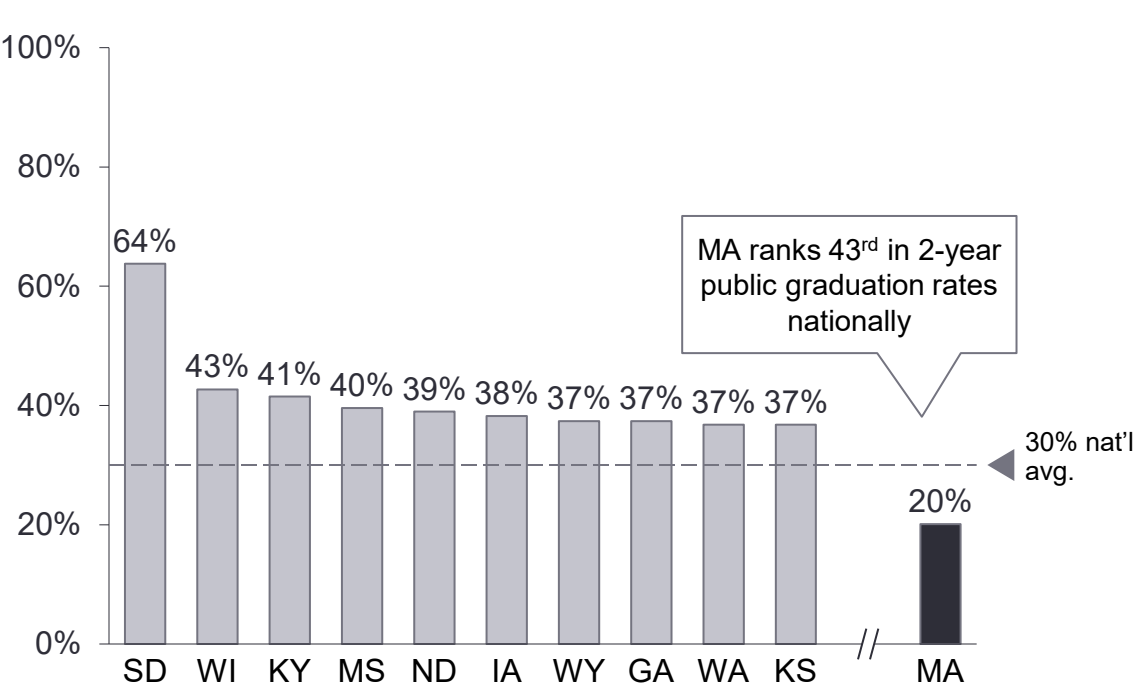
1. Pell and total average graduation rates are weighted by full time equivalent student enrollment
Source: IPEDS

Among first-time, full-time students, Massachusetts ranks in the top quartile nationally for 4-year graduation rates; 2-year rates, however, are in the bottom quartile

Top 10 states with highest 4-year public graduation rates within 150% of expected time¹, FY22



Top 10 states with highest 2-year public graduation rates within 150% of expected time², FY22

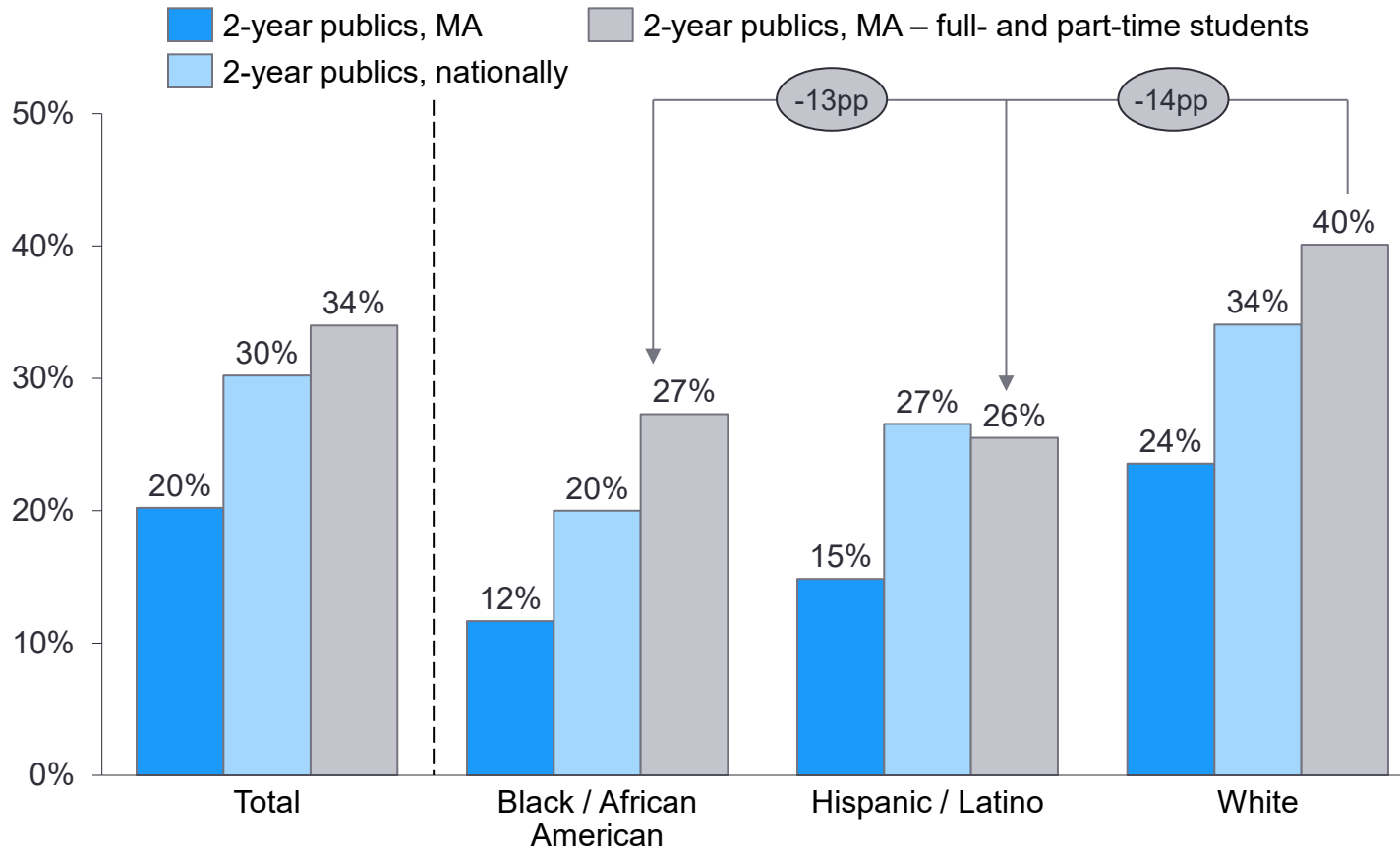


1. Percent of students enrolled in public baccalaureate institutions who entered in fall 2016 and completed a credential at their initial institution within 150% of expected time (e.g., within 6 years for bachelor's degree); graduation rates are weighted by full time equivalent student enrollment

2. Percent of students enrolled in community colleges who entered in fall 2019 and completed a credential at their initial institution within 150% of expected time (e.g., within 3 years for associate degree); graduation rates are weighted by full time equivalent student enrollment

Massachusetts' community college graduation rates lag the national average across demographic groups, among first-time, full-time students

Community college graduation rate within 150% of normal time¹, FY22



Commentary

- ▶ Across subgroups, **MA community colleges' graduation rates underperform the national average**
- ▶ Graduation rates for students of color in Massachusetts are lower than their peers nationally:
 - Black – 8 p.p. lower
 - Latino – 12 p.p. lower
- ▶ *Completion anywhere* rates for students of color in MA are also lower than their white peers:
 - Black – 13 p.p. lower
 - Latino – 14 p.p. lower

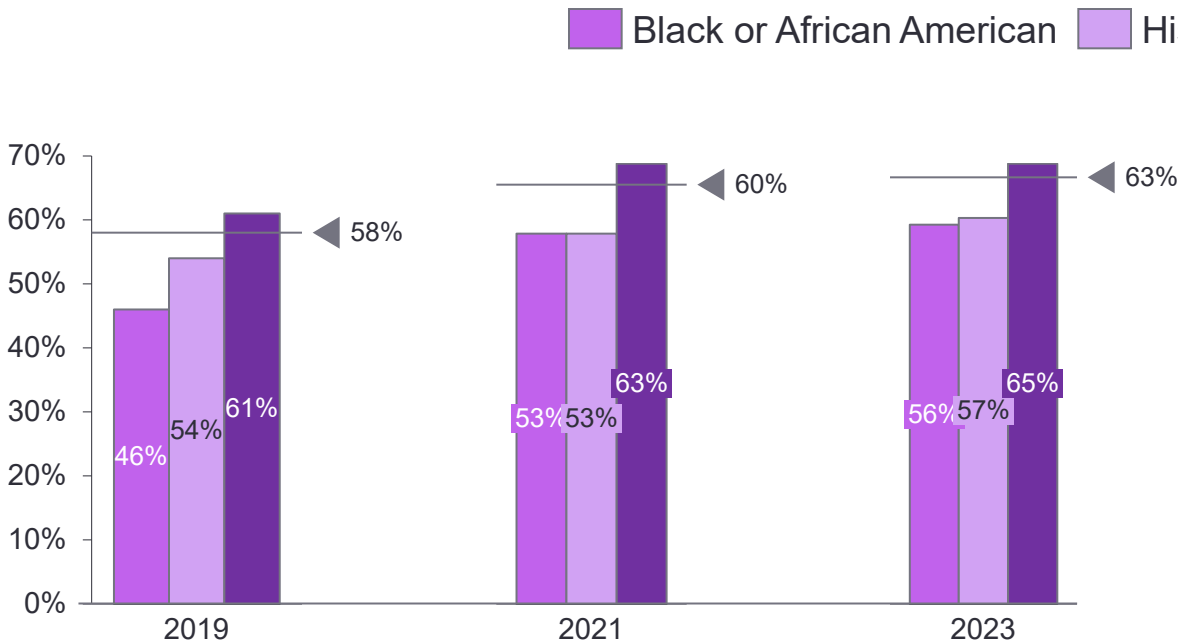
1. 2-year college graduation rates are weighted by full time equivalent student enrollment

2. Completion anywhere is the percent of full- and part-time students completing a degree or certificate anywhere in the U.S. within six years

Source: IPEDS; MA DHE internal data

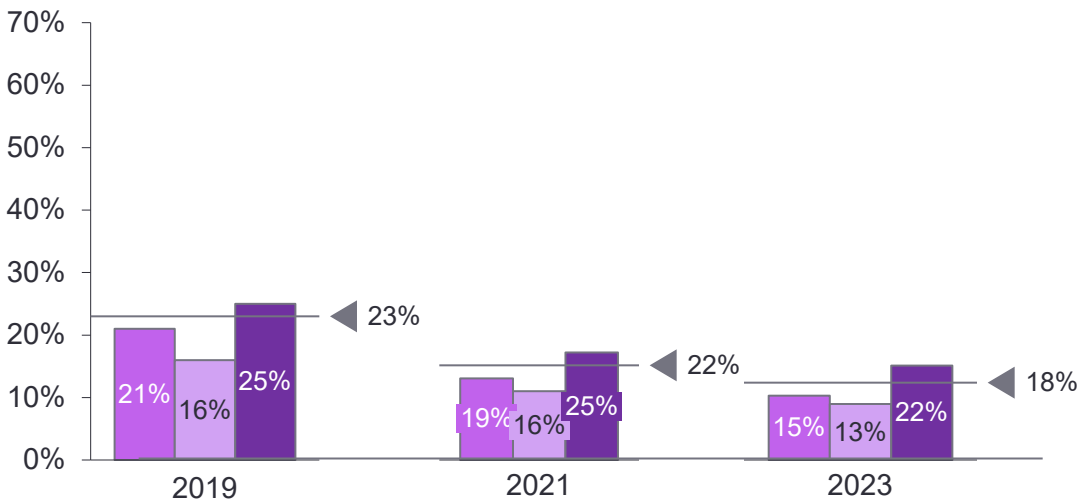
For two-year college students who transfer, however, completion rates are relatively strong and rising; But the transfer rate is low and declining

Graduation rate of transfer students from MA community colleges¹, 2019-2023



	Black	Hispanic / Latino	White	MA
Change ('19-'23)	+10 p.p.	+3 p.p.	+4 p.p.	+5 p.p.

Transfer rate from MA community colleges to 4-year institutions², 2019-2023



	Black	Hispanic / Latino	White	MA
Change ('19-'23)	-6 p.p.	-3 p.p.	-3 p.p.	-5 p.p.

1. Percentage of students who graduate from a MA state university or UMass campus within four years after fall transfer from a MA community college (ACARE)
2. Percentage of MA community college students who transferred to any 4-year institution in the U.S. within four years after fall entry to community college as a first-time or transfer student (ACARE)
Source: Advisory Council to Advance Representation in Education's (ACARE) "Leading the way in Massachusetts" report

The Massachusetts SUCCESS¹ program allocates funding to provide wraparound supports and services to improve outcomes for underserved student populations

SUCCESS program overview

	Description
Program overview	<ul style="list-style-type: none">▶ SUCCESS was created in FY21 for the MA state-funded community colleges to provide wrap-around services to students facing systemic barriers▶ All 15 MA community colleges participate in some aspects of the SUCCESS program and receive a share of the total appropriated funding based on the need and size of student population
State investment	<ul style="list-style-type: none">▶ FY21 total legislative investment: \$7m▶ FY22 total legislative investment: \$10m▶ FY23 total legislative investment: \$14m▶ FY24 total legislative investment: \$14m▶ Per student, direct costs are estimated to be \$1.5-2k
Personnel	<ul style="list-style-type: none">▶ Over 460 full time and part time positions in FY22
Participants	<ul style="list-style-type: none">▶ FY22: over ~6,350 students served▶ FY23 (preliminary): ~8,000 students served
Results	<ul style="list-style-type: none">▶ 67% of SUCCESS participants engaged in FY22 persisted to the following fall as compared to 51% of peers who did not engage in the program

SUCCESS provides a variety of enhanced services² to support students through their postsecondary experience, including:

Peer mentorship

- ▶ Students are paired with mentors who have similar interests / backgrounds to discuss academic progress, personal struggles, and roadmaps to graduation

Integrated career exploration

- ▶ Funding for ambassadors to coordinate career readiness and wellness activities
- ▶ Activities and field trips are accompanied with actionable information for overcoming personal and academic barriers

Academic / scholarship advising

- ▶ Funding for academic advising staff results in significantly reduced wait times to meet with academic advisors during enrollment
- ▶ Chatbot “Quinn” sends nudges to students via text to keep them on track (Quinsigamond Community College or QCC)

Faculty support

- ▶ Support in designing flexible curricula to meet diverse student needs and improve campus climate for SUCCESS participants

1. Supporting Urgent Community College Equity through Student Services

2. Not all services are offered at every community college

Source: SUCCESS Fund Initiative 2022 Final Report

Other states and campuses are pursuing a number of strategies to improve graduation rates – CUNY ASAP / ACE is a leading example

	CUNY ASAP / ACE
Program overview	<ul style="list-style-type: none"> ▶ Accelerated Study in Associate Programs (ASAP) is a comprehensive, integrated, data-driven program launched in 2007 and offered at 9 CUNY community colleges. It is designed to help students in associate degree programs graduate on time by eliminating financial, academic, and personal barriers ▶ Accelerate, Complete, Engage (ACE) is an adaptation of ASAP that supports bachelor's degree students and is available at 7 SUNY colleges
Program elements	<ul style="list-style-type: none"> ▶ Financial support – MetroCard for free public transportation, tuition waivers, and textbook stipends ▶ Academic support – structured pathways, one-on-one, high touch advising ensuring enrollment in required developmental courses, and access to student success seminars ▶ Structured schedules – advising to maintain a full-time enrollment schedule to assist students in balancing work and other commitments outside of school ▶ Career and transfer services – career development services and support in transfer application submission for students interested in pursuing a 4-year degree
Impact and outcomes	<ul style="list-style-type: none"> ▶ A 2020 randomized controlled trial found ASAP participants earned an average of 8.5 more credits, were 16 p.p. more likely to graduate, and were 6 p.p. more likely to enroll in a four-year college or university over a 3-year period ▶ The ASAP three-year graduation rate (53%), drawn from eight cohorts spanning 2007 to 2014, surpasses the 25% rate observed in a historically matched statistical comparison group from the CUNY randomized controlled trial. ▶ The ASAP model has been replicated at community colleges in 7 other states (including OH, WV, TN, PA, NC, CA, NY -- Westchester County)
Associated costs	<ul style="list-style-type: none"> ▶ ~\$1,850 to \$3,400 per student, based on context and supports offered

Other states and campuses are pursuing a number of strategies to improve graduation rates – Georgia State University offers another leading example

Georgia State Student Success Department at GSU (NISS)	
Program overview	<ul style="list-style-type: none"> ▶ Georgia State University's (GSU) student success department has adopted several innovative approaches to improve student outcomes, especially for first generation and low-income students ▶ GSU created the National Institute for Student Success (NISS), which provides consulting services for other institutions interested in improving their graduation, retention and success rates for underrepresented student populations
Program elements	<ul style="list-style-type: none"> ▶ Retention grants – “microgrants” in the amount of ~\$300 - \$2,000 awarded to students who are close to graduating but face potential financial shortfall that may jeopardize degree completion due to small, unpaid balances ▶ GPS Advising – a predictive analytic tool that tracks over 800 risk factors to identify students at risk of falling behind, supporting a high-touch advising program. Once alerted, advisors schedule individual meetings create an action plan (costs \$500 / student) ▶ Organizing around Meta Majors help first year students develop broader exposure to disciplines and make more informed choices about major selection. Since implementation, major changes after the first year have decreased by 30%. Freshmen also receive social support from Learning Communities of 25 students all aligned to the same Meta Major experiences ▶ Summer bridge program for applicants of each freshmen class with at-risk academic profiles (e.g., <3.4 entry GPA) are directed into a wraparound Student Success summer program of ~400 students. Retention rates of these students have increased from 50% to 90%. Graduation rates have increased to 80%. ▶ Success Academy – competitive program that admits students to GSU and provides 3 semesters of an extended learning community starting the summer prior to freshman year ▶ Keep HOPE Alive program – supports students who lost GPA-based scholarships by providing targeted academic support and financial aid to support regaining scholarship
Impact and outcomes	<ul style="list-style-type: none"> ▶ GSU has seen a 14 p.p. increase in 4-year graduation rates since implementing the program in 2012, to achieve a 55% total graduation rate in FY23 ▶ The number of Black students who earn a bachelor's degree at GSU increased 103%, and average retention rate increases for Black and Hispanic students, respectively, are 10.8 p.p and 12.7 p.p among NISS partners ▶ Since implementing GPS advising, GSU PELL student graduation rate rose to 58% (2021), from 31% (2007, pre-innovation) ▶ Replications at partner institutions (70 institutions in 18 different states, 1M+ students) averaged 8.8 p.p. improvements to retention
Associated costs	<ul style="list-style-type: none"> ▶ ~\$800-2,500 per student based on size of retention grant provided

Source: GSU Student Success Initiatives, Heckscher Foundation, NISS Annual Report (2024), Student Affairs Administrators in Higher Education (NASPA) report (2019), IPEDS

Based on the current state and a review of the landscape, MA has multiple options to consider for investing in student success

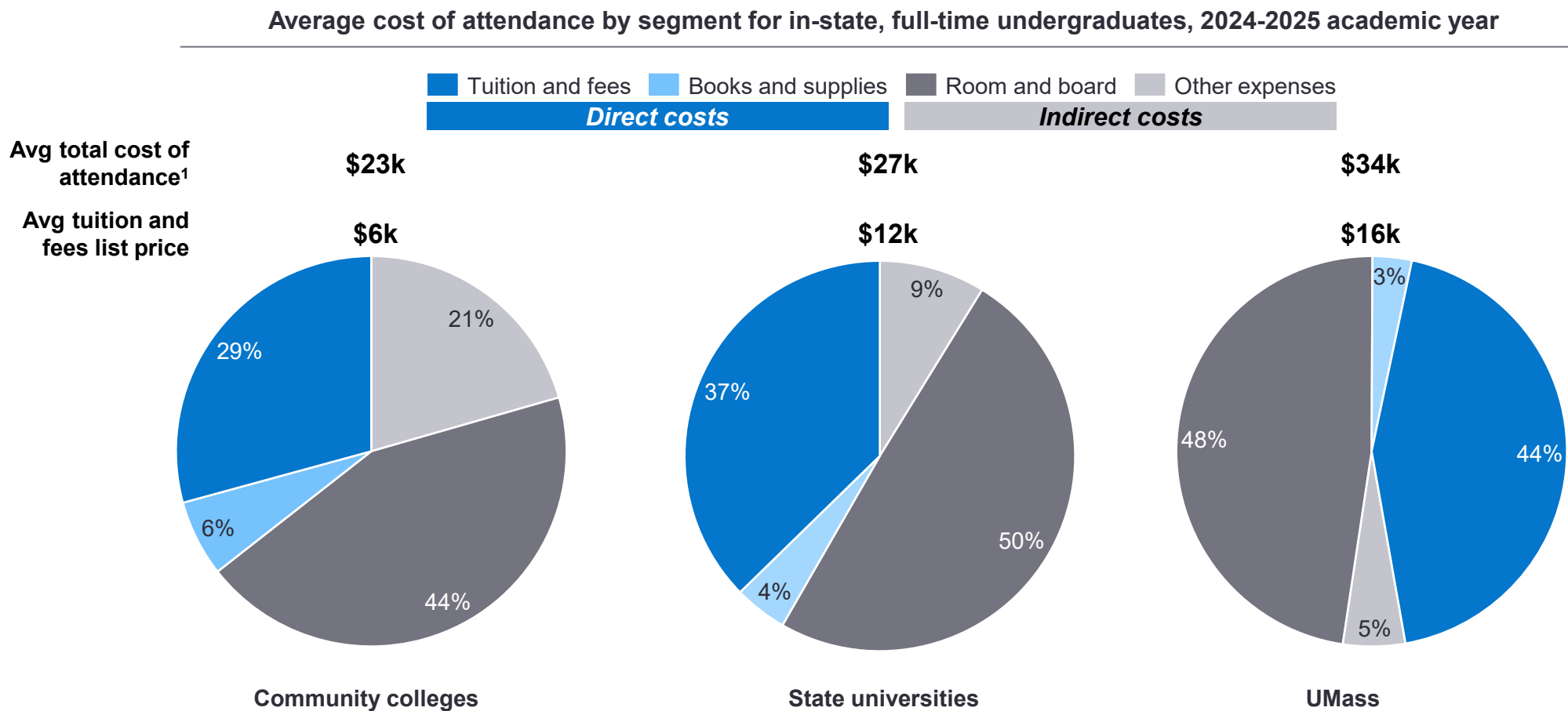
	A) Expansion of existing model	B) DHE-designed Success Program	C) Voluntary Program
Description	<ul style="list-style-type: none"> ▶ Expand current flexible grant structure beyond community colleges and state universities to include UMass campuses ▶ Increase the allocation per institution to allow for enhanced services ▶ Build on current programming at two-year and state institutions, leveraging investments made in: <ul style="list-style-type: none"> – Peer mentorship – Integrated career exploration – High touch, multi-pathway advising – Faculty support 	<ul style="list-style-type: none"> ▶ This policy approach would parallel the Commonwealth’s K-12 approach in Foundation Budget and Student Opportunity Act to provide more funding to accompany students needing greater support ▶ Modelled on Accelerated Study in Associate Programs (ASAP) and Accelerate, Complete, Engage (ACE) programming, emphasizing: <ul style="list-style-type: none"> – Financial support, academic support, personalized, “intrusive” advising, and experiential learning (e.g., internships) – Data tracking and analysis – Support for ongoing program adaptation ▶ Design implementation requirements for participating institutions 	<ul style="list-style-type: none"> ▶ ASAP and ACE to be extended to all at-risk students, though participation is voluntary ▶ This model requires institutions to implement evidence-based ASAP / ACE structures and practices, incentivizing compliance with funds that support a suite of financial, academic, and personal resources and services: <ul style="list-style-type: none"> – Financial support, academic support, personalized, “intrusive” advising, and experiential learning (e.g., internships) – Data tracking and analysis – Support for ongoing program adaptation ▶ Costs to replicate ranged on geographic context and range of supports offered
Total additional cost	<ul style="list-style-type: none"> ▶ Award amount: <ul style="list-style-type: none"> – \$1,500 - \$2,000 per eligible student ▶ Total cost: <ul style="list-style-type: none"> – \$62m - \$98m 	<ul style="list-style-type: none"> ▶ Award amount: <ul style="list-style-type: none"> – \$1,800 - 2,000 per eligible student ▶ Total cost: <ul style="list-style-type: none"> – \$82m - \$92m 	<ul style="list-style-type: none"> ▶ Award per student: <ul style="list-style-type: none"> – \$1,500 to \$2,000 per student² ▶ Total cost: <ul style="list-style-type: none"> – Up to \$92m, depending on program participation rates

1. Cost estimates based on serving ~59k Pell-eligible students in MA in FY25; current cost is \$28m across all segments

2. Ranges based on context and offerings of program – original CUNY design was \$3,400 but Ohio ASAP replication required just \$1,850 per student

Source: GSU Student Success Initiatives, Heckscher Foundation, NISS Annual Report (2024), Student Affairs Administrators in Higher Education (NASPA) report (2019), MA DHE internal data

The average COA before financial aid for in-state, full-time undergraduates is ~\$23k at community colleges, ~\$27k at state universities, and ~\$34k at UMass campuses



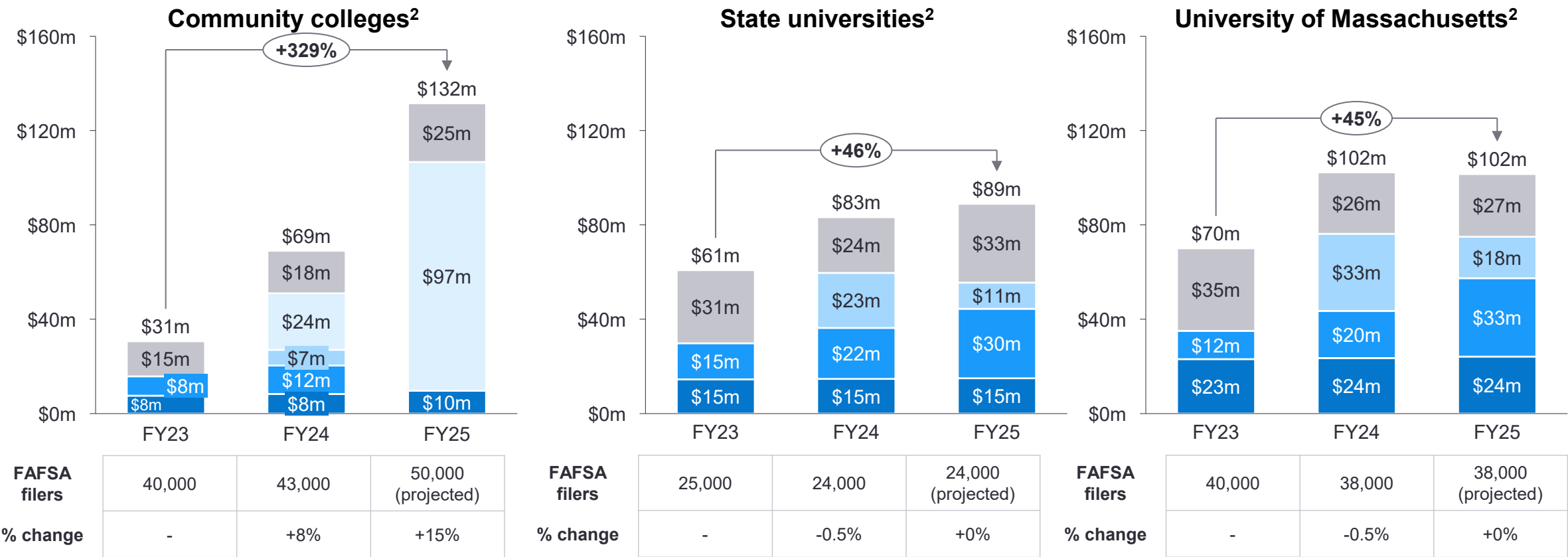
Financial aid programs in MA primarily focus on supporting students by awarding grants to cover tuition, fees, books, and supplies; these cost categories typically make up ~44-50% of a student's total cost to attend

State financial aid distributions have dramatically increased over the last three years, in particular at the community college level with the introduction of MassEducate

State financial aid disbursed (FY23) and projected (FY24 & FY25¹), by segment

MassGrant MassGrant Plus Expansion All other state aid
MassGrant Plus MassEducate / MassReconnect

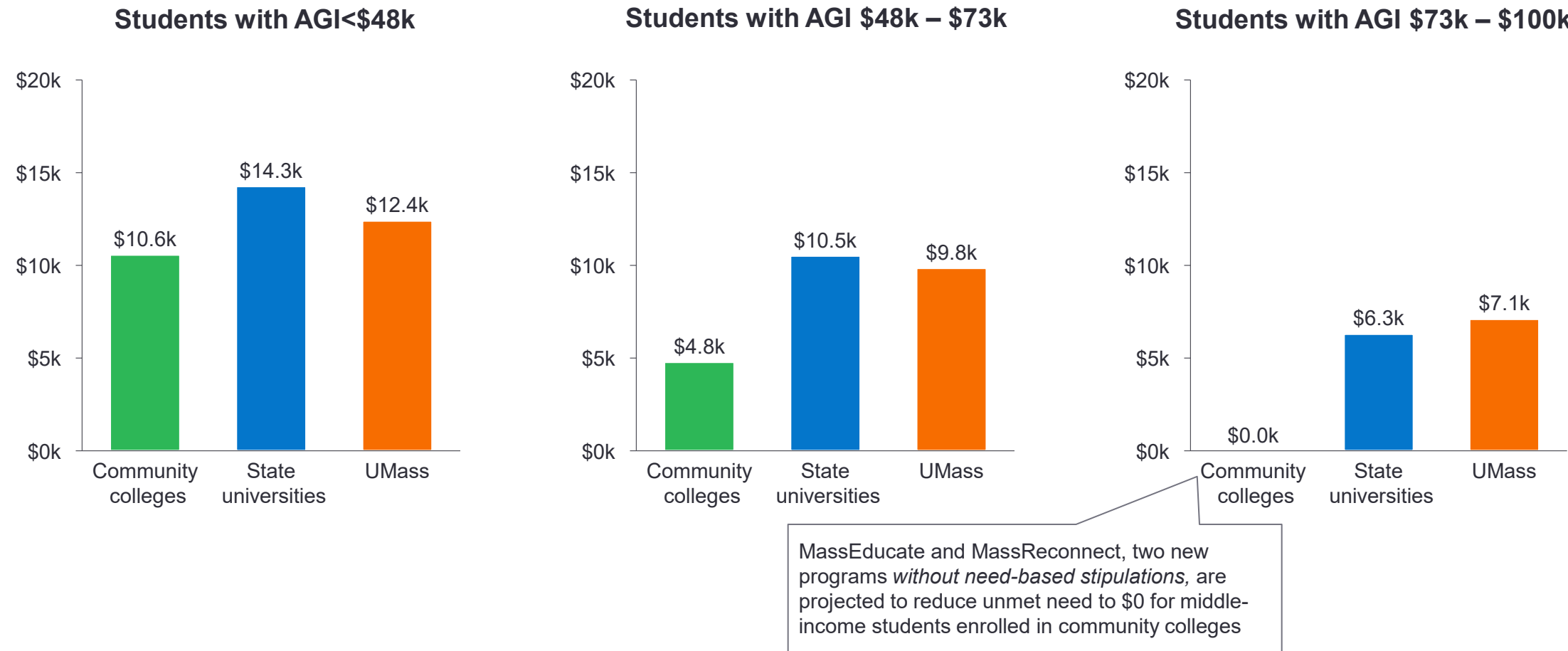
Distributed state aid across segments totaled **\$187m** (FY23 – actuals), **\$254m** (FY24 – projected), and **\$323m** (FY25 – projected)



1. FY24 and FY25 are sourced from simulated data and are preliminary
2. Growth rates represent total percent change, calculated from FY23-FY25
Source: Institutions and preliminary estimates of FY24 distributions
3. Books and supplies stipends are only included in FY25 estimates, as the early allocations data does not disentangle stipend allocations from the award allocations

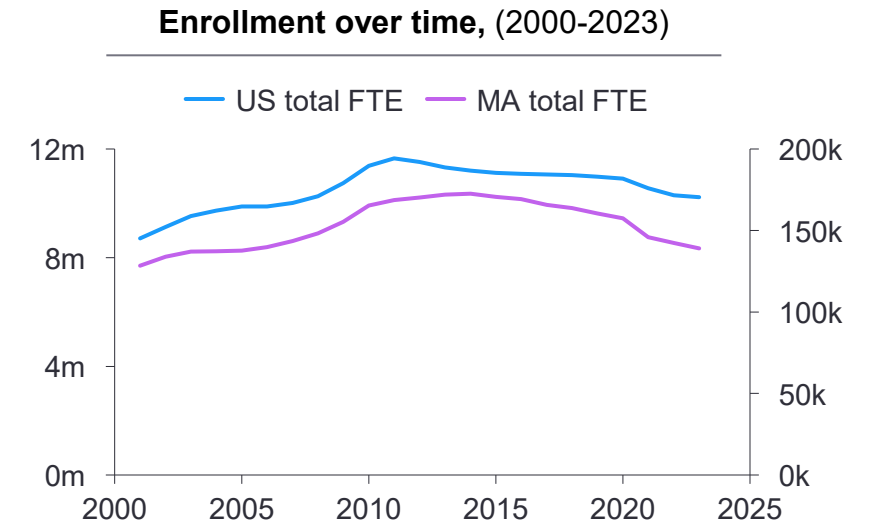
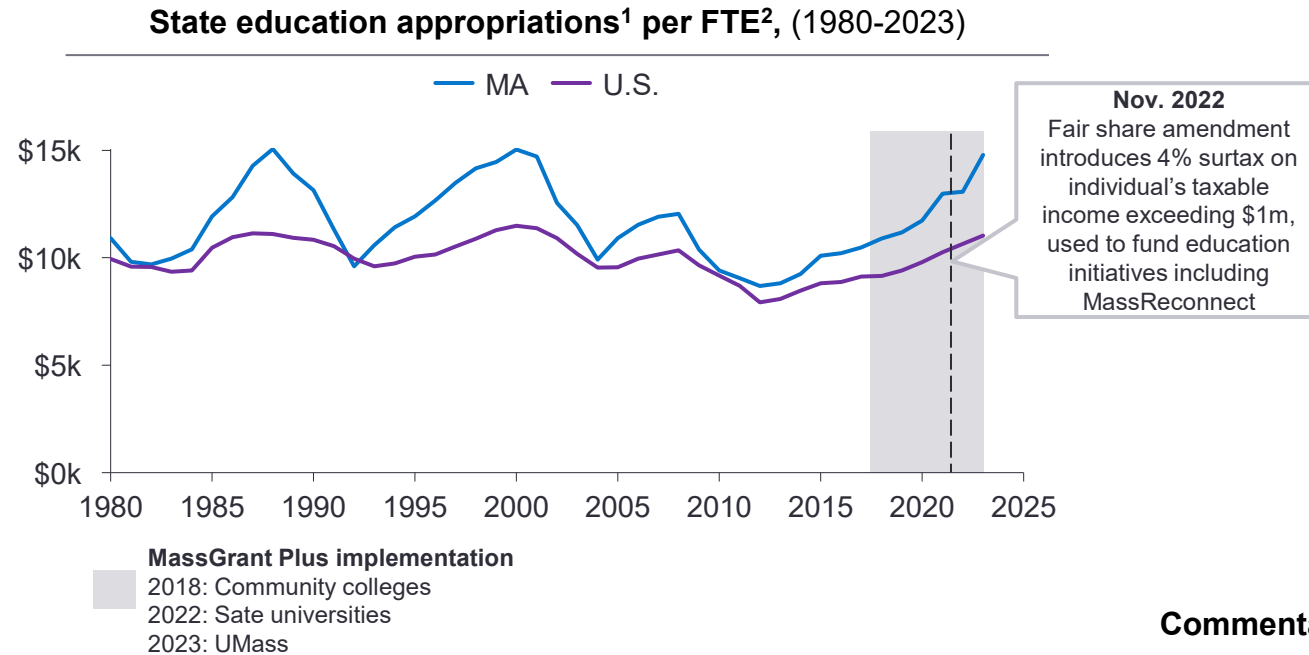
For lowest, low- and middle-income students, unmet need for financial aid persists across segments when considering total cost of attendance

Average unmet need¹ per full-time FAFSA filer by segment, FY25 projected



1. In terms of cost of attendance, inclusive of all sources of aid, less expected family contribution
Source: Preliminary estimates of FY24 distributions

Massachusetts financial aid allocations are subject to annual legislative approval, which limits the ability of families to plan for the net cost of college



Commentary

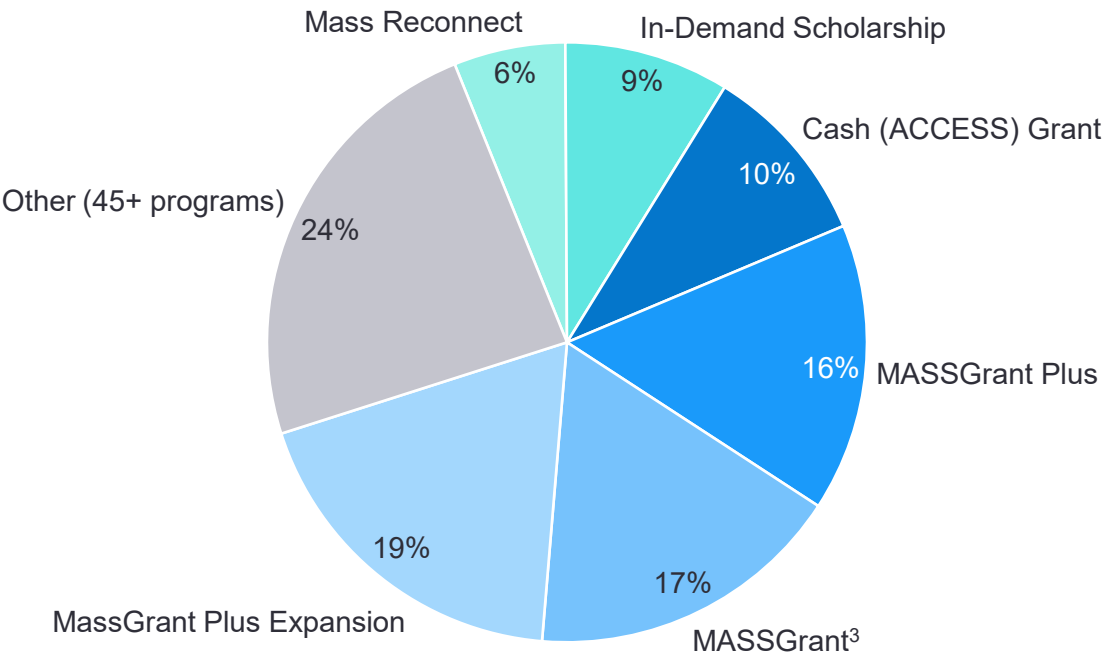
- ▶ Some aspects of financial aid, such as eligibility criteria and program structures, may be outlined in state regulations; the **actual funding is subject to annual legislative approval and budget appropriations**
- ▶ Per-FTE aid has increased ~16% annually since 2018 in MA, which has helped close the gap between MA aid and national averages, **however that funding is not guaranteed year-over-year**
- ▶ **A clear guarantee that existing aid programs will persist** could allow students and families to make decisions without worrying that financial support will erode over time

1. Constant 2023 dollars adjusted by the Higher Education Cost Adjustment (HECA)

2. Education appropriations are a measure of state and local support available for public higher education operating expenses and student financial aid, excluding appropriations for research, hospitals, and medical education. Education appropriations include federal stimulus funding

A lack of coordination among financial aid programs has resulted in ~50 state programs, including ~25 tuition waiver programs; ~75% of aid is distributed via only 6 programs

Percentage of aid disbursed by program, FY24



Total aid disbursed in the FY24 simulation is projected to be \$261m;
75% of aid was distributed via 6 programs (4 need-based)

List and description of “other” programs¹

Non-Waiver Program Name (N=21)	Program Type
Chief Justice Ralph Gants Judicial Scholarship	Workforce development
Children of Fallen Service Member	Entitlement
Christian Herter Scholarship	Need
Commonwealth Commitment	Entitlement
Completion Incentive Grant Fund	Need
Community College Civic Engagement Internship	Merit
DCF Adopted Children Fee Assistance	Entitlement
Early Educators Scholarship	Workforce development
Emergency Grant	Need
Foster Child Grant	Need
Gilbert Matching Grant	Need
John and Abigail Adams Scholarship	Merit
Massachusetts High Demand Scholarship	Workforce development
Moving to College Scholarship	Entitlement
Nursing Scholarship for Community Colleges	Workforce development
One Family Scholarship	Need
Paraprofessional Teacher Preparation Grant	Workforce development
Part Time Grant	Need
Public Service Grant	Entitlement
State University Internship Incentive Program	Workforce development
Washington Center Scholarship	Entitlement

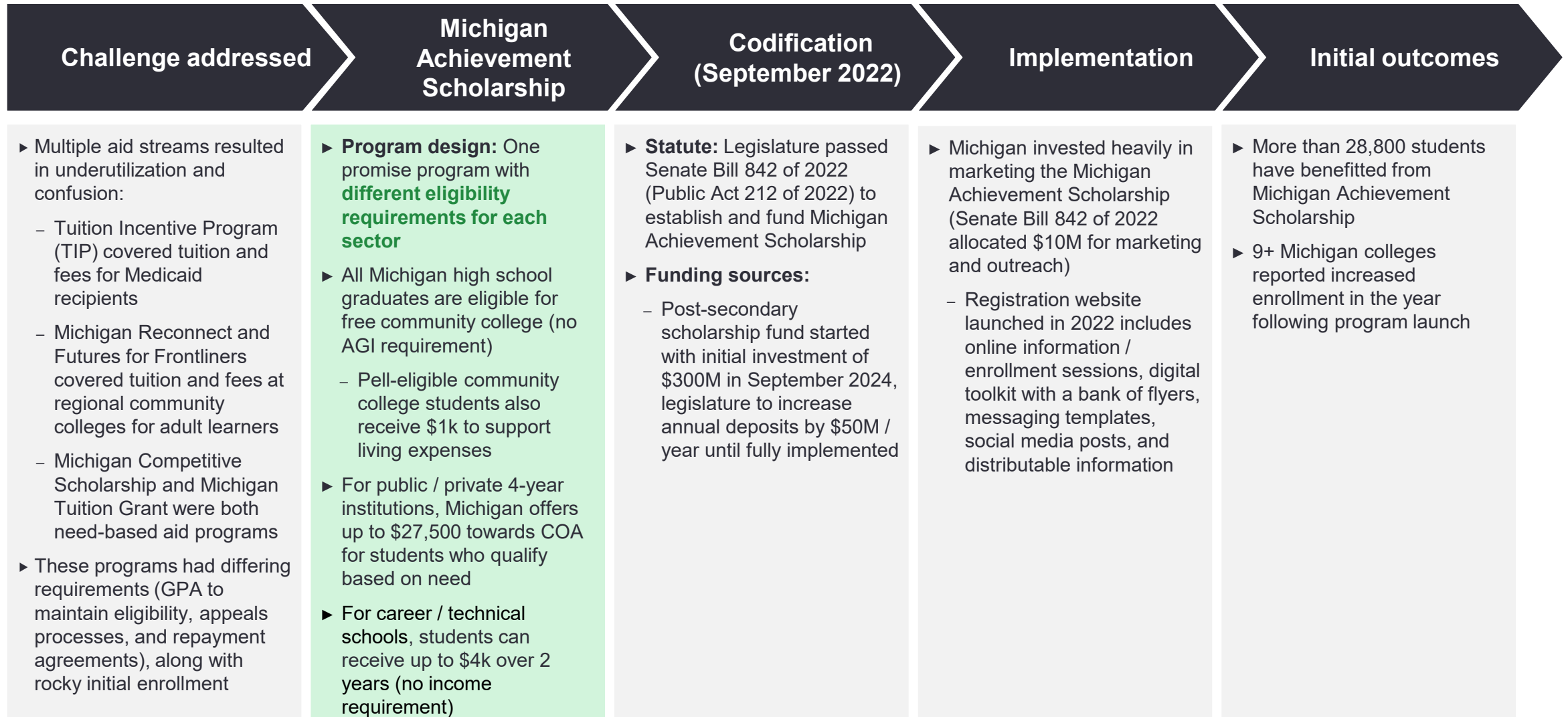
1. In-Demand Scholarship supports students pursuing careers needed in Massachusetts; Cash (ACCESS) Grant covers fees and non-state supported tuition
3. MassGrant data only includes funds disbursed to public institutions
Source: Program level internal data

Tennessee provides a tuition and fees free program with no income requirement after reorganizing existing scholarships into a “Tennessee Promise” of free community college

Challenge addressed	Tennessee Promise Program	Codification (May 2024)	Implementation	Initial outcomes
<ul style="list-style-type: none">▶ State aid from HOPE scholarship (lottery-funded), Tennessee Student Assistance Award, Wilder-Naifeh Technical Skills grant, and federal aid (Pell Grant) left unmet need, was not streamlined, and was confusing for students	<ul style="list-style-type: none">▶ Program design: Last-dollar scholarship that funds tuition and fees for students pursuing an associate’s degree. Funds cannot be used for books / supplies or other costs of attendance▶ Income requirement: None (all students eligible)▶ Other requirements:<ul style="list-style-type: none">– Attend team meetings and mandatory college orientation– Remain enrolled for consecutive semesters– 12 hours / semester– 2.0 GPA / semester– 8 hours community service / semester	<ul style="list-style-type: none">▶ Statute: Tennessee legislature passed SB2471 (HB2491) to establish Tennessee Promise Scholarship Act of 2014 and fund the promise▶ Funding sources:<ul style="list-style-type: none">– Law established an endowment for funding Promise through state lottery• Endowment to be funded by state lottery• Funds appropriated to Promise but not spent will not return to General Fund and will remain allocated to Promise	<ul style="list-style-type: none">▶ Partner organizations work with high school guidance counselors to enroll students who might not otherwise apply to college▶ Though enrollment rose due to TN Promise, it became clear that student success supports (e.g., mentorship and emergency funding) are integral to graduation<ul style="list-style-type: none">– Promise Plus model introduced COMPLETE grants which cover other costs of college for Pell-eligible students (groceries, gas, computers)– Promise Plus is currently still a bill in TN legislature, but has not yet been passed	<ul style="list-style-type: none">▶ Community college graduation rates rose from 16% (2011, no program), to 22% (2014, widespread county programs), to 28% (2020, statewide Promise program)▶ Promise students have higher retention and graduation rates than non-recipient peers

Green text highlights eligibility requirements and notable differences in case studies usage parameters

Michigan provides targeted aid towards cost of attendance for low-income students, rolling multiple financial aid programs into a single Michigan Achievement Scholarship



Green text highlights eligibility requirements and notable differences in case studies usage parameters

New Mexico provides aid towards cost of attendance with no income requirement, leveraging a trust fund to ensure that scholarships are funded in perpetuity

Challenge addressed	Opportunity & Lottery Scholarships	Codification (February 2022)	Implementation	Initial outcomes
<ul style="list-style-type: none"> ▶ Lottery Scholarship (launched 1996) fully covered tuition for students pursuing Associates' and Bachelors' degrees (~10,000 students / year) ▶ Economic downturn in 2016 forced the state to roll the program back to covering only 60% of student tuition ▶ Governor restored program to cover 100% tuition in 2021, using federal funds 	<ul style="list-style-type: none"> ▶ Program design: Opportunity scholarship covers adults, returning, and part-time learners while Lottery scholarship covers immediate high school graduates entering college ▶ Scholarships promise free 2-year and 4-year college, technical school, or tribal school to all students ▶ Both programs allow students to use funds for childcare, transportation, and other living expenses ▶ Income requirement: None ▶ Other requirements: <ul style="list-style-type: none"> – Citizenship not required 	<ul style="list-style-type: none"> ▶ Statute: Opportunity Scholarship Fund Act passed in 2022 by NM legislature, expanded in 2024 ▶ Funding sources: <ul style="list-style-type: none"> – Opportunity Scholarship funded by higher education trust fund established with \$959M, supplemented with funds from tax stabilization reserve – Lottery Scholarship primarily funded by state lottery 	<ul style="list-style-type: none"> ▶ NM public colleges and universities automatically apply Lottery Scholarship / Opportunity Scholarship to aid package, as long as student meets eligibility criteria 	<ul style="list-style-type: none"> ▶ Since signing Opportunity Scholarship in 2022, NM enrollment rose 7% and short-term certificate completion rose 39% ▶ From 2021-2022, retention rates were 8% higher for Opportunity Scholarship students compared to peers ▶ ~42k students are receiving the scholarship (as of March 2024) ▶ 86% of students who receive the Lottery Scholarship for six or more semesters earn a certificate or degree

Green text highlights eligibility requirements and notable differences in case studies usage parameters

Potential options proposed to the challenges identified align with ideas advanced in MA and nationally and incorporate guiding principles for financial aid redesign

Guiding principles for financial aid redesign prioritize equity and affordability

	The challenge	Potential solutions
1	Unmet need persists among low- and middle-income students	<p>► Potential options to address unmet need include:</p> <ol style="list-style-type: none">1. Basic Needs Stipend2. Pell Grant Match3. Pell Match with Basic Needs Stipend4. Debt Free Commitment
2	Lack of codified aid policies	<p>► Potential options to codify aid policies include codifying current programs or an expanded guarantee into law with an accompanying dedicated funding source</p>
3	System is neither coordinated nor comprehensive	<p>► Potential options to promote a more coordinated and comprehensive financial aid system include streamlining current programming to provide clearer messaging to enhance navigability of the system and expanding eligibility criteria to all learners</p>

Guiding principles for financial aid redesign:

(A)

Simple

(B)

Transparent

(C)

Prioritizes the neediest students

(D)

Promotes affordability

(E)

Promotes program completion

In order to initiate discussion, four specific options – typical of ideas that have been advanced in Massachusetts and nationally are charted below

	1) Basic Needs Stipend	2) Pell Grant Match	3) “Double” Pell Match + Basic Needs Guarantee	4) Debt-Free Commitment
Description	<ul style="list-style-type: none"> ▶ State covers tuition and fees plus a fixed amount (~10% of COA for 4-year students) towards remaining cost of attendance for ~30k Pell-eligible students at 4-year institutions ▶ Builds on the \$1,200 stipend stipulated by the legislature to ensure all Pell-eligible students enrolled in 4-year institutions have a cost-of-living stipend¹ 	<ul style="list-style-type: none"> ▶ Consolidate need-based programs into a state match for the student Pell Grant award, effectively creating a state “double Pell” award for the low income and working-class students ▶ Matching Pell Grant provides a more nuanced / scaled approach to providing additional aid to the low income and working-class students 	<ul style="list-style-type: none"> ▶ Combine features of Basic Needs Stipend and Pell Grant Match programs so that low- and middle-income students receive additional state aid to cover cost-of-living expenses <ul style="list-style-type: none"> – State match for federal Pell award – Cost-of-living stipend for Pell eligible students 	<ul style="list-style-type: none"> ▶ State expands aid to allow all students with unmet need beyond all sources of aid and expected family contribution to attend institutions without taking on a loan burden ▶ Program includes work-study expectation / contribution equal to \$5k (11 hours / week for 30 weeks)
Modelled eligibility and award value	<ul style="list-style-type: none"> ▶ Income eligibility: <ul style="list-style-type: none"> – Pell eligibility ▶ Award amount: <ul style="list-style-type: none"> – Fixed amount (\$3.3k for 4-year segments) – Does not consider EFC 	<ul style="list-style-type: none"> ▶ Income eligibility: <ul style="list-style-type: none"> – Pell eligibility ▶ Award amount: <ul style="list-style-type: none"> – State “double” for Pell Grant awarded – Does not consider EFC 	<ul style="list-style-type: none"> ▶ Income eligibility: <ul style="list-style-type: none"> – Pell eligibility ▶ Award amount: <ul style="list-style-type: none"> – State “double” for Pell Grant awarded – Stipend amount dependent on number of credits registered – Does not consider EFC 	<ul style="list-style-type: none"> ▶ Income eligibility: <ul style="list-style-type: none"> – All students with unmet financial need after accounting for EFC (relative to COA) ▶ Award amount: <ul style="list-style-type: none"> – The portion of COA not covered by all sources of existing aid, EFC, and \$5k wages earned on a work-study program
Idea origin	▶ Existing MassEducate / MassReconnect books, supplies, and “other costs” stipend)	▶ National & Massachusetts advocacy groups	▶ Expanding MassEducate / MassReconnect to 4-year segments	▶ National movement to make higher education debt-free for all (e.g., EdTrust, IHEP)

1. MassEducate and MassReconnect provide a stipend of \$1,200 to community college students for the same purpose, incremental to the \$1,200 stipend provided through MassGrant Plus Expansion

Incremental costs from \$100m to \$450m across the four options for financial aid program redesign, above and beyond the current investment of \$330m across segments

Access and affordability redesign options for consideration

	1) Basic Needs Stipend			2) Pell Grant Match			3) Basic Needs Guarantee with a “Double” Pell Grant Match			4) Debt-Free Commitment		
	CC	SU	UMass	CC	SU	UMass	CC	SU	UMass	CC	SU	UMass
Base case (Projected FY25)	\$132m	\$89m	\$102m	\$132m	\$89m	\$102m	\$132m	\$89m	\$102m	\$132m	\$89m	\$102m
Incremental cost	None; stipend provided by ME / MR	\$41m	\$73m	\$47m	\$34m	\$58m	\$47m ²	\$39m	\$66m	\$193m	\$111m	\$153m
Total incremental cost	\$114m			\$139m			\$152m			\$457m		
Total students served by state aid ¹	35,000	20,000	30,000	40,000	15,000	25,000	40,000	15,000	25,000	45,000	20,000	30,000
Average incremental award	N/A	\$3.3k	\$3.3k	\$1.2k	\$2.5k	\$2.5k	\$1.8k	\$2.9k	\$2.9k	\$5.6k	\$6.5k	\$6.0k

1. Total students served largely includes those who already received some form of state aid; these are based on historical patterns of FAFSA filers and current protocols regarding the distribution of state aid – all figures should be interpreted as draft estimates

2. Scenario 2&3 are equivalent at Community Colleges where the basic needs stipend is already provided through MassEducate and MassGrant Plus

Source: Internal data

Across community colleges, leadership reported that challenges with the recruitment of faculty are more prevalent compared to challenges with retention

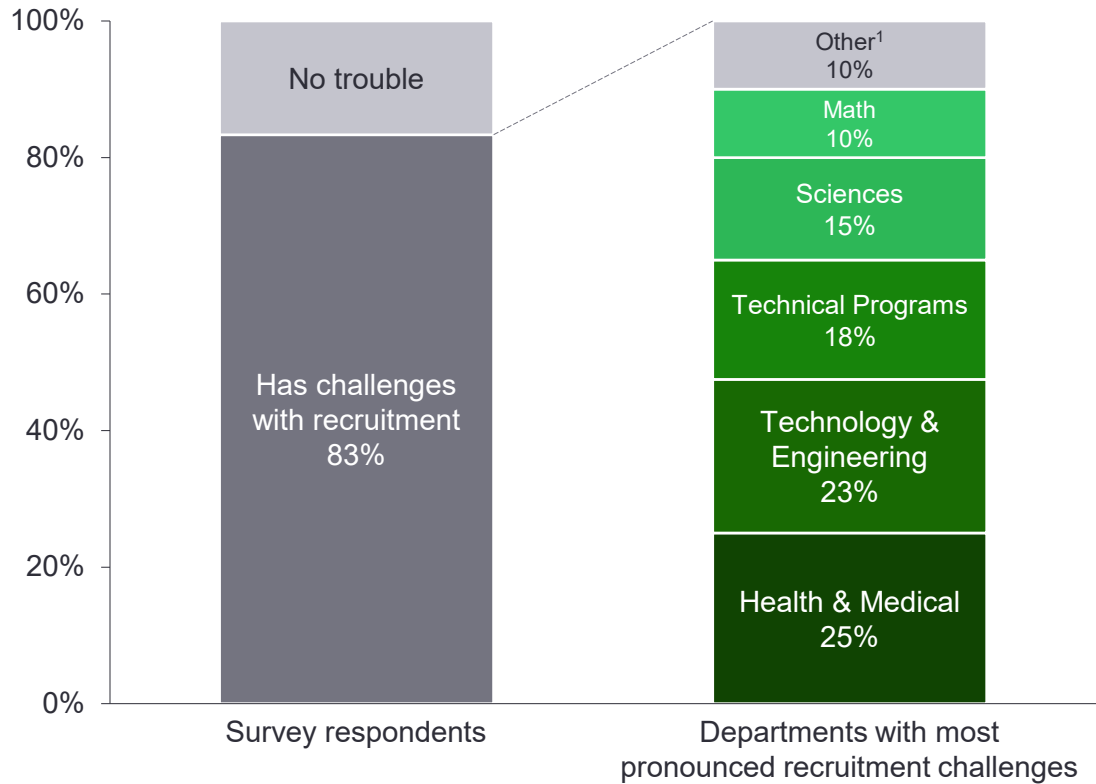
Community college

Faculty survey

Recruitment & retention questions

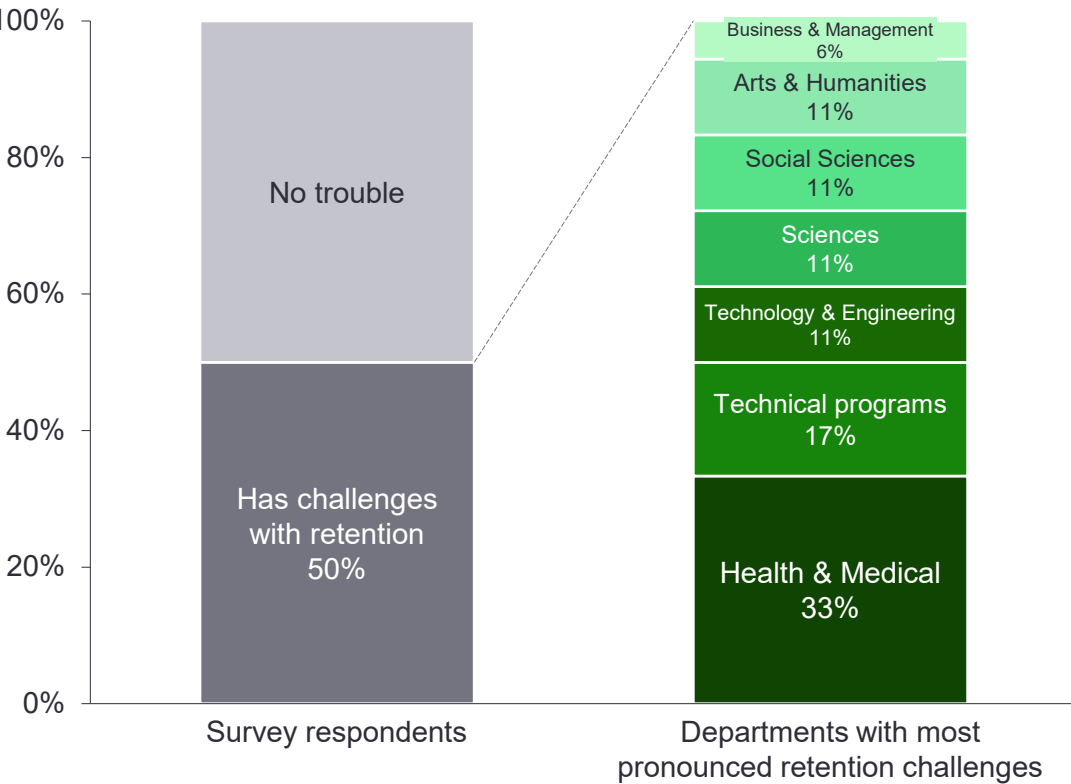
[FACULTY] Departments with most pronounced recruitment challenges

“In which department areas are the challenges with faculty recruitment most pronounced? Please select up to 5.”



[FACULTY] Departments with most pronounced retention challenges

“In which department areas are the challenges with faculty retention most pronounced? Please select up to 5.”



1. Other selected departments include social sciences, education, business & management, and technical programs
Source: Survey regarding faculty (n=12)

Across state universities, leadership report that faculty recruitment is more challenging than retention; science departments are most challenged by recruitment and retention

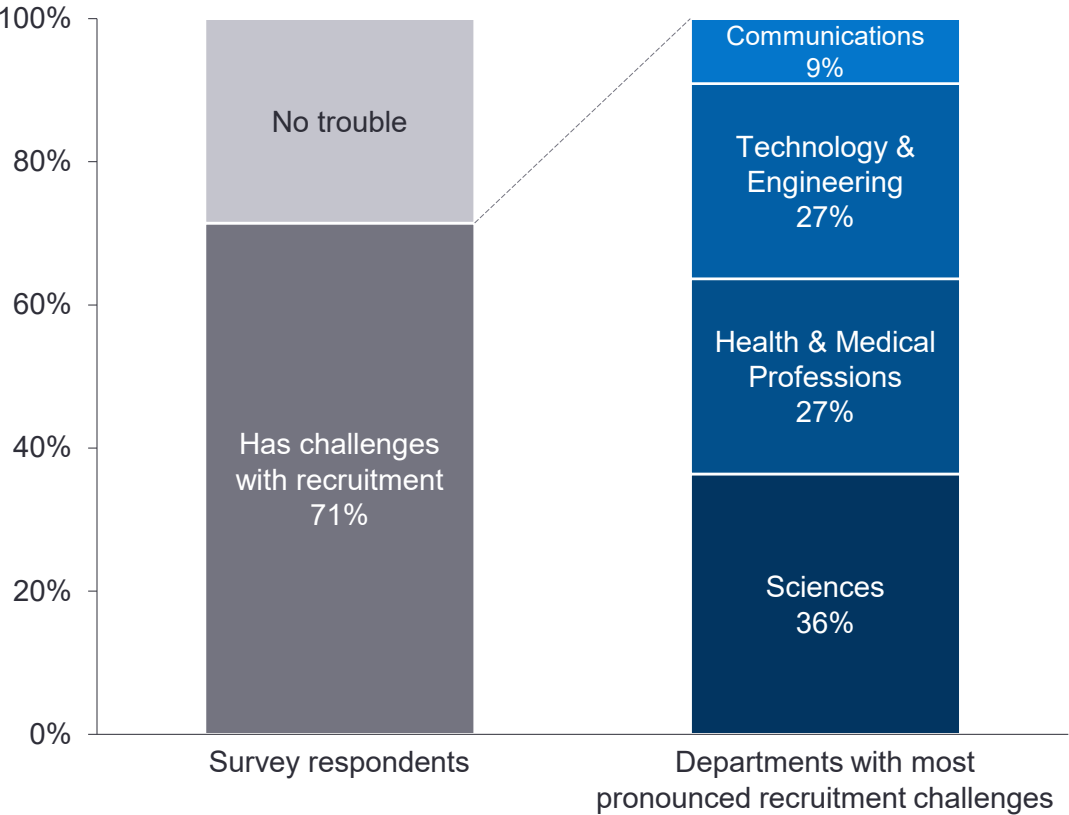
State universities

Faculty survey

Recruitment & retention questions

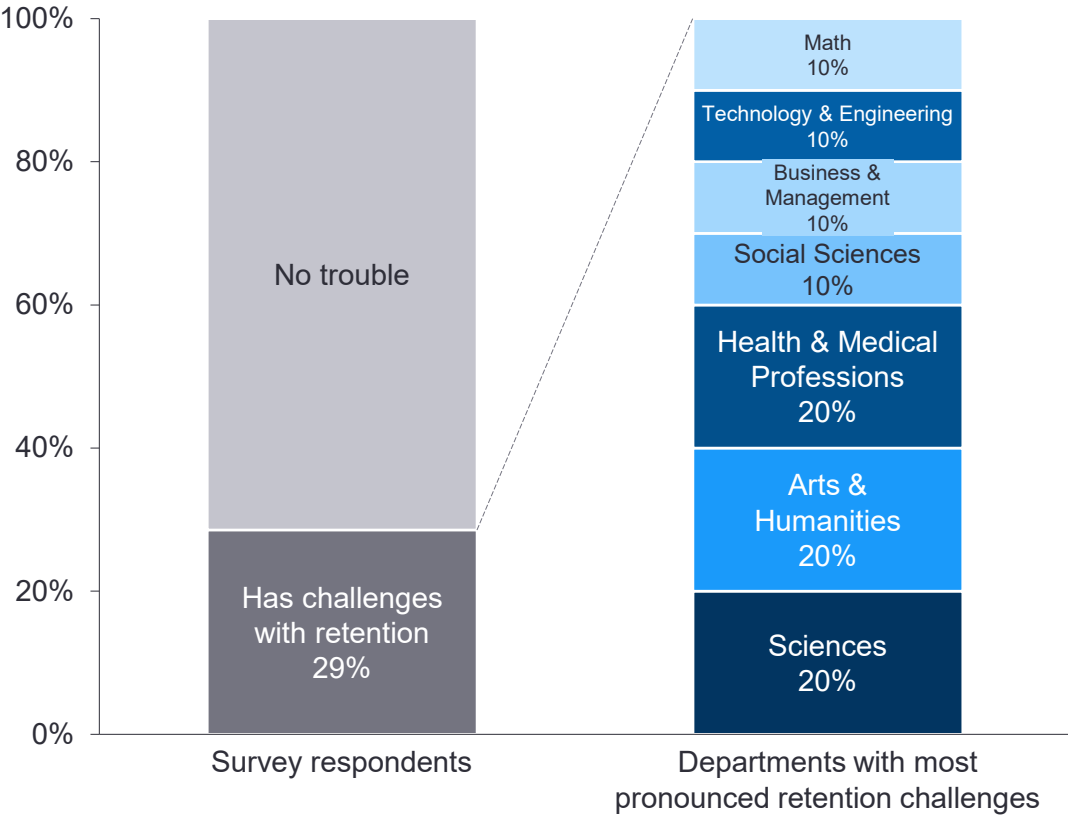
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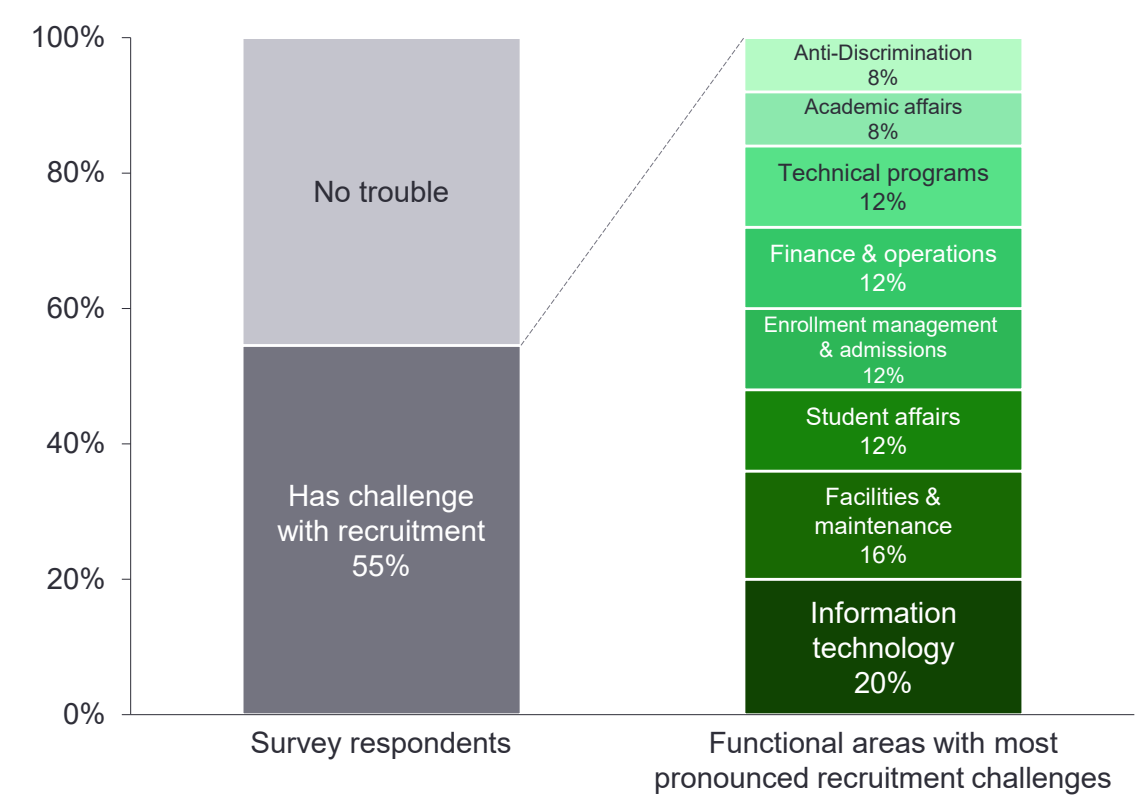
“In which department areas are the challenges with faculty pronounced? Please select up to 5.”



Community college leadership report near equal challenges in staff recruitment and retention; challenges are less common than for faculty retention / recruitment

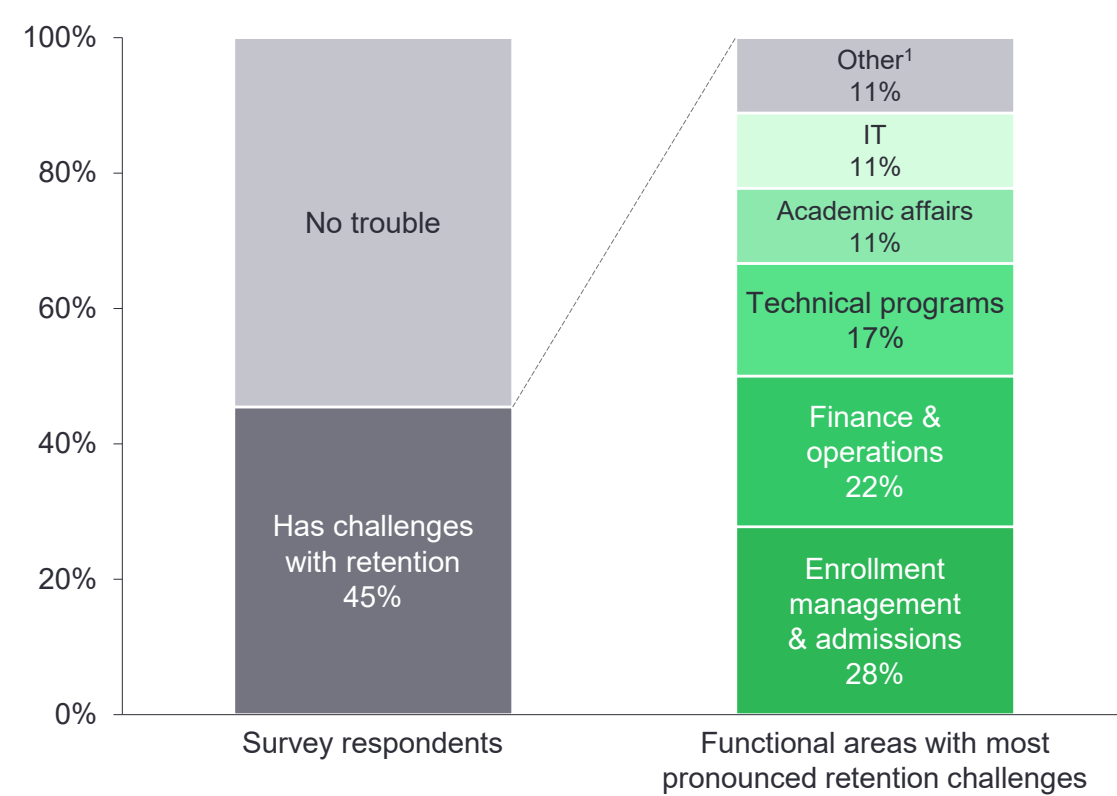
[STAFF] Functional areas with most pronounced recruitment challenges

? “In which functional areas are the challenges with staff recruitment pronounced? Please select up to 5.”



[STAFF] Functional areas with most pronounced retention challenges

? “In which functional areas are the challenges with staff retention most pronounced? Please select up to 5.”



1. Other selected functional areas include student affairs and facilities and maintenance
Source: Survey regarding staff (n=11)

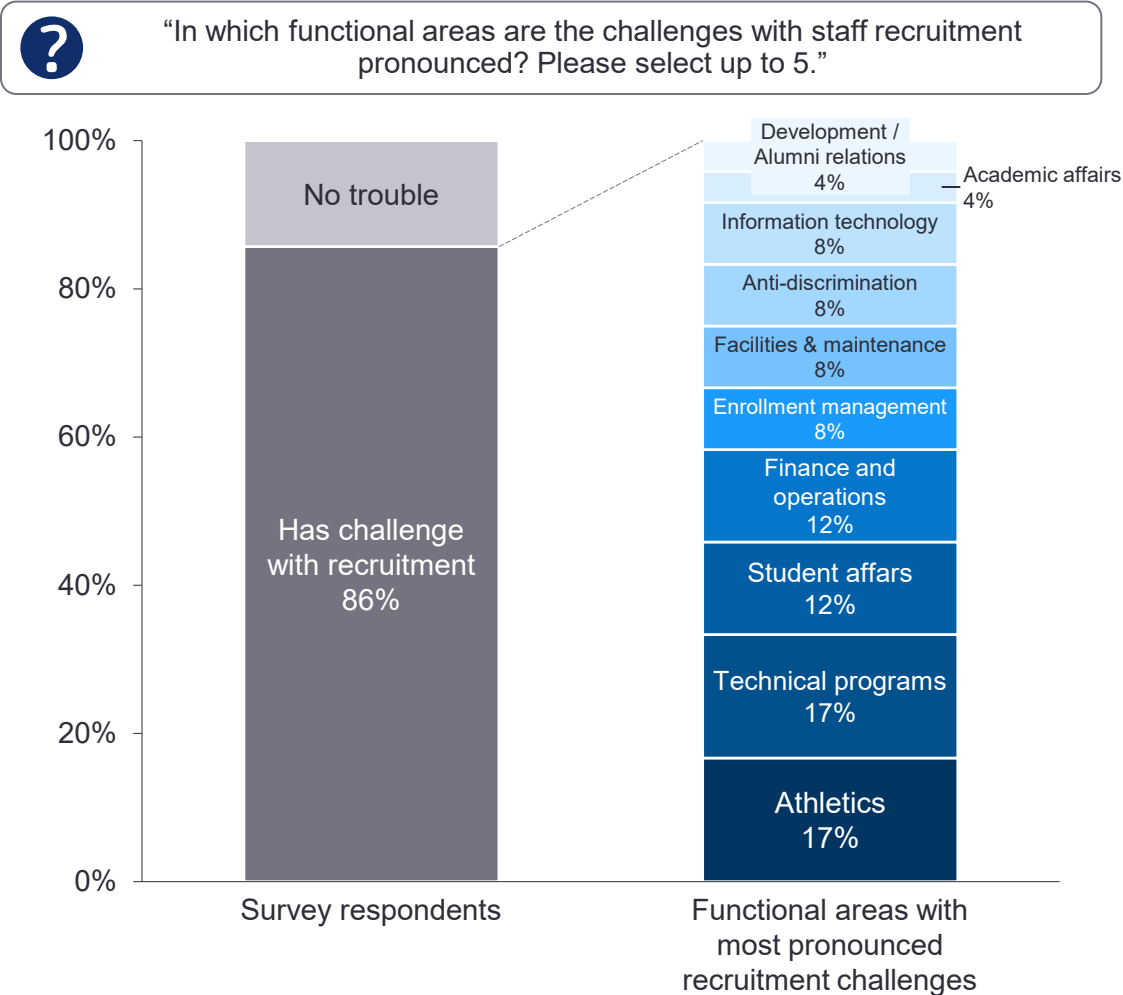
Across state universities, staff recruitment is a more prevalent challenge than retention; a wide range of functional areas face difficulties with recruitment

State universities

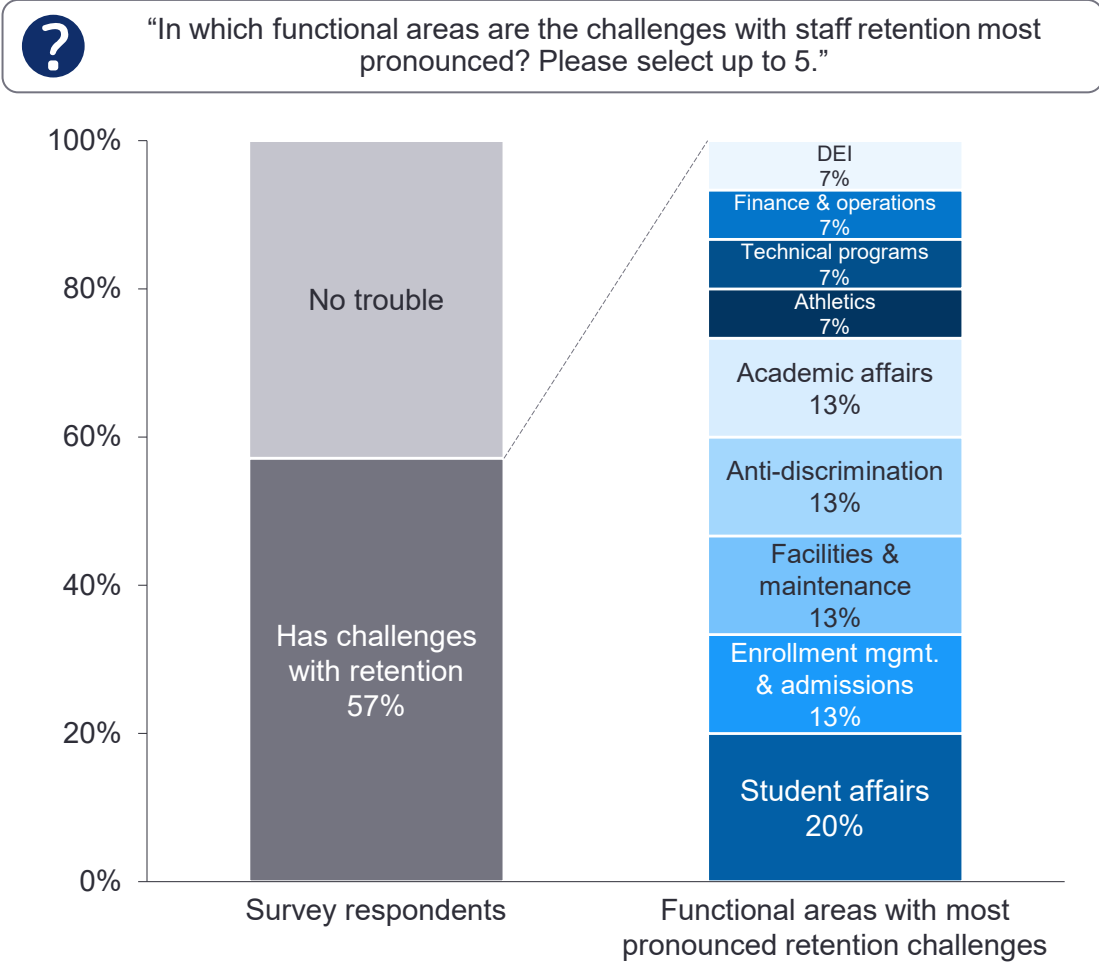
Staff survey

Recruitment & retention questions

[STAFF] Functional areas with most pronounced recruitment challenges



[STAFF] Functional areas with most pronounced retention challenges



Compensation disparities and cost of living / housing are identified by institution leadership as key challenges for community college recruitment and retention of faculty

Community college

Faculty survey

Challenge by type

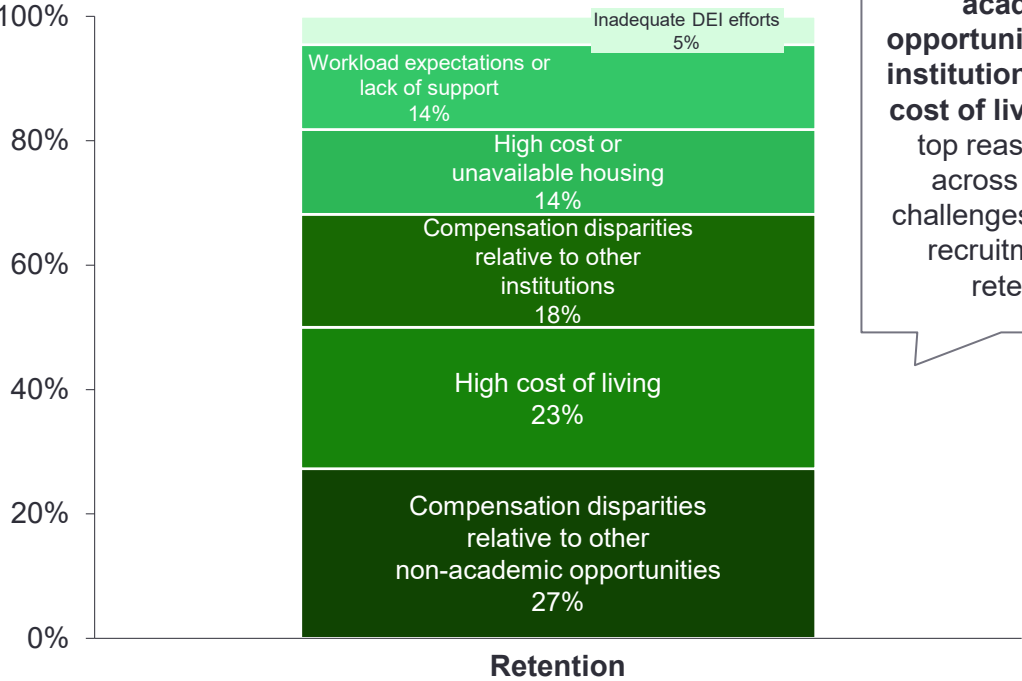
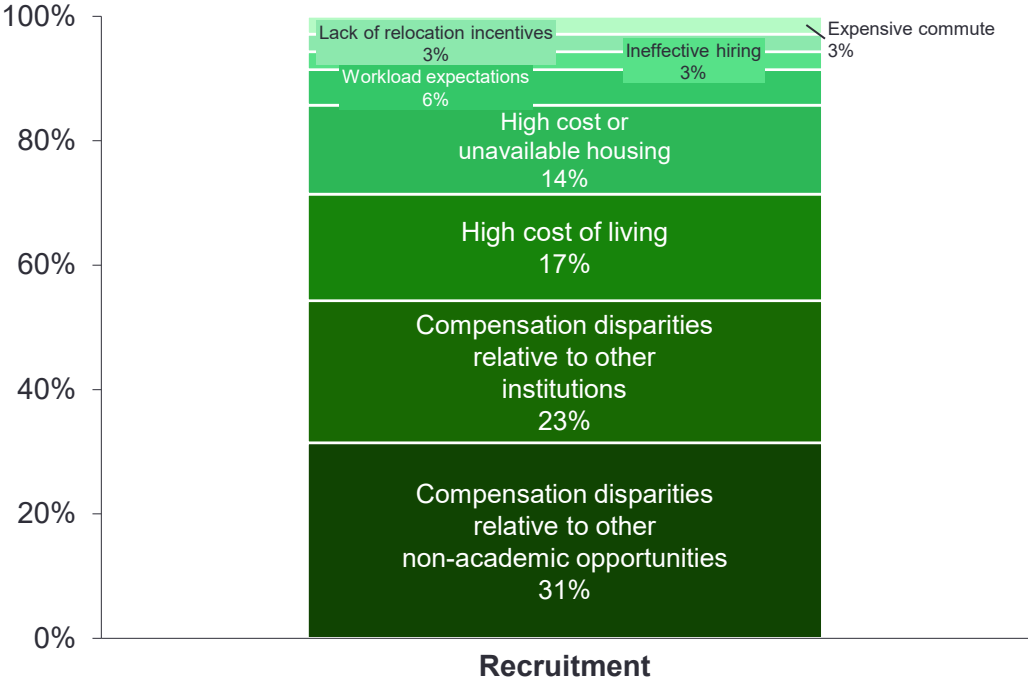
Top reasons for recruitment / retention challenges



“What do your hiring data suggest are the reasons for these faculty [recruitment / retention] challenges?
Please select up to 5 from the list below.”

“Of the selected reasons that contribute the most pronounced challenges in faculty [recruitment / retention], please rate each selected reason on a scale of 1-7 (where 1 = “Poses a small challenge”, and 7 = “Poses a significant challenge”).”

Rated 5, 6, or 7: count of selected reasons



Compensation relative to non-academic opportunities / other institutions and high cost of living are the top reasons cited across CCs for challenges in **faculty** recruitment and retention

Compensation disparities, high cost of living, and workload are identified by institution leadership as key challenges for state university recruitment and retention of faculty

State universities

Faculty survey

Challenge by type

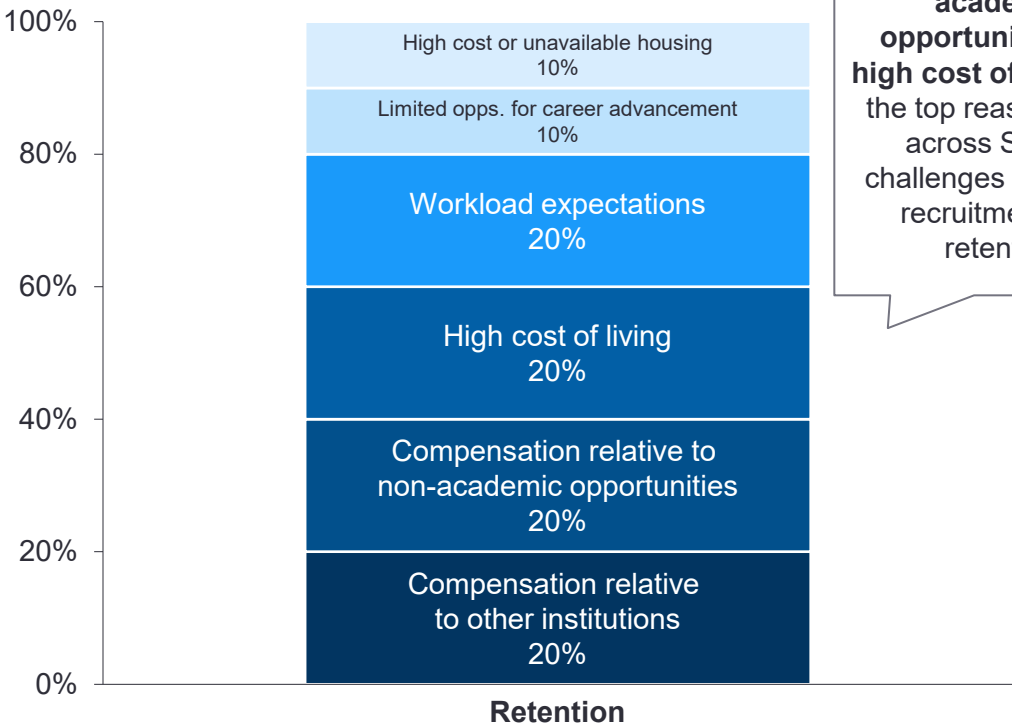
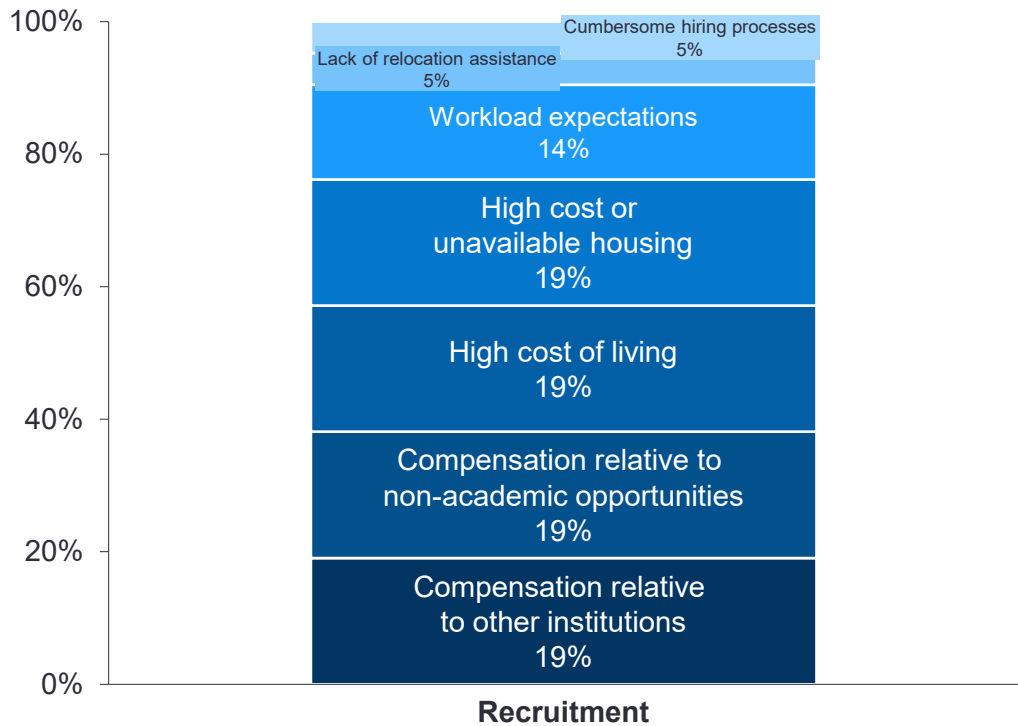
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Rated 5, 6, or 7: count of selected reasons



Compensation relative to other institutions / non-academic opportunities and high cost of living are the top reasons cited across SUs for challenges in **faculty** recruitment and retention

Compensation disparities and cost of living are identified by institution leadership as key challenges for community college recruitment and retention of staff

Community college

Staff survey

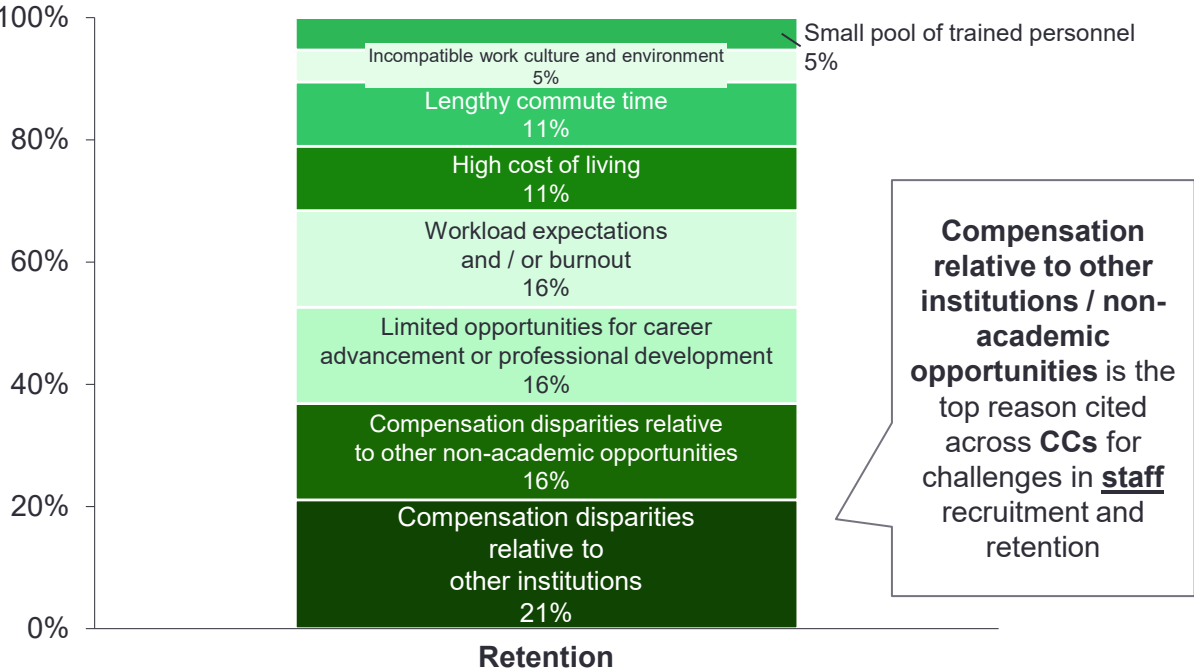
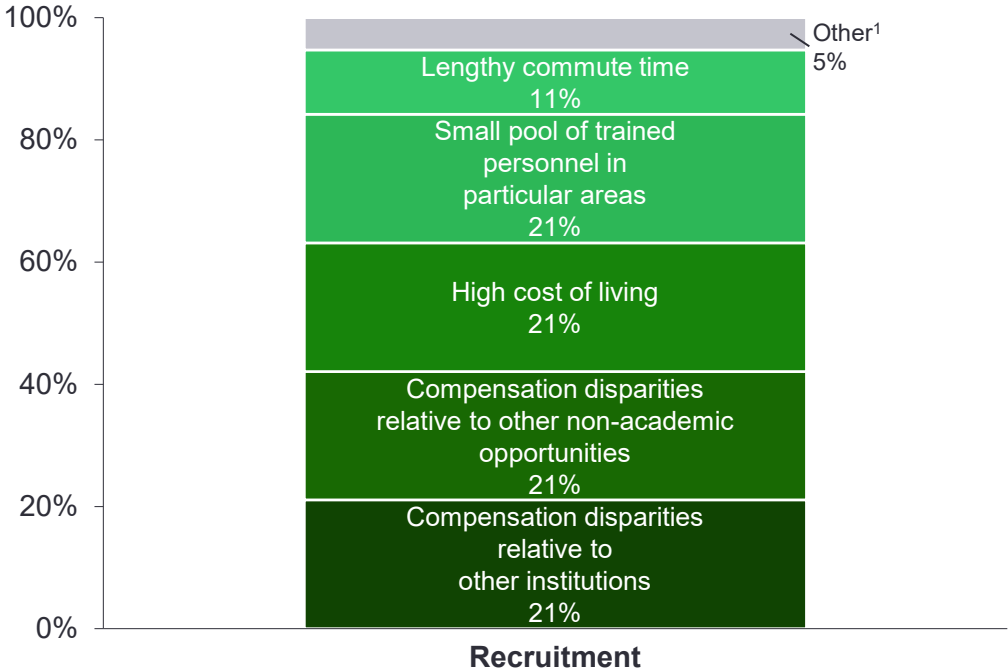
Challenge by type

Top reasons for recruitment / retention challenges

“What do your hiring data suggest are the reasons for these staff [recruitment / retention] challenges? Please select up to 5 from the list below.”

“Of the selected reasons that contribute the most pronounced challenges in staff [recruitment / retention], please rate each selected reason on a scale of 1-7 (where 1 = “Poses a small challenge”, and 7 = “Poses a significant challenge”).”

Rated 5, 6, or 7: count of selected reasons



Compensation relative to other institutions / non-academic opportunities is the top reason cited across CCs for challenges in staff recruitment and retention

1. Other reasons include limited remote work opportunities (5%)
Source: Survey regarding staff (n=11)

Compensation disparities, cost of living, and a limited pool of trained personnel are identified by institution leadership as key challenges for SUs to recruit and retain staff

State universities

Staff survey

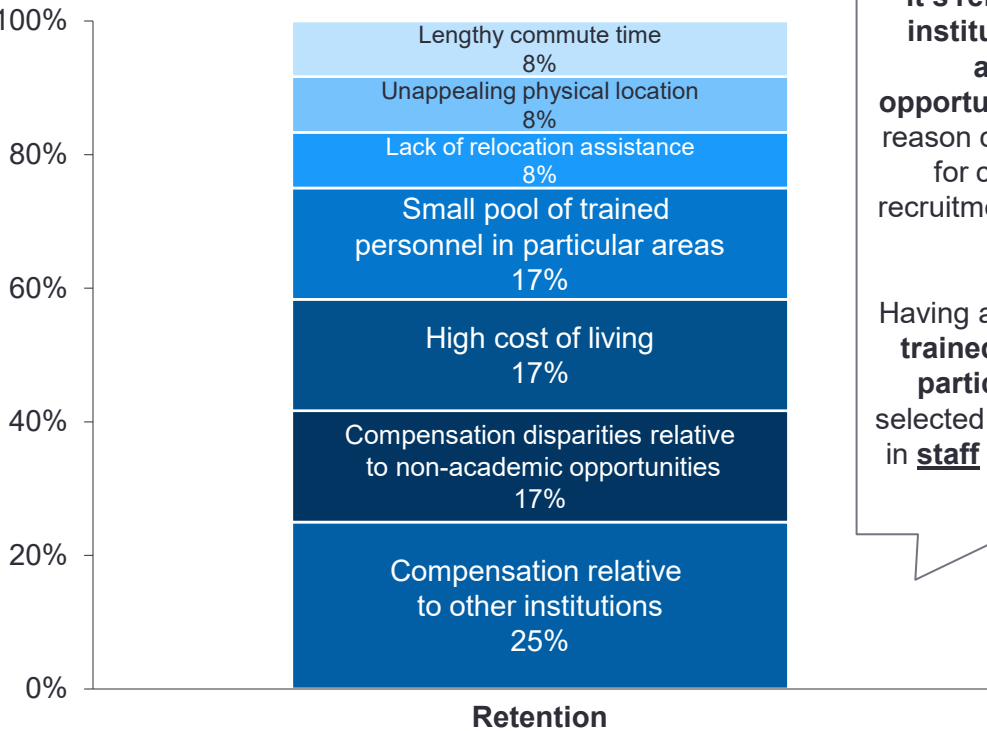
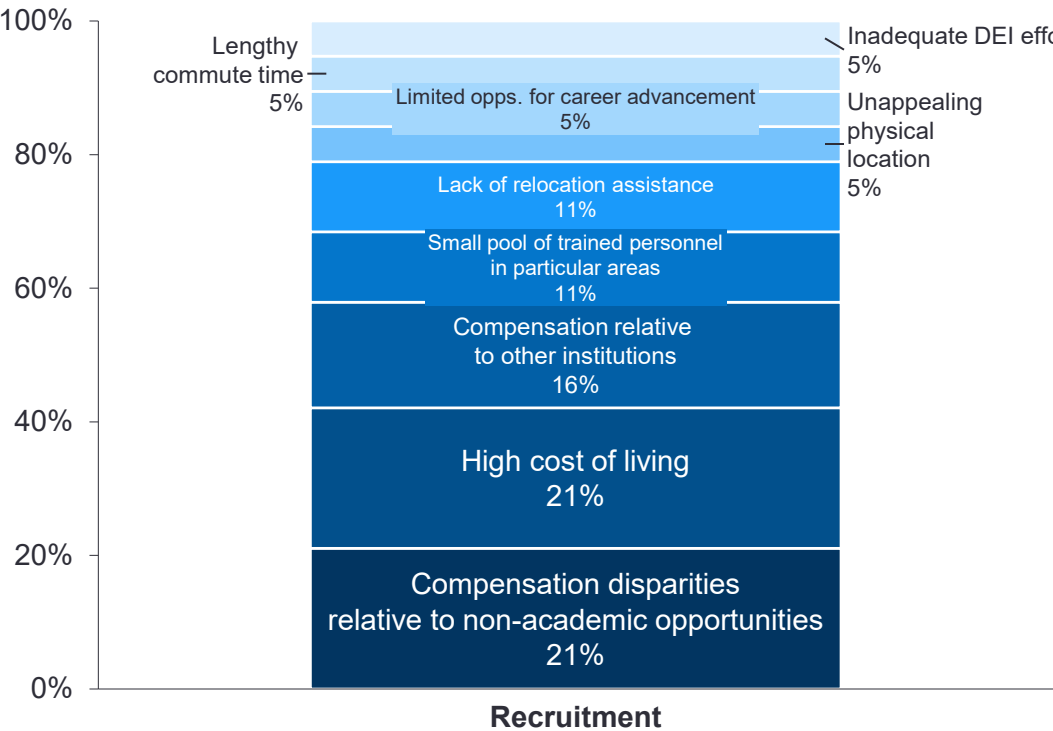
Challenge by type

Top reasons for recruitment / retention challenges

“What do your hiring data suggest are the reasons for these staff [recruitment / retention] challenges? Please select up to 5 from the list below.”

“Of the selected reasons that contribute the most pronounced challenges in staff [recruitment / retention], please rate each selected reason on a scale of 1-7 (where 1 = “Poses a small challenge”, and 7 = “Poses a significant challenge”).”

Rated 5, 6, or 7: count of selected reasons



Compensation (whether it's relative to other institutions or non-academic opportunities) is the top reason cited across SUs for challenges in recruitment and retention in **staff**

Having a **limited pool of trained personnel in particular areas** is selected as top challenge in **staff** retention across SUs

Health / medical and other specialized faculty are reportedly the hardest to recruit and retain at community colleges; compensation disparities with other attractive alternatives is a broad challenge

Community college	Faculty survey	Open response
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Key themes from the faculty recruitment and retention survey [OPEN RESPONSE]

Recruitment & retention	Key reasons for challenges	Solutions
<p>Recruitment and retention challenges are concentrated in the health & medical professions and the technology and trade fields, where industry alternatives are particularly attractive</p> <p>“ Health fields and computer science are the most challenging positions to hire and retain faculty - full-time and adjuncts. We have lost faculty from all disciplines for reasons pertaining to compensation, workload, and the high cost of living, and high cost of housing”</p> <p>“ How can I offer a prospective faculty member \$70-80K when they can make \$130K in industry or even at our local voc-tech? The collective bargaining agreements' framework for salaries is strangling our ability to hire in specialized areas”</p> <p>“ While the lower salaries affect all areas, technology, trade, and healthcare are more challenging given the pay scale we can offer in comparison with other institutions and industry”</p>	<p>Challenges with faculty recruitment and retention, broadly, are attributed to compensation disparities as well as high cost of living</p> <p>“ Faculty can make more money at nearly any K-12 school than they can at a community college”</p> <p>“ We have lost faculty from all disciplines for reasons pertaining to compensation, workload, high cost of living, and high cost of housing”</p> <p>These issues are particularly acute in recruitment and retention of diverse faculty</p> <p>“ We struggle to recruit and retain diverse talent due to our low salaries. We have lost individuals to the public [k-12] schools (that offer higher pay), other higher ed institutions that provide more pay and better perks (as well as perceived prestige), and the private sector”</p>	<p>Improved processes for certain groups (e.g., international) and promotion pathways are generally perceived as promising solutions for faculty recruitment and retention challenges</p> <p>“ We are most successful when we hire from within, so those adjunct pools become critical. In certain fields like HVAC and IT, we don't have enough adjuncts and/or adjuncts who are looking to transition to a faculty role”</p> <p>“ Labor supply factors combined with the College's willingness to sponsor visa applicants has helped to diversify the faculty in the last academic year. 3 of the last 5 faculty hires increased the diversity of the faculty, and the college is sponsoring a visa application for 2 of those 3”</p>

Faculty in STEM fields are reportedly the hardest to recruit and retain at state universities; compensation disparities with other attractive alternatives is a broad challenge

- State universities
- Faculty survey
- Open response

Key themes from the faculty recruitment and retention survey [OPEN RESPONSE]

Recruitment & retention	Key reasons for challenges	Solutions
<p>Recruitment and retention challenges are concentrated in the sciences, technology, and health & medical fields, where industry alternatives are particularly attractive</p> <p>“ We've lost several promising social science, business, and science/health early career faculty over the last few years despite investing in support through grant (AGEP) and NEBHE efforts”</p> <p>“ It is challenging to find adjuncts in high-demand fields like computer science”</p> <p>“ The most challenging efforts to recruit faculty are in the nursing field, and trying to hire for diversity is very challenging”</p>	<p>Challenges with faculty recruitment and retention, broadly, are attributed to compensation disparities as well as high cost of living</p> <p>“ The salaries we offer do not allow us to compete effectively. That combined with the high cost of housing and living is a continual challenge”</p> <p>These issues are particularly acute in recruitment and retention of diverse faculty</p> <p>“ Non-tenure track positions are the more challenging to fill and retention is an issue. This is especially true as we work to diversify our faculty”</p> <p>“ Hiring faculty of color is a competitive pursuit. With larger and more well resourced institutions recruiting for diversity, it is difficult for a rural, small, public institution to be competitive with salary and research funds”</p>	<p>Beyond higher compensation, improvement of fringe benefits, especially in healthcare, as well as upgrade of facilities seem to be perceived as most promising for addressing those challenges</p> <p>“ Although the GIC health benefits program is adequate, it is not competitive with many private institutions plans. And the vision/dental program is useless”</p> <p>“ There is a significant need to address deferred maintenance and upgrade facilities, particularly in STEM fields”</p>

Both SU & CC segment leaders noted access to better facilities, technology & resources as top priorities with CCs prioritizing improved human resources support & SUs prioritizing research/professional development as potential responses to recruitment & retention challenges

Community college & state universities

Faculty survey

Potential solutions (not compensation)

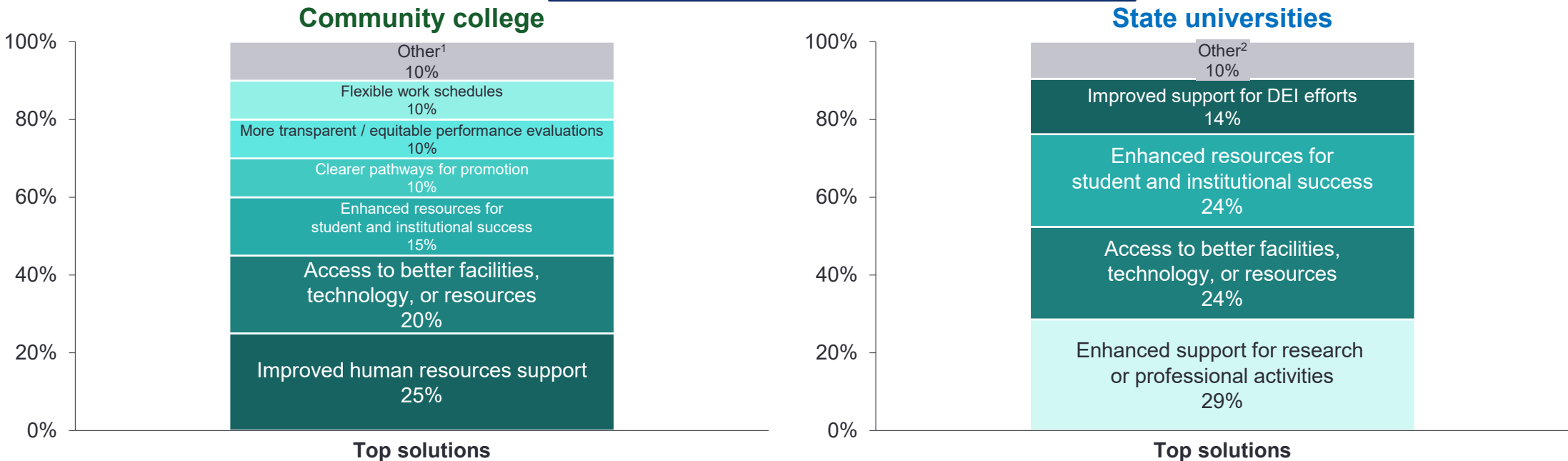
Top solutions to address recruitment or retention challenges



“Beyond higher compensation, are there specific changes to working conditions or contractual obligations that could address recruitment or retention challenges for faculty? Please select up to 5 from the list below.”

“Please rate the selected changes to working conditions or contractual obligations that could address recruitment or retention challenges for faculty on a scale of 1-7 (where 1 = “Provides the least impact of the selected” and 7 = “Provides the most impact of the selected”).”

Rated 5, 6, or 7: count of selected solutions



1. Other solutions include enhanced support for research or professional activities (5%) and increased access to decision-making or governance (5%)

2. Other solutions include expanded leave policies (5%) and reduced workload (5%)

Source: Survey regarding faculty (n=19)

For staff recruitment/retention, clearer promotions and flexible work schedules may benefit CCs and SUs; affordable housing was identified as a potential solution for SUs

Community college
& state universities

Staff survey

Potential solutions
(not compensation)

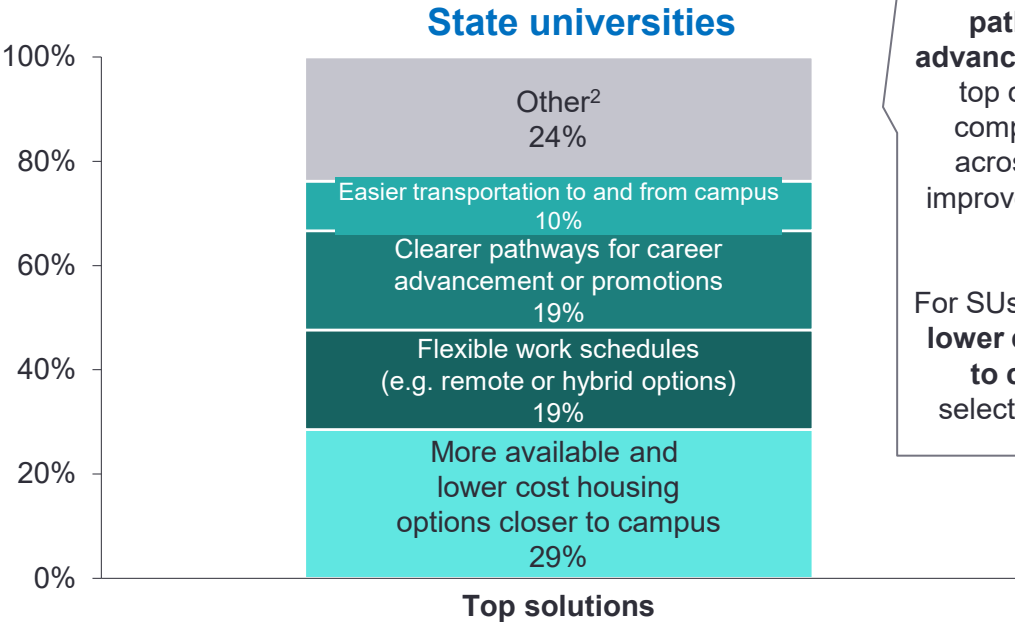
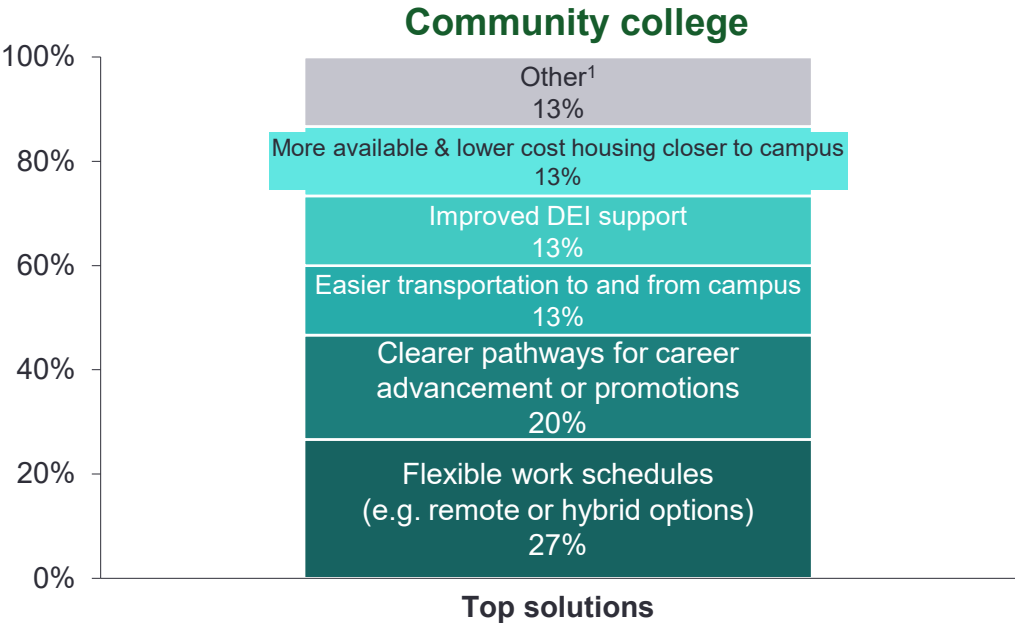
Top solutions to address recruitment or retention challenges



“Beyond higher compensation, are there specific changes to working conditions or contractual obligations that could address recruitment or retention challenges for faculty? Please select up to 5 from the list below.”

“Please rate the selected changes to working conditions or contractual obligations that could address recruitment or retention challenges for faculty on a scale of 1-7 (where 1 = “Provides the least impact of the selected” and 7 = “Provides the most impact of the selected”).”

Rated 5, 6, or 7: count of selected solutions



Increased flexible work schedules and clearer pathways for career advancement are among the top cited potential non-compensation solutions across CCs and SUs to improve staff recruitment or retention

For SUs, **more available and lower cost housing closer to campus** is the top selected potential solution

1. Other solutions include enhanced resources for student / institution success (7%) and more transparent / equitable performance evaluations

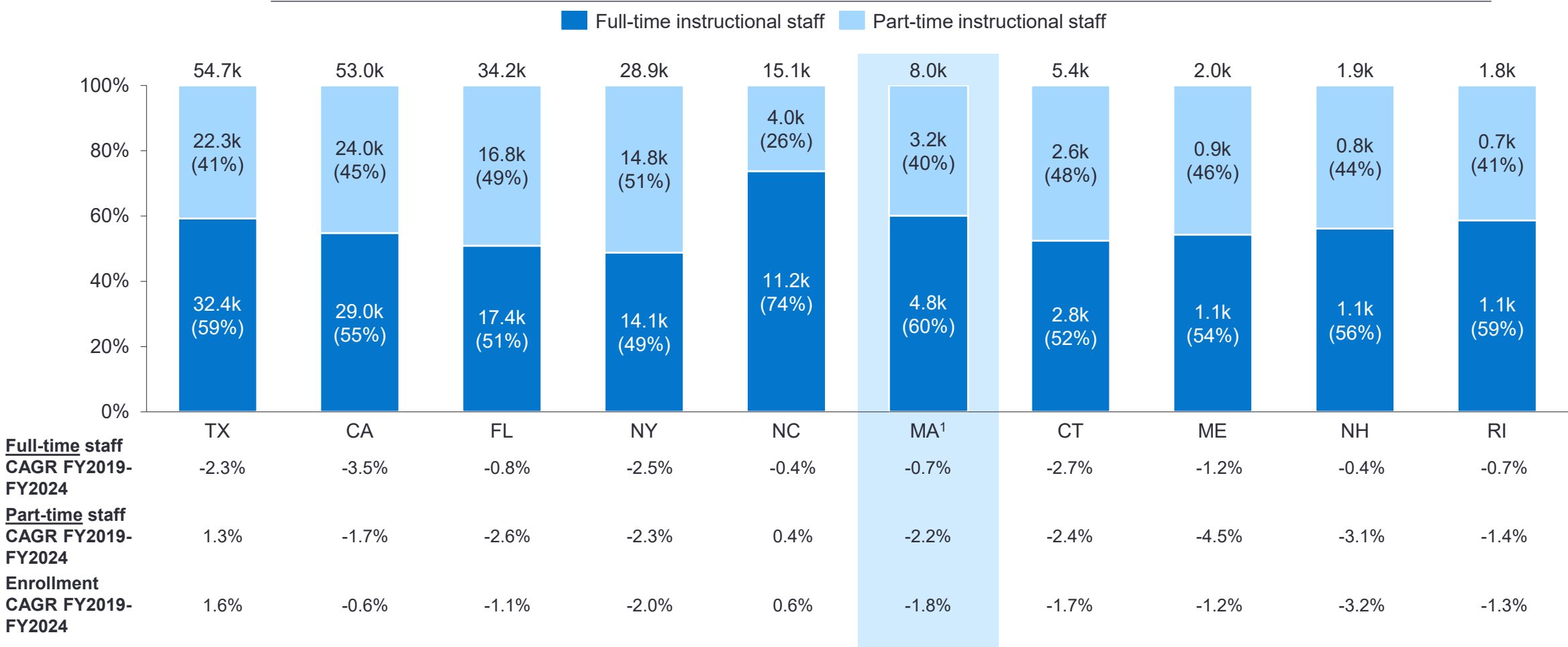
2. Other solutions include improved DEI support (5%), enhanced resources for student / institutional success (5%), more transparent / equitable performance evaluations (5%), access to better facility / technology / resources (5%), and expanded leave policies (5%)

Source: Survey regarding staff (n=7)

The mix of full- and part-time *instructional staff* at public 4-year institutions is about 50/50 among comparison states; MA skews more toward full-time staff (broadly defined)

Public 4-year²

Full- and part-time instructional staff mix, FY2024

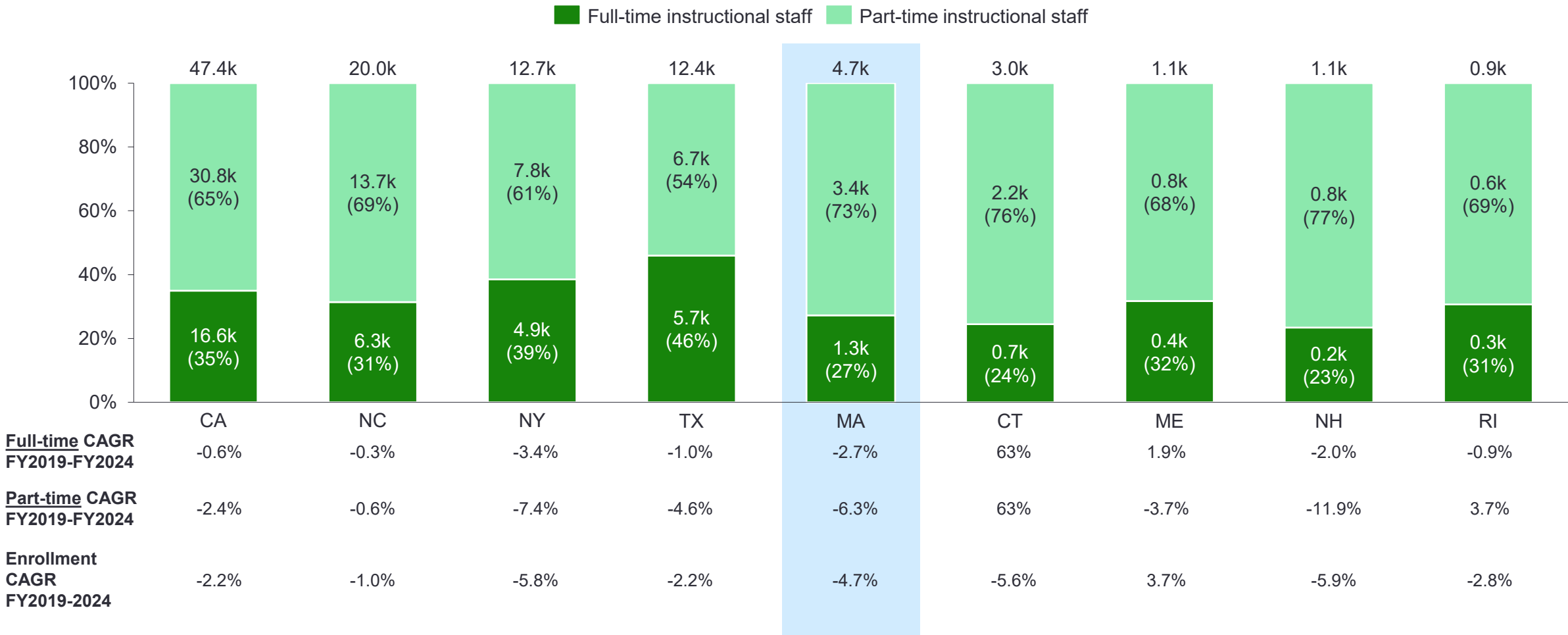


1. Excludes faculty and enrollment figures from UMass Chan Medical School
2. "4-year" institution label is inclusive of both State Universities and UMass campuses
Source: IPEDS

Approximately three-quarters of total *instructional staff* in public, 2-years in MA are part-time, similar to the mix in other comparison states

Public 2-year

Full- and part-time instructional staff mix¹, FY2024

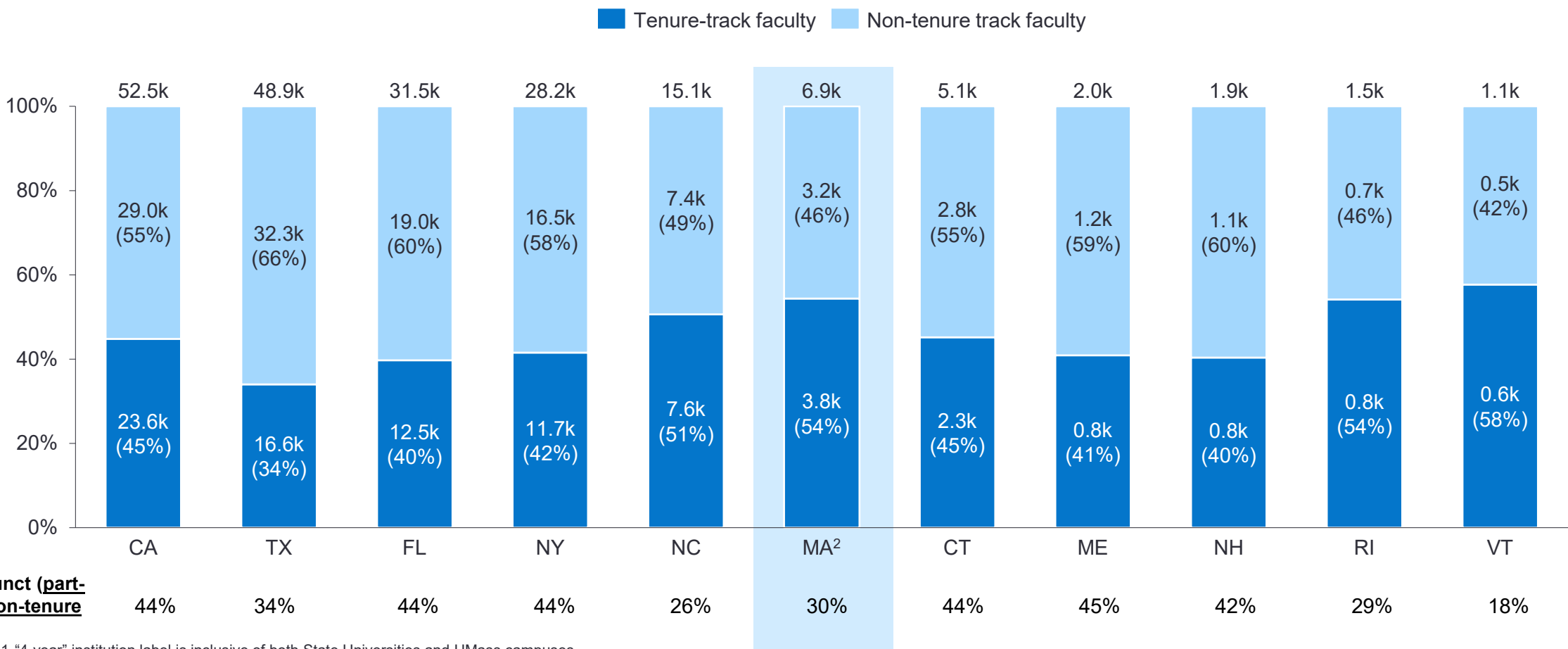


1. VT, FL excluded due to missing data
Source: IPEDS

Public 4-year institutions in MA have a greater share of tenure-track than non-tenure track faculty

Public 4-year¹

Full- and part-time tenure-track to non-tenure track faculty mix for public 4-year institutions³, by state, FY2024



% Adjunct (part-time non-tenure track)

44%

34%

44%

44%

26%

30%

44%

45%

42%

29%

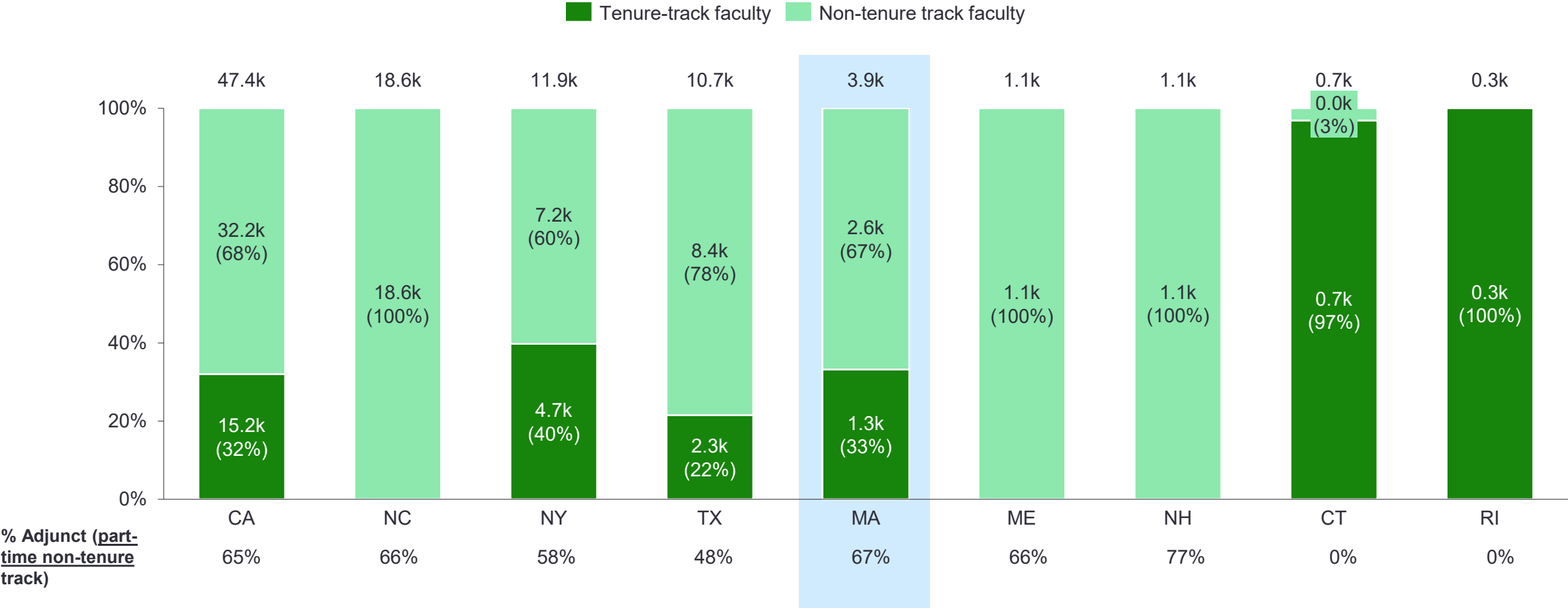
18%

1. "4-year" institution label is inclusive of both State Universities and UMass campuses
2. Excludes faculty and enrollment figures from UMass Chan Medical School
3. "Tenure" is inclusive of faculty on the tenure-track and those with tenure status
Source: IPEDS

Roughly two-thirds of all *faculty* in public 2-years in MA are non-tenure track; tenure mix ranges from 100% in RI to 0% in NC, with MA in line with CA, NY, and TX

Public 2-year

Full- and part-time tenure-track to non-tenure track faculty mix for public 2-year institutions, by state¹, FY2024

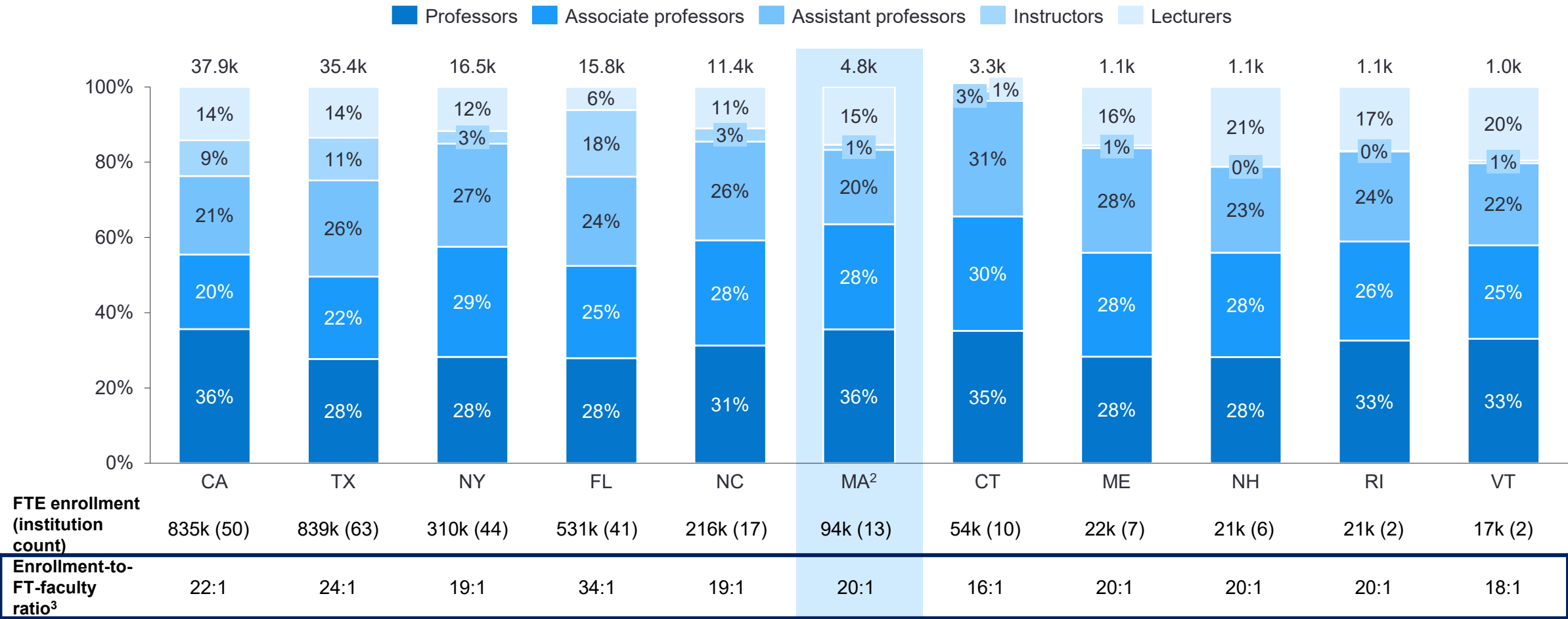


1. VT, FL excluded due to missing data
Source: IPEDS

The split of full-time professor roles at public 4-year institutions in MA is roughly equivalent between the different ranks compared to other comparison states

Public 4-year¹

Full-time faculty mix by rank for public 4-year institutions, by state, FY2024

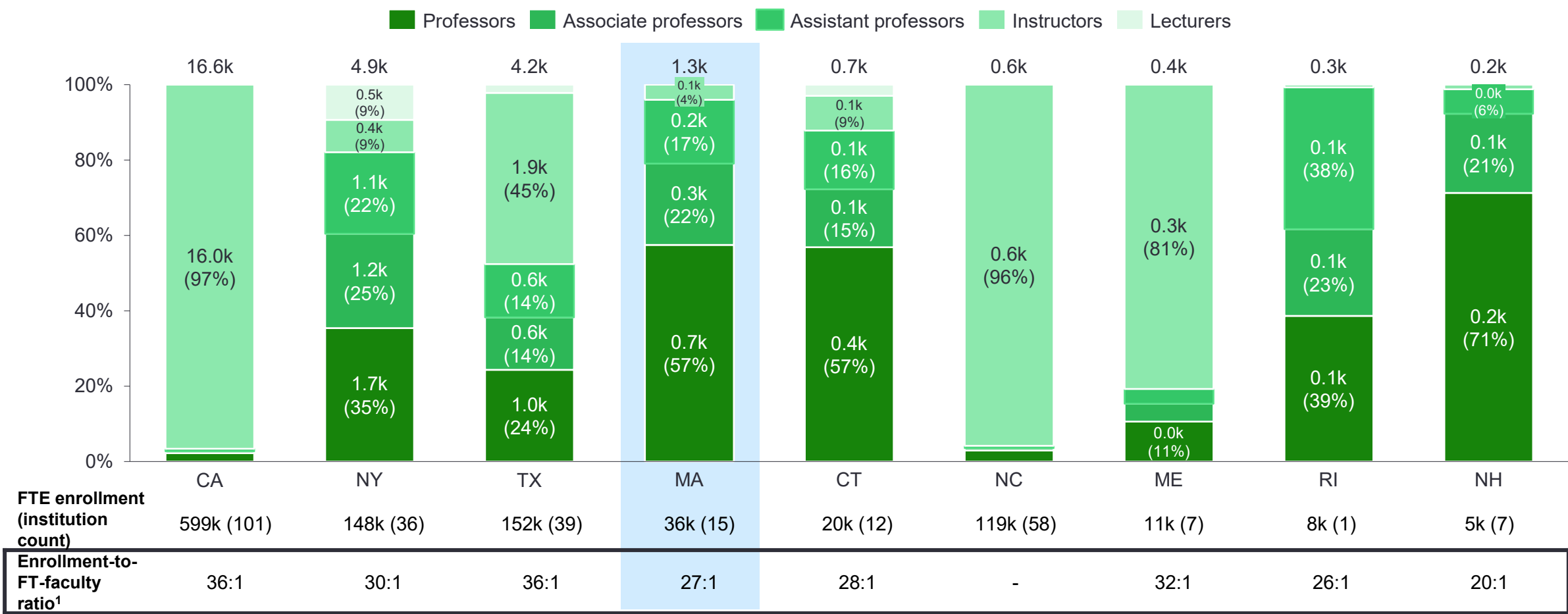


1. "4-year" institution label is inclusive of both State Universities and UMass campuses
2. Excludes faculty and enrollment figures from UMass Chan Medical School
3. Calculated by taking the FTE undergrad and graduate enrollment divided by total full-time instructional staff, of all ranks
Source: IPEDS

The mix of full-time faculty roles at public 2-years in MA constitutes largely full professor roles, in line with states like CT and NH

Public 2-year

Full-time faculty mix by rank for public 2-year institutions, by state², FY2024



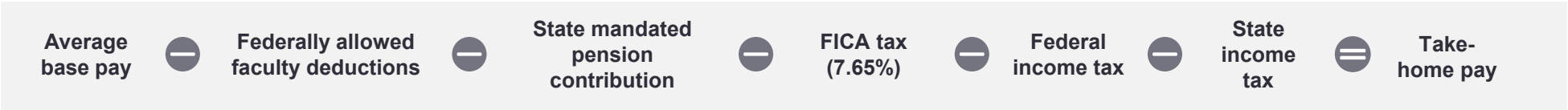
1. Calculated by taking the FTE undergrad and graduate enrollment divided by the total full-time instructional staff, of all ranks
2. VT, FL excluded due to missing data; NC enrollment-to-faculty ratio excluded due to near large unranked faculty mix
Source: IPEDS

Methodology for the faculty recruitment and retention study first generates an apples-to-apples “take home” salary across states then evaluates benefits



Calculation of faculty take-home pay

- ▶ IPEDs provides **average base salaries** equated to 9 months of **full-time instructional staff** of different ranks: Professor, Associate Professors, Assistant Professors, Instructors, and Lecturers. Latest data is as of FY2024.
- ▶ We arrive at the estimate of **take-home pay**¹ by calculating:



Illustrative take-home pay for a professor employed at a 4-year institution in MA



1. Local taxes are excluded from this analysis; we assume single-filer status and do not take into account other deductions such as having a larger family
Source: Average base salaries (IPEDS), federal income tax and FICA tax contributions (IRS), required pension contribution per state and state income tax (various state websites)

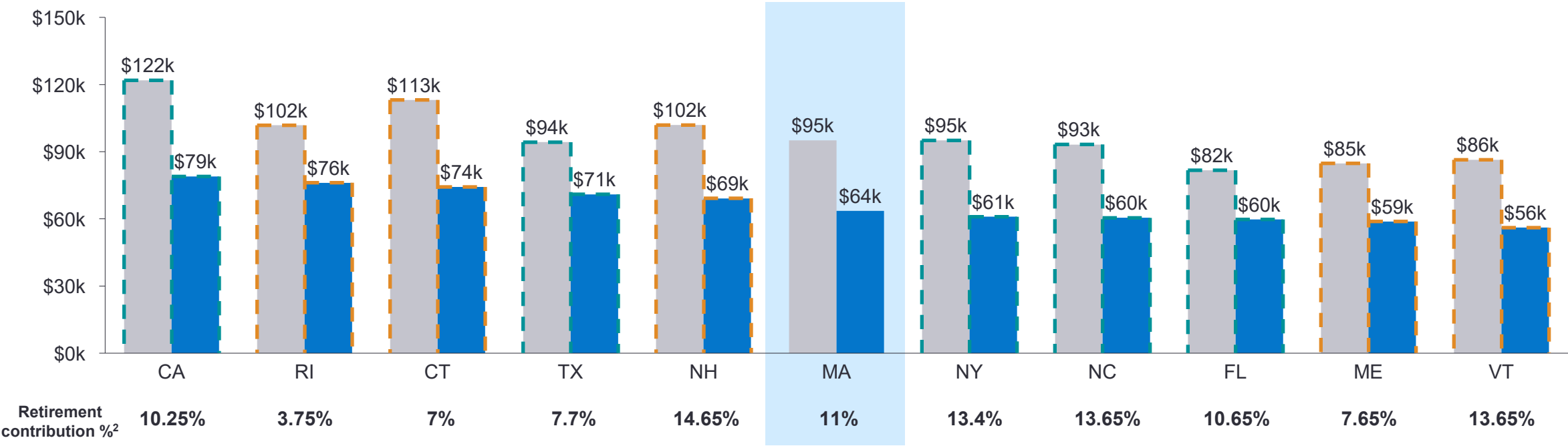
Take-home pay for professors at public 4-year institutions in MA is about average of comparison states

Public 4-year

Average base and take-home salaries at public 4-year institutions, FY2024¹

Professors, Associate Professors, and Assistant Professors

Base (9 mon) Take-home (9 mon) Economic competitor Geographic competitor



1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Sum of annual pension contribution and levied FICA tax
Source: IPEDS, IRS, federal and state documentation

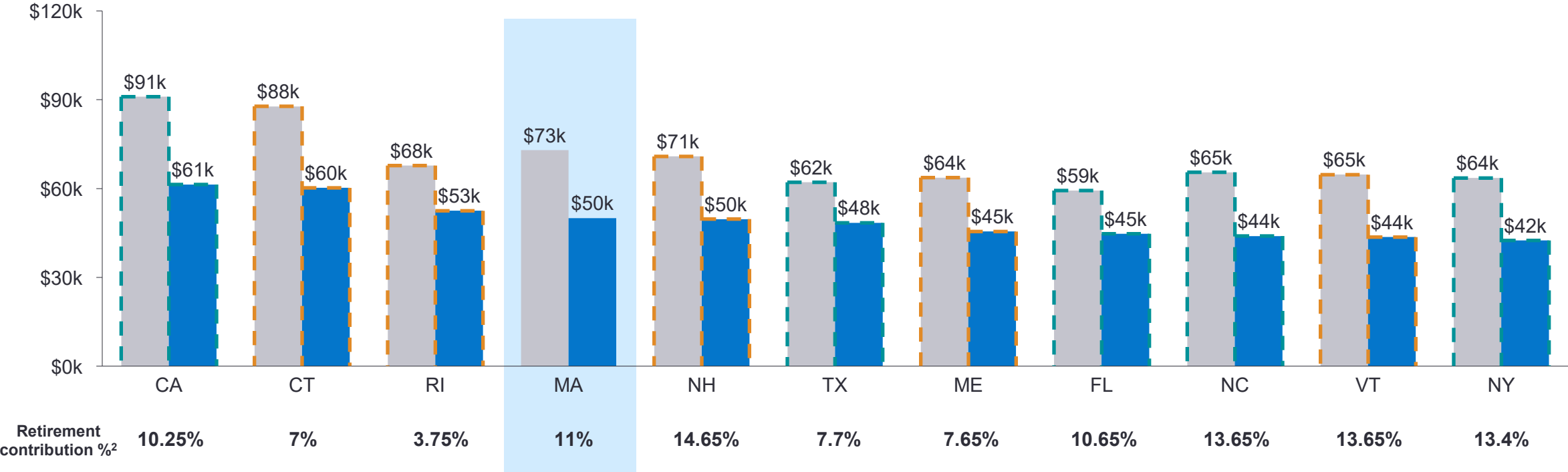
Take-home pay for instructors and lecturers at public 4-year institutions in MA falls in the middle of average take-home pay in comparison states

Public 4-year

Average base and take-home salaries at public 4-year institutions, FY2024¹

Instructors and Lecturers

Base (9 mon) Take-home (9 mon) Economic competitor Geographic competitor



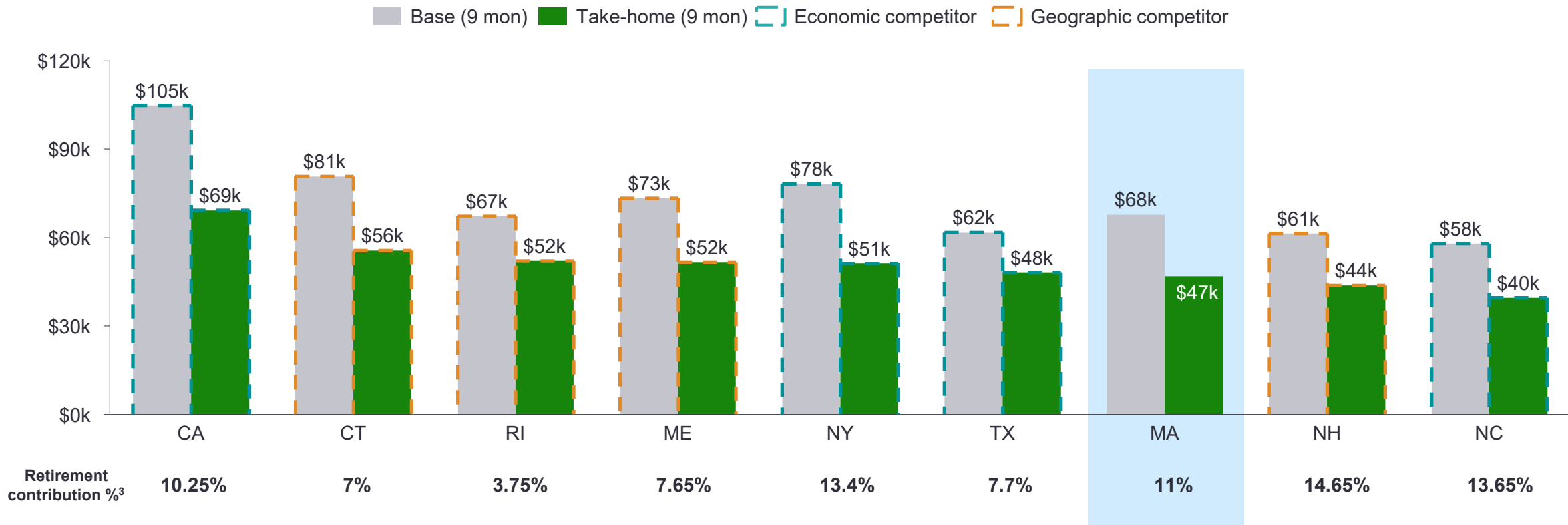
1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Sum of annual pension contribution and levied FICA tax
Source: IPEDS, IRS, federal and state documentation

Take-home pay for professors, associate professors, and assistant professors at public 2-year institutions in MA lags comparison states

Public 2-year

Average base and take-home salaries at public 2-year institutions¹, FY2024²

Professors, Associate Professors, and Assistant Professors



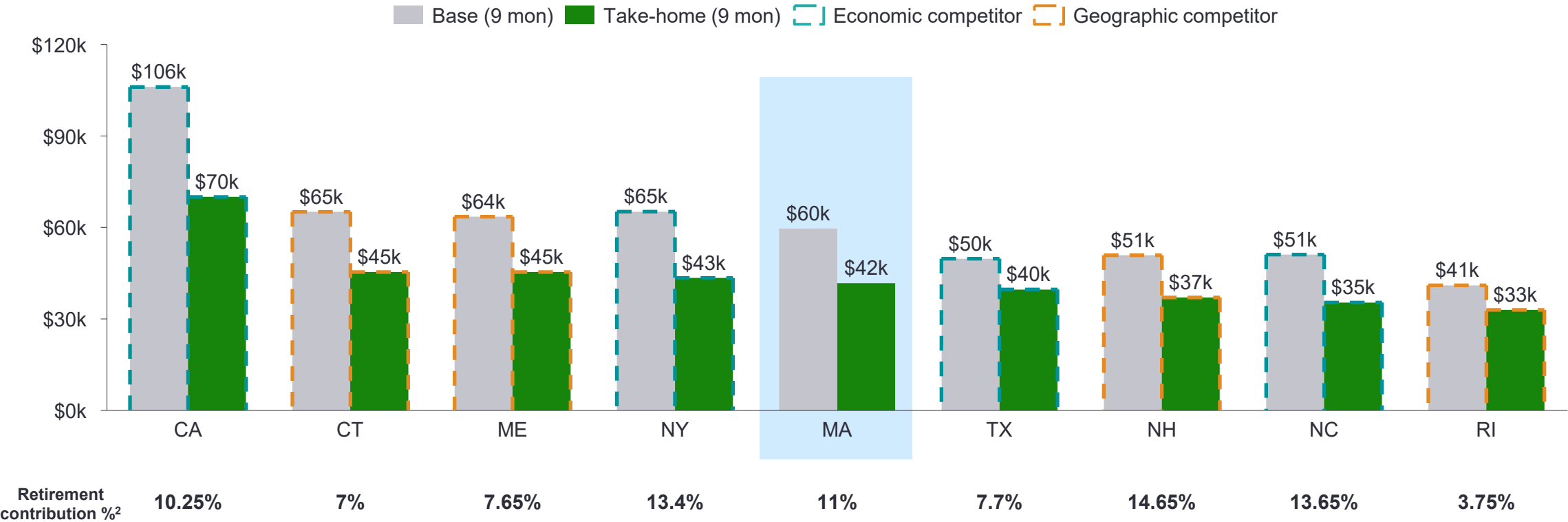
1. VT, FL excluded from comparison set due to missing data
2. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
3. Sum of annual pension contribution and levied FICA tax
Source: IPEDS, IRS, federal and state documentation

Take-home pay for instructors and lecturers at public 2-year institutions in MA is about average of take-home pay in comparison states

Public 2-year

Average base and take-home salaries at public 2-year institutions¹, FY2024

Instructors and Lecturers²



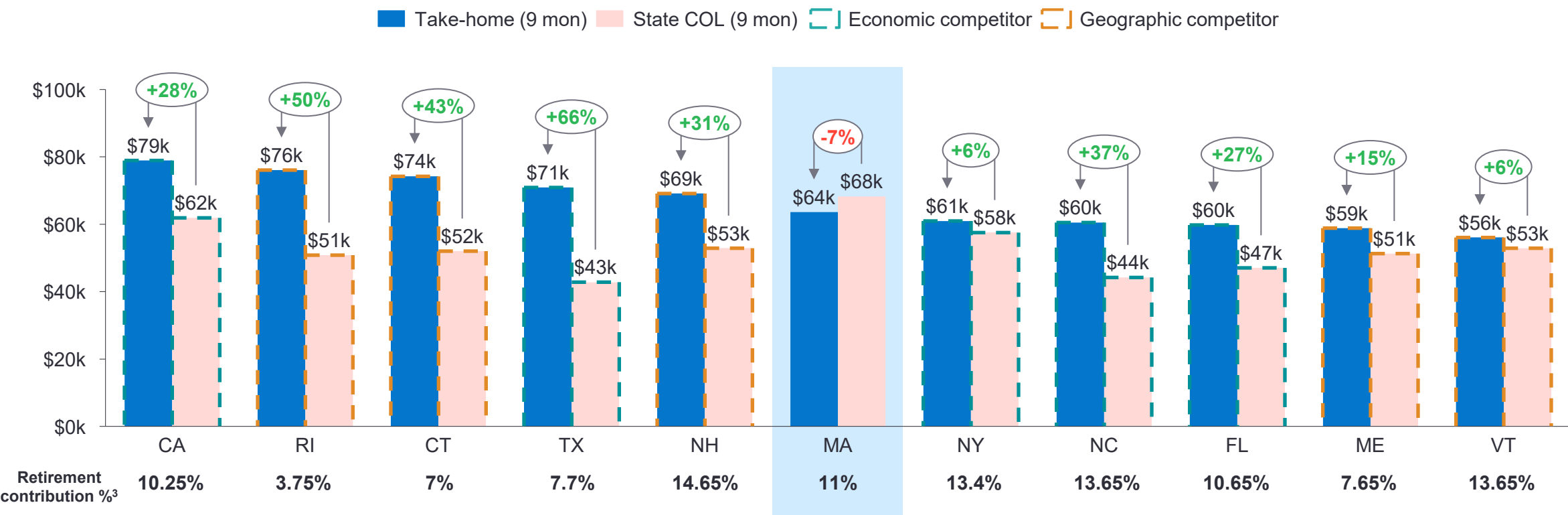
1. VT, FL excluded from comparison set due to missing data
2. Only CT, NY, TX include both "Instructor" and "Lecturer" data; remaining states only include base salary data for the "Instructor" title
Source: IPEDS, IRS, federal and state documentation

Take-home pay for professors in public, 4-year institutions in all comparison states is sufficient to cover their state's average COL; this not the case in MA

Public 4-year

Average take-home salaries and state cost-of living at public, 4-year institutions, FY2024^{1,2}

Professors, Associate Professors, and Assistant Professors



1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Cost of living (COL) by state calculated using World Population Review COL index and take-home pay analysis
3. Sum of annual pension contribution and levied FICA tax
Source: IPEDS, IRS, World Population Review, federal and state documentation

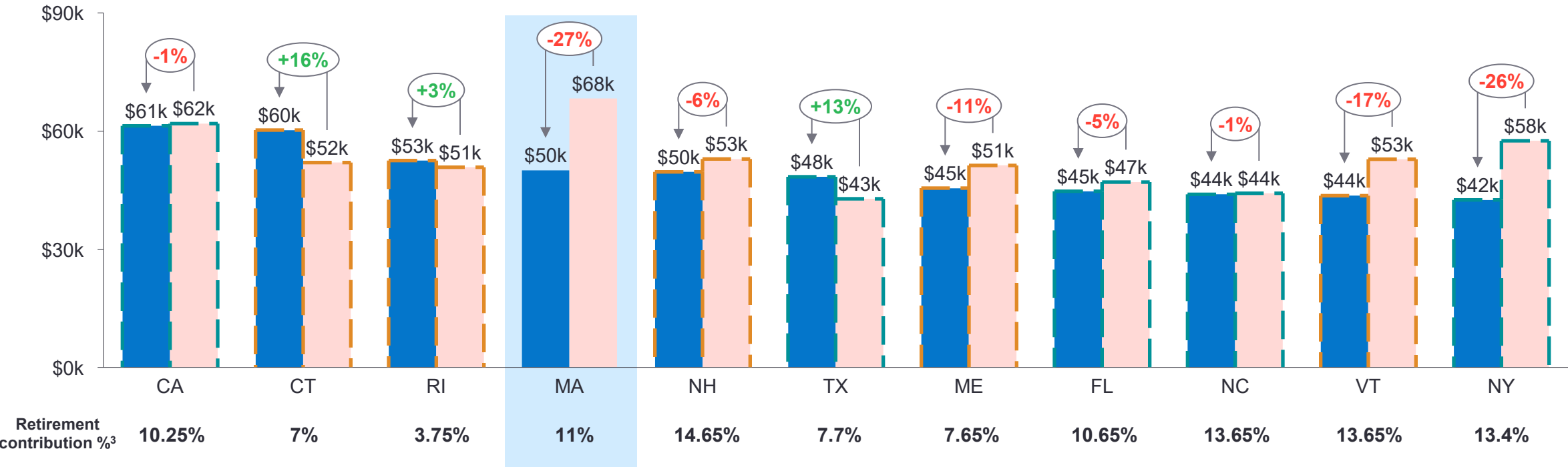
CA, CT, and RI have the highest take-home pay amongst instructors and lecturers; take-home pay for MA and NY is similarly not sufficient to cover the state's COL (by ~26-27%)

Public 4-year

Average take-home salaries and state cost-of-living at public, 4-year institutions, FY2024^{1,2}

Instructors and Lecturers

Take-home (9 mon) State COL (9 mon) Economic competitor Geographic competitor



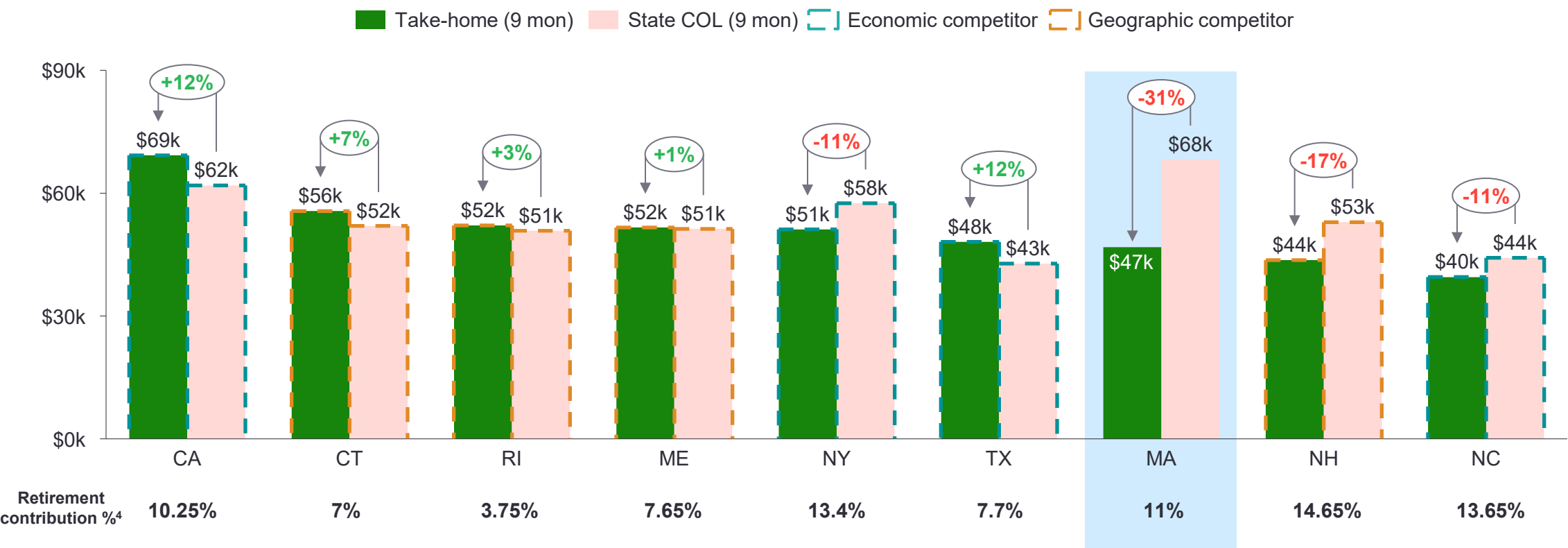
1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Cost of living (COL) by state calculated using World Population Review COL index and take-home pay analysis
3. Sum of annual pension contribution and levied FICA tax
Source: IPEDS, IRS, World Population Review, federal and state documentation

Take-home pay for professors at public, 2-year institutions is insufficient to cover state average COL in MA, NY, NH, NC; MA experiences the largest gap in coverage

Public 2-year

Average take-home salaries and state cost-of living at public, 2-year institutions, FY2024^{1,2,3}

Professors, Associate Professors, and Assistant Professors



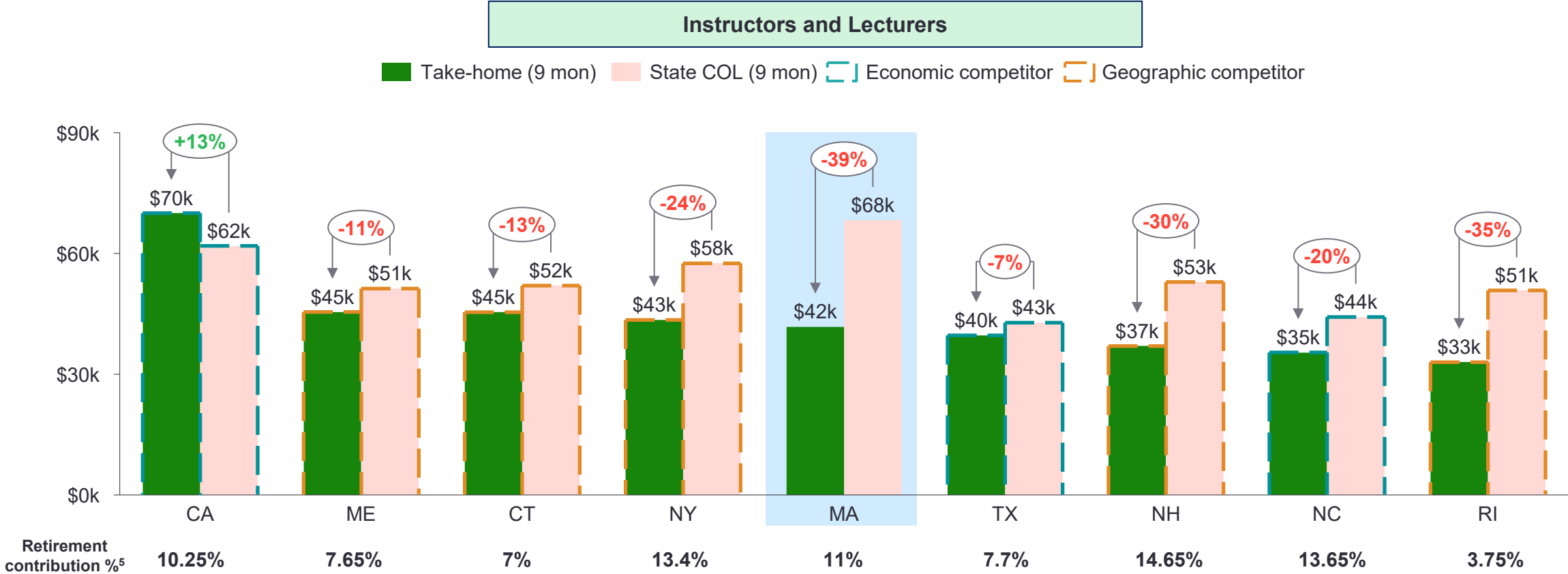
1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Cost of living (COL) by state calculated using World Population Review COL index and take-home pay analysis
3. VT, FL excluded from comparison set due to missing data
Source: IPEDS, IRS, World Population Review, federal and state documentation

4. Sum of annual pension contribution and levied FICA tax

Take-home pay for MA and most comparison states is not sufficient to cover the state's COL; CA is the only selected state where salary for instructor/lecturer roles covers COL

Public 2-year


Average take-home salaries and state cost-of-living at public, 2-year institutions, FY2024^{1,2,3,4}



1. Salary data collected Spring 2024, FY2024 tax rates applied to calculate take-home pay
2. Cost of living (COL) by state calculated using World Population Review COL index and take-home pay analysis
3. Only CT, NY, TX include both "Instructor" and "Lecturer" data; remaining states only include base salary data for the "Instructor" title
Source: IPEDS, IRS, World Population Review, federal and state documentation

4. VT, FL excluded from comparison set due to missing data
5. Sum of annual pension contribution and levied FICA tax

The World Population Review's Cost of Living Index (COLI) is a measure to compare salaries across states with different cost contexts



Calculation of faculty take-home pay, with cost-of-living adjustment

- ▶ **The Cost of Living Index (COLI)** compiles metrics from **6 categories** (housing, utilities, grocery items, transportation, health care, and miscellaneous goods and services) into a single value for each state
- ▶ The COLI is relative to the **national average household COL**, which is ~\$61k for 12 months (~\$46k for 9 months)

States		Cost of Living Index, 2024
Geographic competitors	MA	148.4 (48.4% <u>above</u> average COL)
	CT	113.1
	ME	111.5
	NH	115
	RI	110.5
	VT	114.9
Economic competitors	CA	134.5
	FL	102.3
	NY	125.1
	NC	96.1
	TX	93 (7% <u>below</u> average COL)

The index represents the COL in terms of percentage points:

- ▶ MA’s index of 148.4 represents a COL that is 48.4% *higher* than the average
- ▶ TX’s index of 93 represents a COL that is 7% *lower* than the average

To arrive at a state’s cost-of-living expense, we multiply the national average COL by the state’s COLI

*Illustrative example:
9-month COL for MA*

\$46k
9-month
national
average COL

×

148.4%
MA’s cost-of-
living index

=

\$68k
9-month
COL expense
in MA

Our analysis on faculty take-home salaries is not a rigorous compensation study. Such a study would require extensive data collection and analysis



Limitations of this analysis

- ▶ This analysis is **not meant to be a rigorous compensation study**. Such a study would consider market medians, discipline, years of experience, and assess the cost of labor in target metropolitan statistical areas (MSAs)
- ▶ Instead, this analysis uses publicly available data from IPEDS, the Integrated Postsecondary Education Data System, across all public 4-year and 2-year institutions. This source aggregates institution reported data for **average 9-month base salary by rank (e.g., assistant professor) and by institution for FY2024**
- ▶ Average base salary has **limitations** because it **aggregates across discipline** and **years of experience**, both of which have an impact on compensation that we cannot disentangle with the current data

Methodology for the faculty and staff recruitment and retention study first generates an apples-to-apples “take home” salary across states by rank, then evaluates benefits



Summary of employee benefits

- ▶ Faculty in public institutions across Massachusetts and its comparison states participate in different **pension plans**. Details from these plans are collected from various state websites. This analysis does not investigate the Optional Retirement Plans that affect MA and its comparison states
- ▶ **Information on additional benefits** has been gathered from **collective bargaining agreements** (CBAs) available across MA, CT, ME, NH, RI, VT, CA, FL, and NY¹.
- ▶ CBAs include information on benefits such as:
 - Vacation benefits
 - Childcare / parental benefits
 - Flexible work schedules and modality structures (flexible work arrangement policies – remote work or compressed workweeks)

Community College agreement mandates a 5 courses per semester teaching load, while the State Universities mandate a 4 courses per semester teaching load

1. State laws in NC and TX prohibit public employees from entering CBAs; information on these states are found via additional secondary research from institution websites
Source: State websites, CBAs (university websites)