Tuesday, November 11, 2003

10.00 - 11.00 am
Spruce

Issue Analysis and Research Committee

Committee Members
Cece Foxley (UT), chair
Marc G aspard (WA), vice chair
Chuck Ruch (SD), ex officio
Don Carlson (WA), ex officio
Johnny Ellis (AK)
Larry Gudis (AZ)
Francisco Hernandez (CA)
Tim Foster (CO)
Doris Ching (HI)
Richard Bowen (ID)
Cindy Younkin (MT)
Ray Rawson (NV)
Patricia Sullivan (NM)
Richard Kunkel (ND)
Ryan Deckert (OR)
Robert Burns (SD)
Committee Chair (UT)
Committee Vice Chair (WA)
John Barrasso (WY)

Agenda

Presiding: Cecelia Foxley (UT), chair
Staff: Cheryl Blanco, director, Policy Analysis and Research
Sally Johnstone, director, WCET

Action Item
Issue Analysis and Research Committee
Meeting Minutes, May 20, 2003

Information Item: State and Institutional Policies Related to Accelerated Learning Programs. Attached is an information item for committee discussion concerning a potential proposal to Lumina Foundation for Education for the Policy Analysis and Research unit to conduct a national audit and analysis of state and institutional policies related to accelerated-learning programs, such as Advanced Placement, dual and concurrent enrollment, and the International Baccalaureate.
Discussion Item: Benchmarks Document. Staff will give a progress report on the “benchmarks” document discussed at the May 2003 commission meeting.

Information Item: Unit updates. Staff will provide an update and respond to the committee’s questions concerning ongoing activities.

1. Policy Analysis and Research – Cheryl Blanco
2. WCET – Sally Johnstone

Other Business

Adjourn
Chair Cecelia Foxley convened the Issue Analysis and Research Committee on May 20, 2003. She announced that Russell Poulin was representing the WCET in the absence of Sally Johnstone, director of the WCET. The minutes of the November 12, 2002, and April 22, 2003, committee meetings were approved without revisions.

For the action item on the Western Consortium for Accelerated Learning Opportunities (WCALO)–Phase 2, Chair Foxley asked Cheryl Blanco to summarize the information. Blanco reported that the proposal would continue the work supported by the U.S. Department of Education’s Advanced Placement Incentive Program over the past two-and-one-half years during the first phase of the WCALO project. Since the initial grant period of three years was ending, staff would like permission to seek funding for another three-year period. She mentioned some of the continuation and new activities planned for the Phase 2 work. In response to a question from Commissioner Gudis, she highlighted the accomplishments of Phase 1. Commissioners had several questions including the priority of this project in the unit’s work plan, staffing, state partners in the consortium, and status of the proposal with WICHE as a partner or as a qualifying individual organization. The committee unanimously approved the request to seek and expend funds for this project.

Chair Foxley asked Poulin to update the committee on the proposal “Development of Costing Tool for Distance Education and ICTs for Teacher Education and Support in Sub-Saharan Africa.” Poulin reported that the World Bank had invited WCET to submit a proposal to develop an educational technology-costing model for teacher training in sub-Saharan Africa. Although WCET was one of the four finalists, it was not awarded the grant. Therefore, this item should be removed from the agenda. Chair Foxley approved this request.

On the information item “Extending the WCET EduTools Website to Incorporate a New Category of University-created Course Management Systems,” the chair again recognized Poulin. He explained that
this had been prepared as an action item for the committee but that the potential funder had reduced the 
budget range. As a result, the project now falls below the approval threshold required for proposals.

Chair Foxley moved to the discussion item titled “Tuition for Military Personnel, Spouses, and 
Dependents.” Blanco explained that this item was discussed at the November 2002 committee meeting 
and during the April 2203 conference call. Following the last discussion, staff were directed to update the 
state policy matrix and draft a statement of “best practice” policy for the committee’s consideration. 
Commissioner Kuepper provided more detailed background on the Army’s interest in this initiative and the 
major concerns around the question of continuity of tuition benefits. During discussion, Commissioner 
Ching said that she was raising this concern in Hawaii and encouraged states to review the policy in line 
with the best practices statement. Commissioner Hernandez asked how the fiscal impact would be 
determined. Commissioner Kuepper explained that he had tried to do that in Colorado by estimating how 
many people would potentially be involved in this. Commissioner Kunkel asked which state has the best 
practices. Commissioner Kuepper replied that some states have a specific reference whereas the policy is 
embedded in something else in some states. Commissioner Hernandez asked why there wasn’t federal 
legislation linked to financial aid on this. Commissioner Kuepper did not know and questioned whether 
there should be because states determine tuition and residency policies – so this is a state issue. 
Commissioner Perry observed that this is an interesting policy area; the state’s responsibility is to be 
consistent in applying the rules, and changes in tuition policy affect other policy areas as well. 
Commissioner Kuepper agreed, saying that states view this in very different ways. Commissioner Carlson 
reported that this is a very real issue in Washington as large numbers of military personnel and families 
are locating in the state following the war in Iraq; the increased demand on area postsecondary 
institutions is significant. Turning to the draft statement in the discussion item, Chair Foxley asked for 
comment on the wording. Members accepted the statement with the revision that the word “dependents” 
would replace all references to “family members” and concurred that the statement should be taken to the 
full commission with a recommendation that the states consider their policies on tuition for military 
personnel and dependents and the “best practice” statement.

The chair called for discussion of the item on the proposed fiscal year 2004 work plan for the Policy 
Analysis and Research unit. She reminded the committee that work load concerns should be taken into 
consideration as current and possible future activities are reviewed. Blanco explained the general format 
of the workplan matrix, which is constructed around five major columns representing the priority themes - 
Finance, Access, Innovation & Info-technology, Workforce, and Accountability - and three broader 
sets of activities: Existing Activities, New Directions (proposals have been approved by the commission), 
and On the Horizon (proposals not yet submitted to the commission or past proposals that are being 
recast). For the Existing Activities segment, Blanco noted that the unit has several activities currently 
underway, with at least one activity in each thematic area. For the New Directions component, the unit 
again has several topics that have been approved by the commission for external funding, some have 
been submitted to foundations or other entities, others are still in the development stage. The On the 
Horizon portion of the workplan required more in-depth discussion. Blanco explained the proposed 
topics, and committee members engaged in discussion around the potential of developing the topics as 
unit activities.

- The Finance issue had one potential new topic: policy work on resident and nonresident tuition 
policies. An exploratory project might look at the pros and cons of reducing or eliminating entirely
the distinction between resident and nonresident tuition policies. Commissioner Gaspard noted that this is a tough issue; it is hard to find good information, and he was not sure what we could add to the debate. Commissioner Burns also observed that it is very much a state-centered issue. Commissioner Perry asked what happens when some states decide to eliminate differences between in-state and out-of-state tuition? Would the Student Exchange Program collapse? Commissioner Younkin asked why a state would eliminate the tuition differential. Suggested responses were for reasons of capacity and to stimulate the economy. Commissioner Burns asked if the issue were driven by distance education. The committee decided to explore the possibility of producing a white paper on state and regional issues associated with the elimination of, or significant reduction in, the difference between in-state and out-of-state tuition.

- Under Access, a potential new activity was to establish an advisory council on K-20 interactions to enhance preparation. The rationale behind the activity is the highly increased interest around the nation on improving K-12 and higher education relations. Commissioner Perry indicated that some states are currently reporting data bases together, and it is reasonable that we look at K-12/higher education regionally. Commissioner Hernandez observed that the driving forces in California are around serving minority students. There is some interest in forcing K-12 and higher education to align. The committee decided to keep this work within the Policy Analysis and Research Committee for the present time rather than recommending establishing a new council on K-20. Commissioners Burns and Hernandez volunteered to assist staff in assembling a handout describing what states were doing around K-12/higher education alignment.

- The Workforce issue contained an activity to convene regional and subregional forums on emerging workforce needs. Blanco explained that WICHE’s grant from the Ford Foundation presently supports activities around workforce needs. Additionally, the Policy unit is collaborating with the Programs and Services unit on this work. She suggested that no new work be developed on this issue in the short term. The committee supported this suggestion.

- The Accountability issue reflected an activity calling for follow-up initiatives responding to the National Center on Public Policy and Higher Education’s report cards. Blanco stated that WICHE has been supporting state and multistate discussions on the report card issues, most of which are also covered in the WICHE Fact Book. The National Center has its own follow-up work providing technical assistance to states, some of it is being done in partnership with the Education Commission of the States and NCHEMS. The committee determined that no new activity was needed from the Policy unit, and that any support work could be handled through existing activities.

- A new activity, one not included in the work plan material, was proposed based on the commissioners’ discussion the previous day. The idea of developing a new “benchmarks” report was suggested. The committee supported this activity, and Commissioners Gaspard and Perry volunteered to assist staff. Chair Foxley reiterated a comment from the commission discussion that we should be aware of data available from other sources such as the NCHEMS “higheredinfo.org” Web site and avoid replicating that information. Blanco suggested that staff produce a draft “benchmarks” document for review during a committee conference call prior to the November commission meeting so that a more complete document would be ready for commissioners to review in November. The committee supported this suggestion.

The committee adjourned to rejoin the commission for the next general session.
INFORMATION ITEM
State and Institutional Policies Related to Accelerated Learning Programs

Summary
Staff are considering a small proposal to be submitted to Lumina Foundation for Education to conduct an audit and analysis of state and institutional policies related to accelerated learning programs. The foundation has indicated an interest in such a report, and a study of this nature is consistent with our issue area of access and our current work with accelerated learning programs through the Western Consortium for Accelerated Learning Opportunities (WCALO).

Background
A key element of access and success to higher education is college readiness. Efforts to improve student preparation for college-level work have increased in recent years and have taken many forms. One of the more prevalent indicators of activity has been with the significant expansion of Advanced Placement (AP) courses and tests, dual and concurrent enrollment options, and the International Baccalaureate (IB) program. Our participation in the U.S. Department of Education’s Advanced Placement Incentive Program (APIP) with grant awards to WCALO over the past three years is part of our effort to enhance access in the West by increasing the successful participation of low-income, rural, and first-generation students in these programs.

While accelerated options are widely used across the states, limited analyses have been conducted on associated policies either at the state level or the institutional level. Among the ongoing questions about these initiatives are: (1) Are they cost effective for students and families? Do students save time and money in college by entering with credits through accelerated options? (2) How do institutions use credit earned through accelerated programs in admissions, placement, credit toward a degree or certificate, and graduation requirements? (3) How are these options financed – who pays and for what? (4) In addition to the well-known programs (i.e., AP, dual enrollment, concurrent enrollment, and IB), are there other lesser-known options for accelerated learning?

Lumina Foundation is interested in a comprehensive, national policy review and analysis of accelerated learning programs at the state level and at public and private institutions. Staff have had an initial, exploratory conversation with foundation staff about our mutual concerns with this topic, and that discussion encouraged WICHE staff to approach the commission with an indication of our interest in submitting a proposal.

Next Steps
Staff will continue to explore the possibilities of a national study on accelerated learning programs. Upon initial approval from the Issue Analysis and Research Committee, staff will return to the commission with an action item to move forward on a formal proposal.
### Initiatives & Activities

**Changing Direction: Integrating Higher Education Financial Aid and Financing Policy (Phase 2)** ~ A grant from Lumina Foundation for Education supported Phase 1 activities on this project from November 2001 through September 2003. In December 2003, we will initiate Phase 2 with continuation funding of $1,000,000 over three years to support expansion and broadening of the scope of this project. New areas under this grant will include financing and retention issues. We will expand several of the activities from Phase 1, such as offering technical assistance to five additional states on integrating financial aid, tuition, and appropriations policies; convening a national policy forum; cosponsoring leadership institutes for legislators, governors’ education policy advisors, and regents; sponsoring state roundtables; commissioning papers; and convening multistate policy forums.

**Strengthening Legislative Engagement in Higher Education** ~ A small planning grant has supported new work around tax structures in WICHE states, including comparative information and analyses of key issues and trends, with a profile of each WICHE state. A focus group was held in September to discuss the draft report *Tax Structure Issues in Western States* with the author, Dr. Don Boyd, and the full report with individual analyses for the WICHE states has been disseminated.

### State Services & Benefits

- Access to state technical assistance to explore integrating financial aid, tuition, and appropriations decision making, revenue structures, and student retention.

- Copies of publications, such as commissioned papers, the data inventory, and special surveys.

- Access to SPIDO (State Policy Inventory Database Online) with tuition policies and summaries from 50 states.

- Participation in a national dialogue on innovative ways to bring financial aid and financing policy together.

- Involvement in multistate policy forums on financing and financial aid policies, revenue structures, and student retention.

- Cosponsorship of state roundtables on any of the key issues covered in this project.

- Participation in leadership institutes for legislators, executive office education staff, regents, and state-level commissioners.
INITIATIVES & ACTIVITIES

Pathways to College Network ~ 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 is the lead organization – working with SHEEO, ECS, and The College Board – in developing and implementing the public policy component of Pathways. We have conducted case studies in five states and sponsored roundtables on P-16 in Montana, Indiana, Washington, and Tennessee. We authored a chapter in Student Success: Statewide P-16 Systems, a collection of five strategy briefs that draw on the case study and roundtable information. We also developed and published a brochure on key financial aid issues in a P-16 environment. WICHE is expanding its free, searchable policy inventory database online (SPIDO) that contains selected policies from the 50 states related to: teacher quality, financial aid, articulation and alignment, early outreach programs, remediation, data and accountability, equity, and governance. With Pathways and other partners, we sponsored regional policy forums in Philadelphia and Atlanta to complement our September 2002 forum in Albuquerque, NM.

Western Consortium for Accelerated Learning Opportunities (WCALO) – An initial three-year grant (2000-2003) from the U.S. Department of Education supported a nine-state consortium (Arizona, Colorado, Hawaii, Idaho, Montana, New Mexico, Oregon, South Dakota, and Utah) to increase the numbers of students from underrepresented populations that participate in accelerated-learning options (e.g., AP, dual enrollment, etc.). This year’s award of $800,000 is supporting a variety of activities in the states and at the consortium level to promote accelerated learning. Our special studies and projects involved the states in working groups as we produced reports and modules addressing regionwide concerns with issues around teacher and counselor professional development, online learning, and serving American Indian students.

A new proposal to broaden the consortium’s focus, include all 15 WICHE states, and develop new initiatives was submitted to the U.S. Department of Education. Additionally, a one-year no-cost extension has been granted to WICHE to use the remaining funds from the initial grant to finish activities that were not completed.

STATE SERVICES & BENEFITS

- Collaboration on state case studies.
- Hosting of state roundtables.
- Tailored technical assistance around P-16 issues.
- Access to SPIDO (State Policy Inventory Database Online).
- Access to a range of publications and strategy briefs around P-16 and access for underrepresented students.
- Funding for online AP courses, teacher and counselor professional development, pre-AP activities with programs like GEAR-UP, and other activities.
- Participation in the Consortium Network of K-12/SHEEO representatives.
- Participation in working groups on issues around online AP, serving American Indian students with accelerated learning, teacher pre-service AP models, counselor training, and student progress.
- State roundtables on accelerated learning.
- Exposure to other state’s approaches to accelerated learning for low-income and rural students.
Access and K-16

**INITIATIVES & ACTIVITIES**

*Expanding Engagement: Public Policy to Meet State and Regional Needs* ~ A grant from the Ford Foundation to work with states on concerns around quality and accountability in a time of stable or declining enrollments. Our emphasis here is on helping states that don’t anticipate enrollment increases to examine different strategies that respond to their specific demographic issues.

*Knocking at the College Door: Projections of High School Graduates by State, Race/Ethnicity and Income, 1998 to 2018* ~ The 6th edition of this report will be released in winter 2003. This popular publication will extend the projections from 2012 to 2018 and add SES data to our model, enabling us to project high school graduates not only by race/ethnicity but also by family income for the 50 states. Complementary publications include individual state profiles.

*Following the Sun: Trends, Issues, and Policy Implications of Student Mobility* ~ Staff will continue to seek funding for a project on student mobility. The purpose of this project would be to assist states in building their capacity to measure and understand the impact of student mobility and to effectively address related public policy issues. This project would engage policymakers and higher education leaders in key policy issues around the ability of states to manage mobility and provide better-informed public policies on mobility issues as they relate to higher education. A related project to begin in early 2004 will utilize a consultant, Dr. Christopher Morphew from the University of Kansas. Dr. Morphew plans to explore student migration patterns, looking specifically at who benefits from these patterns, what evidence exists that these patterns serve states’ higher education and economic needs, and what political and policy factors contribute to these patterns.

*Other Publications* ~ Ongoing work that informs the access conversation in the West includes our regional *Fact Book*, an annual report on tuition and fees in public institutions, our *Policy Alerts* and *Stat Alerts* e-mail notices, state-specific pages on our Web site to show Census data, our short report series titled *Policy Insights*, and an informational bulletin titled *Exchanges*.

**STATE SERVICES & BENEFITS**

- Roundtables for states with stable or declining enrollments.
- Small, state focus group of carefully selected top-level policymakers to define the issues.
- Subregional policy forums.
- Access to high school projections data by race/ethnicity and income for 50 states.
- Individual state profiles.
- Technical assistance.
- State roundtable on mobility issues.
- Tailored technical assistance to examine student mobility in the state.
- Subregional forums on student mobility.
- Analytical information on student mobility.
- Current demographic information and other data on higher education issues.
- Reports, studies, and related information from an array of sources to support informed policy.
Accountability

INITIATIVES & ACTIVITIES

Expanding Engagement: Public Policy to Meet State and Regional Needs ~ The Ford grant also supports our work on accountability and has enabled us to assist California and South Dakota with roundtables and technical assistance. Collaborating with states on an individual basis through targeted technical assistance is a key strategy for this project. Also, state focus groups will bring together a few, carefully selected top-level policymakers in individual states to define the issues. Our objective is to create a community of support at the top by assembling such leaders as the governor, speaker of the house, president of the senate, state higher education executive officer, and prominent business or tribal leaders to discuss these challenges and to identify potential solutions. We will also utilize several other venues – state roundtables, a subregional multistate conference, publications, briefing papers, and research reports – to promote discussion and action among policymakers and policy shapers on accountability issues.

STATE SERVICES & BENEFITS

- Participation in the regional forum, The Changing Face of Accountability.
- Access to state-specific technical assistance.
- Convening state roundtables.
- Access to consultants, facilitators, and other external expertise.

Workforce

INITIATIVES

Expanding Engagement: Public Policy to Meet State and Regional Needs ~ Our efforts on workforce issues are supported by a grant from the Ford Foundation and center on four areas: nursing, college faculty, information technology workforce, and teacher education. In 2003 we published a Policy Insights report about the supply and demand issues for registered nurses.

STATE SERVICES

- Access to analytical information on workforce issues.
- Participation in regional workforce forums.
- Access to technical assistance, consultants, and facilitators.
- Small, state focus group of carefully selected top-level policymakers to define the issues.
**INITIATIVES**

*Expanding Engagement: Public Policy to Meet State and Regional Needs* ~ With support from our Ford Foundation grant, we sponsored a regional policy forum in October 2003 titled *Weathering the Perfect Storm: Information Technology in a Limited Resource Environment*. The forum explored the challenges of providing information technology in a limited-resource environment and the policy issues that legislators and education leaders are facing. Among these are concerns around the impact of reduced resources on meeting the needs of underrepresented and low-income students for postsecondary education. The forum also focused on teaching and learning and administrative services. A summary of major policy issues that emerged during the forum are included in one of our *Exchanges* reports.

**STATE SERVICES**

- Access to analytical information on workforce issues.
- Participation in regional policy forum on supporting information technology in a time of limited resources.
- Access to technical assistance, consultants, and facilitators.
- Small, state focus groups of carefully selected top-level policymakers to define the issues.