
Higher Education Fiscal 2022 Budget Overview

**Department of Legislative Services
Office of Policy Analysis
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Analysis of the FY 2022 Maryland Executive Budget, 2021

Higher Education

Fiscal 2022 Budget Overview

State Funding Changes for Higher Education (\$ in Thousands)

	<u>Adjusted¹</u> <u>2020</u>	<u>Working</u> <u>Adjusted</u> <u>2021²</u>	<u>Allowance</u> <u>2022</u>	<u>Allowance</u> <u>Adjusted</u> <u>2022³</u>	<u>Adj.</u> <u>Change</u> <u>2021-2022</u>	<u>% Change</u> <u>2021-2022</u>
Public Four-year Institutions						
University System of Maryland (USM)	\$1,520,088	\$1,510,800	\$1,433,881	\$1,471,912	-\$38,888	-2.6%
Morgan State University	104,890	111,456	109,372	111,300	-156	-0.1%
St. Mary's College of Maryland	28,602	27,336	29,188	29,188	1,852	6.8%
Subtotal – Public Four-year	\$1,653,581	\$1,649,592	\$1,572,441	\$1,612,400	-\$37,192	-2.3%
Other Higher Education						
Maryland Higher Education Commission						
Administration	\$6,541	\$7,311	\$7,677	\$7,772	\$461	6.3%
Financial Aid	121,378	130,382	134,154	134,054	3,672	2.8%
Educational Grants ⁴	4,395	4,987	4,854	4,854	-133	-2.7%
College Savings Plan Match	10,157	12,466	10,068	10,068	-2,398	-19.2%
Non-USM Regional Higher Education Centers ⁵	1,410	1,410	1,410	1,410	0	0.0%
Independent Institutions	59,025	59,025	88,810	59,025	0	0.0%
Aid to Community Colleges	330,348	340,824	371,523	344,907	4,083	1.2%
Baltimore City Community College	41,004	38,698	39,880	39,880	1,183	3.1%
Subtotal – Other Higher Education	\$574,258	\$595,102	\$658,376	\$601,970	\$6,868	1.2%
Total Higher Education	\$2,227,839	\$2,244,694	\$2,230,817	\$2,214,370	-\$30,324	-1.4%
Consolidated Appropriations Act (CAA)						
Institutional Funds ⁶		\$219,771				
CAA Financial Aid ⁶		\$88,940				

¹ The 2020 adjusted includes Coronavirus Aid, Relief, and Economic Security Act State Support for the public four-year institutions and Baltimore City Community College totaling \$31.3 million.

² The 2021 working is adjusted to reflect deficiencies and a general salary increase effective January 1, 2021. The public four-year institutions and BCCC received \$28.7 million general fund deficiency funding for COVID-19 response cost reimbursements and also received \$26.7 million in reimbursable funds for public safety personnel costs. The community colleges received \$10.0 million in Governor's Emergency Education Relief grant funding to provide workforce development courses. The public four-year institutions also received \$24.2 million in bond premium funding for capital-related expenditures not included above.

³ The 2022 allowance is adjusted to include the annualization of the fiscal 2021 general salary increase and reductions contingent on the Budget Reconciliation and Financing Act.

⁴ Fiscal 2021 and 2022 includes funds to be transferred to the University of Maryland, Baltimore Campus for the Wellmobile.

⁵ Includes funds to be transferred to the University of Maryland Global Campus to administer the Waldorf Center in fiscal 2021 and 2022 by budget amendment.

⁶ The CAA funding total includes estimated funding for community colleges, public four-year institutions, and private nonprofit four-year institutions. Institutions have until September 2022 to expend the funds and, therefore, these funds may carry over to fiscal 2022. The CAA funding does not include distribution of federal enhancement funds to Historically Black Colleges and Universities, as allocations for those funds have not yet been made.

Note: Does not include pay-as-you-go funding for the Community Colleges Facilities Renewal Grant Program.

Source: Department of Budget and Management; Department of Legislative Services

Executive Summary

The Higher Education Overview provides a summary of the changes in State funding for higher education. These changes include a review of the Maryland public four-year institutions, independent institutions, aid to community colleges, and funding for Baltimore City Community College. Additionally, an evaluation of changes in funding for the Maryland Higher Education Commission, financial aid and educational grant programs, the College Savings Plan Match, and funding for non-University System of Maryland regional higher education centers is also provided.

A comparative analysis is also provided to review performance indicators against peer states. These metrics include State funding support, changes in tuition and fee levels, enrollment, outcome measures, and an evaluation of Maryland's 55% degree attainment goal. The Higher Education Overview will also provide an analysis of the impact that the COVID-19 pandemic is having on higher education as well as an update on new Title IX regulations.

Operating Budget Recommended Actions

1. Adopt narrative requesting a report on faculty workload.

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Operating Budget Overview

Fiscal 2020 Actions

The fiscal 2020 funding includes Coronavirus Aid, Relief, and Economic Security (CARES) Act State-support funding for the public four-year institutions and Baltimore City Community College (BCCC) totaling \$31.3 million.

Fiscal 2021 Actions

The fiscal 2021 adjusted working appropriation includes a general salary increase of 2%, general fund deficiencies for COVID-19 response cost reimbursements for the public four-year institutions and BCCC totaling \$28.7 million, a \$1.0 million general fund deficiency for the University System of Maryland Office to reimburse the Maryland Economic Development Corporation (MEDCO) for expenses related to MEDCO-financed residential halls, \$26.7 million in reimbursable fund deficiencies for public safety and personnel cost reimbursement (including \$0.9 million for BCCC), \$10.0 million in Governor's Emergency Education Relief grant funding for community colleges to provide workforce development courses, a \$3.5 million deficiency for the Maryland Community College Promise Scholarship, and three deficiencies for educational grants totaling \$3.1 million. The fiscal 2021 adjusted working appropriation is \$16.9 million, or 0.8%, above the fiscal 2020 adjusted.

Public four-year institutions also received \$24.2 million in special fund bond premiums for capital projects, which is not included in this analysis.

In addition to these adjustments, Maryland's public four- and two-year institutions, as well as the private nonprofit higher education institutions, will also have access to \$308.7 million in Consolidated Appropriations Act (CAA) funding through September 2022, of which \$219.8 million may be used for institutional purposes and \$88.9 million must be spent on financial aid for students. The CAA funding total also does not include distribution of federal enhancement funds to Historically Black Colleges and Universities, as allocations for those have not yet been made.

Fiscal 2022 Allowance

State support for higher education decreases \$30.3 million, or 1.4%, after accounting for the annualization of the fiscal 2021 2% general salary increase and three Maryland Higher Education Commission (MHEC) reductions contingent on legislation totaling \$56.5 million.

Funding for the State's four-year public higher education institutions, from fiscal 2017 to the fiscal 2022 adjusted allowance, is shown in **Exhibit 1**. State fiscal 2022 adjusted funds decrease 2.3%, or \$37.2 million, from the fiscal 2021 adjusted working appropriation. Coppin State University receives

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the largest decrease of 10.0%, or \$5.1 million, followed by the University of Maryland Eastern Shore at 6.9%, or \$3.0 million. These large percentage decreases are the result of these institutions receiving a large share of the \$50.5 million State Coronavirus Relief Funding that was allocated to the University System of Maryland (USM) in fiscal 2021, at 9.9%, and 6.7%, of that funding respectively, which was not part of their base appropriation in fiscal 2022. St. Mary's College of Maryland (SMCM) receives an increase of 6.8%, or \$1.9 million, as a result of its funding formula.

Exhibit 1
State Support for Public Universities
Fiscal 2017-2022
(\$ in Thousands)

<u>Institution</u>	<u>Actual</u> <u>2017</u>	<u>Actual</u> <u>2018</u>	<u>Actual</u> <u>2019</u>	<u>Adjusted</u> <u>2020</u>	<u>Adjusted</u> <u>Working</u> <u>2021</u>	<u>Adjusted</u> <u>Allowance</u> <u>2022</u>	<u>Annual</u> <u>% Change</u> <u>2017-22</u>	<u>\$ Change</u> <u>2021-22</u>	<u>% Change</u> <u>2021-22</u>
University of Maryland, Baltimore Campus	\$225,154	\$231,774	\$236,403	\$263,294	\$246,899	\$242,799	1.5%	-\$4,101	-1.7%
University of Maryland, College Park Campus	466,337	462,493	488,442	\$531,536	530,668	519,493	2.2%	-11,175	-2.1%
Bowie State University	44,830	\$44,813	46,014	49,609	47,285	46,494	0.7%	-791	-1.7%
Towson University	117,803	\$118,507	120,317	134,791	137,394	134,235	2.6%	-3,159	-2.3%
University of Maryland Eastern Shore	40,347	\$40,240	41,803	43,728	44,202	41,159	0.4%	-3,043	-6.9%
Frostburg State University	41,501	41,418	42,341	45,500	43,968	42,616	0.5%	-1,352	-3.1%
Coppin State University	47,320	46,878	47,294	49,544	50,705	45,639	-0.7%	-5,067	-10.0%
University of Baltimore	37,317	37,018	37,952	41,381	42,505	42,181	2.5%	-324	-0.8%
Salisbury University	51,702	54,097	55,095	59,606	61,327	58,210	2.4%	-3,117	-5.1%
University of Maryland Global Campus	41,835	43,518	43,838	44,397	44,255	42,716	0.4%	-1,539	-3.5%
University of Maryland Baltimore County	118,331	122,121	131,479	147,667	150,643	147,683	4.5%	-2,960	-2.0%
University of Maryland Center for Environmental Science	22,868	22,574	22,812	23,696	22,577	22,180	-0.6%	-397	-1.8%
University System of Maryland Office	26,050	26,672	37,961	41,205	43,802	41,938	10.0%	-1,864	-4.3%
Morgan State University	93,203	93,661	97,412	104,890	111,456	111,300	3.6%	-156	-0.1%
St. Mary's College of Maryland	25,160	24,535	25,834	28,602	27,336	29,188	3.0%	1,852	6.8%
Total Funding for Public Four-year Institutions	\$1,399,758	\$1,410,320	\$1,474,996	\$1,609,448	\$1,605,023	\$1,567,831	2.3%	-\$37,192	-2.3%
Total with Other Higher Education Funding*	\$1,443,701	\$1,455,928	\$1,521,320	\$1,653,581	\$1,649,592	\$1,612,400	3.3%	-\$37,192	-2.3%

*Other higher education funding includes funding for agricultural extension and experimental station programs and the Maryland Fire and Rescue Institute.

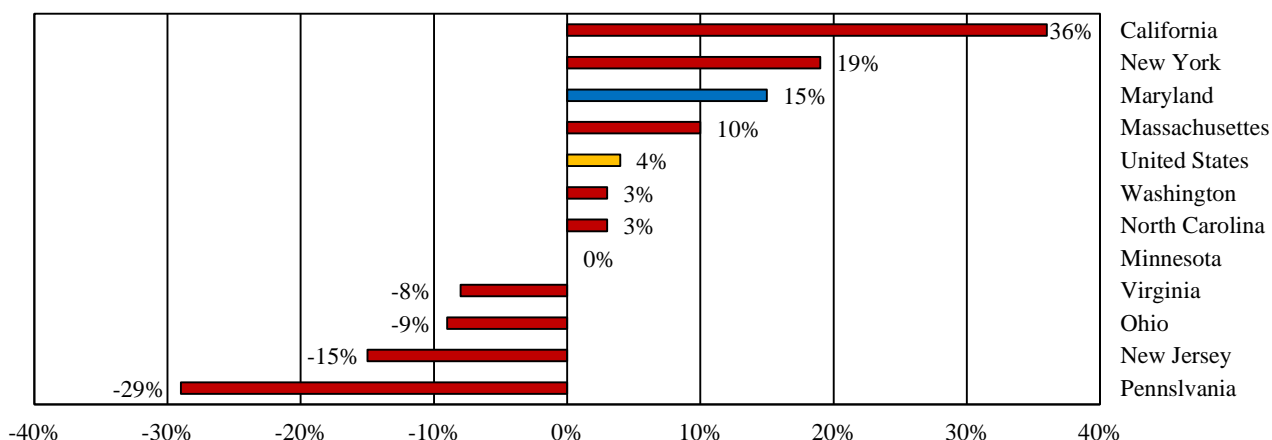
Note: Office for Civil Rights enhancement funds to the Historically Black Colleges and Universities are included beginning in fiscal 2017 for those institutions.

Source: Governor's Fiscal 2017-2022 Budget Books; Department of Legislative Services

Comparing Funding of Higher Education

Nationally, from fiscal 2009 to 2019, state funding per full-time equivalent student (FTES) on average increased 4% (adjusted for inflation), as shown in **Exhibit 2**. This reversed a trend that began after the Great Recession whereby state funding on higher education per FTES had generally decreased. Overall, 20 states did not experience a decline, including California, New York, Maryland, Massachusetts, North Carolina, and Washington, where funding increased 36%, 19%, 15%, 10%, 3%, and 3%, respectively. Among competitor states, New Jersey and Pennsylvania showed the largest decline in state funding per FTES, 15% and 29%, respectively. The College Board notes that even though Pennsylvania experienced modest enrollment growth, funding declined over the decade. Maryland public four-year institution funding can be seen in **Appendices 2** and **3**. Funding by FTES for Maryland public four-year institutions can be seen in **Appendices 4** and **5**, while total FTES enrollment trends can be seen in **Appendix 6**.

Exhibit 2
10-year Percentage Change in State Funding Per FTES
Fiscal 2009-2019



FTES: full-time equivalent student

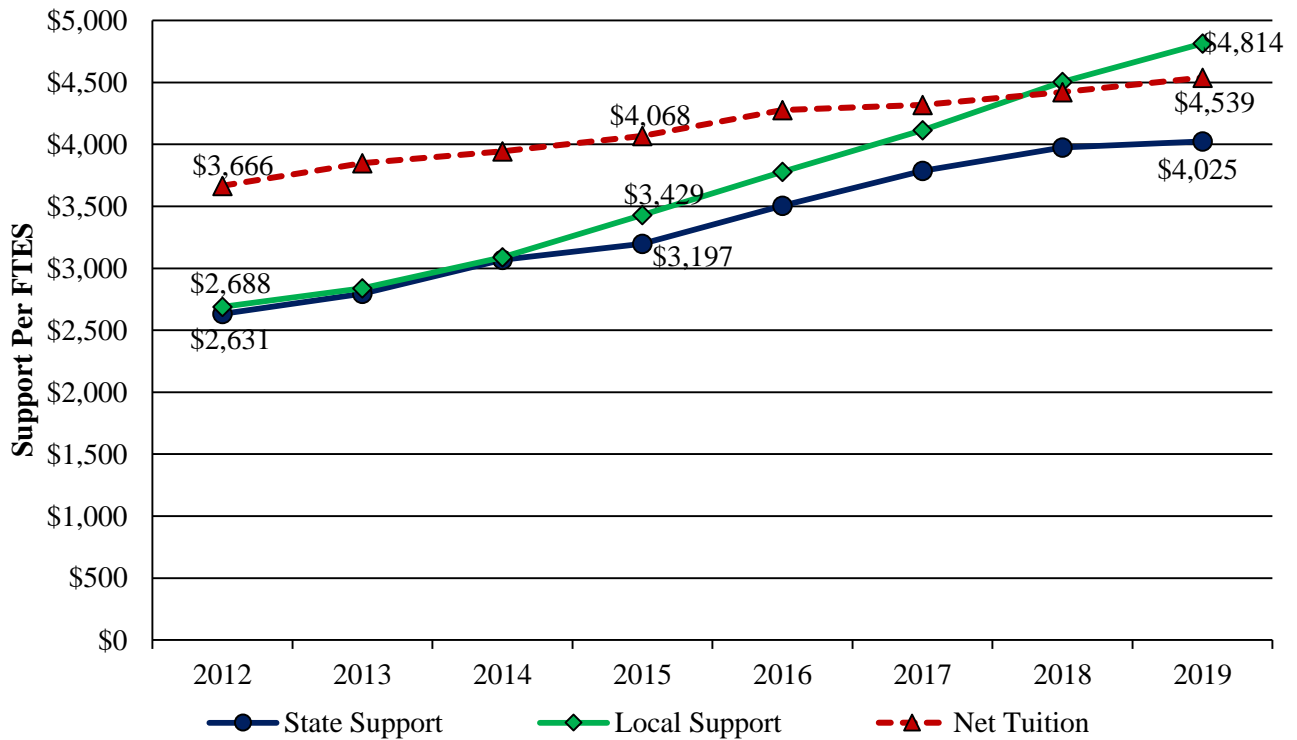
Source: The College Board, *Trends in College Pricing*

State Funding by Segment

Exhibit 3 shows the source of funding per FTES for Maryland’s two-year public institutions. State and local support were nearly equal from fiscal 2012 to 2014. State funding per FTES remained fairly flat in fiscal 2015 due to cost containment measures but increased 9.6% in fiscal 2016, followed by an additional increases of 8.0% in fiscal 2017, 4.9% in fiscal 2018, and 1.3% in fiscal 2019. Local

support grew 6.9%, exceeding State support by \$789 per FTES by fiscal 2019 when compared to fiscal 2018. The growth in State and local funding per FTES of 27.0% and 44.9%, respectively, between fiscal 2015 and 2019, is mainly due to enrollment falling 12.6%. Tuition increases resulted in revenue per FTES increasing 11.9% from fiscal 2015 to 2019.

Exhibit 3
State and Local Support and Net Tuition Per FTES for
Maryland’s Two-year Public Institutions
Fiscal 2012-2019



FTES: full-time equivalent student

Note: Net tuition includes tuition, required fees, books and supplies, room and board, and other related expenses.

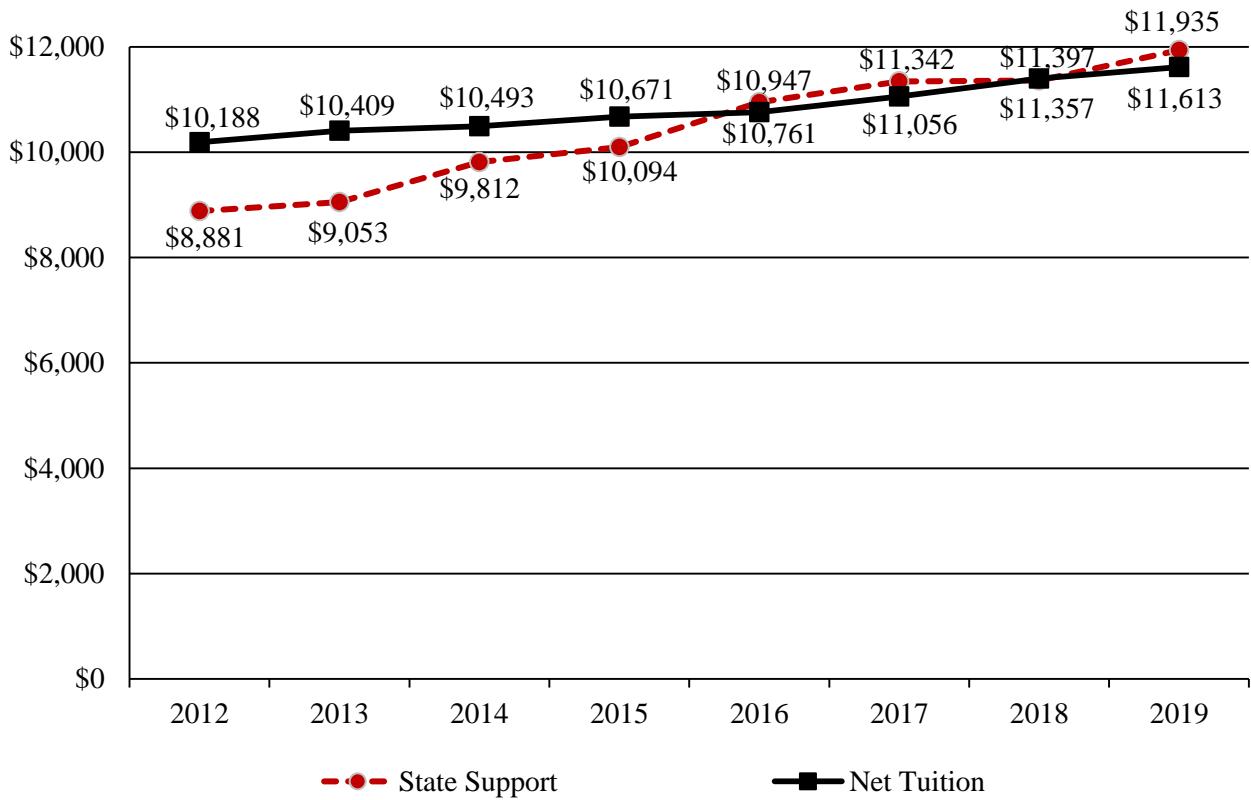
Source: State Higher Education Finance: Fiscal 2019, State Higher Education Executive Officers Association

State support per FTES in fiscal 2019 exceeded net tuition at Maryland’s public four-year institutions, as shown in **Exhibit 4**. Net tuition per FTES increased to \$11,613 in fiscal 2019, continuing a steady increasing trend. After remaining relatively flat in fiscal 2015 due to cost containment measures, State funding per FTES spiked 8.5%, or \$853 per FTES, in fiscal 2016, exceeding tuition by

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\$186 per FTES. State funding continued to exceed tuition in fiscal 2017, totaling \$11,342, while net tuition totaled \$11,056. State funding per FTES marginally increased to \$11,357 per FTES in fiscal 2018, while net tuition increased 3.1%, exceeding State support by 0.4%, or \$40 per FTES. Fiscal 2019 reversed that position. Overall, State funding has increased by 34.4% from fiscal 2012 to 2019.

Exhibit 4
State Support and Net Tuition Per FTES for Four-year Public Institutions
Fiscal 2012-2019



FTES: full-time equivalent student

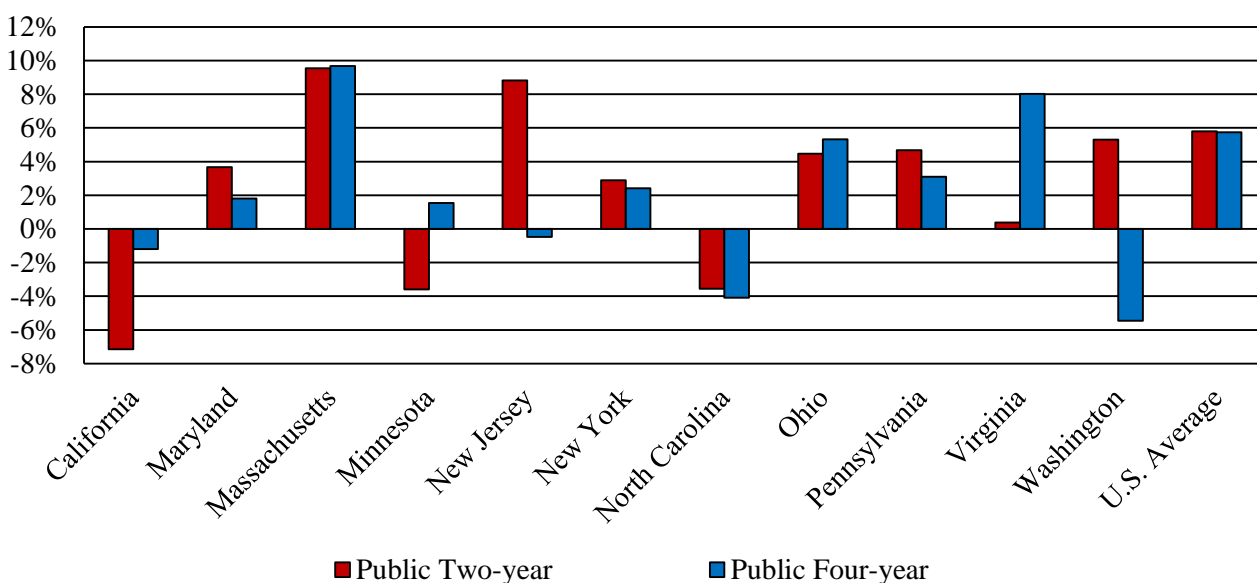
Note: Net tuition includes tuition, required fees, books and supplies, room and board, and other related expenses.

Source: State Higher Education Finance: Fiscal 2019, State Higher Education Executive Officers Association

Tuition and Fees

Exhibit 5 shows the percentage change in in-state tuition and fees at Maryland’s and its competitor states’ two- and four-year institutions between fiscal 2016 and 2021. Nationally, the average tuition and fees at two-year institutions declined in eight states, of which three are competitor states – California, Minnesota, and North Carolina. Except for California and North Carolina, the average tuition and fee rate in Maryland and its competitor states exceeded the national average by at least \$206. Rates at Maryland’s two-year institutions grew 4%, below the national average of 6%, and slower than five of the competitor states. According to the College Board, for the 2020-2021 academic year, the average rate for Maryland was \$4,810, making it the twenty-first (excluding Alaska) most expensive in the country with seven competitor states having higher rates.

Exhibit 5
Five-year Percentage Change for In-state Tuition and Fees
At Two- and Four-year Public Institutions
Fiscal 2016-2021



Note: Five-year percentage change for in-State tuition and fees at two-and four-year public institutions are the average published tuition and fees in 2020 dollars.

Source: The College Board, Annual Survey of Colleges

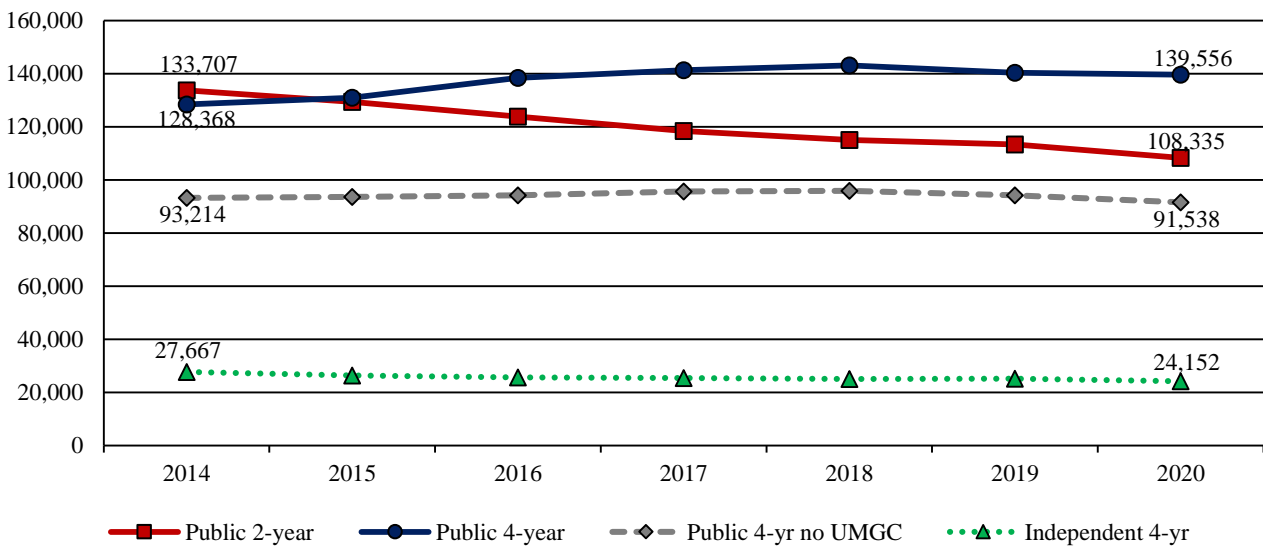
Over the past five years, average tuition and fees at public four-year institutions increased in all competitor states except Washington, North Carolina, California, and New Jersey where rates decreased by 5%, 4%, 1%, and 1%, respectively. Maryland’s rates increased 2%, below the national average of 6%. According to the College Board, when compared to all states, at \$10,130, Maryland has the twenty-fifth most expensive tuition and fee rate in the country. This is below the national average

of \$10,498 and that of six competitor states – Massachusetts, Minnesota, New Jersey, Ohio, Pennsylvania, Virginia, and Washington. **Appendices 7 and 8** show the tuition and fee rates at Maryland’s public four- and two-year institutions, respectively.

Undergraduate Enrollment

Total undergraduate enrollment at Maryland’s public institutions and independent institutions decreased across all segments by 2.4% in fall 2020. As shown in **Exhibit 6**, enrollment continued to decline by 4.4% and 4.0%, respectively, at the two-year public institutions and four-year independent institutions. Enrollment at the four-year public institutions also experienced a decrease of 781 students, a decline of 0.6%, when compared to the fall 2019 total. Higher education enrollment trends by FTES at Maryland’s public four-year institutions can be seen in Appendix 6.

Exhibit 6
Maryland Total Fall Undergraduate Headcount Enrollment by Segment
Fall 2014-2020



UMGC: University of Maryland Global Campus

Note: Fall 2020 enrollment reflects opening fall enrollment data and is subject to revision.

Source: Maryland Higher Education Commission

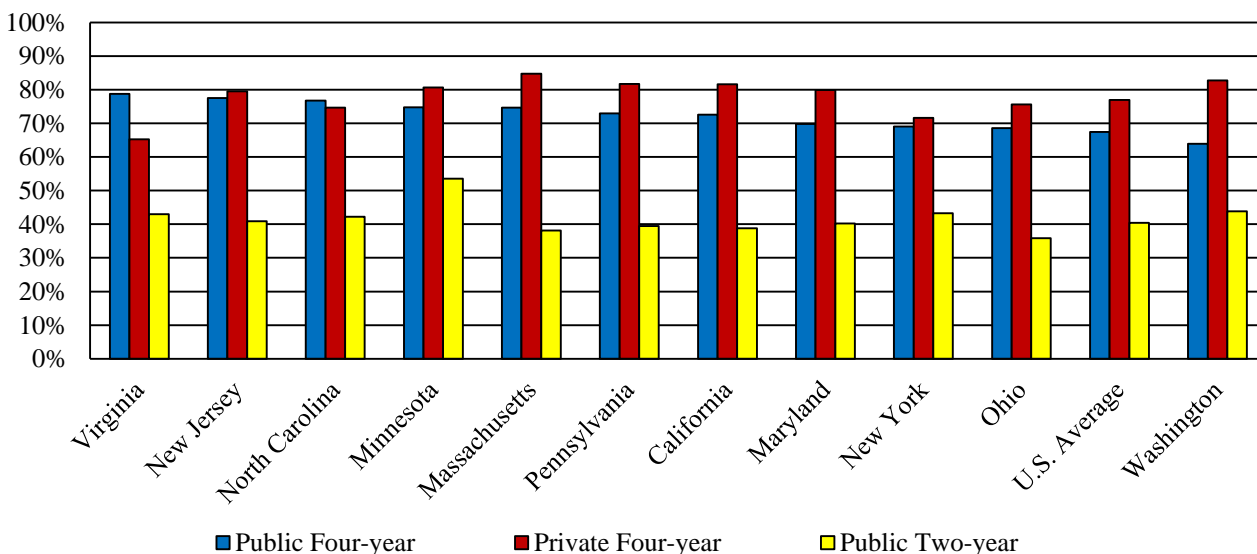
Nationally, according to the National Student Clearinghouse (NSC), enrollment across all segments declined 2.5%, or 461,390 students, in fall 2020. Enrollment at the nation’s public two-year institutions decreased 10.1%, or 544,266 students, while the public four-year institutions increased by 0.2%, or 14,376 students. Enrollment at the four-year private nonprofit institutions also decreased by 0.1%, or 3,445 students.

Productivity Measures

Graduation rates are one metric used to gauge an institution’s performance. Specifically, they measure student persistence and success in completing a degree. Traditional graduation rates only measure the progress of first-time, full-time (FT/FT) cohorts – those students enrolled at an institution at the start of the academic year and continuously enrolled as full-time students until graduation. However, most students today are neither exclusively full- or part-time but rather change their enrollment status over the course of their college career. In addition, according to NSC, two-thirds of all bachelor’s degree graduates and about half of those who earned an associate degree attended more than one institution. Therefore, NSC tracks the completion rate of all students six years after they enter college.

Exhibit 7 shows the six-year completion rates of all students who enrolled in an institution in fall 2014 across the three sectors in Maryland and the competitor states. Maryland’s private institutions, many of which are nonprofit institutions represented by the Maryland Independent College and University Association (MICUA), graduate students at a higher rate than 38 other states. The completion rate of Maryland’s public four-year institutions of 69.8% is greater than the national average of 67.4% but, of the competitor states, only exceeds Ohio and Washington. The traditional six-year graduation rates, as reported by MHEC, are shown by institution in **Appendix 9**. Maryland’s two-year institutions completion rate of 40.2% is 0.2 percentage points below the national average and is above California, North Carolina, Pennsylvania, and Ohio.

Exhibit 7
Comparison of Six-year Outcomes for All Students at
Four- and Two-year Institutions
Fall 2014 Cohort

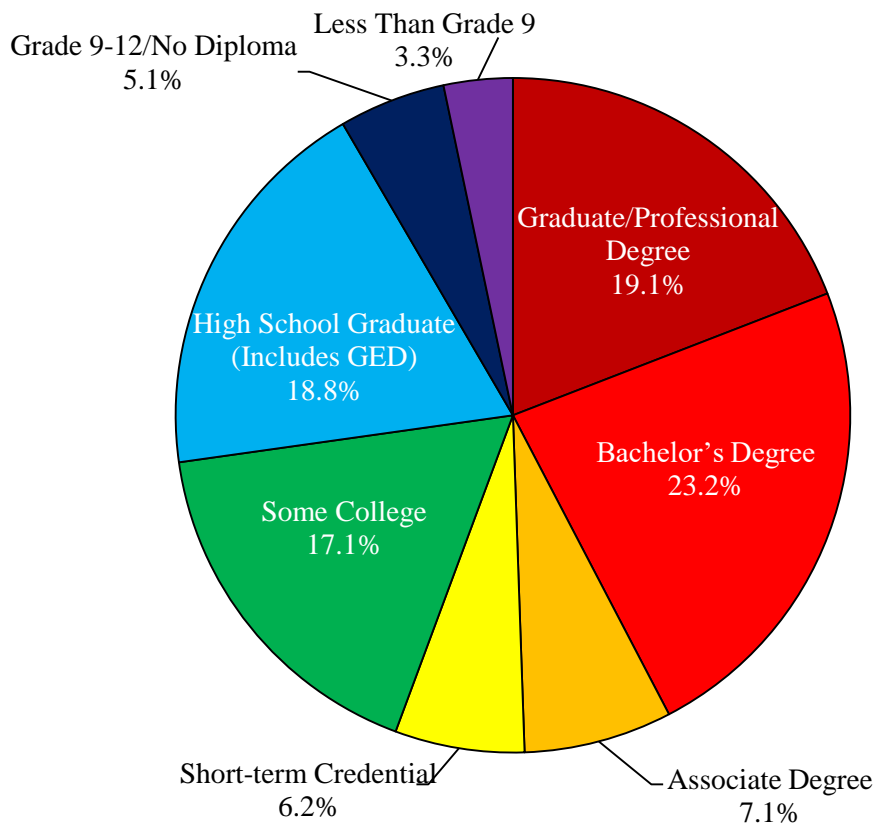


Source: National Student Clearinghouse

Progress Toward 55% Degree Attainment

To maintain a competitive and productive workforce, Maryland has a college completion goal that at least 55% of adults 25 to 64 years old will hold at least one degree credential by 2025. As of 2018, according to the Lumina Foundation, almost half (49.4%) Marylanders hold at least one degree credential, as shown in **Exhibit 8**. It should be noted that, starting in 2018, Lumina included certifications in the attainment numbers, which resulted in a 4.2 percentage point increase in Maryland’s attainment from 51.4% in 2017 to 55.6% in 2018.

Exhibit 8
Maryland Education Attainment
Adults 25 to 64 Years Old
2018



Source: Lumina Foundation: A Stronger Nation

In looking at attainment levels by county, only four counties have over 50% of adults with at least an associate degree, as shown in **Exhibit 9**. This shows areas in which the State could target resources to increase completion among residents.

Exhibit 9
Percentage of Maryland Adults 25 to 64 Years Old
With at Least an Associate Degree
By County
2018

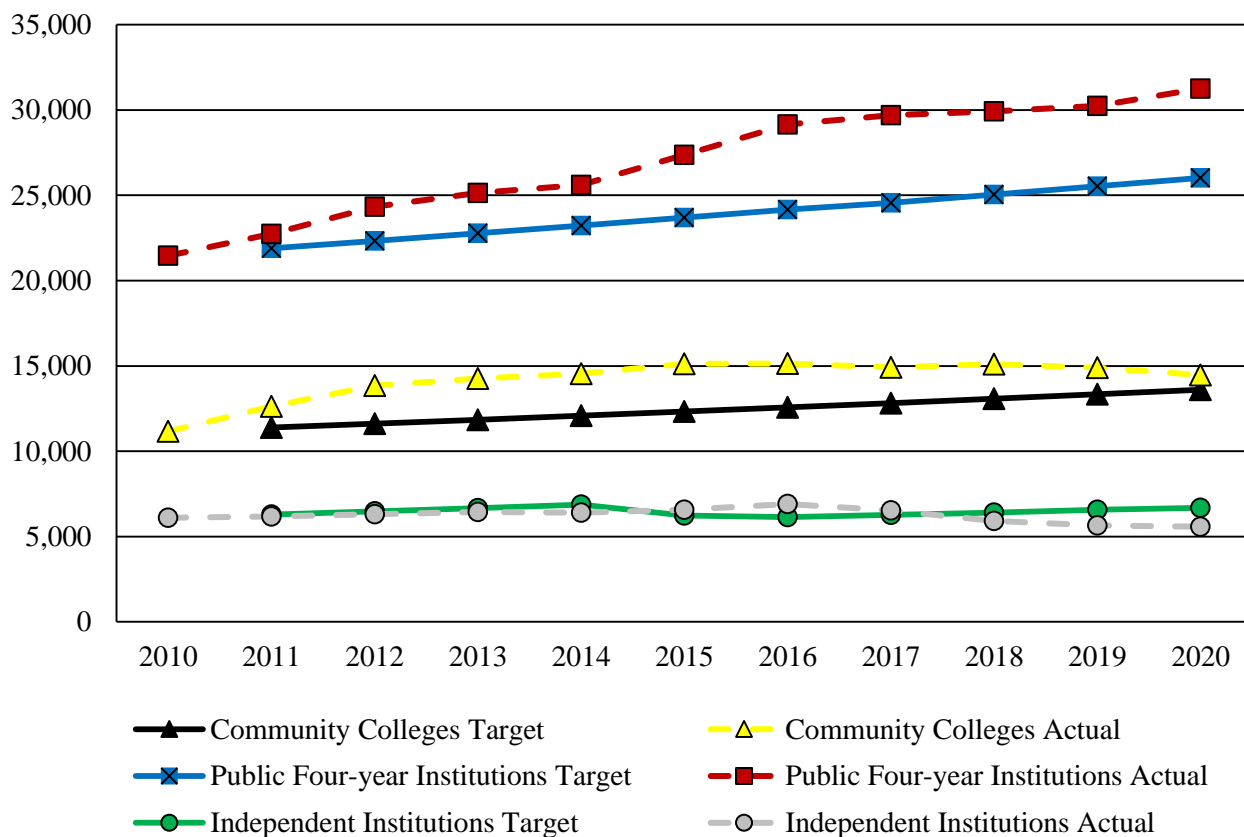
<u>County</u>	<u>Attainment</u>	<u>County</u>	<u>Attainment</u>
Howard	69.6%	Charles	39.9%
Montgomery	65.4%	Prince George’s	39.9%
Frederick	52.1%	Worcester	39.8%
Anne Arundel	51.2%	Baltimore City	38.2%
Baltimore	48.0%	Wicomico	36.0%
Harford	48.0%	Washington	31.5%
Carroll	47.1%	Allegany	31.0%
Queen Anne’s	45.1%	Cecil	31.0%
Talbot	43.9%	Garrett	30.8%
St. Mary’s	42.2%	Dorchester	27.5%
Calvert	41.1%	Caroline	25.2%
Kent	40.1%	Somerset	20.4%

Source: Lumina Foundation: A Stronger Nation

In 2012, MHEC developed a model, last revised in 2017, to set degree targets for institutions to reach in order for the State to reach its 55% completion goal. Based on the model, MHEC estimated that a total of 1.8 million Marylanders would have to possess a degree to meet the 55% goal. MHEC estimates that, in 2025, 903,511 residents, ages 25 to 49 who held at least an associate degree in 2010, will still be in the target group. Therefore, when excluding this population from the target of 1.8 million, Maryland will need to have an additional 924,909 degree holders between 2010 (the base year) and 2025. Public two- and four-year and independent and other private institutions would account for 719,035 of the additional degree holders, while the remaining would be due to migration of individuals from other states and countries who already hold a college degree.

After factoring in migration and mortality rates, MHEC’s model determined that the goal can be reached if the public sector annually increases degree production by 2.0% and the private sector by 2.3%. As shown in **Exhibit 10**, community colleges and public four-year institutions have consistently surpassed their respective targets. However, the rate of growth in the number of degrees at community colleges has slowed and even declined since fiscal 2016, resulting in an average decline of 0.9% since fiscal 2016. Since fiscal 2017, the rate of growth in degrees at the public four-year institutions slowed from an average of 5.3% from fiscal 2011 to 2016 to 1.8% from fiscal 2017 to 2020. In the last 10 years, the independent institutions have only exceeded their targets in 2 years and, since 2017, the number of degrees conferred has, on average, declined 5.2%.

Exhibit 10
55% Degree Attainment Goals by Public Segments
Fiscal 2010-2020



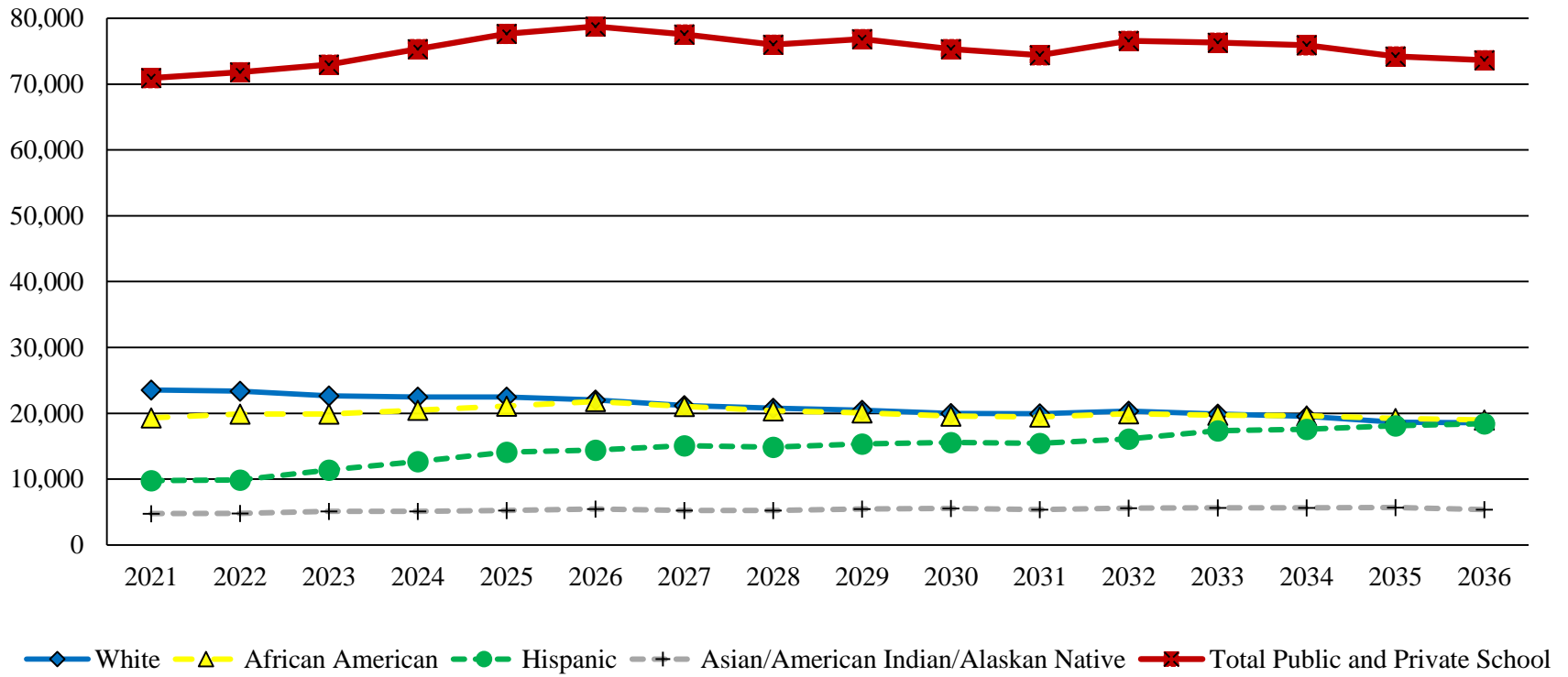
Source: Maryland Higher Education Commission

As of fiscal 2020, 523,041 degrees (including independent and other private institutions), or 72.7% of the target, have been conferred. However, if the trend in degree production continues, the State will not meet its target. It should also be noted that, starting in fiscal 2015, the number of degrees awarded by public four-year institutions are overstated due to a change in the reporting requirements for the University of Maryland Global Campus in which all associate and bachelor’s degrees conferred to all students, stateside and overseas, are included in the total number of degrees. Overall, for fiscal 2020, MHEC estimates that the degree attainment rate for the State to be 50.3% and, over the course of the past 10 years, the average annual change per year has been 0.5%. At this rate, Maryland’s degree attainment rate would be 52.8% by 2025. Furthermore, it is too early to determine the impact COVID-19 will have on degree attainment.

Postsecondary Pipeline

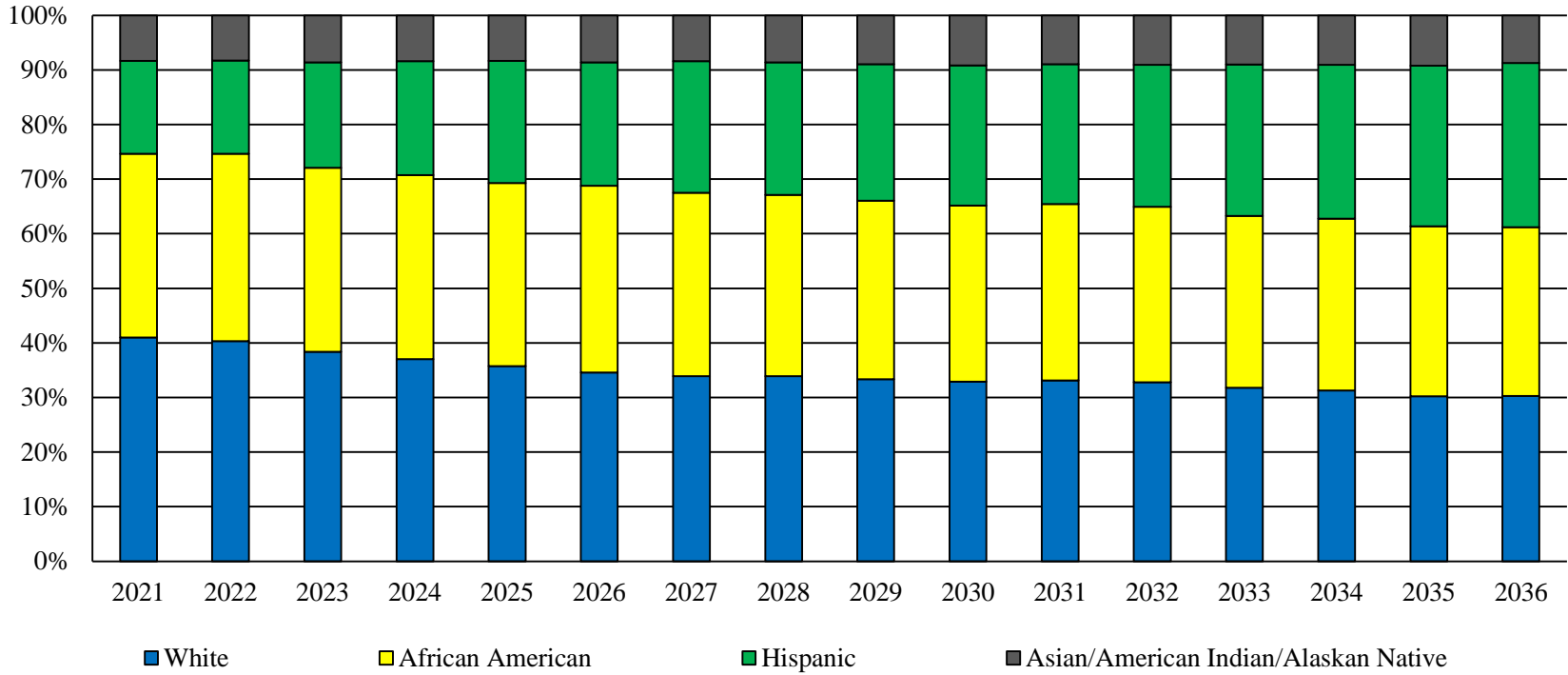
In order to meet its 55% degree attainment goal, Maryland needs to improve student progression from high school into postsecondary education and eventually completion. Overall, the number of students entering the pipeline (both public and private high school graduates) is projected to reach its peak of 78,770 in fiscal 2026, an increase of 11.1% from fiscal 2021, as shown in **Exhibit 11**. However, maintaining the 55% goal may be challenging as the number of graduates is expected to decline 6.5% by fiscal 2036. In addition, public high school graduates will become increasingly more diverse with, for example, the portion of Hispanic graduates increasing from 13.8% in 2021 to 25.0% in 2036, as shown in **Exhibit 12**. In order to maintain or increase enrollment, institutions will need to develop pathways, programs, and services targeted to retain and graduate first-generation and low-income students. It should be noted that these projections do not reflect the impact of COVID-19, which, along with the economic downturn, is expected to have a significant impact on the student pipeline.

Exhibit 11
Estimated High School Graduates
Fiscal 2021-2036



Source: Western Interstate Commission for Higher Education

Exhibit 12
Demographic Trends of Maryland High School Graduates
Fiscal 2021-2036

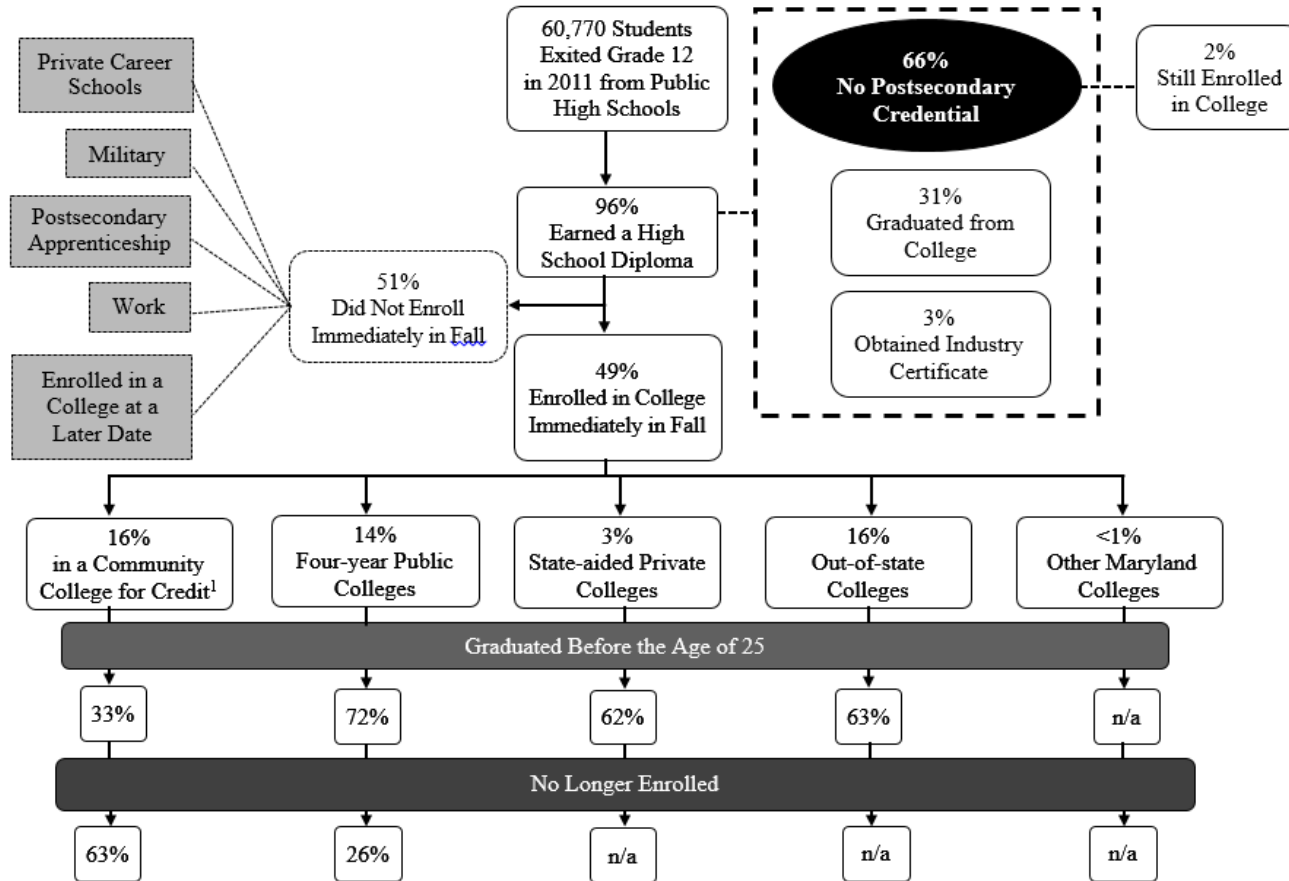


Source: Western Interstate Commission for Higher Education

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The postsecondary pipeline highlights student progress as a continuum from high school to postsecondary education and completion and the relative strengths and weaknesses at each stage of transition, thereby indicating where the State should focus its policies in order to improve outcomes. **Exhibit 13** shows the outcomes of students who exited grade 12 from a Maryland public high school in 2011. The first leakage in the pipeline is the 51% of students who decide not to pursue postsecondary education, including for-credit certificates or certifications at a public institution immediately in the fall after graduation. It is not clear what happened to these students, but they may have pursued other options such as joining the workforce, military, or postsecondary apprenticeship. These students may not have even considered attending college for a variety of reasons including cost, preparation, or family expectations. It should be noted that some of these students may enroll in college two or more years after graduating high school. The other major leakage is that only 31% of those who enrolled in college in the fall immediately after high school graduation graduated from college before the age of 25. This indicates that there is room at the institutional level to improve student success to earn a degree. In addition, the State can target policy and resources to those with some college but no degree.

Exhibit 13 Postsecondary Pipeline Eight Years After Exiting Grade 12 from a Maryland Public High School

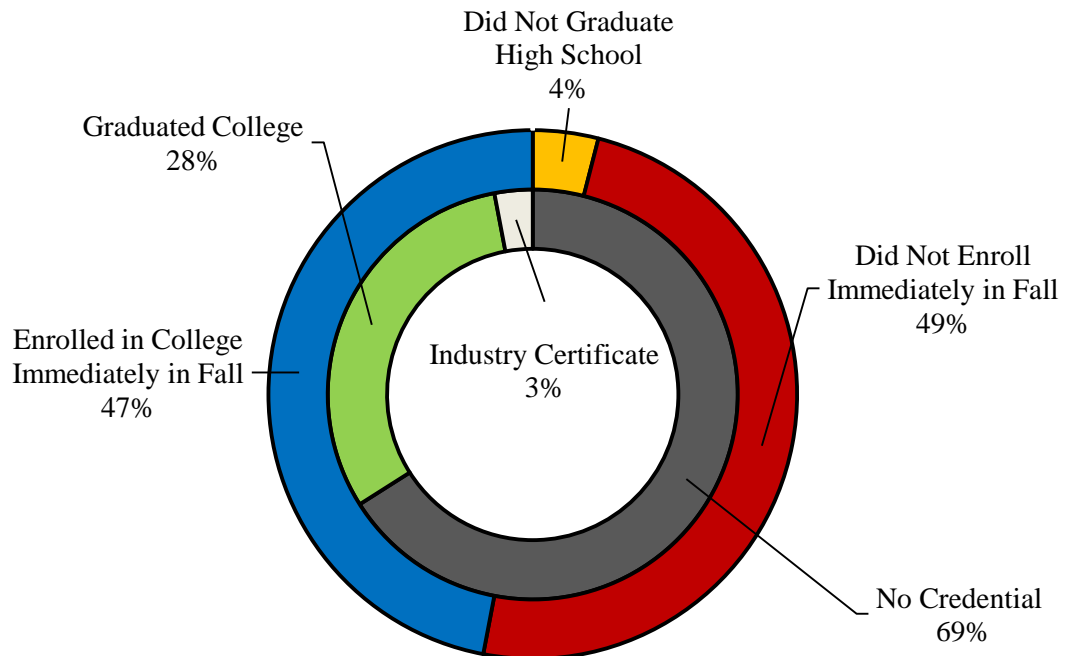


¹ Includes students enrolled in for-credit certificate courses.

Source: Maryland Longitudinal Data System

Exhibit 14 further illustrates the outcomes of the 2011 cohort. Overall, the leakage in the student pipeline occurs at all levels from high school to postsecondary education, and it will take all the segments working together to improve student outcomes to help more students obtain a credential or certification.

Exhibit 14
Postsecondary Pipeline
Outcomes of Grade 12 Students Who Exited Maryland Public Schools in 2011

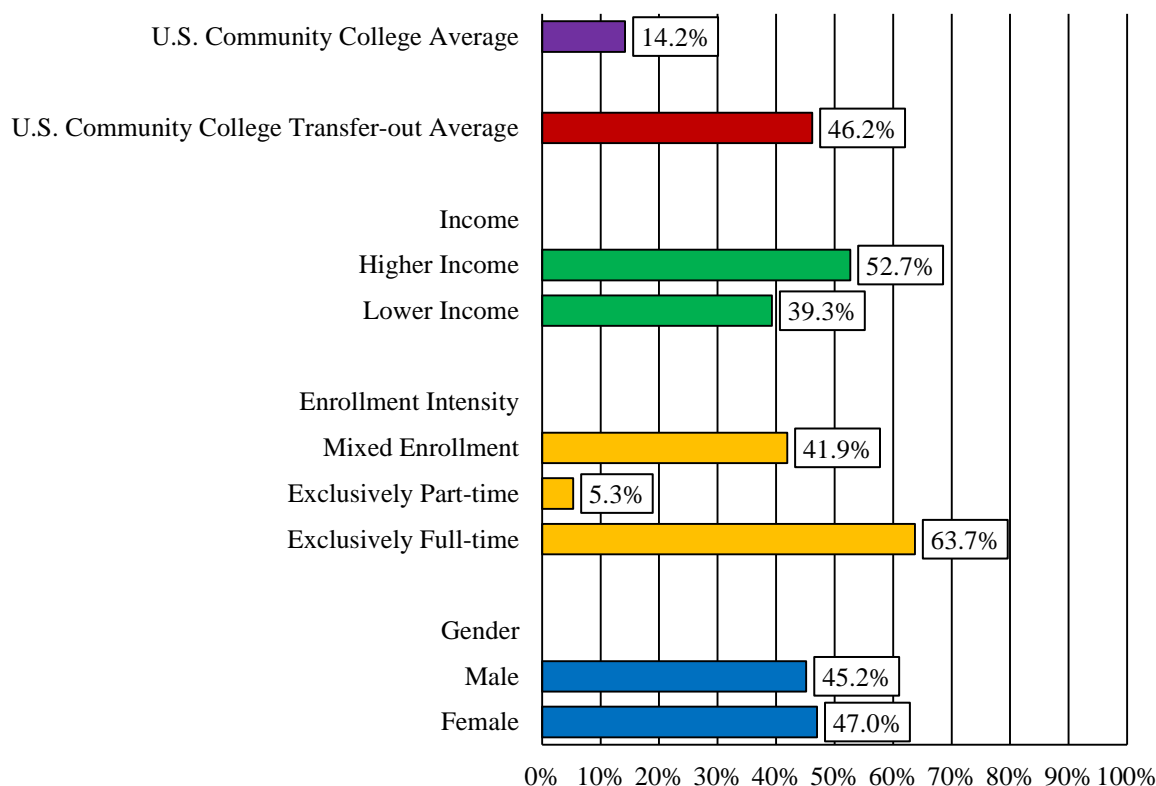


Source: Maryland Longitudinal Data System; National Center for Education and Economy

Transfer of College Credits in Maryland

According to the Community College Research Center at Columbia University, about 80% of entering community college students nationwide indicate that they want to earn a bachelor's degree or higher. However, as shown in **Exhibit 15**, within six years of beginning community college, only 14.2% of first-time students who start at a public two-year institution earn a bachelor's degree. Of first-time students who began at a two-year institution in Maryland for the fall 2014 beginning cohort, NSC data documented that 21.1% of these students earn a bachelor's degree anywhere in the United States within six years.

Exhibit 15
National Community College Cohort Transfer-out
Bachelor’s Degree Six-year Completion Rate
Fall 2013 Cohort



Source: National Student Clearinghouse

The transfer-out bachelor’s completion rate, also shown in Exhibit 15, documents a much higher six-year bachelor’s completion rate. The transfer-out completion rate provides the number of community college transfer students who earned a bachelor’s degree from any four-year institution within six years of entering a community college compared to the total number of community college transfer students. Of this population, on average, 46.2% from the fall 2013 cohort went on to earn a bachelor’s degree within six years, while 63.7% of those who were enrolled exclusively full-time later transferred and earned a bachelor’s degree.

In Maryland, 28.6% of FT/FT students who entered community college in fall 2015 transferred to a four-year institution within four years. Of those students, slightly over half (53.3%) earned an associate degree or lower division certificate prior to transferring. Research conducted by USM has shown that students who transfer at the sophomore or junior level have an increased chance of finishing a bachelor’s degree within four years of transfer.

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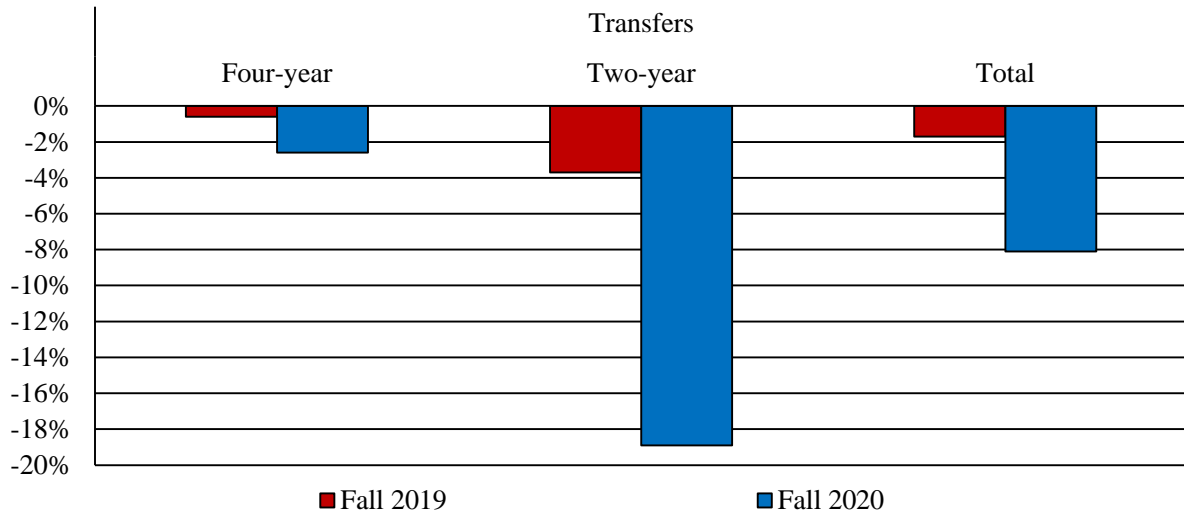
The General Assembly has enacted several policy initiatives in recent years to address college readiness, college completion, and college affordability, including the College and Career Readiness and College Completion Act of 2013 (CCRCCA) and the College Affordability Act of 2016. The CCRCCA provided incentives for dual enrollment and also required community colleges and four-year institutions to work together to develop transfer agreements (also called articulation agreements) for college credit transfer in general education and other major academic areas, including a guarantee that students leaving community college with an associate degree would be able to transfer at least 60 credits toward a bachelor's degree.

One reason that students fail to earn a bachelor's degree is that the college credit transfer process is inefficient and complicated. In general, institutions usually require all students, whether transfer or native (meaning enrolled at the institution as a first-time student), to retake courses that do not meet specific gateway requirements. It is at the discretion of the receiving institution to determine whether course credit will be counted toward graduation and, just as importantly, toward a student's major. Some reasons for rejecting or not applying a course to the major include that (1) the student received a low grade; (2) the course is a technical, repeated, or developmental course; (3) the level of the course is different; (4) the quality of the course is different; (5) the student's major had changed; and (6) there is no course equivalent. Additionally, some laboratory courses may only transfer with a satisfactory grade in a corresponding lecture course.

As a result of these courses not transferring, students end up taking longer to earn their bachelor's degree. The CCRCCA required MHEC to collect and report college credit transfer data annually for Maryland students. This data would allow the identification of transfer trends and areas where improvements to the transfer process could be made. The Department of Legislative Services recently learned that this data is not being collected. **MHEC should comment on what steps are being taken to ensure that it is complying with the requirements of CCRCCA and when this data will be available.**

The COVID-19 pandemic has also had a significant impact on the transfer population, as shown in **Exhibit 16**. Early disruptions in institution reopening plans due to COVID-19, coupled with the disparate economic and health impacts of the virus across different populations, have made navigating transfer options even more difficult. Transfers from two-year institutions decreased by 18.9% relative to fall 2019, which had also already decreased by 3.7% relative to fall 2018. Between two- and four-year institutions, total transfers are down 8.1% in fall 2020 when compared to fall 2019.

Exhibit 16
Transfer Student Enrollment Decline
Fall 2019-2020



Source: National Student Clearinghouse

NSC’s COVID-19 Transfer, Mobility, and Progress December 2020, report found that:

- This fall, transfer students decreased considerably (8.1%), more than triple the drop in non-transfer students (2.4%, not counting freshmen). But four-year colleges experienced relatively smaller declines in transfer-in students as well as overall enrollments during the pandemic.
- Student mobility fell in all transfer pathways this fall.
- Black and Hispanic transfer students decreased most precipitously at community colleges, whereas Asian students made gains in the four-year college sector.
- Male student mobility declined sharply during the pandemic, regardless of age.
- While fewer students re-enrolled this fall after a stop-out, more opted for a primarily online institution this fall than they did pre-pandemic.

MHEC, USM, Morgan State University (MSU), SMCM, MICUA, and the Maryland Association of Community Colleges (MACC) should comment on what steps are being taken to assist the transfer student population, specifically identifying actions that have been taken as a result of the COVID-19 pandemic to more easily facilitate the student transfer process for these students.

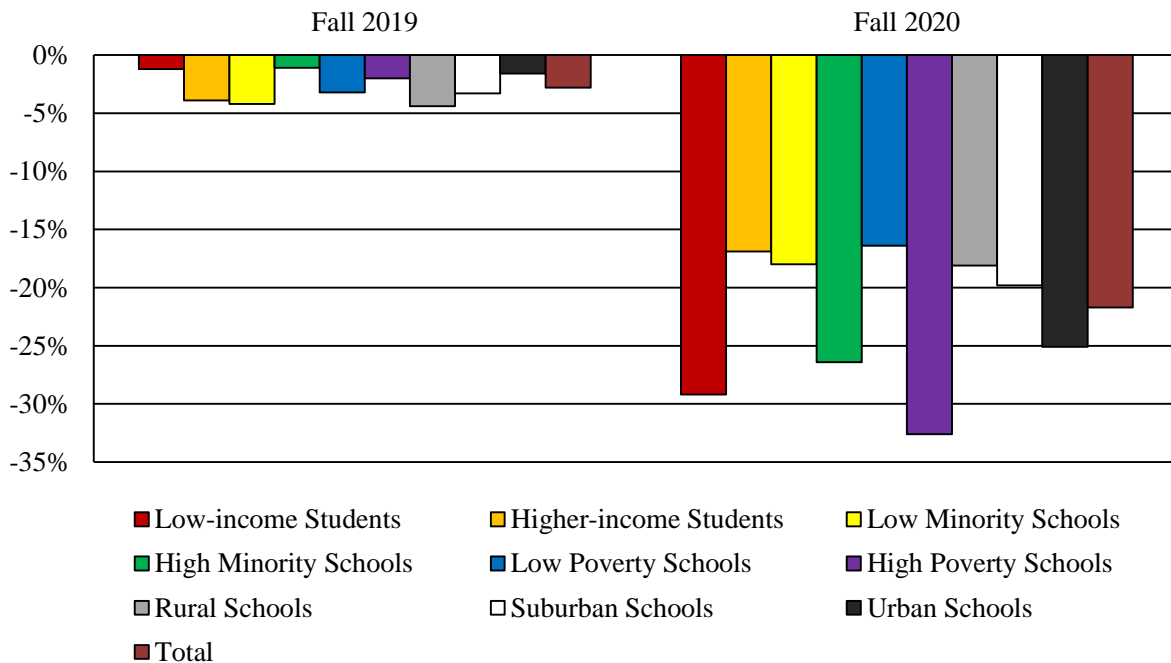
Issues

1. COVID-19 Higher Education Impact

Enrollment

COVID-19 is dramatically reshaping how colleges and universities are educating their students, protecting campus communities, and conducting operations. In addition to how higher education institutions are being impacted by the pandemic, graduating high school students are also changing their higher education enrollment preferences. Preliminary data from NSC found that, while there was little impact on high school graduation in the 2019-2020 school year, far fewer graduates went to college immediately after high school, declining by 21.7% compared to 2019 graduates, as shown in **Exhibit 17**. COVID-19 impacted immediate college enrollment rates considerably for graduates of high-poverty, low-income, and urban high schools. Public college enrollment among graduates of low-income high schools declined at disproportionately higher rates, illustrating impediments to college access during the pandemic.

Exhibit 17
Changes in Number of Students Enrolling in College After High School
By High School Characteristics
Fall 2019-2020



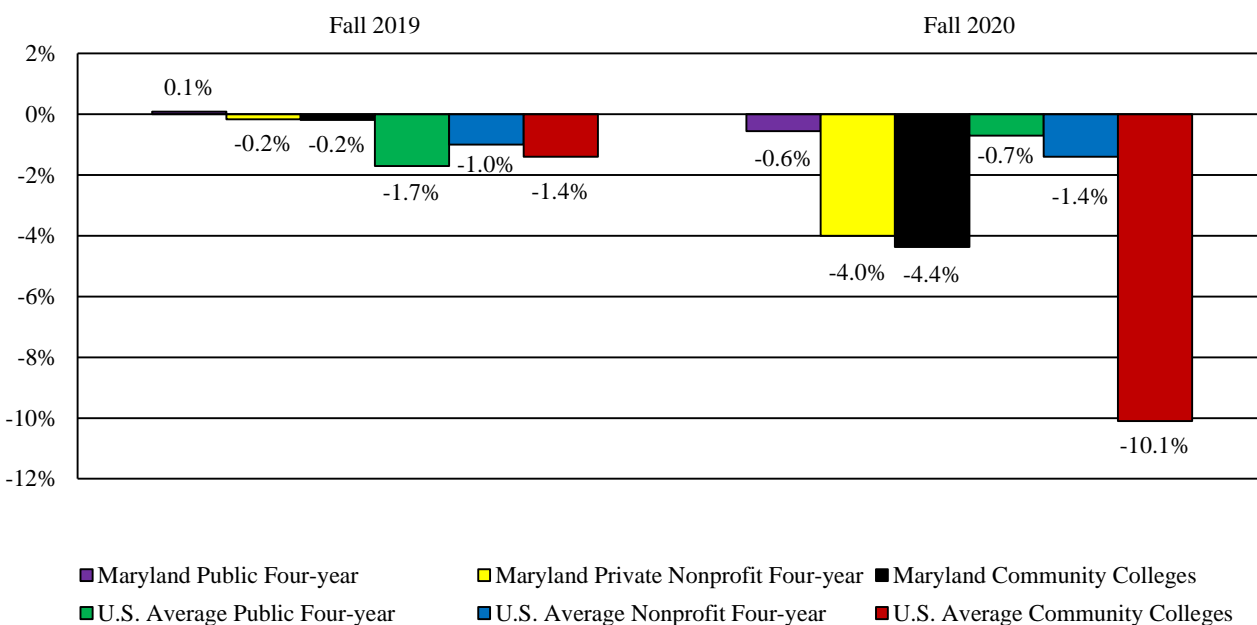
Source: National Student Clearinghouse

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Unsurprisingly, college enrollments nationally have dropped this fall across all institution types. Community colleges experienced the greatest decrease in enrollment, falling by 10.1%, far exceeding the decline in undergraduate enrollment from the public and private nonprofit four-year institutions at 0.7%, and 1.4%, respectively.

Maryland’s undergraduate enrollment decline at the public four-year institutions of 0.6% is in line with the decreases experienced nationally, as shown in in **Exhibit 18**. Maryland private nonprofit colleges and universities (MICUA institutions) experienced enrollment declines that were more pronounced than the national average. A comprehensive breakdown of institutional level enrollment trends can be found in the individual institutional analyses.

Exhibit 18
Changes in Enrollments by Higher Education Segment
Fall 2019-2020

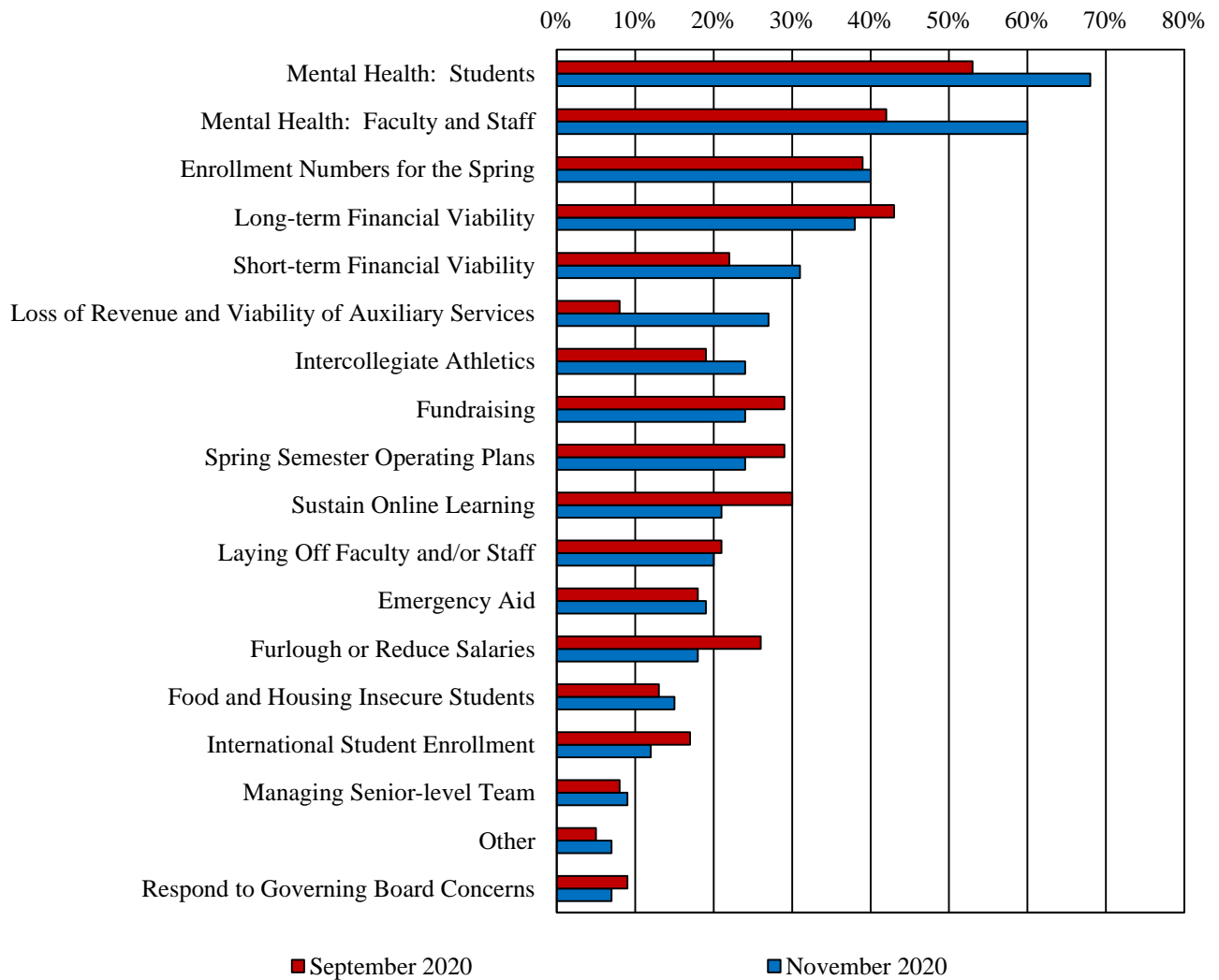


Source: National Student Clearinghouse; Maryland Higher Education Commission

In September 2020, the American Council on Education surveyed college and university presidents in order to capture how they are responding to the challenges presented by COVID-19, as well as to better understand the immediate and long-term effects of the pandemic on higher education more broadly. In the second survey of the fall 2020 term, 268 presidents responded to share their most pressing concerns; how the pandemic has affected their fall enrollment and financial health; plans for the spring 2021 term; efforts to support student, faculty, and staff mental health; and strategies for internationalization.

As shown in **Exhibit 19**, the top issues reported by presidents due to COVID-19 included mental health concerns, enrollment, and financial viability of their respective institutions.

Exhibit 19
Most Pressing Issues Facing Presidents Due to COVID-19
September to November 2020



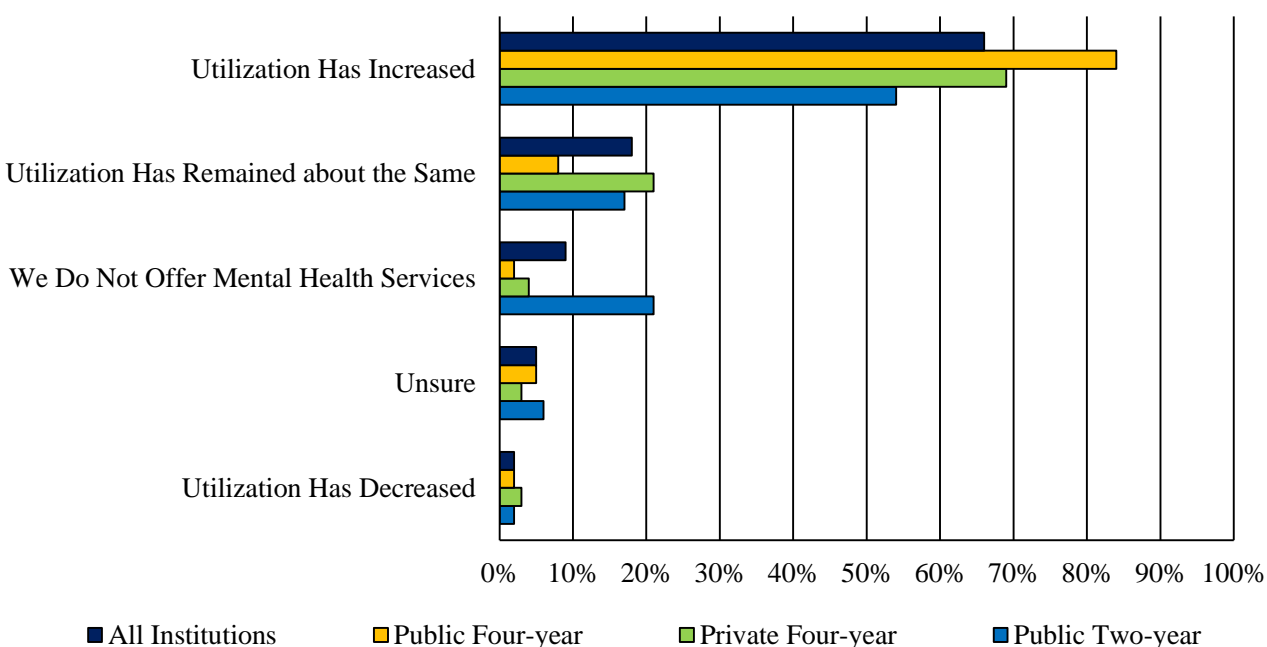
Note: Of the 268 presidents, 117 lead private four-year institutions (44%), 62 lead public four-year institutions (23%), 63 lead public two-year institutions (24%), 12 lead private graduate-only institutions (4%), 7 lead for-profit institutions (3%), 5 lead private two-year institutions (2%), and 2 lead other institutions (1%).

Source: Pulse Point Survey of College and University Presidents on COVID-19: November 2020, American Council on Education.

Mental Health

Over 66% of all presidents reported an increase in the utilization of mental health services at their institution due to COVID-19, as shown in **Exhibit 20**. Presidents at public four-year institutions (84%) were most likely to report a rise in the utilization of mental health services, followed by presidents at private four-year (69%) and public two-year institutions (54%). Approximately one in four presidents at public two-year institutions (21%) reported that their campus does not offer mental health services.

Exhibit 20
COVID-19 Pandemic’s Effect on the Utilization of Mental Health Services
November 2020



Source: Pulse Point Survey of College and University Presidents on COVID-19: November 2020, American Council on Education.

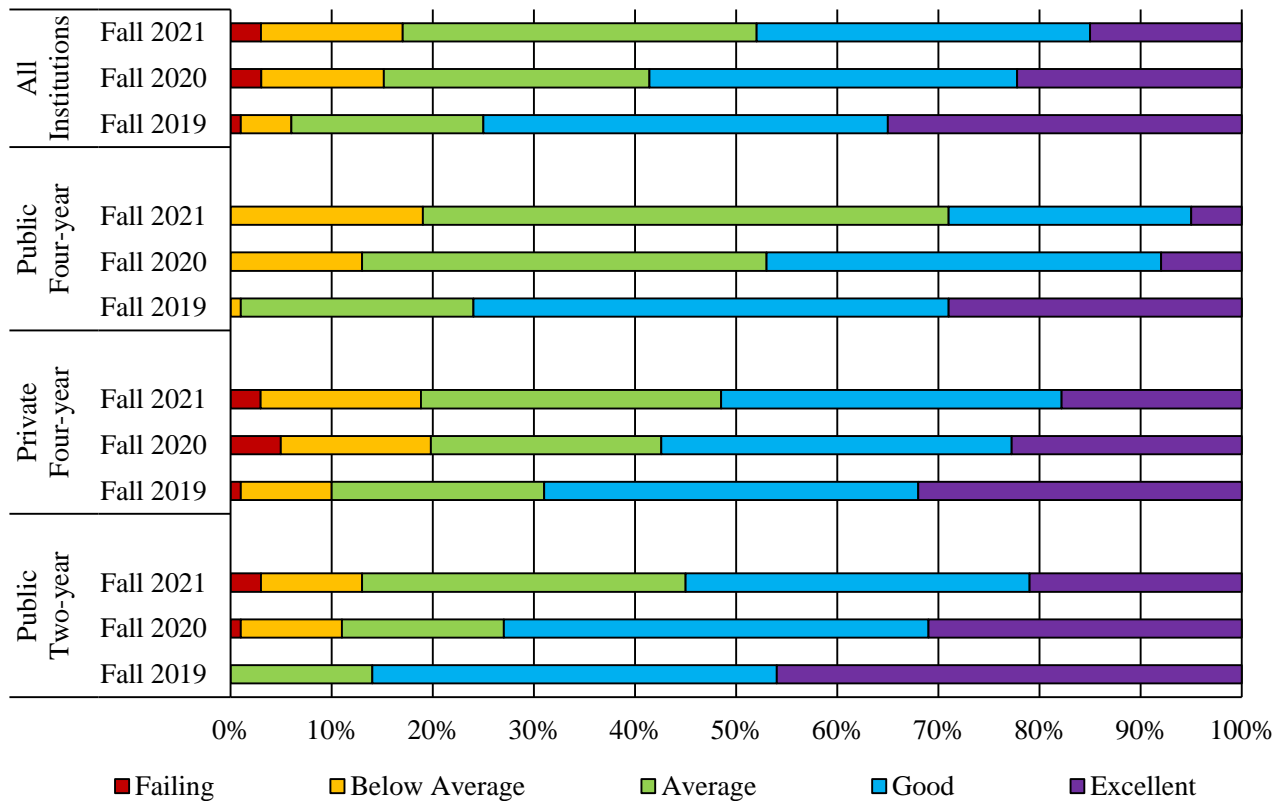
In order to address growing concerns over mental health, college and university leaders are implementing different strategies to support the mental health and well-being of their campus community. Over half of the presidents reported that their institutions invested in virtual or teletherapy services and/or telepsychiatry. Slightly less than half of the presidents reported that their institution has implemented new student engagement strategies to provide students with resources on mental health and well-being and expanded campus access to digital mental health programs and promotion platforms. Just over one-third of presidents reported that their institution held listening sessions with faculty and staff to hear their concerns about their own mental health and well-being.

Financial Health and Stability

The COVID-19 pandemic has created financial challenges for many colleges and universities including lost revenue from auxiliary enterprises; refunds provided to students for tuition, room and board; and declines in revenue from out-of-state enrollment. The federal government has provided financial relief in the CARES Act, which provided \$14 billion in emergency funding to higher education institutions, and the CAA, which provided \$21 billion to higher education institutions. The breakdown of funding for how these laws impacted Maryland higher education institutions can be found in their respective analyses.

Across all institutions, three-quarters of presidents graded their institution’s overall financial health in fall 2019 as being either “excellent” or “good”; however, as shown in **Exhibit 21**, only 58% of presidents graded their institution’s financial health in fall 2020 as either “excellent” or “good”, and only 48% expect their institution’s overall financial health to be “excellent” or “good” by fall 2021.

Exhibit 21
Presidents Self Grading of their Institution’s Overall Financial Health
Fall 2019, 2020, 2021



Source: Pulse Point Survey of College and University Presidents on COVID-19: November 2020, American Council on Education.

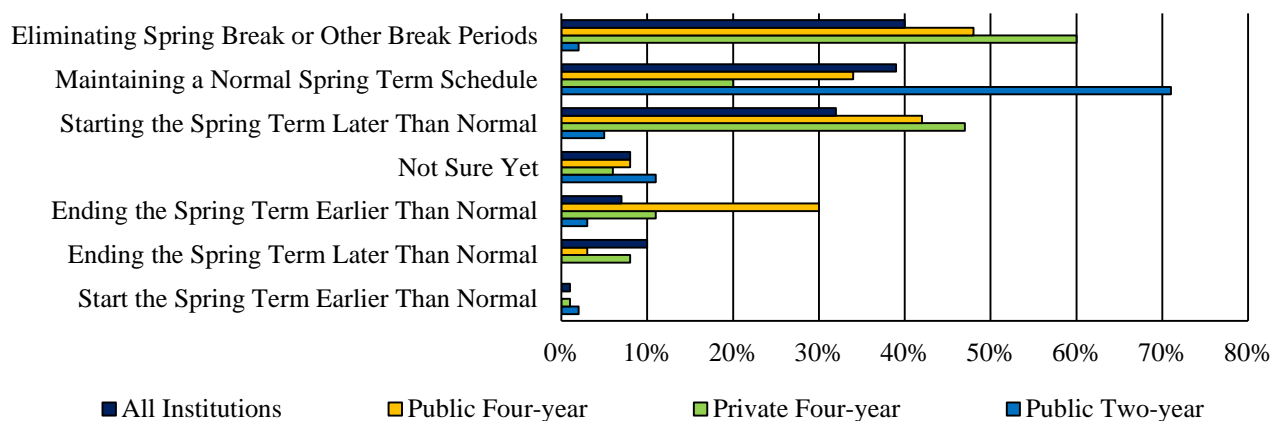
Spring Plans/Accessibility

Higher education institutions implemented numerous programmatic changes to education delivery in order to meet the needs of their students as a result of the COVID-19 pandemic. The Centers for Disease Control and Prevention (CDC) identified a risk scale for higher education institutions, from lowest risk to highest risk, identifying actions and activities that would promote a safe educational environment. The CDC also documented behaviors that reduce the spread of the virus, which should be adopted by higher education institutions. A more complete breakdown of actions taken by Maryland higher education institutions can be found in their respective analyses.

There was variability in how institutions decided to provide the delivery of their education. Some institutions opted to go entirely virtual for the fall semester, while others adopted a hybrid model of some in person and some virtual. Others modified their academic calendar by ending all in-person coursework by the Thanksgiving break. Institutions where in-person learning was occurring generally adopted social distancing policies, resulting in the reconfiguring of classrooms and the requirement of wearing a face mask.

As institutions transition to the spring 2021 semester, presidents have learned from the fall 2020 semester, identifying changes to their academic calendar. As shown in **Exhibit 22**, 40% of all presidents indicated that their institutions plan to “eliminate spring break or other break periods,” while 39% of presidents indicated that their plan was to “maintain a normal spring schedule.” 32% indicated that they planned to “start later than normal.” The majority of presidents at public two-year institutions (71%) indicated that their institutions plan to “maintain a normal spring term schedule,” while only 34% of presidents at public four-year institutions and 20% of presidents at private four-year institutions reported plans to “maintain a normal spring term schedule.”

Exhibit 22
Modifications to the Spring 2021 Academic Calendar
 November 2020



Source: Pulse Point Survey of College and University Presidents on COVID-19: November 2020, American Council on Education

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More than half of the presidents indicated that their institutions plan to offer predominately online instruction with some in-person instruction in the spring. Across sectors, the type of instruction planned for the spring 2021 term closely mirrors the type of instruction offered at the beginning of the fall 2020 term. The largest difference is among institutions who plan to offer exclusively online instruction. While 8% of the presidents indicating offering exclusively online instruction in fall 2020, only 2% of the presidents reported plans to offer exclusively online instruction in the spring.

The largest obstacle for students to online learning is equitable Internet and technological access. In a recent survey from New American and Third Way, 57% of college students said that accessing a stable, high-speed Internet connection has been challenging as their education has shifted online. Students from the poorest families, without Internet access, are more likely to be denied education as a result of the pandemic; 17% of the college students surveyed by New American and Third Way indicated that they had to purchase new Internet service as a consequence of the shift to online education. Some students, especially in rural areas, have no broadband Internet availability. Others have generally spotty Wi-Fi or experience router overload when multiple devices are working at once within a home. To address these realities, some higher education institutions have installed signal boosters on their campuses to extend their Wi-Fi, or used CARES Act funding to provide laptops and wireless hotspots for students. Similar to the impact that the COVID-19 pandemic has had on students, higher education institutions have also been affected, whereby institutions with fewer resources have had less ability to provide additional resources for their students.

The Chancellor, presidents of SMCM and MSU, MICUA, and MACC should comment on steps that have been taken to address education delivery and access for their students.

Updates

New Title IX Regulations

In 2011, the Obama Administration released a “Dear Colleague Letter” and in 2014, a “Question and Answer on Title IX and Sexual Violence” that provided guidance for how institutions should identify and confront allegations of sexual harassment. Former Education Secretary Betsy DeVos rescinded the guidance documents in 2017 and proposed new regulations, the first since 1975, which were published in the Federal Register on November 29, 2018. The new regulations were issued May 6, 2020, with a deadline of August 14, 2020, for institutions to implement. This short time during a pandemic left institutions scrambling to comply with the 2,000 page regulation. According to a *Chronicle of Higher Education* survey of over 600 institutions, due to a diminished opportunity for campus discussion and the accelerated timeframe, many made a distinction between what the regulations allowed and focused on what was required.

Major changes to the regulations included:

- Narrowing the definition of sexual harassment to include “unwelcome conduct on the basis of sex that is so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the recipient’s education program or activity.” It also covers domestic violence, dating violence, and stalking. Previous guidance defined sexual harassment as “unwelcome conduct of a sexual nature.”
- Institutions no longer have to designate most employees as “mandatory reporters.” Under previous guidance, institutions policies typically required faculty and staff to report to the Title IX office when they heard about potential allegations.
- Institutions must investigate off-campus sexual misconduct that occurs in educational activities, *i.e.*, college-owned buildings and college-sponsored trips but not off-campus housing or study abroad programs. However, the new regulations state institutions “remain free” to apply misconduct policies for programs abroad if they so choose. Fraternity houses are considered educational programs if recognized by the institution.
- Institutions would be allowed to choose either the “clear and convincing evidence” standard or the lower “preponderance of the evidence” standard in determining when sexual harassment has occurred. However, institutions must apply the same standard to all sexual harassment cases including those involving faculty and staff. Under previous guidance institutions had to adopt a “preponderance of the evidence” standard.
- Institutions may no longer use the single investigator model in which the investigator investigates, adjudicates, and issues disciplinary sanctions. The regulations now require three separate officials to work through separate pieces of the complaint process: a Title IX

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coordinator to receive the report; an investigator to gather the facts and interview witnesses; and a decision maker to determine sanctions and remedies for the parties.

- Institutions must provide evidence related to the allegations to both parties and advisers at least 10 days prior to requiring a response, and parties are not prohibited from speaking about the allegations.
- Institutions are required to allow cross-examination of the complaining and responding parties and any witness during a live hearing. However, students cannot cross-examine each other; instead, institutions must ensure both parties have an advisor, who does not have to be a lawyer, who will pose questions on their behalf. It should be noted that, given the current circumstances of institutions transitioning to online education, they may hold hearings via videoconferencing. The Obama-era guidance discouraged this because of the potential to retraumatize victims and discourage victims from coming forward.

It is expected that the Joseph R. Biden, Jr. administration will dismantle the regulations, but it could be a lengthy process. Due to the current litigation of the new regulations that will probably continue into the spring, the administration could put the rules on hold and then issue new regulations. If the administration pulls the regulations, it will still need to issue guidance on how institutions are to handle sexual misconduct complaints.

Operating Budget Recommended Actions

1. Adopt the following narrative:

Instructional Faculty Workload Report: The committees request that the University System of Maryland (USM), Morgan State University (MSU), and St. Mary’s College of Maryland (SMCM) continue to provide annual instructional workload reports for tenured/tenure-track faculty. By focusing on these faculty, the committees gain a sense of the teaching activities for the regular core faculty. However, there are other types of instructional faculty at institutions, such as full- and part-time nontenured/nontenure-track faculty, including adjunct faculty, instructors, and lecturers. Focusing on only tenured/tenure-track faculty provides an incomplete picture of how students are taught. Therefore, the report should also include the instructional workload when all types of faculty are considered. Additional information may be included at the institution’s discretion. Furthermore, the USM report should include the percent of faculty meeting or exceeding teaching standards for tenured/tenure-track faculty for the University of Maryland, Baltimore Campus.

Information Request	Authors	Due Date
Annual report on faculty workload	USM MSU SMCM	December 8, 2021

Appendix 1
2020 Joint Chairmen’s Report Responses from Agencies

The 2020 *Joint Chairmen’s Report* (JCR) requested that the public four-year institutions prepare five reports. Electronic copies of the full JCR responses can be found on the Department of Legislative Services Library website.

- ***Instructional Faculty Workload Report:*** Morgan State University’s (MSU) tenure and tenure-track faculty taught 97% of expected course units, full-time contractual faculty taught 98% of expected course units, and department chairs taught 126% of expected course units. St. Mary’s College of Maryland (SMCM) full-time tenure-track faculty taught an average of 21.7 credits, while part-time faculty taught an average of 5.1 credits. Tenured/tenure track faculty at the University System of Maryland (USM) produced 41% of the total credit hours, full-time nontenure-track instructional faculty produced 28% of the total credit hours produced, and part-time faculty produced 27% of the total credit hours produced; others produced 4%.
- ***Report on Feasibility of a Bowie State University (BSU) Law School:*** The Maryland Higher Education Commission (MHEC) and USM were instructed to convene a workgroup to determine the costs of establishing a school of law at BSU, regional demand for such a program, an analysis of the level of enrollment needed to justify a new law school, accreditation and regulatory requirements, and impact on Maryland’s existing law schools. This workgroup found that establishing a school of law at BSU was not in keeping with the institution’s mission and vision at this time. The workgroup identified the potential establishment of a Center for Law, Social Justice and Civic Engagement at BSU, which would serve as an anchor for interdisciplinary teaching, research, and community dialogue around critical society issues of race, equity, social justice, and democracy, with dedicated collaboration between BSU and the University of Maryland, Baltimore Carey School of Law and the Law School at the University of Baltimore as an option worth further exploration.
- ***Report on Postsecondary Strategies to Implement the Blueprint for Maryland’s Future:*** A workgroup was established including members from MHEC, USM, the Maryland State Department of Education, the Maryland Department of Labor, community colleges, independent colleges, and apprentice sponsors. The summary of recommendations for reform of educator preparation focused on four key areas: early childhood and preK; educator preparation program reform; post-program and initial certification; and financial support for recruitment and retention. The summary of recommendations for dual enrollment focused on four key challenges: demographic disparities; transportation; credit and noncredit opportunities; and funding and sustainability. Finally, the summary of recommendations for apprenticeship and career credential programs focused on four key challenges: articulating credits from registered apprenticeships to colleges; expanding registered apprenticeships; adding four-year institutions of higher education as apprenticeship sponsors; and allowing for registered teacher apprenticeship for career and technology education teachers who come from skilled professions. Recommendations were provided for each of these key areas and challenges.

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- ***Report on Mold Mitigation:*** The Maryland Independent College and University Association provided a summary from each of the 13 member institutions detailing mold inspection and remediation plans, institutional protocols, public notification plans, and efforts to address any mold problems for any campus building. The public four-year institutions, including MSU, SMCM, and the USM institutions, also provided their mold mitigation plans that included mold inspection and remediation plans, institutional protocols, public notification processes, and efforts to address mold problems for campus buildings.
- ***High Use of Contractual Employees:*** USM identified 1,197 contractual staff members as of July 1, 2020; 69% of that total comes from three institutions: the University of Maryland Global Campus (27%), the University of Maryland, College Park (26%), and the University of Maryland, Baltimore (15%). USM has a policy for converting eligible contingent category II employees to regular positions within three years. As of October 2020, MSU had a total of 509 contractual employees when including all contractual employee groups. MSU proposes to convert employees after they have been employed for at least three years based on the need of services and satisfactory performance. Baltimore City Community College (BCCC) identified 34 contractual employees as of their fiscal 2020 report. Prior to the fiscal 2020 report, BCCC included adjunct faculty, grant-funded employees, employees working less than 30 hours, tutors, and secondary employment employees that are not eligible for contractual conversion and are no longer included in the contractual employee category. BCCC's contractual conversion policy is voluntary for contractual employees; employees are chosen based on tenure and have the option to be converted to a regular position.

Appendix 2
Trends in Education and General Revenues¹
Public Four-year Institutions
Fiscal 2017-2022
(\$ in Thousands)

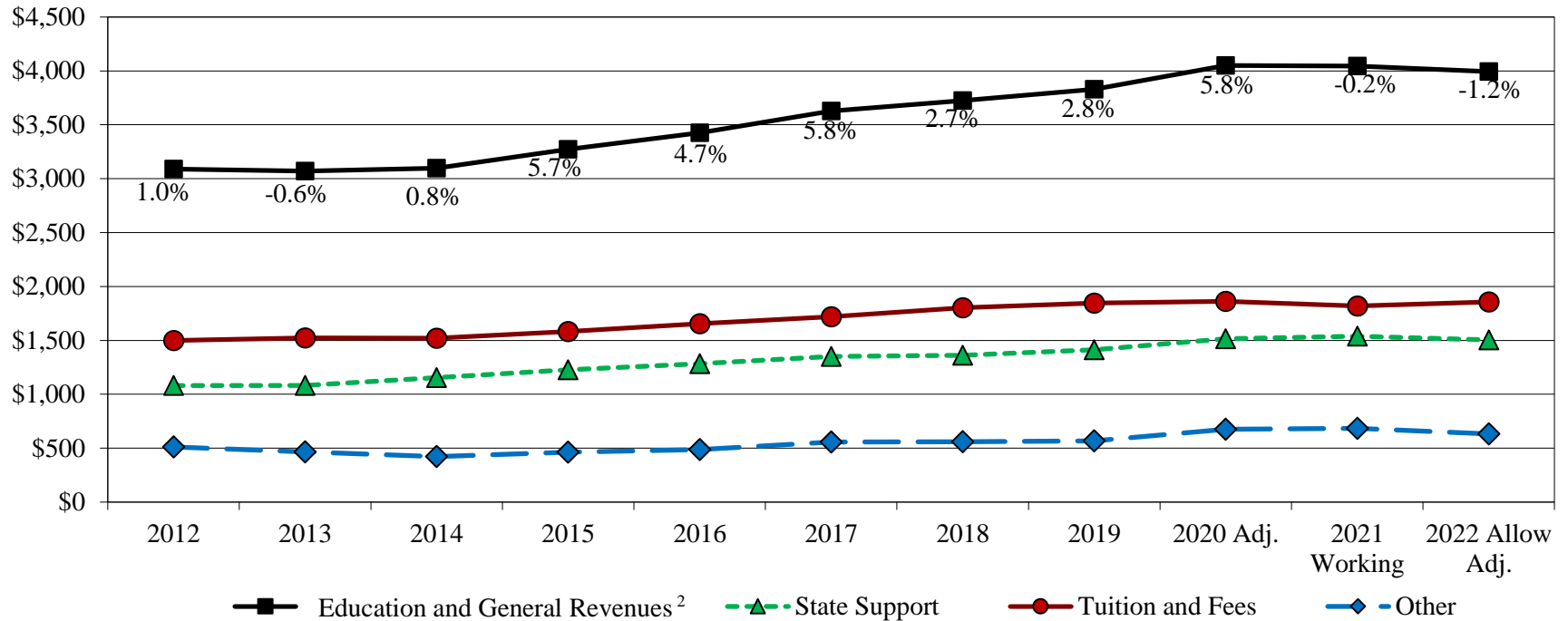
<u>Institution</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>Adjusted 2020</u>	<u>Adjusted Working 2021</u>	<u>Adjusted Allowance 2022</u>	<u>Annual % 2017-2022</u>	<u>% Change 2021-2022</u>
University of Maryland, Baltimore Campus	\$571,239	\$582,599	\$594,979	\$670,794	\$669,752	\$670,644	3.3%	0.1%
University of Maryland, College Park Campus	1,319,576	1,367,157	1,422,222	1,465,386	1,456,357	1,445,466	1.8%	-0.7%
Bowie State University	84,798	91,486	94,915	99,766	102,712	94,829	2.3%	-7.7%
Towson University	318,100	326,266	334,685	358,731	344,544	339,761	1.3%	-1.4%
University of Maryland Eastern Shore	77,973	72,968	72,732	77,506	83,334	69,815	-2.2%	-16.2%
Frostburg State University	82,671	81,251	83,477	86,117	81,453	80,200	-0.6%	-1.5%
Coppin State University	62,528	61,950	63,311	65,748	72,692	61,592	-0.3%	-15.3%
University of Baltimore	104,552	103,084	100,038	99,674	102,085	102,192	-0.5%	0.1%
Salisbury University	129,975	130,602	134,898	142,338	140,802	136,290	1.0%	-3.2%
University of Maryland Global Campus	393,670	414,475	415,624	417,153	418,415	417,935	1.2%	-0.1%
University of Maryland Baltimore County	269,334	280,769	293,180	335,403	328,143	325,786	3.9%	-0.7%
University of Maryland Center for Environmental Science	30,611	31,524	30,290	29,889	29,747	29,638	-0.6%	-0.4%
Morgan State University	165,154	166,579	170,567	178,705	191,717	195,056	3.4%	1.7%
St. Mary's College of Maryland	46,681	44,923	47,606	53,873	51,238	54,402	3.1%	6.2%
Total	\$3,626,251	\$3,724,110	\$3,828,234	\$4,051,192	\$4,043,246	\$3,993,968	2.0%	-1.2%

¹Education and General revenues represent tuition and fees, State funds (general and the Higher Education Investment Fund), grants and contracts (federal, State, and local), and sales and services of educational activities less auxiliary program enterprise revenue. For the University of Maryland, Baltimore Campus, hospital revenues were excluded prior to fiscal 2020 but, due to a change in accounting procedures, those revenues are no longer excluded. For the University of Maryland, College Park and the University of Maryland Eastern Shore, agriculture experimental station and cooperative extension programs are excluded. Fiscal 2020 adjusted and fiscal 2021 working adjusted include Coronavirus Aid, Relief, and Economic Security Act State support.

Note: Numbers may not sum to total due to rounding.

Source: Governor's Fiscal 2017-2022 Budget Books

Appendix 3
Education and General Revenues at Four-year Institutions¹
Fiscal 2012-2022
(\$ in Millions)



¹State support for the University System of Maryland Office and the University Center of Maryland Center for Environmental Sciences are not included. Figures also exclude funding for agriculture experimental station and cooperative extension programs and the Maryland Fire and Rescue Institute. For the University of Maryland, Baltimore Campus, hospital expenditures are excluded prior to fiscal 2020 but, due to a change in accounting procedures, those revenues are no longer excluded.

²Education and General revenues represent tuition and fees, State support (general funds and Higher Education Investment Funds), grants and contracts (federal, State, and local), and sales and services of educational activities less auxiliary enterprise revenue.

Note: The fiscal 2020 adjusted includes Coronavirus Aid, Relief, and Economic Security (CARES) Act State support. The fiscal 2021 working includes a general salary increase and CARES Act State support. The fiscal 2022 adjusted allowance includes annualization of the fiscal 2021 general salary increase.

Source: Governor’s Fiscal 2012-2022 Budget Books; Department of Legislative Services

Appendix 4
Education and General Revenues¹
Per Full-time Equivalent Student
Public Four-year Institutions
Fiscal 2017-2022

<u>Institution</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>Working 2021</u>	<u>Adjusted 2022</u>	<u>Annual % Change 2017-2022</u>	<u>% Change 2021-2022</u>
University of Maryland, Baltimore Campus	\$85,171	\$84,631	\$86,129	\$97,798	\$96,173	\$95,059	2.2%	-1.2%
University of Maryland, College Park Campus	39,857	40,603	41,808	43,385	42,521	43,407	1.7%	2.1%
Bowie State University	18,104	17,949	18,647	19,623	20,203	18,652	0.6%	-7.7%
Towson University	17,132	17,373	17,664	19,151	19,260	18,993	2.1%	-1.4%
University of Maryland Eastern Shore	21,357	21,998	24,755	29,050	31,235	25,905	3.9%	-17.1%
Frostburg State University	18,035	18,730	19,843	21,465	20,600	20,000	2.1%	-2.9%
Coppin State University	26,439	25,802	29,571	30,940	43,244	35,935	6.3%	-16.9%
University of Baltimore	26,269	27,920	30,105	34,007	35,397	35,434	6.2%	0.1%
Salisbury University	16,413	16,675	17,456	18,461	19,209	18,358	2.3%	-4.4%
University of Maryland Global Campus	11,562	11,658	11,563	11,847	11,765	11,751	0.3%	-0.1%
University of Maryland Baltimore County	24,282	25,018	25,890	30,304	29,831	29,326	3.8%	-1.7%
Morgan State University	24,672	23,396	23,963	25,195	26,934	27,174	2.0%	0.9%
St. Mary's College of Maryland	27,492	27,276	28,835	35,005	32,574	34,806	4.8%	6.9%
Average (Weighted)	\$26,069	\$26,309	\$27,086	\$29,185	\$29,307	\$29,053	2.2%	-0.9%

¹Education and General revenues represent tuition and fees, general funds, Higher Education Investment Funds, grants and contracts (federal, State, and local), and sales and services of educational activities less auxiliary program enterprise revenue. For the University of Maryland, Baltimore campus, hospital revenues were excluded prior to fiscal 2020 but, due to a change in accounting procedures, those revenues are no longer excluded. For the University of Maryland, College Park and the University of Maryland Eastern Shore, agriculture experimental station and cooperative extension programs are excluded.

Note: The fiscal 2020 adjusted includes Coronavirus Aid, Relief, and Economic Security (CARES) Act State support. The fiscal 2021 working includes a general salary increase and CARES Act State Support. The fiscal 2022 adjusted allowance includes annualization of the fiscal 2021 general salary increase.

Source: Department of Budget and Management; Department of Legislative Services

Appendix 5
Fiscal 2022 Revenues Per FTES by Revenue Source¹
Public Four-year Institutions

<u>Institution</u>	<u>Total E&G Revenues</u>	<u>State Funds</u>	<u>Tuition and Fees</u>	<u>FTES</u>	<u>E&G Revenues Per FTES</u>	<u>State Funds Per FTES</u>	<u>Tuition and Fees Per FTES</u>	<u>State as % of E&G</u>	<u>Tuition and Fees as % of E&G</u>
University of Maryland, Baltimore Campus	\$670,643,595	\$242,798,813	\$170,206,170	7,055	\$95,059	\$34,415	\$24,126	36%	25%
University of Maryland, College Park Campus	1,445,465,799	519,493,225	\$639,445,838	33,300	43,407	15,600	19,203	36%	44%
Bowie State University	94,828,979	46,494,394	\$47,208,677	5,084	18,652	9,145	9,286	49%	50%
Towson University	339,760,860	134,234,977	\$190,140,913	17,889	18,993	7,504	10,629	40%	56%
University of Maryland Eastern Shore	69,814,791	41,158,677	\$23,058,959	2,695	25,905	15,272	8,556	59%	33%
Frostburg State University	80,199,739	42,615,667	\$35,681,539	4,010	20,000	10,627	8,898	53%	44%
Coppin State University	61,592,148	45,638,590	\$15,533,558	1,714	35,935	26,627	9,063	74%	25%
University of Baltimore	102,191,925	42,181,372	\$55,442,908	2,884	35,434	14,626	19,224	41%	54%
Salisbury University	136,289,896	58,209,843	\$75,507,253	7,424	18,358	7,841	10,171	43%	55%
University of Maryland University College	417,935,475	42,716,028	\$366,757,730	35,565	11,751	1,201	10,312	10%	88%
University of Maryland Baltimore County	325,786,187	147,682,972	\$139,974,929	11,109	29,326	13,294	12,600	45%	43%
Morgan State University	195,056,434	111,300,232	\$75,132,108	7,178	27,174	15,506	10,467	57%	39%
St. Mary's College of Maryland	54,401,860	29,187,759	\$23,771,866	1,563	34,806	18,674	15,209	54%	44%
Total Higher Ed	\$3,993,967,688	\$1,503,712,549	\$1,857,862,448	137,470	\$29,053	\$10,938	\$13,515	38%	47%

E&G: Education and General

FTES: full-time equivalent student

¹E&G revenues include tuition and fees, general funds, Higher Education Investment Funds, grants and contracts (federal, State, and local), and the sales and services of educational activities minus auxiliary program enterprise revenue. For the University of Maryland, Baltimore campus, hospital revenues were excluded prior to fiscal 2020 but due to a change in accounting procedures those revenues are no longer excluded. For the University of Maryland, College Park and the University of Maryland Eastern Shore, agriculture experimental station and cooperative extension programs are excluded.

Source: Governor's Fiscal 2022 Budget Books

Appendix 6
Higher Education Enrollment Trends
Full-time Equivalent Student
Public Four-year Institutions
Fiscal 2017-2022

<u>Institution</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>Working 2021</u>	<u>Allowance 2022</u>	<u>Annual % 2017-2022</u>	<u>% Change 2021-2022</u>
University of Maryland, Baltimore Campus	6,707	6,884	6,908	6,859	6,964	7,055	1.0%	1.3%
University of Maryland, College Park Campus	33,108	33,671	34,018	33,776	34,250	33,300	0.1%	-2.8%
Bowie State University	4,684	5,097	5,090	5,084	5,084	5,084	1.7%	0.0%
Towson University	18,568	18,780	18,947	18,732	17,889	17,889	-0.7%	0.0%
University of Maryland Eastern Shore	3,651	3,317	2,938	2,668	2,668	2,695	-5.9%	1.0%
Frostburg State University	4,584	4,338	4,207	4,012	3,954	4,010	-2.6%	1.4%
Coppin State University	2,365	2,401	2,141	2,125	1,681	1,714	-6.2%	2.0%
University of Baltimore	3,980	3,692	3,323	2,931	2,884	2,884	-6.2%	0.0%
Salisbury University	7,919	7,832	7,728	7,710	7,330	7,424	-1.3%	1.3%
University of Maryland Global Campus	34,050	35,553	35,944	35,213	35,565	35,565	0.9%	0.0%
University of Maryland Baltimore County	11,092	11,223	11,324	11,068	11,000	11,109	0.0%	1.0%
Morgan State University	6,694	7,120	7,118	7,093	7,118	7,178	1.4%	0.8%
St. Mary's College of Maryland	1,698	1,647	1,651	1,539	1,573	1,563	-1.6%	-0.6%
Total	139,100	141,555	141,337	138,810	137,960	137,470	-0.2%	-0.4%

Source: Department of Budget and Management

Appendix 7
Tuition and Fee Rates at Public Four-year Institutions
Fiscal 2021-2022

	<u>Tuition</u>	<u>2021 Fee</u>	<u>Total</u>	<u>Tuition</u>	<u>2022 Fee</u>	<u>Total</u>	<u>% Tuition Change</u>	<u>% Fee Change</u>	<u>% Total Change</u>
In-state Full-time Undergraduate									
University of Maryland, College Park Campus	\$8,824	\$1,955	\$10,779	\$9,000	\$1,955	\$10,955	2.0%	0.0%	1.6%
Bowie State University	5,647	2,798	8,445	5,760	2,803	8,563	2.0%	0.2%	1.4%
Towson University	6,962	3,236	10,198	7,100	3,362	10,462	2.0%	3.9%	2.6%
University of Maryland Eastern Shore	5,418	3,140	8,558	5,526	3,203	8,729	2.0%	2.0%	2.0%
Frostburg State University	6,700	2,710	9,410	6,834	2,760	9,594	2.0%	1.8%	2.0%
Coppin State University	4,648	2,068	6,716	4,741	2,068	6,809	2.0%	0.0%	1.4%
University of Baltimore	7,014	2,082	9,096	7,154	2,210	9,364	2.0%	6.1%	2.9%
Salisbury University	7,264	2,780	10,044	7,408	2,850	10,258	2.0%	2.5%	2.1%
University of Maryland Global Campus ¹	9,000	450	9,450	9,180	450	9,630	2.0%	0.0%	1.9%
University of Maryland Baltimore County	8,704	3,324	12,028	8,878	3,424	12,302	2.0%	3.0%	2.3%
Morgan State University	5,477	2,151	8,008	5,477	2,151	8,008	0.0%	0.0%	0.0%
St. Mary's College of Maryland	12,116	3,008	15,132	12,479	3,098	15,577	3.0%	3.0%	3.0%
Out-of-state Full-time Undergraduate									
University of Maryland, College Park Campus	\$34,936	\$1,955	\$36,891	\$34,936	\$1,955	\$36,891	0.0%	0.0%	0.0%
Bowie State University	16,338	2,798	19,136	16,501	2,803	19,304	1.0%	0.2%	0.9%
Towson University ²	21,098	3,236	24,334	25,514	3,362	28,876	20.9%	3.9%	18.7%
University of Maryland Eastern Shore ³	15,828	3,140	18,968	16,145	3,203	19,348	2.0%	2.0%	2.0%
Frostburg State University ⁴	20,800	2,710	23,510	21,320	2,760	24,080	2.5%	1.8%	2.4%
Coppin State University	11,045	2,068	13,113	11,266	2,068	13,334	2.0%	0.0%	1.7%
University of Baltimore	19,374	2,082	21,456	19,762	2,210	21,972	2.0%	6.1%	2.4%
Salisbury University ²	17,330	2,780	20,110	17,678	2,850	20,528	2.0%	2.5%	2.1%
University of Maryland Global Campus ^{1,2}	14,970	450	15,420	14,970	450	15,420	0.0%	0.0%	0.0%
University of Maryland Baltimore County	24,338	3,324	27,662	25,555	3,424	28,979	5.0%	3.0%	4.8%
Morgan State University	15,895	2,151	18,046	15,895	2,151	18,046	0.0%	0.0%	0.0%
St. Mary's College of Maryland	28,193	3,008	31,209	29,038	3,098	32,136	3.0%	3.0%	3.0%

¹Based on 30 credit hours.

²Towson University, Salisbury University, and the University of Maryland Global Campus have separate, lower out-of-state rates for students enrolled at the University System of Maryland at Hagerstown.

³The University of Maryland Eastern Shore has a separate, lower regional rate for non-Maryland students residing in Delaware and the eastern shore of Virginia.

⁴Frostburg State University has a separate, lower out-of-state rate for non-Maryland students residing within 120 miles of campus.

Note: All rates are pending approval by the institution or system's governing boards. Morgan State University will be determining their fiscal 2022 tuition and fee schedule at their May 4, 2021 Board of Regents Meeting.

Source: Morgan State University; St. Mary's College of Maryland; University System of Maryland

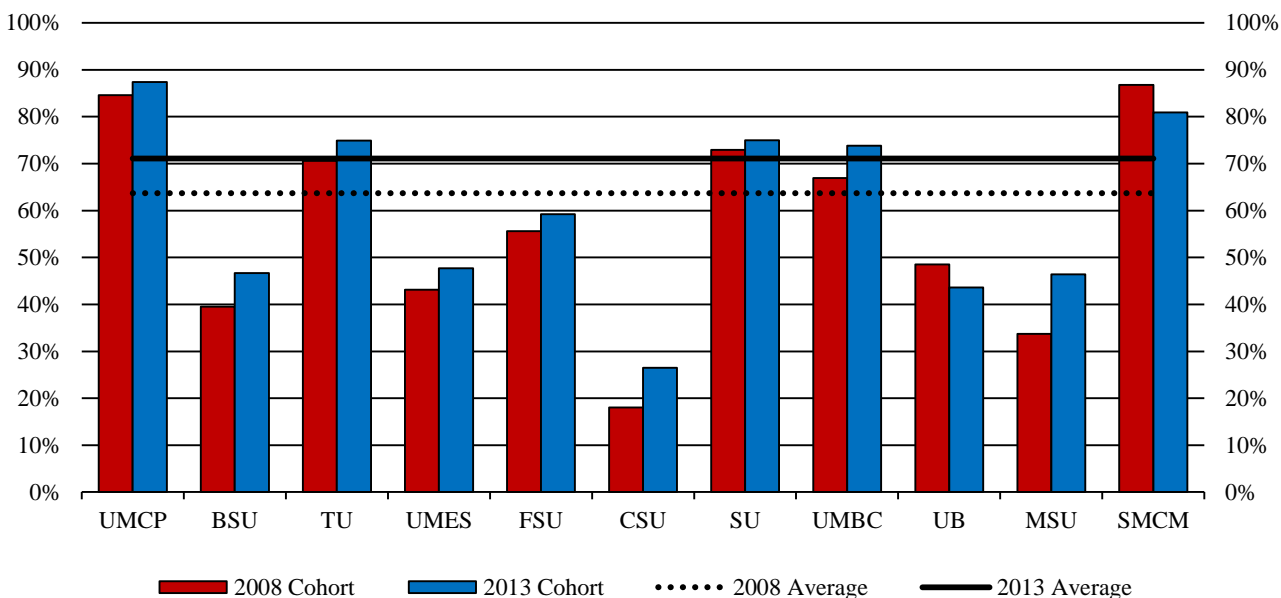
Appendix 8
Tuition and Fee Rates at Public Two-year Institutions
Fall 2020

<u>Community College</u>	Resident of Service Area			Outside Service Area			Out-of-state Resident		
	<u>Tuition</u>	<u>Fees</u>	<u>Total</u>	<u>Tuition</u>	<u>Fees</u>	<u>Total</u>	<u>Tuition</u>	<u>Fees</u>	<u>Total</u>
Allegany College of Maryland	\$3,870	\$1,050	\$4,920	\$7,410	\$1,050	\$8,460	\$9,420	\$1,050	\$10,470
Anne Arundel Community College	3,600	800	4,400	7,230	800	8,030	12,240	800	13,040
Baltimore City Community College	3,300	1,080	4,380	3,300	1,080	4,380	8,400	1,080	9,480
Community College of Baltimore County	3,660	1,356	5,016	7,230	1,356	8,586	11,160	1,356	12,516
Carroll Community College	4,080	1,080	5,160	8,235	1,695	9,930	10,485	2,145	12,630
Cecil College	3,750	1,020	4,770	7,050	1,020	8,070	8,490	1,020	9,510
Chesapeake College	3,750	1,100	4,850	5,790	1,130	6,920	8,100	1,130	9,230
College of Southern Maryland	3,930	983	4,913	6,870	1,718	8,588	8,820	2,205	11,025
Frederick Community College	3,840	829	4,669	8,400	829	9,229	11,370	829	12,199
Garrett College	2,970	1,290	4,260	8,190	1,290	9,480	10,050	1,290	11,340
Hagerstown Community College	3,690	480	4,170	5,760	480	6,240	7,560	480	8,040
Harford Community College	3,986	797	4,783	6,783	797	7,580	9,580	797	10,377
Howard Community College	4,260	850	5,110	7,170	850	8,020	8,760	850	9,610
Montgomery College	3,960	1,362	5,322	8,070	2,184	10,254	11,220	2,814	14,034
Prince George's Community College	3,210	1,460	4,670	6,060	1,460	7,520	9,120	1,460	10,580
Wor-Wic Community College	3,720	660	4,380	7,440	660	8,100	9,330	660	9,990
Average	\$3,724	\$1,012	\$4,736	\$6,937	\$1,150	\$8,087	\$9,632	\$1,248	\$10,879

Note: This assumes a student enrolls in 30 credits per academic year.

Source: Maryland Association of Community Colleges

Appendix 9
Six-year Graduation Rate for First-time, Full-time Students
2008 and 2013 Cohort

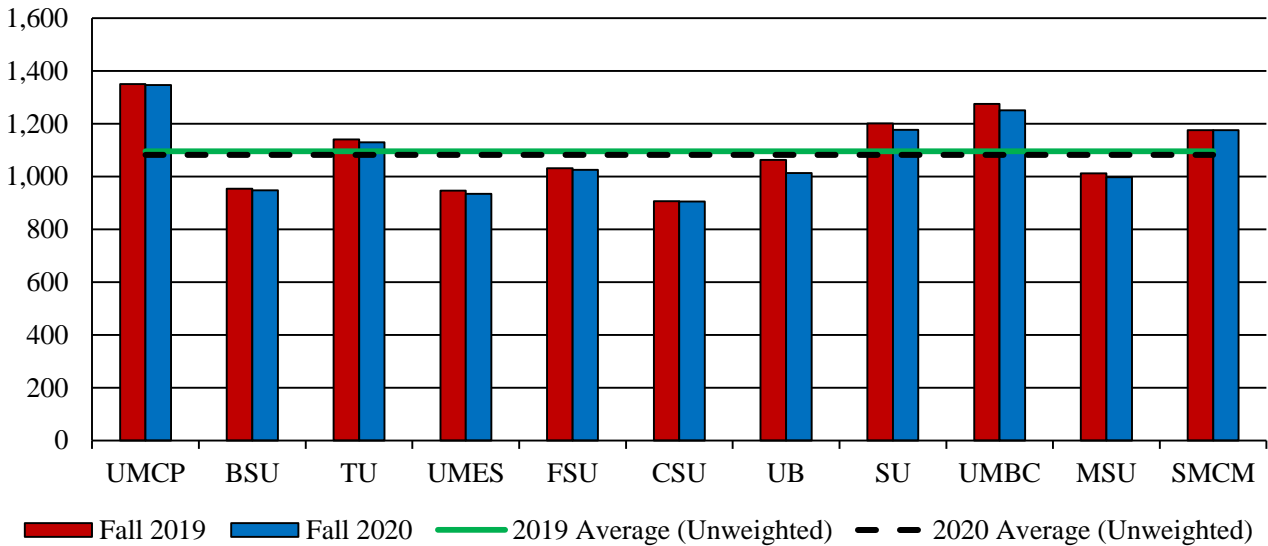


	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
University of Maryland, College Park Campus (UMCP)	84.6%	86.3%	86.2%	85.0%	86.1%	87.4%
Bowie State University (BSU)	39.5%	44.2%	41.4%	42.1%	47.6%	46.7%
Towson University (TU)	70.6%	74.1%	74.1%	75.8%	77.1%	74.9%
University of Maryland Eastern Shore (UMES)	43.1%	37.9%	42.8%	44.3%	45.7%	47.7%
Frostburg State University (FSU)	55.6%	61.4%	55.2%	57.3%	58.0%	59.2%
Coppin State University (CSU)	18.0%	18.9%	20.0%	25.1%	24.0%	26.5%
Salisbury University (SU)	72.9%	75.1%	74.5%	76.2%	72.0%	75.0%
University of Maryland Baltimore County (UMBC)	66.9%	66.7%	67.4%	65.9%	70.3%	73.8%
University of Baltimore (UB)	48.5%	39.7%	39.3%	34.8%	43.3%	43.6%
Morgan State University (MSU)	33.7%	33.6%	34.7%	38.7%	41.9%	46.4%
St. Mary’s College of Maryland (SMCM)	86.8%	83.2%	79.9%	81.3%	85.2%	80.9%
All Students Average	63.7%	66.1%	65.5%	67.4%	68.8%	71.1%

Note: The data includes first-time, full-time students enrolled at an institution at the start of the academic year. Institution rates include those who graduated from the institution or those who transferred and graduated from any Maryland public four-year institution.

Source: Maryland Higher Education Commission

Appendix 10
Scholastic Aptitude Test Scores of First-year Students

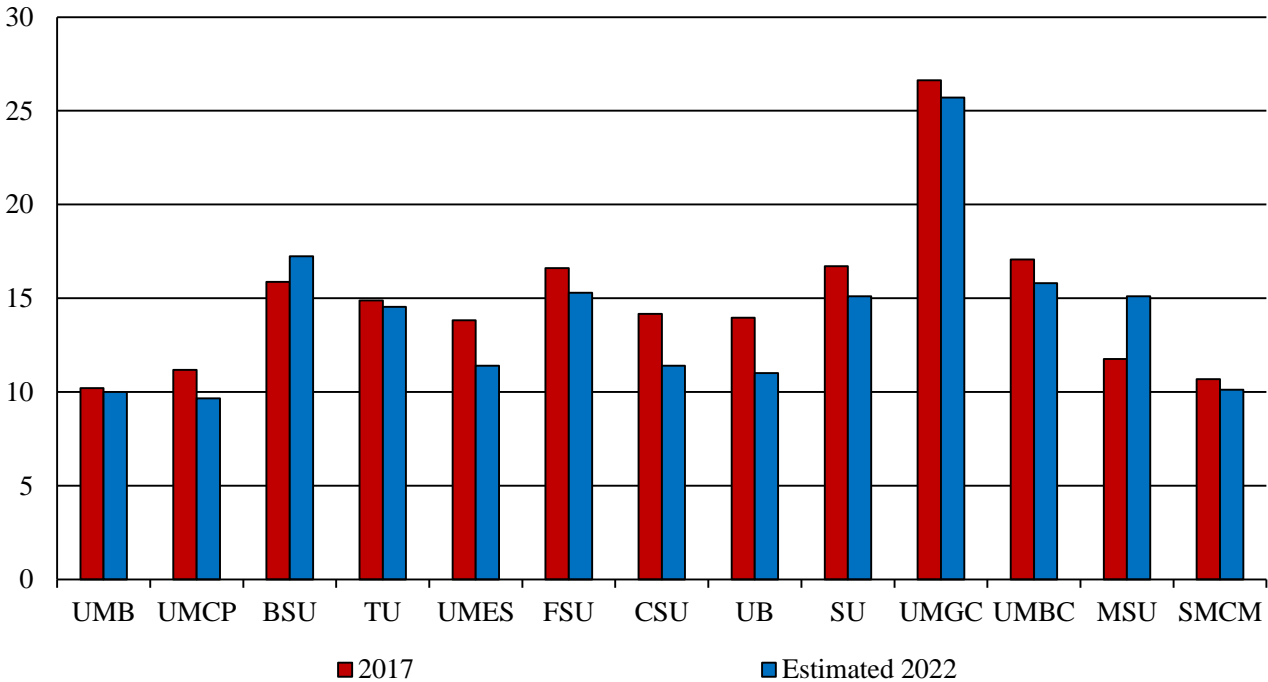


	<u>Fall 2015</u>	<u>Fall 2016</u>	<u>Fall 2017</u>	<u>Fall 2018</u>	<u>Fall 2019</u>	<u>Fall 2020</u>
University of Maryland, College Park (UMCP)	1,306	1,305	1,322	1,352	1,350	1,347
Bowie State University (BSU)	873	868	947	951	954	948
Towson University (TU)	1,087	1,072	1,133	1,138	1,141	1,129
University of Maryland Eastern Shore (UMES)	844	875	954	962	947	935
Frostburg State University (FSU)	969	972	1,025	1,031	1,031	1,025
Coppin State University (CSU)	895	839	930	953	906	905
University of Baltimore (UB)	974	924	1,003	1,021	1,063	1,013
Salisbury University (SU)	1,160	1,156	1,209	1,215	1,201	1,177
University of Maryland Baltimore County (UMBC)	1,210	1,217	1,251	1,278	1,275	1,251
Morgan State University (MSU)	890	938	1,001	1,007	1,012	998
St. Mary's College of Maryland (SMCM)	1,149	1,127	1,169	1,178	1,176	1,176
Average (Unweighted)	1,032	1,027	1,086	1,099	1,096	1,082

Note: The College Board implemented a redesigned SAT in 2016 that was taken by a majority of the entering students, which the Maryland Higher Education Commission (MHEC) attributes to the increase in the average scores in fall 2017. According to MHEC, the College Board states that, due to the test redesign that includes new questions and format, different College Board data systems, and changes in test takers time, a comparison cannot be made between the 2017 and prior year scores. Prior to 2017, data reflects critical reading (maximum 800) and math (maximum 800). Beginning in 2017, data reflects evidence-based reading and writing (maximum 800) and math (maximum 800) scores only.

Source: Maryland Higher Education Commission

Appendix 11
Student-to-faculty Ratio
Fiscal 2017 and 2022



	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>Est. 2022</u>
University of Maryland, Baltimore Campus (UMB)	10.2	9.8	9.8	9.7	9.9	10.0
University of Maryland, College Park Campus (UMCP)	11.2	9.9	9.7	9.3	9.8	9.7
Bowie State University (BSU)	15.9	17.6	18.6	18.6	18.2	17.2
Towson University (TU)	14.9	14.8	14.9	15.0	14.5	14.5
University of Maryland Eastern Shore (UMES)	13.8	13.3	12.3	11.4	11.4	11.4
Frostburg State University (FSU)	16.6	16.2	16.6	15.3	15.1	15.3
Coppin State University (CSU)	14.2	13.7	13.2	13.0	11.2	11.4
University of Baltimore (UB)	14.0	13.8	12.2	11.1	11.0	11.0
Salisbury University (SU)	16.7	15.8	15.2	15.2	14.9	15.1
University of Maryland Global Campus (UMGC)	26.6	26.2	25.5	25.4	25.7	25.7
University of Maryland Baltimore County (UMBC)	17.1	16.7	16.8	15.9	16.2	15.8
Morgan State University (MSU)	11.8	12.5	13.3	13.6	15.0	15.1
St. Mary’s College of Maryland (SMCM)	10.7	10.4	10.7	9.8	10.2	10.1

Note: Full-time equivalent.

Source: Department of Budget and Management