Monday, May 22, 2006

May 22, 2006, 3.00 - 4.15 pm
May 23, 2006, 8.00 - 9.00 am
Van Gogh-Remington Rooms

Issue Analysis and Research Committee

Jane Nichols (NV), chair
Ryan Deckert (OR), vice chair
David Nething (ND), ex officio
Cam Preus-Braly (OR), ex officio

Johnny Ellis (AK)
David Lorenz (AZ)
Robert Moore (CA)
Jenna Langer (CO)
Roy Ogawa (HI)
Michael Gallagher (ID)
Sheila Stearns (MT)
Warren Hardy (NV)
Beverlee McClure (NM)
Richard Kunkel (ND)
Committee vice chair (OR)
Robert Burns (SD)
Bonnie Jean Beesley (UT)
Jeanne Kohl-Welles (WA)
Tex Boggs (WY)

Agenda

Presiding: Jane Nichols, chair
Staff: Cheryl Blanco, director, Policy Analysis and Research
      Sally Johnstone, director, WCET

May 22, 2006, 3.00 - 4.15 pm

Action Item Approval of the Issue Analysis and Research Committee meeting minutes of November 7-8, 2005 8-3

Action Item Approval of the FY 2007 Issue Analysis workplan 8-5

May 23, 2006, 8.00 - 9.00 am

Information Items:

“Benchmarks Report” update (separate document) 8-7

Project on productivity in higher education 8-7

Partnership with Observatory for Borderless Higher Education update 8-8

Unit updates 8-19
  • WCET – Sally Johnstone
  • Policy Analysis and Research – Cheryl Blanco

Other business

Adjournment
ACTION ITEM

WICHE Issue Analysis and Research Committee
Meeting Minutes
November 8-9, 2005

Members Present*
Johnny Ellis (AK)
David Lorenz (AZ)
Roy Ogawa (HI)
Dwight Johnson (ID) (Monday)
Cindy Younkin (MT)
Ray Rawson (NV)
Beverlee McClure (NM)
Richard Kunkel (ND)
Robert Burns (SD)

Other Commissioners Present*
Bill Byers (CO)
Camille Preus-Braly (OR) (Monday)
Klaus Hanson (WY)

Members Absent
Jane Nichols, chair (NV)
Don Carlson (WA)
Francisco Hernandez (CA)
Rick O’Donnell (CO)
James Sager (OR)
David Gladwell (UT)
Phyllis Gutierrez Kenney (WA)
Tex Boggs (WY)

Staff Present
David Longanecker, executive director
Cheryl Blanco, senior program director, Policy Analysis and Research
Russ Poulin, associate director, WCET
Pat Shea, assistant director, WCET
Marvin Myers, director, Administrative Services
Brian Prescott, research associate, Policy Analysis and Research
Demarée Michelau, project coordinator, Policy Analysis and Research
Erin Barber, administrative assistant

Guests Present
Sharmila Basu-Conger, State Higher Education Executive Officers
David Wright, State Higher Education Executive Officers

*All attendees were present both Monday and Tuesday, unless otherwise noted.

In the absence of Chair Jane Nichols and Vice Chair Ryan Deckert, Commissioner Richard Kunkel convened the Issue Analysis and Research Committee on November 7 and 8, 2005. The minutes of the committee’s meeting of May 16-17, 2005, were approved without revisions.

Commissioner Kunkel asked Cheryl Blanco to take attendance, and a quorum was established. He stated that the agenda would be modified slightly by moving the “Benchmarks” item from an action item to an information item. He called on Blanco to give a summary of the action item on the residency study. She noted that this would be a national study of current policies related to the establishment of residency for purposes of pursuing postsecondary education in order to determine how these policies interact with decisions concerning such areas as admissions, financial aid, and financing. A major partner in this project would be the State Higher Education Executive Officers (SHEEO). David Wright was introduced as the key SHEEO staff member involved. Interest in residency requirements has escalated in the form of new concerns related to issues such as undocumented immigrants, financial aid eligibility, exemption of certain groups from residency requirements, criteria for establishing residency, and the role of residency status as a revenue source for institutions. Due to the complexity of the study, it would be conducted over an 18-month period and would address a number of research questions, as outlined in the action item. Major activities would include: separate online surveys designed for all academic officers in SHEEO offices and a representative sample of admissions officers, registrars, and financial aid directors in two- and four-year public and private institutions in the 50 states; an inventory of state laws related to residency; and focus groups of SHEEOs, SHEEO academic officers, admissions officers, registrars, legislators, and legislative staff. The estimated budget would require $225,000 through external funding.
In the discussion which followed, Commissioner Hanson suggested that references to aliens include documented as well as undocumented individuals. Commissioner Burns mentioned that the National Center for Education Statistics (NCES) at the U.S. Department of Education may have data available. Commissioner McClure suggested that it would be very helpful to have standardized language related to immigrants and mentioned that some work in that area has been done by another group; she agreed to share that information with staff. Commissioner Rawson suggested that the study should take into account differences in the relative contributions of tuition and state funding and that the study look at those proportions across the states. Commissioner Younkin asked that the study compare residency requirements in areas other than education across states. Commissioner Burns noted that residency requirements are politically driven.

COMMISSIONER JOHNSON MOVED A VOTE ON APPROVING THE RESIDENCY STUDY, WITH A SECOND BY DAVID LORENZ. The motion was unanimously approved.

Commissioner Kunkel turned to the “Benchmarks” item on the agenda and asked Blanco to review the changes made. Blanco mentioned that the committee approved the “Benchmarks” document at its May 2005 meeting. At that time, members suggested a few changes concerning layout and wording. Those changes were made, and the “Benchmarks” report in the agenda book reflects the content and format approved in May. She said that the information would be updated annually and brought before the committee so that regional progress on access and finance issues could be monitored and discussed at the annual May meeting. Commissioner Rawson suggested that additional information be considered for “Benchmarks” to show how lifetime earnings are related to educational attainment. David Longanecker pointed out that the “Benchmarks” document had recently been made available for dissemination at the Western Governors’ Association meeting.

The accelerated learning options project was the next agenda item, and Commissioner Kunkel asked Blanco to talk about this study, supported by Lumina Foundation for Education. Her presentation covered the project’s major activities, as well as some very preliminary results of the policy audit, transcript analysis, and institutional survey. The project examines Advanced Placement (AP), dual/concurrent enrollment, International Baccalaureate, and Tech-Prep programs. She also presented some preliminary policy implications for discussion. Committee members reacted to the implications and made some suggestions.

Following brief comments from Blanco on other activities underway in the Policy Analysis and Research unit, the committee adjourned for the day.

When the committee reconvened on Tuesday morning, Commissioner Kunkel asked Russell Poulin and Pat Shea to update the committee on WCET. Poulin updated the committee on WCET’s membership and activities, including the evaluation of eArmyU courses, the EduTools reviews of e-learning software and courses, a benchmarking project with the Observatory for Borderless Higher Education, the “No Significant Difference” website, and WCET consulting projects. Shea discussed the Center for Transforming Student Services, a new service to match institutions with adjunct faculty, and a project to improve electronic student services for students at Montana’s institutions.

Commissioner McClure said that the information presented throughout the commission and committee meetings was very helpful, especially the various links to online material. She asked if there was a single place on the WICHE website where anyone could go to get the online information mentioned during the meeting and easy access to other resources. Staff said not to their knowledge but they would look into the possibility of developing such a site.

Before the Issue Analysis and Research Committee adjourned to join the Programs and Services Committee, Blanco introduced staff from the Policy Analysis and Research unit and a guest. For the remainder of the Tuesday morning meeting, the Issue Analysis and Research Committee met in joint session with the Programs and Services Committee for a presentation and discussion of the Master Property Program.
## Existing Activities

*(GF=general fund)*

<table>
<thead>
<tr>
<th>Finance</th>
<th>Access &amp; Success</th>
<th>Innovation &amp; Info-technology</th>
<th>Workforce</th>
<th>Accountability</th>
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</thead>
<tbody>
<tr>
<td>Annual Tuition and Fees report (GF)</td>
<td>Student Exchange Programs: Professional Student Exchange Program (PSEP), Western Regional Graduate Program (WRGP), Western Undergraduate Exchange (WUE)</td>
<td>Support of the NorthWest Academic Forum’s regional initiatives (NWAF)</td>
<td>Escalating Engagement (Ford)</td>
<td>Regional benchmarks (GF)</td>
</tr>
<tr>
<td>WICHE’s Technology Costing Methodology</td>
<td>State Scholars Initiative (OVAE) Pathways to College Network (GE Fund, James Irvine Foundation, FIPSE and others) Escalating Engagement (Ford) Multiyear policy projects on higher ed finance and financial aid (Lumina Foundation) Multiyear policy projects on higher ed finance and financial aid (Lumina Foundation)</td>
<td>NEON, the Northwest Educational Outreach Network (FIPSE) and Internet Course Exchange (ICE) Developing best practices in online student services and audits of institutions’ online student services via CENTSS, the Center for Transforming Student Services (WCET)</td>
<td>Developing Student Exchange Program responses to critical workforce shortages Mental health student exchange Workforce Briefs</td>
<td>Electronic Regional Factbook: Policy Indicators for Higher Education (GF) Policy Insights on a range of higher education issues (GF)</td>
</tr>
<tr>
<td>Multyear policy projects on higher ed finance and financial aid (Lumina Foundation)</td>
<td>High school graduates projections by state, race/ethnicity, and income Children’s mental health improvement projects in Wyoming and South Dakota</td>
<td>EduTools work to provide comparisons of electronic learning software (WCET)</td>
<td>Building partnerships for competency: public mental health workforce development</td>
<td>Facilitation of the Western States Decision Support Group for Public Mental Health (SAMHSA)</td>
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<td>Performance measurement improvement in the Western states public mental health programs</td>
<td>Accelerated learning options national forum (Lumina) Multiyear forum on 1st dollar for access (Ford)</td>
<td>Building regional participation in the American TelEd Communications Alliance (self-funding)</td>
<td>Rural mental health training initiatives</td>
<td>Electronic alerts and clearinghouse (GF)</td>
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<tr>
<td>Property insurance and risk consortium (self-funding) Legislative Advisory Committee Workshop for legislative staff (Lumina) Technical assistance workshop (Lumina)</td>
<td>Workforce Briefs</td>
<td>EduTools online course evaluation project</td>
<td>State technical assistance with South Dakota and Hawaii (Ford)</td>
<td>SPIDO (GF)</td>
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### New Directions
(proposals have been approved by the commission)

<table>
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<tr>
<th>Finance</th>
<th>Access</th>
<th>Innovation &amp; Info-technology</th>
<th>Workforce</th>
<th>Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residency policies</td>
<td>PSEP revitalization</td>
<td>Quality measures in e-learning (WCET)</td>
<td>Expanding professional advisory councils (health professions)</td>
<td>Collaboration with NCHEMS, SHEEO and WICHE on database maintenance and exchanges</td>
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<td></td>
<td>Methodological review of <em>Projections of High School Graduates</em> (Spencer)</td>
<td>Good practice for the creation and use of open educational resources material (WCET)</td>
<td>Regional social work consortium (seeking funding)</td>
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<td></td>
<td>Student mobility</td>
<td>EduTools sustainability model (WCET)</td>
<td>Development of an R-34 research proposal focused on evidence-based practice in rural mental health with the University of New Mexico Health Sciences Center</td>
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<td></td>
<td>Portable financial aid</td>
<td>Acquiring a regional learning center for SHEPC</td>
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### On the Horizon
(proposals not yet submitted to the commission or past proposals that are being recast)

<table>
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<tr>
<th>Finance</th>
<th>Access</th>
<th>Innovation &amp; Info-technology</th>
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<tbody>
<tr>
<td>WICHE service repayment program</td>
<td>New traditional students</td>
<td>Expansion of NEON and ICE</td>
<td>WICHE licensure and credentialing service</td>
<td>Follow-up initiatives responding to the National Center on Public Policy and Higher Education’s report cards and The National Commission on Higher Education’s Report</td>
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<tr>
<td>Productivity as a strategy to address cost and affordability concerns</td>
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<td>Development of portal technologies (i.e., WUE and WREGP databases)</td>
<td>Recruiting leaders for Western higher education</td>
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<td></td>
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<td>Facilitating Internet II connectivity throughout the West</td>
<td>Assisting states in identifying academic program development needs</td>
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<td></td>
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<td>Health and allied health workforce development and policy</td>
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**May 22-23, 2006**

**8-6**

**Access**
- New traditional students
- Assisting states and institutions in planning for new types of students (WCET)
- Projecting financial aid program funding to increase access for low-income students

**Innovation & Info-technology**
- Quality measures in e-learning (WCET)
- Good practice for the creation and use of open educational resources material (WCET)
- EduTools sustainability model (WCET)
- Acquiring a regional learning center for SHEPC

**Workforce**
- Expanding professional advisory councils (health professions)
- Regional social work consortium (seeking funding)
- Development of an R-34 research proposal focused on evidence-based practice in rural mental health with the University of New Mexico Health Sciences Center

**Accountability**
- Collaboration with NCHEMS, SHEEO and WICHE on database maintenance and exchanges

**Finance**

**Access**
- PSEP revitalization
- Methodological review of *Projections of High School Graduates* (Spencer)
- Student mobility
- Portable financial aid

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INFORMATION ITEM
Project on Productivity in Higher Education

Summary
Staff is considering submitting a proposal to a foundation for a multiyear project concerning productivity in higher education as a strategy to remedy some college cost and affordability issues. The goal of the project would be to assist states and policymakers in making college more affordable by addressing productivity issues and thus increasing access and success for economically disadvantaged students. A study of this nature is consistent with our issue areas of access and success and financing.

Background
The increasing cost of higher education and the associated concerns with affordability and access for economically disadvantaged and traditionally underserved students have generated much public debate. Accompanying this national conversation is widespread interest in strategies to stabilize – or possibly reduce – costs and increase productivity in order to protect access to college, particularly for disenfranchised populations.

“No issue is more important than the matter of affordability in keeping open the doors of college opportunity, particularly for students from low-income groups. Over the past several years, dramatic increases in college costs have raised the issue’s importance even further.” This quote from Lumina Foundation for Education for its initiative College Costs: Making Opportunity Affordable succinctly underscores the primacy of cost, affordability, and access issues in American higher education. The project proposed by the Policy Analysis and Research unit would address these issues from the perspective of productivity.

The proposed project would have at least three major objectives:

1) To assist states and their institutions in exploring and implementing measures that improve college affordability and access by increasing productivity.

2) To assist policymakers and policy shapers nationally in learning how a range of productivity strategies might make college more affordable for economically disadvantaged students.

3) To expand the policy and research literature with new studies and white papers on topics related to affordability, productivity, and increased access.

Through multiple activities such as state technical assistance, commissioned papers, focus groups, town meetings, leadership institutes for policymakers and policy shapers, and a national forum, the project would strive to help a number of states develop action plans and begin implementing productivity strategies to improve college affordability for disadvantaged students.

For purposes of the project, productivity would be interpreted in terms of state and institutional policies and practices. For example, in the initial phase staff and consultants would work closely with state and institutional officials to identify policies that promote or inhibit greater productivity to increase access and success. In the second phase, new approaches would be examined in order to design an action plan for change and formulate an assessment of progress. In the final implementation phase, the state and its institutions would apply the new change strategies and evaluate performance in terms of effects on productivity, cost, affordability, access, and success. Ten to 12 states would receive technical assistance, and most states would benefit from other activities, such as the national forum and publications.

Next Steps
Staff will explore funding opportunities to support a national project on productivity. Upon initial approval from the Issue Analysis and Research Committee, staff will develop a more complete project design and return to the commission with an action item to move forward on a formal proposal.
This summary highlights the lessons of the first International Benchmarking Programme jointly sponsored by the Observatory on Borderless Higher Education and the WCET. The purpose of the programme was to examine current institutional practice of strategic development and implementation of policies and practices in the campus-wide integration of information and communication technologies and on-line learning with a view to identifying institutional good practice.

Both the sponsoring organisations believe that it is important to share experiences with the subscribing institutions of the OBHE and WCET. The considerable value gained through actively participating in the whole of the benchmarking process is drawn from undertaking the institutional self-review process and participating in the workshop and cannot be fully appreciated in this distillation. However, we believe that it will provide a very useful point of departure for institutions to begin to reflect on their current practice and to implement change. (A full report on the workshop is available.)

There are two key elements to the overall programme: an institutional review followed by a workshop. In the first instance, institutions are given an institutional self-review document which was developed by the OBHE/WCET Facilitation Team. The document set out a series of questions under identified themes which participating institutions worked through; they then submitted an institutional report. The institutional self-review documents were submitted for analysis by the Facilitation Team. Draft statements of good practice were drawn from the submissions as well as brief overview reports which illustrated different aspects of institutional practice in each of the key areas. Participating institutions then came together for a two-day workshop in Vancouver, Canada to share experiences and to refine the statements of good practice. Thereafter, participants were able to make further comment on the statements via the Project website.

Participating institutions reflected a cross-section of the higher education sector including large research intensive institutions and smaller liberal arts universities. This diversity is regarded as a strength of the programme as good management practice is transferable across all types of institutions. Having said this, there are clearly some limitations and caveats that should be acknowledged when utilising the statements of good practice.

These statements are not meant to be exhaustive. Rather, they are indicative of how universities' management processes might respond to the various elements of strategy, implementation and dissemination. The statements are a reflection of the institutions that participated – thus, some statements suggest certain assumptions about organisational structures (e.g. Heads of e-learning or whether functions are centralized or decentralized). Such statements should not be considered as placing a particular value on any one institutional model; instead, they should be seen as one possible approach to a particular practice set in a particular organisational context. The differing contexts may also lead to some level of inconsistency across the statements put forward. It must be recognised that institutions may be at different stages in development and evolution and therefore good practice in one institution may be less appropriate in another. Each institutional leader will need to make a judgement as to the appropriateness and utility of the statement to their organisation.

1 The Observatory for Borderless Higher Education is an international strategic information service headquartered in London, England. It is a joint initiative of the Association of Commonwealth Universities and Universities UK. (www.obhe.ac.uk)
2 WCET is a membership organization headquartered in Boulder, Colorado. It is a self-supporting affiliate of the Western Interstate Commission for Higher Education. (www.wcet.info)
The issue of decentralisation versus centralisation in the context of e-learning operations is a critical issue for consideration when considering the statements of good practice which follow. Various models for funding and services were outlined in the course of the benchmarking process. These included a centralised structure and funding model, a central funding and more decentralised services model and a centralised funding and decentralised services structure etc. By way of illustration, the chart below indicates the level of centralisation for four of the institutions included in the benchmarking project and one outlier from outside the project, as an example.
The chart depicts an institution’s placement regarding e-learning operations. The two axes are:

**Funding**
- A completely centralised institution would have all of its funding for e-learning operations derive from the government or the central administration of the institution.
- A completely decentralised institution would have all of its funding for e-learning operations derive from charging for its services.
- Most e-learning operations have a combination of some central support funds and having to earn some funding on its own.

**Staffing/Service Providers**
- A completely centralised institution would employ staff to provide all of the e-learning services.
- A completely decentralised institution would have no centralised staff and it would be the responsibility of each academic unit to provide all of the e-learning services.
- Most e-learning operations have a combination of some central support staff and some “service providers”.

Institution A receives most of its funding centrally and has a centralised staff to provide e-learning operations support. This is a common model in small institutions where the economies of scale lead to a more centralised approach.

Institutions B and C use a combination of central and decentralised staffing. Institution C derives most of its funding from a central source, but some of the funds are “pass through” funds that support e-learning support staff that are located in the academic units. Institution B uses the “service agreement” model where there is some central funding to support base administrative functions of the e-learning operations, but most of the funding is derived from contracting with the academic units on a “fee for service” basis.

Institution D has a variety of providers of e-learning service providers. Some academic units have their own operations and others use a central unit. Very little of the funding is centrally provided. Some economies of scale are lost as the different providers of e-learning services offer some services that are shared at most institutions, but compete with each other at this institution.

Institution E is the University of California, Los Angeles, which was not part of the benchmarking study. This model was included as a radical new attempt to have all funding and services (other than a few centralised staff) completely devolved out to academic units. The central unit provides a few “economy of scale” services, such as joint purchasing.

This illustration has been provided by way of contextualization of the different institutional approaches taken by participating universities. It therefore provides an important background for reading the Statement of Good Practice.
Summary of Good Practices from 2005 International Benchmarking Project

<table>
<thead>
<tr>
<th>IT and e-learning Strategy Development</th>
<th>1. The entire institutional community is involved in IT planning and chief IT staff members are engaged with institutional strategic planning processes.</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>2. Planners integrate, prioritize, and apply IT wisely to all activities on campus as a way to improve the business of the institution (ranging from administrative processes to the teaching, research and learning processes of the institution.)</td>
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<td>3. The IT strategy is reviewed regularly for consistency with university goals. An IT strategic plan is considered a “living document” with regularly scheduled reviews and revisions.</td>
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<td>4. IT planners are intimately involved in the e-learning strategic planning process for all aspects of the campus (regardless of whether e-learning is centralized or departmentalized). The e-learning strategies come from the institution’s goals to ensure campus wide acceptance and support.</td>
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<td>5. IT plans include appropriate elimination of obsolete equipment and services.</td>
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<td>6. IT planners use a consistent methodology across campus units/departments to assess the full costs of specific IT choices. This allows for comparisons across campus units/departments.</td>
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<td>7. IT planners are sensitive to how IT implementation may change people’s jobs and communicate that effectively.</td>
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<td>8. Security plans include procedures to safeguard data and equipment, improper use of university resources, legal issues for students and faculty members.</td>
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<td>9. The monitoring of IT strategic development and implementation is not to be solely in the hands of the chief information officer, but includes academic and administrative staff leaders.</td>
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<td>10. Institutions support a single Course Management System to save money, allow for better internal support for faculty and students, and integration with administrative systems.</td>
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<td>11. Where appropriate and within well-defined and articulated institutional plans, IT and e-learning planners</td>
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</table>
incorporate available consortia, partners, or communities to take full advantage of their resources to leverage programmatic, technical and administrative services and systems.

| IT Operations Management | 1. IT management structure reflects the complexity of the institution;  
| | a) Whatever is decentralized still enjoys coordination, communication & support with the central IT shop – perhaps using a “federated” model.  
| | b) IT is governed in compliance with existing structures, including campus advisory committees and trustee engagement.  
| | 2. The head of IT serves in the CEO’s cabinet and may report directly to the CEO. In any case, both the CAO and CFO are actively engaged with IT issues and IT has a strong champion at the highest levels.  
| | 3. Library IT support and management is organizationally integrated with IT support & management.  
| | 4. Online information systems provide answers to common problems and questions, but students, faculty and nonacademic staff also have access to human support as needed.  
| | 5. A single Help Desk organization supports all IT customers using best practices in customer support.  
| | 6. A portal provides convenient personalized access to all online campus services through a single sign-on process.  
| | 7. Innovative practices from anywhere are shared throughout the institution.  
| | 8. The institution has the capacity to develop and implement IT policies as needed.  
| | 9. IT partners with and supports innovators and innovation as a recognized aspect of organizational mission.  
| | 10. Service standards are set and measured for IT services provided.  
| | 11. Project management methodologies are embraced and applied appropriately.  
| | 12. Equipment is fully & cost-effectively maintained through its entire useful lifecycle, but no longer.  
| | 13. The organization understands modern security practices and balances the security/service tension |
14. Users understand the security environment including their responsibilities and its impact on them.

15. The e-learning infrastructure provides hardware and software resources that are redundant, highly reliable and recoverable should a disaster strike.

<table>
<thead>
<tr>
<th>E-learning Operations Management</th>
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<tbody>
<tr>
<td>1. The role of e-learning in supporting the institution’s mission is included in key strategic documents. The expected goals and outcomes of technology use (i.e., increase access, increase quality, control costs) are clearly stated and understood.</td>
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<tr>
<td>2. E-learning clearly communicates how it supports the institution’s mission and serves institutional stakeholders.</td>
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<tr>
<td>3. E-learning is one of the responsibilities of the chief academic officer. It is not a technical issue.</td>
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<td>4. As appropriate to meet institutional goals and outcomes, e-learning is integrated into the instructional fabric of the university.</td>
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<td>5. The head of e-learning has input to the key academic decision-making processes in the institution.</td>
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<tr>
<td>6. The e-learning management and support structure reflects the complexity of the institution and the institution’s maturity in implementing e-learning.</td>
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<tr>
<td>7. Decentralized e-learning support units coordinate and cooperate with the centralized e-learning unit.</td>
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<td>8. Central support units and academic unit personnel meet on a yearly basis to create an agreement of what e-learning services will be provided by that centralized support unit.</td>
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<tr>
<td>9. E-learning planning is addressed by a committee that has representation from appropriate academic and administrative units from throughout the institution.</td>
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<tr>
<td>10. While e-learning support may be dispersed, there is a central strategic plan for e-Learning and central oversight that the academic units are in line with the strategic plan.</td>
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<td>11. The institution has a publicly-available set of policies regarding teaching and learning via e-learning</td>
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</table>
12. Promotion and tenure policies are supportive of faculty teaching with and experimenting with e-learning technologies.

13. The institution has a policy regarding intellectual property rights.

14. Standards are set for e-learning systems that will be supported by the campus. If other systems are allowed, they are not supported.

15. National and international standards for e-learning technologies, software, and learning objects are monitored and implemented, as appropriate.

16. The institution has a supportive environment for faculty to learn about e-learning technologies and to experiment in teaching with those technologies.

17. Faculty and administrators examine how changing faculty roles may better enable them to meet their institution’s mission and goals. E-learning technologies are not just add-ons, but are integrated into the instructional strategy.

18. Faculty new to teaching via e-learning are required to participate in faculty development on how to use these tools. They learn how to teach via e-learning through activities that make use of the e-learning tools that they will use.

19. Students have access to comparable student support services, regardless of location.

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**Resources for IT Infrastructure**

1. Resources are allocated for major IT projects only after review through established and well-understood institution-wide processes.
   a) The institution is capable of understanding its full costs
   b) The institution is capable of understanding return and/or value on investment relative to stated institutional visions and plans

2. Decentralized initiatives are reviewed before substantial decentralized resources are committed
<table>
<thead>
<tr>
<th>Staff Development Training</th>
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<tbody>
<tr>
<td>1. Training funds are a priority in the budgeting process.</td>
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<td>2. The outcomes of all training programs are adequately assessed.</td>
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<tr>
<td>3. There is a consistency of approach to IT training campus-wide (regardless of reporting lines).</td>
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<td>4. New staff members are proactively inducted into training opportunities.</td>
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<td>5. When IT strategic planning is likely to change people’s jobs, they are involved in the training design process.</td>
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<tr>
<td>6. Incentives for using IT in teaching and research are built into regular promotion and tenure processes.</td>
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<tr>
<td>7. Awards for excellence will advertise full campus commitment for innovative use of IT in teaching.</td>
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<tr>
<td>8. Demonstrated proficiency is required before using new tools in teaching (driver’s license approach).</td>
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<tr>
<td>9. New faculty members hired with expectation that they will be innovative in their use of technology in teaching.</td>
</tr>
<tr>
<td>10. Incentives (positive and/or negative) used to encourage faculty to share instructional resources.</td>
</tr>
</tbody>
</table>

| 3. The institution applies lifecycle funding models for all components of the IT infrastructure, with appropriate lifecycles established for desktops, laptops, printers, software, network equipment, and servers; IT is part of the operating budget of the institution. |
| 4. Standards are set for software and hardware systems throughout the campus to allow for cost savings in support and licensing; these standards are reviewed regularly. |
| 5. The institution understands chargeback mechanisms and applies them appropriately. |
| 6. The institution understands Service Level Agreements (SLA’s) and applies them appropriately. |
| 7. Resources are fungible between personnel and other expenses. |
| 8. The institution understands outsourcing and when to use it. |
To help fill the pipeline for future teachers and leaders, institutions encourage graduate student learning in information technology and e-learning.

11. Students are provided training and support consistent with required information literacy, legal issues, and computing skills.

12. Access to IT training is available to on- and off-campus students.

13. Training materials and opportunities are available to fit staff and student schedules and can be delivered through alternative modalities allowing for just-in-time training.

14. Administrative, IT, and executive support staff training materials include project management, financial, and statistical packages.

15. Training material selection and/or development include input from experienced trainers and users.

16. Collection of feedback from IT and e-learning users on a planned schedule and utilizes the feedback to improve services.

17. Have a process to collect and act upon complaints and suggestions from IT and e-learning users.

18. Actively use the data collected (survey results, suggestions, help desk requests, downtime, faculty requests, etc.) to inform decisions.

19. Plan to manage user expectations, including developing ways to handle user feedback on issues that can not be immediately resolved.

20. Communicate your past performance, current plans, and future goals to your user audience.

21. Inform your audience on back-up plans when the technology inevitably fails.

22. Periodically benchmark IT and e-learning services against those of other institutions, including participating in benchmarking collaborations.
8. Periodically benchmark IT and e-learning services against similar services in other industries.

9. Have a defined process and set of measures to examine the effectiveness of IT and e-learning services in meeting user needs.

10. Have a defined process and set of measures to examine the “value for the money” of IT and e-learning services.

11. Actively seek opportunities to join collaborative partnerships (both internal and external) to improve the IT and e-learning services (both in effectiveness and “value for the money”) it provides to its users.

For further information on how your institution can be involved in the OBHE/WCET Benchmarking Programme contact:

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INFORMATION ITEM
Policy Analysis and Research
Unit Update
May 2006

Financing

Changing Direction: Integrating Higher Education Financial Aid and Financing Policy (Phase 2) — A grant from Lumina Foundation for Education supports this project, which ends in August 2006. Phase 1 activities occurred between November 2001 and August 2003; Changing Direction moved into Phase 2 in September 2003, with additional funding of $1 million over three years to support the expansion and broadening of the scope of this project. New areas under this grant include financing and retention issues. Project activities include offering technical assistance to 14 states on integrating financial aid, tuition, and appropriations policies; convening multistate policy forums; cosponsoring leadership institutes for legislators, governors’ education policy advisors, regents, and legislative staff; updating and expanding our SPIDO (State Policy Inventory Database Online) and commissioning research and policy papers.

Residency Policies — Pending external funding, a new finance project will begin in FY 2007 to look at residency policies. Residency requirements for higher education are gatekeepers for access in that they provide protection through lower tuition rates for in-state students. They also align the contributions that taxpayers implicitly provide for higher education with the benefits they receive as “residents.” Finally, these requirements are important finance strategies through their high value as potential revenue generators. The project will examine how state residency requirements interact with other state and institutional policies, particularly those concerning admissions, financial aid, and financing, to promote or inhibit access to and success in postsecondary education for underserved populations.

Legislative Advisory Committee — To ensure that we engage state legislators in a variety of ways, WICHE created a Legislative Advisory Committee in 1995 composed of two legislators from each of the 15 WICHE states. The purpose of the committee is to inform the WICHE Commission’s Executive Committee and staff about significant legislative issues which pertain to higher education and related state issues; to provide input on WICHE initiatives; and to advise staff on program and participant considerations related to WICHE’s regional or subregional educational policy workshops. In recent years, the committee has met in conjunction with the annual meeting of the National Conference of State Legislatures (NCSL) or the Council of State Governments - West.

Access and Success

Pathways to College Network — Pathways is an alliance of major foundations, nonprofit organizations, educational institutions, and the U.S. Department of Education to improve college access and success for large numbers of underserved youth. WICHE has been the lead organization in developing and implementing the public policy and financial aid components of Pathways. As a lead partner, WICHE participated in the national release of A Shared Agenda, the alliance’s call to action for creation of an education system in the U.S. that encourages all young people to prepare for college. WICHE also expanded SPIDO, its free, online policy inventory database, with policies from the 50 states related to: tuition and fees; teacher quality; financial aid; articulation and alignment; early outreach programs; remediation; data and accountability; and equity. A new domain on accelerated learning options was added this year.

Accelerated Learning Options: A Study of State and Institutional Policies and Practices — Findings from this project will help guide policymakers and institutional leaders in K-12 and higher education on how to best channel limited resources for students. The study will assist them in designing policies and practices that will more effectively broaden the opportunity for underrepresented students to participate in accelerated learning – Advanced Placement, dual/concurrent enrollment, the International Baccalaureate diploma, and Tech-Prep – in order to enhance their changes for access and success. Major project activities include: a national policy inventory; a survey of institutional policies among public 2- and 4-year and private institutions; a transcript analysis; and student focus groups. The project’s final report, Accelerated Learning Options: Moving the Needle on Access and Success, will be released in May 2006.
National Policy Forum on Accelerated Learning ~ In conjunction with the release of our report, Moving the Needle on Access and Success, WICHE will convene a national policy forum in partnership with Jobs for the Future. The forum, “Accelerated Learning: Shaping Public Policy to Serve Underrepresented Youth,” will be held in Atlanta, GA, on June 8-9, 2006. The conference will examine policy issues, research, and practices related to accelerated learning and increasing access for low-income youth, quality of accelerated learning courses, and the financing of these programs.

Escalating Engagement: State Policy to Protect Access to Higher Education ~ A new grant from the Ford Foundation allows WICHE to expand and accelerate the work we have started both in terms of access as a key issue area and the involvement of policymakers. Major activities include policy forums, state technical assistance, roundtables, and commissioned papers.

Portable Aid and Access and Choice Decisions among Low-income Students ~ Contingent upon external funding, this project will examine how financial aid programs with awards that are portable across state lines impact student access to higher education and choice of institution and whether these programs influence students of varying income levels and race/ethnicity differently. Building on a study of WICHE’s Western Undergraduate Exchange, this study will include two state portable aid programs in Rhode Island and the regional exchange program at the New England Board of Higher Education.

Other Publications ~ Ongoing work that informs the access conversation in the West includes our projections of high school graduates, Knocking at the College Door, regional fact book, an annual report on tuition and fees, our Policy Alerts and Stat Alerts e-mail notices, Benchmarks, our short report series titled Policy Insights, and an informational bulletin titled Exchanges.

Workforce

Escalating Engagement: State Policy to Protect Access to Higher Education is a new project funded by the Ford Foundation to expand and accelerate our efforts related to workforce issues. Workforce activities will include policy forums, state technical assistance, roundtables, and commissioned papers. Hawaii and South Dakota were selected for technical assistance in 2006 to examine how higher education can better support state economic development and workforce needs. Escalating Engagement will also assist the North Dakota State Board of Higher Education in working with members of the Roundtable on Higher Education and other state decision makers in creating new strategies that more closely link postsecondary education to near-term and future economic and workforce development goals of the state.