SENATE No. 678

The Commonwealth of Massachusetts

PRESENTED BY:

Michael O. Moore

To the Honorable Senate and House of Representatives of the Commonwealth of Massachusetts in General Court assembled:

The undersigned legislators and/or citizens respectfully petition for the adoption of the accompanying bill:

An Act relative to strengthening and expanding affordable, quality higher education opportunities for residents of the Commonwealth.

PETITION OF:

NAME:	DISTRICT/ADDRESS:
Michael O. Moore	Second Worcester
Jason M. Lewis	Fifth Middlesex
Carmine L. Gentile	13th Middlesex

SENATE No. 678

By Mr. Moore, a petition (accompanied by bill, Senate, No. 678) of Michael O. Moore, Jason M. Lewis and Carmine L. Gentile for legislation relative to strengthening and expanding affordable, quality higher education opportunities for residents of the Commonwealth. Higher Education.

The Commonwealth of Massachusetts

In the One Hundred and Eighty-Ninth General Court (2015-2016)

An Act relative to strengthening and expanding affordable, quality higher education opportunities for residents of the Commonwealth.

Whereas, The deferred operation of this act would tend to defeat its purpose, which is to assist in providing forthwith affordable postsecondary educational opportunities for residents of the commonwealth, therefore, it is hereby declared to be an emergency law, necessary for the immediate preservation of the public convenience.

Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same, as follows:

- 1 SECTION 1. Section 1 of chapter 15A of the General Laws, as appearing in the 2012
- 2 Official Edition, is hereby amended by inserting after the 3rd paragraph, the following
- 3 paragraph:- It is hereby further declared to be the policy of the commonwealth to ensure that the
- 4 university of Massachusetts, each state university, and each community college has at its
- 5 disposal adequate funds to provide, foster and support high quality institutions of public higher
- 6 education that serve the interests of the commonwealth and its citizens in the manner described
- 7 in this section. For that purpose, it is hereby further declared to be the policy of the
- 8 commonwealth to make annually to the university of Massachusetts, each state university, and
- 9 each community college appropriations which, with all other unrestricted funds that are

available, in the case of each, for expenditure in the conduct of its affairs and the support of its
mission, are sufficient to fully fund its operating requirements. It is hereby further declared to be
the policy of the commonwealth to provide adequate funds to the university of Massachusetts,
each state university, and each community college for capital needs including the repair,
renovation, construction, reconstruction, improvement, demolition, expansion, acquisition,
furnishing, or equipping of buildings, structures, facilities and other infrastructure, including, but
not limited to technology infrastructure, necessary to maintain high quality institutions of higher
education.

18 SECTION 2. Section 9 of said chapter 15A, as so appearing, is hereby amended by 19 inserting after the word "education", in line 229, the following:-; and (hh) to build and 20 maintain, in conjunction with the university of Massachusetts, the state universities, and the 21 community colleges, a transfer system providing individual students with clear and consistent 22 information on the student's progress toward fulfilling degree requirements in any undergraduate program at any public institution of higher education in the state; provided, that the system shall 23 include a standard core of course offering and numbering that are honored for common credit 24 toward degrees and certificates across the commonwealth's public institutions of higher 25 education, and course-to-course equivalencies across these institutions that will enable students 27 to transfer from one public institution of higher education to another without loss of credit; provided further, that the board shall coordinate the implementation of the system and all public 28 institutions of higher education institutions in the state shall utilize the system for all 29 30 undergraduate programs and course offerings; provided further, that the board, in consultation with the University of Massachusetts, the state universities, and the community colleges, shall 31

- determine the form in which all data and course equivalencies shall be submitted by these institutions.
- 34 SECTION 3. Section 9 of said chapter 15A, as so appearing, is hereby by further amended by adding the following paragraph: All postsecondary educational institutions offering courses and programs leading to degrees or certificates to residents of the 36 commonwealth shall provide uniform student financial aid information to every prospective 37 38 student who has been accepted for admission to the institution. Each institution shall provide this information prior to the institution's enrollment deadline for purposes of providing each 39 student with time to make an informed decision about enrollment. Each institution shall use the 40 41 financial aid shopping sheet or such other standardized document developed by the U.S. Department of Education to provide this information. Each institution annually shall post on its 42 43 website a list and description of all scholarships, grants, or other funds that do not have to be paid back that are available at the institution to assist students in paying for their education. 44 Each institution shall inform students about any income based loan repayment programs and 45 public interest or other loan forgiveness programs available for borrowers of student loans. In 46 addition, all public institutions of higher education in the state shall work with American Student 47 Assistance through its SALT or other programs and the Massachusetts Educational Financing 49 Authority to provide financial literacy for students attending these institutions.
- The board of higher education shall develop a clear and consistent definition of what constitutes student financial aid which shall be used by all postsecondary educational institutions offering courses and programs leading to degrees or certificates to residents of the commonwealth.

SECTION 4. Section 15F of said chapter 15A, as so appearing, is hereby amended by inserting in lines 11, 20, 21 23, 27, 30, and 33, after the word "credit", the words:-and for-credit.

56 SECTION 5. Section 16 of said chapter 15A, as so appearing, is hereby amended by adding the following paragraph: No state scholarship funds under this section, any other section 57 of this chapter, or other state student financial aid however provided, shall be made available to, 58 or on behalf, of any student enrolled in any postsecondary educational institution which the 60 board of higher education determines does not meet the requirements of this paragraph. To meet the requirements of this paragraph, a postsecondary educational institution shall demonstrate to the board that it has: (a) not more than 40% of its undergraduate students 62 borrowing student loans; (b) graduation rates of not less than 30% for undergraduate students 63 taking 150% or less of the expected time to complete degree requirements, as most recently 64 65 reported by the U.S. Department of Higher Education, provided, that graduation rates shall include students who transfer; or (c) an average 3 year cohort default rate that is not more than 66 20%, as most recently reported by the U.S. Department of Education. The board of higher 67 education shall promulgate rules and regulations to implement this paragraph including, but not 68 limited to, procedures and processes for annually determining which postsecondary educational 69 institutions meet the requirements of this paragraph, and a process for an institution to appeal a 71 determination that they do not meet the necessary requirements. The board of higher education shall annually post a list of institutions that meet the requirements of this paragraph on the department of higher education's website. No state scholarship funds under this section, any 73 74 other section of this chapter, or other state student financial aid however provided, that is made available to, or on behalf, of any student enrolled in any for-profit postsecondary educational 75 institution shall be used for purposes of marketing or advertising. 76

SECTION 6. Chapter 15A of the General Laws is hereby amended by inserting after section 42, the following section:-

79 Section 43. There shall be a Partnership to Advance Collaboration and Efficiency, herein referred to as PACE. The purposes of PACE shall be to foster collaborations that promote 80 operational efficiencies, cost savings, increased productivity, and increase and enhance high 81 quality higher education opportunities for residents of the commonwealth at the public 82 83 institutions of higher education set forth in section 5. Initiatives undertaken by PACE shall include, but not be limited to, cooperative efforts directed at increasing joint purchasing, expanding shared services, increasing innovative measures for delivering higher education, and 85 86 enhancing academic opportunities for students. PACE shall be governed by a steering 87 committee consisting of the following: the president of the university of Massachusetts; 2 88 persons from the university of Massachusetts appointed by the president to serve for terms not 89 exceeding 4 years, as the president may determine; 3 presidents of the state universities to be selected by vote of the presidents of the 9 state universities conducted at least once every 4 years; 90 3 presidents of the community colleges to be selected by vote of the presidents of the 15 91 community colleges to be conducted at least once every 4 years; and the commissioner of higher 92 education. Notwithstanding any general of special law to the contrary, the steering committee 94 may hire staff, enter into contracts, interagency or other agreements, apply for federal, state, or 95 other grants, establish subcommittees, and do whatever it deems necessary to carry out the purposes of PACE. The steering committee shall annually submit, on or before March 1, to the 96 97 joint committee on higher education and the house and senate committees on ways and means a report detailing the results of all PACE initiatives undertaken during the prior year. Monies 98 saved as a result of initiatives undertaken pursuant to this section shall supplement, not offset, or 99

reduce state appropriations provided to the university of Massachusetts, the state universities, and the community colleges, and shall be used by the institutions to reduce the cost of education for students attending these institutions. 102

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103 SECTION 7. Paragraph (B) of section 2 of chapter 18 of the General Laws, as amended by section 1 of chapter 65 of the acts of 2013, is hereby amended by adding the following 2 clauses:-105

(m) take all necessary actions, including connecting individuals with education opportunity coordinators established in section 5, to ensure that individuals receiving cash assistance through transitional aid to families with dependent children may engage in community college programs where assessment shows their chances of achieving long-term careers will improve.

111 (n) annually file a report with the chairs of the joint committee on higher education, the joint committee on children, families, and persons with disabilities, and the house and senate 112 committees on ways and means that shall include, but not be limited to:- (1) information 113 114 regarding the efficacy of community college placements in developing careers for recipients of 115 cash assistance; (2) the number of recipients enrolled in certificate or two-year degree programs 116 at community colleges; (3) the number of recipients enrolled in a certificate or two-year degree program receiving grants under the TAFDC Career Pathways Trust Fund established in section 117 2LLLL of chapter 29; (4) graduation rates of recipients of cash assistance enrolled full time in a 118 119 certificate or two-year degree program; (5) employment rates of former recipients 6 months after completing a degree or certificate program; and (6) employment rates of former recipients 1 year 120 after completing a degree or certificate program. No personal identifying information shall be 121

- used in the report. The first report shall be filed on or before August 1 two years after the
 TAFDC Career Pathways Trust Fund is established and annually, on or before August 1, after
 that.
- SECTION 8. Section 5 of said chapter 18, as so appearing, is hereby amended by adding the following paragraph:-
- 127 The commissioner shall establish education opportunity coordinator positions within the 128 department. The coordinators shall work with recipients of cash assistance through transitional 129 aid to families with dependent children who enroll in community colleges for the purpose of earning a certificate or two-year degree. The coordinators shall work with recipients, community colleges, and case managers. Coordinators shall provide focused assistance to recipients 131 including but not limited to developing career plans, identifying a program of study, accessing 133 financial aid and work study, and helping obtain other supports such as childcare and 134 transportation assistance. The commissioner shall enter into a memorandum of understanding 135 with the community colleges to ensure coordinators execute the duties of this paragraph. Each 136 community college shall have at least 1 on-campus coordinator.
- SECTION 9. Chapter 29 of the General Laws is hereby amended by inserting after section 2KKKK the following section:-
- 2LLLL. (a) There is hereby established and set up on the books of the commonwealth a
 separate fund to be known as the TAFDC Career Pathways Trust Fund, hereinafter referred to as
 the fund, to which shall be credited any appropriations, bond proceeds or other monies
 authorized by the general court and specifically designated to be credited thereto. Middlesex
 Community College, hereinafter referred to as the college, shall hold the fund in an account or

accounts separate from other funds or accounts; provided, however, that the fund shall be
administered by the Massachusetts Community Colleges Executive Office. Appropriations
unexpended at the end of the fiscal year shall remain in the fund and may be expended without
further appropriation.

- (b) The fund shall be used to provide and fund employment opportunities for students
 enrolled full time in a certificate or two-year associate's degree program at any community
 college who receive cash assistance under transitional aid to families with dependent children.
- (c) Funds shall be expended to reimburse or pay students receiving cash assistance under transitional aid to families with dependent children and enrolled full time in a certificate or two-year associate's degree program at any community college, provided students may continue to qualify for reimbursement or payment for up to 3 months after the student's cash assistance under transitional aid to families with dependent children expires if the student is still matriculated.
- (d) Funds expended shall, to the greatest extent feasible, be for jobs at an off-campus community service placement as defined in subsection (f), at the college the student attends, or that provide career development opportunities. For any funds expended for profit-making off-campus employers, said employer shall conduct business in the commonwealth and shall, to the greatest extent feasible, provide demonstrable benefit to the student's academic or vocational pursuits.
- (e) The share from funds distributed shall not exceed 80 percent of the total compensation paid to students, with the exception of off-campus community service placements as defined in subsection (f). Employers shall pay the costs of any employee benefits including all payments

due as an employer's contribution under the state workman's compensation laws, federal Social Security laws, and other applicable laws. The federal work-study program shall not be used to provide the employer's share of student compensation.

- 169 (f) An off-campus community service placement shall include direct service planning, career development, or applied research that is designed to improve the quality of life for 170 residents of the community served, particularly low-income residents, in such fields as health 171 172 care, child care, education, literacy training, welfare, social services, public safety, crime 173 prevention and control, transportation, recreation, housing and neighborhood improvement, rural development, and community improvement. Placements shall be identified by the college 174 175 through formal or informal consultation with local nonprofit, governmental, and community-176 based organizations.
- The placement shall not be at an organization for whom a substantial portion of its mission is political activities, including but not limited to electing candidates, influencing ballot questions, and raising money for political campaigns.
- (g) Students shall be paid the rate of pay as compared to entry-level salaries and wages
 provided other employees engaged in similar work, provided total applicant resources shall be
 considered to ensure to the maximum extent feasible that students may remain qualified for other
 federal and state public assistance programs. The office may make reasonable adjustments to
 salaries and wages to maximize a student's participation in other federal and state public
 assistance programs.
- 186 (h) Funds shall not be expended under the program to compensate students for hours
 187 worked in excess of an average of 15 hours per week over the period of enrollment or 30 hours

per week during vacation period. A student shall not be concurrently employed in the same position by the fund and the federal work-study program and exceed the 15 hours per week average.

- (i) Students may receive academic credit for work experience gained through fund jobs.
- (j) Students who fail to remain on target to graduate or earn a certificate in the regular
 duration of a full-time student may no longer be eligible for monies from the fund, subject to the
 discretion of the commissioner.
- (k) Notwithstanding any general or special laws to the contrary, monies received from the
 Massachusetts TAFDC Career Pathways Trust Fund established in Section 2LLLL of chapter 29
 of the General Laws shall not count against a recipient's income, assets, or any other eligibility
 standard in qualifying for cash assistance benefits.
- (l) The college and the board of higher education shall enter a memorandum of understanding to ensure that funds are properly expended and disbursed. The college shall enter into agreements with employers, community colleges, the department of transitional assistance, and others for the operation of the fund. These agreements shall include such provisions as the office may deem necessary or appropriate to carry out the purposes of this section. These agreements shall be made available to the board upon request.
- SECTION 10. The second sentence of section 2SSS of chapter 29 of the General Laws, as appearing in the 2012 Official Edition, is hereby amended by inserting, in line 5, after the word "accredited", the words:- public or nonprofit.

SECTION 11. Section 2SSS of said chapter 29, as so appearing, is hereby amended by
striking out the penultimate sentence, in lines 23-25, inclusive, and inserting in place thereof the
following sentence:- The amount of the award shall be applied towards student financial need in
excess of the financial need met by other federal and state grants without regard to the amount
that may be available through loans.

- SECTION 12. Paragraph (2) of section 2 of chapter 62 of the General Laws, as appearing in the 2012 Official Edition, is hereby amended by inserting after subparagraph (Q) the following subparagraph:-
- 216 (R) Amounts received by an employee paid by the employer as contributions to a prepaid 217 tuition program or college savings program established by the commonwealth or any 218 instrumentality or authority thereof held by the employee if the contributions are made pursuant 219 to section 82 of chapter 63 of the General Laws. The amount excluded from the gross income of 220 an employee for the taxable year shall not exceed \$1,000.
- SECTION 13. Paragraph (b) of Section 3 B of said chapter 62, as so appearing, is hereby amended by inserting after subparagraph (16) the following subparagraph:-
- 17) In the case of single individual person or married person filing a separate return or a head of household whose gross income does not exceed \$150,000, either a deduction or a tax credit in an amount equal to the amount expended in a taxable year for the purchase of an interest in, or contributed in a taxable year to an account in, a prepaid tuition program or college savings program established by the commonwealth or any instrumentality or authority thereof; provided, that the total amount deducted in a taxable year shall not exceed \$5,000, and in the case of a tax credit, the tax credit shall not exceed \$1,250. In the case of a married couple filing a joint return

whose gross income does not exceed \$300,000, either a deduction or a tax credit in an amount 231 equal to the amount expended in a taxable year for the purchase of an interest in, or contributed 232 in a taxable year to an account in, a prepaid tuition program or college savings program established by the commonwealth or any instrumentality or authority thereof; provided, the total 233 234 amount deducted in a taxable year shall not exceed \$10,000, and in the case of a tax credit, the 235 tax credit shall not exceed \$2,500.

236 SECTION 14. Chapter 62 of the General Laws is hereby amended by inserting after 237 section 6N, the following section:-

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Section 6O. A person filing an individual or joint return may elect to have any refund to which the person is entitled electronically deposited in an account in a prepaid tuition or college savings program established by the commonwealth or any instrumentality or authority thereof.

A deposit under this section may be made with respect to any taxable year at the time of 242 filing a return of the tax established by this chapter for the taxable year. The commissioner shall 243 prescribe the manner in which the deposit shall be made on the face of the return required by 244 section 5 of chapter 62C. The commissioner shall consult with the Massachusetts Educational 245 Financing Authority in carrying out this section.

246 SECTION 15. Chapter 63 of the General Laws is hereby amended by inserting after 247 section 81, the following section:-

Section 82. A taxpayer who, during the taxable year, makes a contribution to a prepaid tuition program or college savings program established by the commonwealth or any instrumentality or authority thereof in an amount matching a contribution to said programs made in the same taxable year by any employee of the taxpayer whose income does not exceed 200 per 252 cent of the federal poverty level shall be allowed a credit against the tax liability imposed under 253 this chapter in an amount equal to 25 per cent of that matching contribution, but not to exceed 254 \$1,000 per contributing employee per taxable year. For partners, shareholders of Subchapter S corporations, and owners of limited liability companies, if the liability company is treated as a 255 256 partnership for purposes of federal and State income taxation, there is allowed a credit pursuant 257 to this section to be determined in accordance with the determination of income and distributive share of income according to this chapter and Subchapter S of the Internal Revenue Code. If the 258 amount of the credit exceeds the tax liability for the year, the excess may be carried forward and 259 260 applied to the tax liability of the 5 taxable years following the excess credit year. The tax credit shall be applied to the earliest year for which there is a tax liability. If there are credits for more 261 than one year that are available to offset a liability, the earlier credit shall be applied first. 262

SECTION 16. Chapter 69 of the General Laws is hereby amended by inserting after section 1N the following section:-

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Section 1O. To equip students with the knowledge and skills needed to become self-supporting and to enable students to make critical decisions regarding personal finances, the department of elementary and secondary education shall authorize and assist in the implementation of standards and objectives on personal financial literacy. The components of personal financial literacy covered in the standards and objectives shall include: understanding loans, borrowing money, interest, credit card debt, and online commerce; rights and responsibilities of renting or buying a home; saving, investing and planning for retirement; banking and financial services; balancing a checkbook; state and federal taxes; paying for postsecondary education; and charitable giving.

274 The department, in consultation with the advisory committee established under Section 200 (b) of chapter 138 of the Acts of 2012, shall develop standards and objectives on personal 275 financial literacy, for grades pre-kindergarten to 12, inclusive, within the existing mathematics 276 curriculum for implementation by the start of the 2016-2017 school year. The department shall 277 make available to school districts, charter schools, approved private day or residential schools, 278 279 and collaborative schools a list of resources to aid in the selection of materials and curriculum on 280 personal financial literacy. The department shall identify and offer information on cost-effective methods for fulfilling the professional development activities needed to implement said 281 282 standards and objectives. The department may consult with private, nonprofit, or other 283 government institutions in order to identify and offer said information. The department may 284 apply for any federal, state, or other funding, including funding available through the Financial 285 Literacy Trust Fund, as established by section 35QQ of chapter 10 of the General Laws, as amended by Chapter 14 of the Acts of 2011. 286

SECTION 17. Item 7066-0019 of section 2 of chapter 165 of the Acts of 2014, is hereby amended by inserting at the end thereof the following:- provided, further that funds appropriated herein shall remain available for expenditure until June 30, 2016; and in said item by striking out the figures "750,000" and inserting "4,250,000".

SECTION 18. Item 7066-1221 of section 2 of chapter 165 of the Acts of 2014, is hereby amended by inserting at the end thereof the following:-; provided, further that not less than \$1,500,000 shall be expended for matching grants for credit bearing vocationally oriented courses; provided, further that funds appropriated herein shall remain available for expenditure until June 30, 2016; and in said item by striking out the figures "1,450,000", and inserting "2,950,000".

297	SECTION 19. Item 7070-0066 of section 2 of chapter 165 of the Acts of 2014, as
298	amended by Chapter 188 of the Acts of 2014, is hereby amended by inserting at the end thereof
299	the following:-; provided, further that not less than \$3,000,000 shall be expended on the
300	scholarship program for in-demand professions; and provided, further that funds appropriated
301	herein shall remain available for expenditure until June 30, 2016; and in said item by striking out
302	the figures "2,000,000", and inserting "3,000,000".
303	SECTION 20. Section 2 of Chapter 165 of the Acts of 2014, is hereby amended by
304	adding the following items:
305	Department of Transitional Assistance
306	4400-XXXX For education opportunity coordinators established in section 5 of chapter
307	18 of the General Laws, as inserted by this act, to assist recipients of transitional aid to families
308	with dependent children in earning a community college certificate or associate's degree;
309	provided, that funds appropriated herein shall remain available for expenditure until June 30,
310	2016\$1,250,000
311	Department of Elementary and Secondary Education
312	XXXX-XXXX For the development and implementation of standards and curriculum
313	on financial literacy; provided, that funds appropriated herein shall remain available for
314	expenditure until June 30, 2016\$1,000,000
315	Department of Higher Education
316	7066-0115 For the purposes of continuing the implementation of section 15E of chapter
317	15A of the General Laws to encourage private fundraising by the commonwealth's public

318	institutions of higher education for the endowment and capital outlay programs of those
319	institutions; provided, that the board of higher education shall implement this program in a
320	manner which ensures that each institution shall have an opportunity to secure matching funds
321	from this item; provided further, that \$10,000,000 shall be allocated to the university of
322	Massachusetts; provided further, that \$5,000,000 shall be allocated to state universities; provided
323	further, that \$5,000,000 shall be allocated to community colleges; provided further, that if any
324	funds allocated herein for disbursement to state universities and community colleges shall be
325	unused, the remaining funds shall be made available to the university of Massachusetts; provided
326	further, that, to the greatest extent possible, the state universities, community colleges, and the
327	university of Massachusetts shall utilize the funds to increase the number of scholarship
328	opportunities for students; and provided further, that funds appropriated herein shall remain
329	available for expenditure until June 30, 2017\$20,000,000
330	XXXX-XXXX For the Education Rewards Grant Program Fund established by section
331	2SSS of chapter 29 of the General Laws; provided, that funds appropriated herein shall remain
332	available for expenditure until June 30, 2016\$1,500,000
333	XXXX-XXXX For the Licensed Certified Social Worker Student Education Loan
334	Repayment Pilot Program Trust Fund established by this act; provided, that funds appropriated
335	herein shall remain available for expenditure until June 30, 2016\$1,200,000
336	XXXX-XXXX For the Massachusetts Educational Financing Authority to assist in
337	carrying out the early college planning and financing efforts being undertaken by the Authority,
338	and the lower income family postsecondary education savings incentive matching grant pilot
339	program established by this act; provided, that not less than \$1,500,000 shall be expended for the

340	lower income family postsecondary savings incentive matching grant pilot program and shall be
341	credited to the Lower Income Family Postsecondary Education Savings Incentive Matching
342	Grant Pilot Program Trust Fund established by this act; provided, further that funds appropriated
343	herein shall remain available for expenditure until June 30, 2016\$2,500,000
344	XXXX-XXXX For the Completion Grant Incentive Fund Pilot Program established by
345	the board of higher education to increase the graduation and success rates of low income students
346	who are enrolled in certificate or degree programs by providing incentive grants to persist and to
347	complete their degree or certificate program of study over a maximum of four years; provided,
348	further that funds appropriated herein shall remain available for expenditure until June 30, 2016
349	\$3,000,000
350	XXXX-XXXX For a pilot program to be established by the Massachusetts Educational
351	Financing
352	Authority in accordance with section 5 of Chapter 15C of the General Laws to assist in
353	refinancing higher education loans financed through the Authority that have higher interest rates;
354	provided, further that funds appropriated herein shall remain available for expenditure until June
355	30, 2016\$10,000,000
356	XXXX-XXXX For the development and implementation of the transfer system required
357	by section 9 (hh) of chapter 15A of the General Laws, as inserted by this act; provided, further
358	that funds appropriated herein shall remain available for expenditure until June 30, 2016
359	\$2,500,000
360	XXXX-XXXX For a community colleges internship incentive grant program to be
361	administered by the department of higher education; provided, that the commonwealth shall

362 contribute funds to each community college in an amount to match private contributions in each fiscal year; provided further, that the commonwealth's contribution shall be equal to \$1 for every 363 \$1 privately contributed to each community college's board of trustees or foundation; provided 364 further, that the maximum total contribution from the commonwealth shall be no greater than the 365 amount appropriated herein; provided further, that funds from this program shall not result in any 366 367 direct or indirect reduction in the commonwealth's appropriation to the institution's operations, scholarships, financial aid or any state appropriation; provided further, the department of higher 368 education shall establish guidelines and criteria for the administration of the program; and 369 370 provided, further that funds appropriated herein shall remain available for expenditure until June 30. 2016.....\$2.000.000 371

Community Colleges

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SECTION 21. (a) There shall be a licensed certified social worker student education loan repayment pilot program, hereinafter referred to as the pilot program, for the purpose of increasing and retaining access to child welfare services and social services in the commonwealth. The pilot program shall provide financial assistance to eligible program participants to assist them in repaying student education loans, as defined in this section;

384 provided, that the pilot program shall be limited to a total of 100 licensed certified social 385 workers. The pilot program shall be administered by the board of higher education established under section 4 of chapter 15A of the General Laws. The board, in collaboration with the 386 executive office of health and human services, shall promulgate guidelines governing the pilot 387 388 program. The guidelines shall include, but need not be limited to, the following provisions: (1) 389 eligibility shall be limited to persons with incomes that do not exceed 500% of the federal 390 poverty level; (2) eligibility shall be limited to persons entering the field of social work after July 1, 2014; (3) eligibility shall be limited to social workers who are licensed certified social workers 391 392 as defined in section 130 of chapter 112 of the General Laws and who are employed in child welfare, or in a geographic or programmatic setting defined as high need under the guidelines 393 394 governing the pilot program; (4) the commonwealth shall repay a student education loan at a rate 395 not to exceed \$250 per month for a period not to exceed 48 months; (5) payments by the commonwealth shall be made directly to the lender on behalf of a pilot program participant, and 396 397 shall cover only loan payments owed by the participant in the months during which the 398 participant works in the commonwealth as a licensed certified social worker in child welfare, or 399 in a geographic or programmatic setting defined as high need under pilot program guidelines; (6) 400 procedures for selecting 100 pilot program participants among eligible applicants; and (7) 401 measures to deal with situations in which a pilot program participant ceases to comply with 402 program requirements. For the purposes of this section, the term student education loan shall 403 mean any indebtedness, including interest on such indebtedness, incurred to pay tuition, fees or other direct expenses incurred in connection with the pursuit of an undergraduate or graduate 404 405 degree by an applicant, but shall not include loans made by any person related to the applicant, 406 or loans paid by credit card.

- 407 (b) There is hereby established and set up on the books of the commonwealth a separate 408 fund to be known as the Licensed Certified Social Worker Student Education Loan Repayment 409 Pilot Program Trust Fund, hereinafter referred to as the Licensed Certified Social Worker Education Loan Repayment Fund, to which shall be credited any appropriations or other monies 410 411 authorized by the general court and designated to be credited thereto. The board of higher 412 education shall hold the Licensed Certified Social Worker Education Loan Repayment Fund in an account separate from other funds or accounts. Amounts credited to the Licensed Certified 413 Social Worker Education Loan Repayment Fund shall be used, without further appropriation, by 415 the commissioner of higher education or his designee, to carry out the licensed certified social worker student education loan repayment pilot program established in this section.
- shall expire once the final payment is made under this section by the board of higher education on behalf of all pilot program participants. The board of higher education shall evaluate the effectiveness of the pilot program and its benefits and costs to the commonwealth and shall submit a report, together with its recommendations on whether a permanent program should be established and if so how such program should be structured, to the house and senate committees on ways and means and the joint committee on higher education, not less than one year prior to the expiration of the pilot program.
- SECTION 22. (a) Notwithstanding any general or special law to the contrary, a portion of the Educational Rewards Grant Program Fund established by section 2SSS of chapter 29 of the General Laws, as determined by the department of workforce development and the board of higher education, shall be used for a "Supports for Success" pilot program to assist grant recipients complete their degree or certificate programs; provided, that supports provided

through said pilot may include, but need not be limited to, intensive advising and counseling, college and career success courses, work study jobs in the students' field of study, learning communities, curricula redesign to support blended or accelerated remediation, mentoring or tutoring, and child care and transportation assistance.

434 (b) On or before December 1 of each year, the department of workforce development and the board of higher education shall submit to the chairs of house and senate committees on 435 ways and means and the chairs of the joint committee on higher education a report on use in the 436 prior fiscal year of the Educational Rewards Grant Program Fund established by section 2SSS of 437 438 chapter 29 of the General Laws; provided, that such report shall include, but need not be limited 439 to, the number of grants awarded, the amount of each grant, the level of educational attainment 440 of grant recipients before the grant was awarded, degrees and certificates awarded to recipients, 441 recipient demographic information, recipient retention rates while receiving the grant, and 442 analysis of the strengths and areas of needed improvement in the Educational Rewards Grant Program and the "Supports for Success" pilot program and recommendations for such 443 improvements. 444

445 SECTION 23. (a) Notwithstanding any general or special law to the contrary, the board of higher education shall establish a pilot program to promote student employment partnerships 446 between graduates of public and private institutions of higher education in the state and the 447 state's business community. The board shall establish rules and regulations governing the 448 449 implementation and administration of the pilot program, including, but not limited to, any 450 income eligibility requirements for participating students. The pilot program shall consist of not 451 more than 3 public institutions of higher education and not more than 2 private institutions of higher education in the state, and not more than 5 business entities in the state selected by the 452

board of higher education in consultation with the secretary of housing and economic
development. Business entities may consist of, but need not be limited to, employers from the
financial services, life sciences, high technology, and health care industries. Not more than 100
students may participate in the pilot program. Students eligible to participate in the program
shall be in good academic standing at one of the institutions selected to participate in the
program, and must have obtained fifty percent or more of the credits needed to graduate.

- (b) Business entities selected to participate in the pilot program shall supplement a percentage of a participating student's tuition and fees, and in providing this assistance shall receive a 20% state income tax credit on the first \$5,000 of tuition and fees paid by the participating business entity. In exchange for receiving tuition and fee assistance from a participating entity, graduating students shall agree to work in the state for the business entity for an agreed upon period of time, which shall not exceed 24 months. In the event a participating student is unable to perform work for the business entity upon graduation, the student shall refund all or a portion of the financial assistance provided by the business entity, unless the student's failure to perform is based upon a condition or conditions set forth by the board, including, but not limited to, the inability of the business entity to provide the agreed upon employment. If upon a participating student's graduation, the business entity is not able to provide the agreed upon employment for the student, the business entity shall reimburse the state for the amount of the tax credit the business entity received for the student.
- 472 (c) Not later than 3 years after the commencement of the pilot program, the board of
 473 higher education shall file a report with the house and senate committee on ways and means, and
 474 the joint committees on higher education, and revenue detailing the results of the pilot program
 475 and any recommendations as to whether the program should be continued or expanded.

- SECTION 24. (a) As used in this section, the following words shall, unless the context otherwise requires, have the following meanings:
- 478 (1) "Application", an application for a matching grant under the pilot program.
- 479 (2) "Authority", the Massachusetts Educational Financing Authority established under 480 Chapter 803 of the Acts of 1982, as amended.
- 481 (3) "Federal poverty level", the most recent poverty income guidelines published in the 482 calendar year by the U.S. Department of Health and Human Services.
- 483 (4) "Participant", a qualified individual or family who has been approved for a matching 484 grant under the pilot program.
- 485 (5) "Pilot Program", the lower income family postsecondary education savings incentive 486 matching grant pilot program established by this section.
- 487 (6) "Qualified individual or family", an individual or family who resides within the state 488 of Massachusetts and whose household income is not more than 250% of the federal poverty 489 level for the tax year prior to the year in which the application is submitted.
- (b) There shall be a lower income family postsecondary education savings incentive matching grant pilot program. The purpose of the pilot program is to help lower income individuals and families save for postsecondary education through prepaid tuition programs or college savings accounts established by the Authority by providing a state matching grant for the savings.
- (c) The Authority shall:

- 496 (1) Implement and administer the pilot program;
- 497 (2) Develop marketing plans and promotional material for the pilot program;
- 498 (3) Prescribe the procedure for, and requirements relating to, the submission and 499 approval of applications;
- 500 (4) Do all things necessary and proper to carry out the purposes of this section; and
- 501 (5) Adopt any rules and regulations and policies deemed necessary for implementation and administration of the pilot program.
- (d) Applications shall be submitted to the Authority in the manner and form required by the Authority. Applications shall be accompanied by any information deemed necessary by the Authority. Applications, with proof of income, must be submitted each year using the applicant's household income from the previous tax year.
- 507 (e) The Authority may approve up to a total of 250 applications. Applications shall be 508 approved on a first come, first served basis. The Authority shall provide written notice, to an 509 applicant, of the approval or non-approval of the person's application.
- f) The amount of contributions made to an account by a participant who establishes a prepaid tuition program or college savings account with the Authority shall be matched by the state if the participant contributes at least \$150 during the calendar year for which the application has been approved. The aggregate of all matching amounts for any participant shall not exceed \$1,000 in any calendar year.

- 515 (g) The Authority shall deposit in the prepaid tuition program or college savings account 516 of each participant the amount determined by the Authority to meet the matching obligation due 517 to the participant under subsection (f) for the preceding calendar year.
- 518 (h) The Authority shall ensure that all withdrawals of matching funds are used for 519 postsecondary education.
- 520 (i) Not later than 5 years after the commencement of the pilot program, the Authority
 521 shall submit to the secretary of administration and finance, the house and senate committees on
 522 ways and means, and the joint committee on higher education a report evaluating the impact of
 523 the pilot program. The report shall include the number of accounts opened under the pilot
 524 program, the amount of moneys contributed to accounts by the participants, the average income
 525 of the participants, an analysis of the success of the pilot program in meeting the purpose of the
 526 pilot program, a recommendation as to whether the pilot program should be continued or
 527 expanded, and any other information deemed appropriate by the Authority.
- 528 (j) Notwithstanding any general or special laws to the contrary, monies deposited in a 529 prepaid tuition program or college savings account established under this section shall not count 530 against any recipient's income, assets, or any other eligibility standard in qualifying for any 531 benefits under Transitional Aid to Families with Dependent Children, or other state programs.
- (k) There is hereby established and set up on the books of the commonwealth a separate fund to be known as the Lower Income Family Postsecondary Education Savings Incentive Matching Grant Pilot Program Trust Fund, hereinafter referred to as the fund, to which shall be credited any appropriations, bond proceeds or other monies authorized by the general court and specifically designated to be credited thereto. The Authority, shall hold the fund in an account or

accounts separate from other funds or accounts. Amounts credited to the fund shall be used by
the Authority, without further appropriation, to carry out the lower income family postsecondary
education savings incentive matching grant pilot program. Appropriations unexpended at the
end of the fiscal year shall remain in the fund and may be expended by the Authority without
further appropriation.

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SECTION 25. The department of higher education shall study and make recommendations on the "Pay It Forward, Pay It Back" concept for financing postsecondary education whereby, in lieu of paying any tuition or fees, students would sign a binding commitment to pay the state or the state's public higher educational institutions a certain percentage of their annual income for a specified number of years following graduation. The study shall examine the desirability and feasibility of establishing a program to implement the concept in the commonwealth at the state's public higher education institutions, and shall include, but not be limited to, the following: the costs, sources of funding, including, but not limited, state appropriations, use of state bond funds, or pooling of private investment funds, impact on students, and the impact on existing state funding for the operation of the state's public higher education institutions, and on state scholarships and grants. The department shall also ascertain the impact any state laws, including, but not limited to, the state constitution and case law regarding annual appropriations of state funds, pledge of the commonwealth's credit, and the ability of one legislature to bind future legislatures would have on the feasibility of a establishing and funding a program to implement the concept in the state. In so doing, the department shall consult with persons it deems necessary, including, but not limited to, the state's bond counsel and the Massachusetts Educational Financing Authority. The department shall report its findings and recommendations to the board of higher education, the joint

560 committee on higher education, and the house and senate committees on ways and means on or before December 31, 2015. 561

562 SECTION 26. Notwithstanding any general or special law to the contrary, the commonwealth shall appropriate in addition to the amounts provided for the ordinary 563 maintenance of the university of Massachusetts, the state universities, and the community 564 colleges in line items 7100-0200, 7109-0100, 7110-0100, 7112-0100, 7113-0100, 7114-0100, 565 7115-0100, 7116-0100, 7117-0100, 7118-0100, 7502-0100, 7503-0100, 7504-0100, 7505-0100, 566 567 7506-0100, 7507-0100, 7508-0100, 7509-0100, 7510-0100, 7511-0100, 7512-0100, 7514-0100, 7515-0100, 7516-0100, 7518-0100 in the general appropriations act for fiscal year 2015, the total 568 569 amount of such appropriations shall be increased as follows: in fiscal year 2016, by a total of not 570 less than an additional \$95,000,000; in fiscal year 2017, by a total of not less than an additional 571 \$95,000,000; in fiscal year 2018, by a total of not less than an additional \$95,000,000; in fiscal 572 year 2019, by a total of not less than an additional \$95,000,000; and in fiscal year 2020, by a total of not less than an additional \$95,000,000. The dollar amounts specified in this paragraph 573 shall be increased to reflect any increases in inflation and collective bargaining increases. If the 574 575 additional funds required under this paragraph are provided in each fiscal year to the university of Massachusetts, the state universities, and the community colleges, each institution receiving 577 sufficient additional funding shall freeze tuition and mandatory curriculum fee increases for the 578 academic year during which the funding is provided.

579 SECTION 27. Notwithstanding any general or special laws to the contrary, the commonwealth shall appropriate in addition to the amount provided for scholarships and 580 financial aid in line item 7070-0065 in the general appropriations act for fiscal year 2015, the total amount of such appropriation shall be increased as follows: in fiscal year 2016, by a total 582

of not less than an additional \$42,000,000; in fiscal year 2017, by a total of not less than an additional \$42,000,000; in fiscal year 2018, by a total of not less than an additional \$42,000,000; in fiscal year 2019, by a total of not less than an additional \$42,000,000; and in fiscal year 2020, by a total of not less than an additional \$42,000,000. The additional funding required by this paragraph shall be made available for the so-called MASSGrant program administered by the board of higher education.

589 SECTION 28. The house and senate committees on ways and means, in consultation with the presidents of the state universities, the board of higher education, the executive office 591 for administration and finance, and the joint committee on higher education, shall develop a 592 funding formula to determine the allocation of state appropriations in the annual state budget to 593 the individual state universities. The formula shall consist of two parts: base funding and 594 performance funding. Base funding shall be based upon and allocated on factors relating to 595 enrollment and the cost of education. Performance funding shall be based upon and allocated on 596 factors relating to outcomes. The outcome afforded the most weight for performance funding shall be increasing the number of students who complete their degrees; provided that, additional 597 598 points shall be given for graduating students who might have been considered at-risk of not 599 completing their education, including students from lower income households, African-600 Americans students, Latino students, adult students, students with severe disabilities, and those 601 who may have been less academically prepared upon entry. Additional performance outcomes as deemed relevant may be included in the formula. The funding formula may be updated as 602 603 needed from time to time, and shall be available for use commencing with the fiscal year 2016 604 annual budget.

605 SECTION 29. The president of the university of Massachusetts, in consultation with the 606 chair of the board of trustees of the university and the chancellors of the campuses, shall develop a funding formula to determine the allocation of state appropriations received by the university in 607 the annual state budget to the individual campuses that includes, but is not limited to, 608 performance funding. Performance funding shall be based upon and allocated on factors relating 609 610 to outcomes. The outcome afforded the most weight for performance funding shall be increasing the number of students who complete their degrees; provided that, additional points shall be 611 given for graduating students who might have been considered at-risk of not completing their education, including students from lower income households, African-American students, Latino students, adult students, students with severe disabilities, and those who may have been less academically prepared upon entry. Additional performance outcomes may be included in the 615 formula as deemed relevant to the mission of the university.

SECTION 30. Notwithstanding any general or special law to the contrary, all tuition received by the board of trustees of the university of Massachusetts paid by students attending the University of Massachusetts at Worcester who reside in the state shall be retained by the board of trustees in a revolving trust fund and shall be expended as the administration of the University of Massachusetts at Worcester directs in accordance with regulations established by the board. Any balance in the trust fund at the close of the fiscal years shall be available for expenditures in subsequent fiscal years and shall not revert to the General Fund. For any employees of the University of Massachusetts at Worcester who are paid from tuition retained pursuant to this section, fringe benefits shall be funded as if those employees' salaries were supported by state appropriations. This section shall apply only to fringe benefits associated

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with salaries paid from tuition retained by the board of trustees of the University of Massachusetts as a direct result of the implementation of this section.

SECTION 31. To provide for a program of capital improvements to public higher education institutions to provide support for these institutions in carrying out their educational missions and to enhance regional economic development through their educational initiatives, the sums set forth in this section, for the several purposes and subject to the conditions specified in this act, are hereby made available, subject to the laws regulating the disbursement of public funds, which sums shall be in addition to any other amounts previously appropriated for these purposes.

EXECUTIVE OFFICE FOR ADMINISTRATION AND FINANCE

Division of Capital Asset Management and Maintenance

7066-XXXX For costs associated with planning and studies, dispositions, acquisition of land and buildings and interests therein by purchase or by eminent domain under chapter 79 of the General Laws and for the preparation of plans and specifications, repairs, construction, renovations, improvements, maintenance and repair, asset management and demolition at the state universities and community college campus facilities and grounds; provided, that all projects approved for design and construction by the division of capital asset management and maintenance for the state universities and community colleges shall be consistent in priority and need with capital master plans developed by the division of capital asset management and maintenance, in consultation with the presidents of the state universities and community colleges and approved by the board of higher education; and provided further, that all maintenance and

repair work funded by this item shall be included in the capital asset management information system administered by the division of capital asset management.....\$2,100,000,000

650 7100-XXXX For costs associated with planning and studies, dispositions, acquisition of land and buildings and interests therein by purchase or by eminent domain under chapter 79 of 651 652 the General Laws and for the preparation of plans and specifications, repairs, construction, renovations, improvements, maintenance and repair, asset management and demolition at the 653 654 university of Massachusetts campus facilities and grounds; provided, that all projects approved for design and construction by the division of capital asset management and maintenance for the 655 university of Massachusetts shall be consistent in priority and need with capital master plans 656 657 developed by the university of Massachusetts and approved by the board of trustees of the 658 university of Massachusetts; and provided further, that all maintenance and repair work funded 659 by this item shall be included in the capital asset management information system administered by the division of capital asset management\$2,100,000,000 660

SECTION 32. To meet the expenditures necessary in carrying out section 31, the state treasurer shall, upon request of the governor, issue and sell bonds of the commonwealth in an amount to be specified by the governor from time to time but not exceeding, in the aggregate, \$4,200,000,000. All bonds issued by the commonwealth as aforesaid shall be designated on their face, Public Higher Education Capital Expenditure Act of 2015, and shall be issued for a maximum term of years, not exceeding 30 years, as the governor may recommend to the general court under section 3 of Article LXII of the Amendments to the Constitution. The bonds shall be payable not later than June 30, 2054. All interest and payments on account of principal on these obligations shall be payable from the General Fund. Bonds and interest on bonds issued under

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this section shall, notwithstanding any other provision of this act, be general obligations of the commonwealth. 671

672 SECTION 33. The secretary of administration and finance shall submit a report on the progress and all expenditures related to any projects funded through the authorizations in Section 673 31 of this act to the secretary of education, the board of higher education, the chairs of the senate 674 and house committees on ways and means, the senate and house chairs of the joint committee on 675 higher education, and the chairs of the committees on Bonding, Capital Expenditures and State Assets. The report shall include, but not be limited to: the total amount appropriated for each project; the total estimated cost of each project; the amount expended for the planning and design 678 679 of each project up to the time the report is filed; the amount expended on construction of each 680 project up to the time the report is filed; the total amount currently expended on each project; the 681 estimated lifetime maintenance schedule and cost of each project; the original estimated 682 completion date of each project; and the current anticipated completion date of each project. 683 The report shall be submitted on December 31 of each year for a period of 10 years from the effective date of this act. 684

SECTION 34. (a) Notwithstanding the provisions of any general or special law to the contrary, not later than the start of the fall semester of 2016 and for each semester thereafter, if a public institution of higher education determines, by use of multiple commonly accepted measures of skill level, that a student is likely to succeed in college level work with supplemental support, the public institution of higher education shall offer the student remedial support that is embedded with the corresponding entry level course in a college level program. The embedded support shall be offered during the same semester as and in conjunction with the entry level 692 course for purposes of providing the student with supplemental support in the entry level course.

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- 693 (b) Not later than the start of the fall semester of 2016 and for each semester thereafter, if 694 a public institution of higher education determines, by use of multiple commonly accepted 695 measures of skill level, that a student is below the skill level required for success in college level 696 work, the public institution of higher education shall offer the student the opportunity to 697 participate in an intensive college readiness program before the start of the next semester. The 698 student shall complete the intensive college readiness program prior to receiving embedded 699 remedial support, as provided in subsection (a) of this section. The board of higher education, in consultation with the university of Massachusetts, the state universities, and the community 700 701 colleges, shall develop options for an intensive college readiness program.
- (c) Not later than the start of the fall semester of 2016 and for each semester thereafter,
 no public institution of higher education shall offer any remedial support, including remedial
 courses, that is not embedded with the corresponding entry level course, as required pursuant to
 subsection (a) of this section, or offered as part of an intensive college readiness program, except
 the institution may offer a student a maximum of one semester of remedial support that is not
 embedded, provided (1) the support is intended to advance the student toward earning a degree,
 and (2) the program of remedial support is approved by the board of higher education.
- (d) Not later than the start of the fall semester of 2017 and for each semester thereafter,
 board of higher education and the board of elementary and secondary education shall complete
 curricular alignment to enable the successful completion of the high school mathematics and
 language arts curricula, as described in Massachusetts Curriculum Frameworks for English
 Language Arts/Literacy and Mathematics as adopted by the board of elementary and secondary
 education, to be the indicator of readiness for college level work. A public institution of higher
 education may use available evaluation instruments to assess adults, who are returning to or first

enrolling in a higher education program at a public institution of higher education after spending time in the workforce, for readiness for college level work.

(e) Not later than the start of the school year commencing July 1, 2016, and for each school year thereafter, the board of higher education shall ensure that each public institution of higher education works with the department of elementary of secondary education and the local and regional school districts to (1) use available evaluation methods for early assessment of the potential for college readiness of each student enrolled in the eighth and tenth grades in a public school, and (2) share the results of the assessment with the student, the student's parents or legal guardian and the public school in which the student is enrolled.