

# Issue Analysis and Research Committee

Tuesday, 8.00 – 9.45 am

Aspen – Lower Level

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Committee Chair: Cecelia H. Foxley, commissioner of  
higher education, Utah System of Higher Education

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8.00 - 9.45 am

Aspen Room – Lower Level





**Agenda**

**Issue Analysis and Research Committee**

**Committee Members**

Cece Foxley (UT), chair  
Mark Gaspard (WA), vice chair  
Chuck Ruch (ID), ex officio  
Don Carlson (WA), ex officio

Johnny Ellis (AK)  
Larry Gudis (AZ)  
Francisco Hernandez (CA)  
Tim Foster (CO)  
Doris Ching (HI)  
Gary Stivers (ID)  
Cindy Younkin (MT)  
Ray Rawson (NV)  
Patricia Sullivan (NM)  
Richard Kunkel (ND)  
Ryan Deckert (OR)  
Bob Burns (SD)  
Committee chair (UT)  
Committee vice chair (WA)  
John Barrasso (WY)

	Issue Analysis and Research Committee Minutes, November 12, 2002	9-3
	Issue Analysis and Research Committee Minutes, April 22, 2003	9-5
	Western Consortium for Accelerated Learning Opportunities (WCALO) – Phase 2	9-9
	During the April 22 conference call, the committee reviewed an information item concerning a new application for a grant from the U.S. Dept. of Education’s Advanced Placement Incentive (API) program.	
	Development of Costing Tool for Distance Education and ICTs for Teacher Education and Support in Sub-Saharan Africa	9-13

WCET was invited by the World Bank to submit a proposal to develop an educational technology costing model (and tool) for teacher training in sub-Saharan Africa. This would be a modification of the Technology Costing Methodology tools that WCET has been developing for the past three years.



Fiscal Year 2004 Workplan Section

9-17

The committee will take action on its FY 2004 workplan.

Discussion Item: State Tuition Policy for Military Personnel and Dependents (distributed separately)

During the April 2003 conference call, the committee continued its discussion of state tuition policy for military personnel and their spouses and dependents. For this meeting, staff were to provide an updated summary of state policies and a draft statement for a “best practice” policy for the committee’s consideration.

Information Item: 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

**ACTION ITEM**  
**WICHE Issue Analysis and Research Committee**  
**Minutes – November 12, 2002**  
**Broomfield, Colorado**

**Members Present**

Cecelia Foxley, Chair (UT)  
Pauline Gubbels Vice Chair (NM)  
Lawrence Gudis (AZ)  
Francisco Hernandez (CA)  
Doris Ching (HI)  
Frank Kerins (MT)  
Jane Nichols (NV)  
Richard Kunkel (ND)  
Robert Burns (SD)  
Marcus Gaspard (WA)

**Other Commissioners Present**

Chuck Ruch (ID)  
Robert Moore (CA)  
Bill Kuepper (CO)  
Debora Merle (WA)

**Members Absent**

Johnny Ellis (AK)  
Tim Foster (CO)  
Jack Riggs (ID)  
Everett Frost (NM)  
Ryan Deckert (OR)  
John Barrasso (WY)

**Staff Present**

David Longanecker  
Cheryl Blanco  
Sally Johnstone  
Sharmila Basu Conger  
Sharon Bailey  
Demarée Michelau  
Jacki Stirn  
Caroline Hilk  
Michelle Médal

Chair Cecelia Foxley convened the Issue Analysis and Research Committee on November 12, 2002, asking participants to introduce themselves. The minutes of the May 20, 2002, committee meeting were approved without revisions.

Chair Foxley asked Sally Johnstone, director of the Western Cooperative for Educational Technology, to report on the work of WCET. Johnstone told the committee about WCET's successful Annual Conference and MDE Institute, which had occurred since the commission had last met. She also explained that WCET has developed a new partnership with one member, Weber State University in Utah, to handle all the nonacademic aspects of next year's MDE Institute. She also mentioned some new monographs and publications produced by WCET staff including "Implications of MIT's OpenCourseWare Project," "Open Courseware for Developing Countries – Report of UNESCO July 2002 Meeting," "Student Learning as Academic Currency," published by the American Council of Education, and "Signs of the Times: Change Is Coming for E-Learning," in EDUCAUSE REVIEW (Nov. 2002). In addition, Johnstone reported on WCET consulting projects in Louisiana, Montana, New Mexico, Ohio, Oregon, and Wyoming. She briefed the committee on WCET's work to open dialog among U.S. universities and those in the Asia Pacific Region. Finally, she demonstrated the EduTools project that is designed to assist institutions in evaluating course management software purchases.

Chair Foxley directed the members to the discussion item titled "State Tuition Policy for Military Personnel and Dependents." Commissioner Bill Kuepper had asked that this item be included for discussion. Commissioner Kuepper provided background information on this issue, explaining that he was bringing it before the commission as a result of his participation in a meeting sponsored by the U.S. Army's Office of Education on how states' policies differ relating to residency for higher education purposes for military personnel and their dependents; he noted that the Army wants to provide stability for military families

through uniform policy and continuity for dependents. That conversation led him to see a possible role for WICHE in advancing the conversation around serving military personnel and their dependents.

Several commissioners reported their state's policies governing whether, and when, military personnel and their dependents are considered residents for tuition purposes. There was also discussion about how we define "military personnel" for this discussion – which branches of the military would be included and whether the National Guard and ROTC should be included. In that vein, Commissioner Ruch suggested that an important consideration is whether the National Guard has developed a special arrangement with the state for its personnel. Other issues emerged around residency policies and their complexity, policies concerning dependents of military personnel killed in action, continuity of benefits, and the numbers of personnel involved. David Longanecker suggested that perhaps what the Army wants is national citizenship for military personnel after they leave the service. Commissioner Kuepper replied that it was his understanding that the Army was not concerned with that issue but was focusing on active personnel. Commissioner Gubbels said that if we take a look at this, we should also consider financial implications and reaction of the higher education institutions. Commissioner Merle also asked if cost would be part of further committee discussion. Commissioner Jane Nichols suggested that if WICHE could help develop a model policy that would be very helpful. She also emphasized that the timing is good to move on this policy. The committee directed staff to survey the WICHE states to collect baseline information on policies and practices related to this discussion. Cheryl Blanco suggested that the committee hold a conference call in January or February to receive the results of the survey and discuss further action for the May meeting. Chair Foxley and the committee supported that approach.

Chair Foxley moved to the second discussion item on the agenda, program delivery. Because this topic was added to the unit's workplan at the May 2002 meeting of the Issue Analysis and Research Committee, staff requested guidance on specific areas of interest to the committee in order to best develop activity around the topic. Chair Foxley said that her concerns were related to the disappearance of the traditional community college and the impact of that phenomenon on delivery of programs. Commissioner Nichols said she would like to think about it from the aspect of the public good and access to degrees. What are the pathways to degrees and are there policy pieces that stop students? Commissioner Gaspard's interest was in the changing landscape. He indicated that collaboration between branch campuses and main campuses has not been good in Washington state and that we must be less concerned with who delivers the degree or what it is and look at what kinds of degrees are needed. Commissioner Gubbels reiterated this perspective, saying that she believed the discussion in the May committee meeting was on looking at the adequacy of programs to develop students for the workforce. The discussion also touched on consumer awareness of the existence of various acceptable pathways, and if so, what they are. The committee agreed that staff should develop a short background piece to frame this topic for the conference call prior to the May 2003 committee meeting.

Because of time constraints, Chair Foxley asked for a brief report on the current work of the Policy Analysis and Research unit. Cheryl Blanco's update on the Policy Analysis and Research unit's work included a one-page summary handout of the major projects, mention of soon-to-be released publications, and introductions of unit staff.

The committee had no further business and adjourned.

# **ACTION ITEM**

## **WICHE Issue Analysis and Research Committee**

### **Minutes – April 22, 2003**

### **Conference Call**

#### **Members Present**

Cecelia Foxley, Chair (UT)  
Marc Gaspard, Vice Chair (WA)  
Lawrence Gudis (AZ)  
Francisco Hernandez (CA)  
Doris Ching (HI)  
Jack Riggs (ID)  
Jane Nichols (NV)  
Robert Burns (SD)

#### **Other Commissioners Present**

Bill Kuepper (CO)  
Chuck Ruch (ID)  
Don Carlson (WA)

#### **Members Absent**

Johnny Ellis (AK)  
Tim Foster (CO)  
Cindy Younkin (MT)  
Everett Frost (NM)  
Richard Kunkel (ND)  
Ryan Deckert (OR)  
John Barrasso (WY)

#### **Staff Present**

David Longanecker  
Cheryl Blanco  
Sally Johnstone  
Sharon Bailey  
Demarée Michelau

Vice Chair Marc Gaspard convened the Issue Analysis and Research Committee on April 22, 2002, in the temporary absence of Chair Cecelia Foxley. The minutes of the November 12, 2002, committee meeting were approved without revisions.

Vice Chair Gaspard asked Sally Johnstone, director of the WCET, to summarize the action item "Extending the WCET EduTools Web Site to Incorporate a New Category of University-created Course Management Systems." Johnstone explained that the Andrew W. Mellon Foundation had invited WCET to submit a proposal to extend the EduTools Web site to incorporate a new category of course management system, and that to the best of her knowledge, WCET was the only entity invited to submit such a proposal. During the three-year project, WCET proposes to develop and launch an additional content area in order to provide higher education an alternative to commercially developed products and to support university-developed products with tools and sources to share their systems. Commissioner Ching asked whether users could be confident that the course management systems would be comparable to commercially prepared alternatives. Johnstone responded that they probably would not be comparable because they do not cover all the same features, but the EduTools Web site will enable the user to better understand the differences between open source products and commercial products. Commissioner Hernandez asked how costs are ascertained. Johnstone did not know the answer to that yet, but said that the Technology Costing Methodology project could be used to complement the new system. In response to a question from Commissioner Gaspard about the time frame for a response from the foundation, Johnstone responded that she did not know because Mellon does not have time lines like most funders. Chair Foxley had joined the call during Johnstone's presentation and assumed the chair. The action item requesting approval to seek, receive, and expend funds from the Andrew W. Mellon Foundation for this project was approved unanimously by the committee. See Attachment 1 for detail.

Chair Foxley directed the members to the discussion item titled "Tuition for Military Personnel, Spouses, and Dependents." This item was first introduced by Commissioner Bill Kuepper during the November 2002 committee meeting; following that discussion, staff had been directed to provide more information,

including a summary of state policies, which was contained in a matrix for this conference call. Commissioner Kuepper reiterated that the critical point from the Army's perspective was "continuity," or what happens to tuition for spouses and dependents if the military person is assigned to another state. Commissioner Nichols asked for more information on the kind of continuity that is being sought. In the discussion that followed it became evident that the states vary on their policies and that the information sources used in compiling the matrix did not accurately reflect some of the state's practices. For the May committee meeting, staff will contact the individual State Higher Education Executive Offices (SHEEO) for clarification on the state's policies on this issue and provide an updated matrix. Additionally, staff were directed to draft a statement that articulates a "best practice" policy for the committee's consideration.

The next agenda topic was an information item on the Western Consortium for Accelerated Learning Opportunities (WCALO) proposal. Chair Foxley asked Cheryl Blanco to provide background on this item. Blanco explained that staff plan to bring an action item to the committee in May to submit a proposal for a second three-year grant from the U.S. Dept. of Education's (DOE) Advanced Placement Incentive (API) Program. Pending approval from the U.S. DOE of WICHE's request to apply as an independent entity, the new project will continue working with WICHE states to expand access to accelerated-learning options such as Advanced Placement (AP) courses and examinations and dual enrollment for low-income high school students. Further detail will be included in the action item for the May meeting. The commissioners voiced no concern with moving forward on this proposal.

The final agenda item was the FY 2004 work plan. Chair Foxley asked Blanco to comment briefly. Blanco pointed out the three general categories of activities – "Existing Activities," "New Directions," and "On the Horizon" – and the five major issue areas, including finance, access, innovation and info-technology, workforce, and accountability. The Policy Analysis and Research unit has activities in all three categories and in most of the issue areas. She noted that the matrix is being provided now so that commissioners had sufficient time to review it before the May committee meeting. This will be an action item at that time and will undergo extensive discussion in order to forward the committee's workplan to the full commission. Commissioner Ching asked if existing activities will continue; David Longanecker responded that some will if there is work to be done, but anything that has been completed has been taken off the matrix. Commissioner Burns pointed out that financing is the headline issue right now and we might look at how we do more on this. Longanecker affirmed that observation and said that our proposed new Lumina request and our current Ford grant both allow us to address financing issues. Chair Foxley asked that committee members take time to think about the activities and come prepared with their comments and suggestions for the May meeting. David Longanecker also encouraged the members of the committee to read the material for the Programs and Services Committee in the forthcoming May commission meeting Agenda Book, because many of the issues coming before that committee will have significant implications for WICHE, as well.

The committee had no further business and adjourned.

## **ACTION ITEM**

# **Extending the WCET EduTools Web Site to Incorporate a New Category of University-created Course Management Systems**

### **Summary**

WCET has been invited to submit a proposal to extend the WCET EduTools Web site ([www.edutools.info](http://www.edutools.info)) to incorporate a new category of course management system. This category, yet to be fully and completely defined, is primarily characterized as those systems developed and provided on a formal basis by higher education institutions, as opposed to those commercial software companies currently reviewed by EduTools.

### **Background**

EduTools is a resource designed to support higher education institutions as they make decisions about the type of course management system they use. While colleges and universities continue to expand their use of course management systems, the cost of commercially provided products is outpacing the scarce resources on campus. Over the last several years, there have been a number of privately funded projects to develop campus-based course management systems, built on an open technology architecture or framework. These projects include, for example, the Open Knowledge Initiative at MIT. These new products could be a less expensive, resource-rich solution for higher education, but most of these new university-developed products do not have the appropriate documentation and support in place to offer them to other universities. EduTools provides the resource to show the new products, compare their features to commercial products, and will include the documentation necessary for any institution to determine if a university-developed product is a viable alternative for them.

### **Relationship to WICHE's Mission**

The project supports WICHE's goal to support access to higher education by offering high-quality information and resources that can assist a campus in making better decisions about a high-cost technology expense.

### **Project Goal**

The goal is to develop and launch an additional content area in the existing EduTools Web site.

### **Project Objective**

The goal of this new content area is to offer higher education an alternative to commercially developed products, and to support university-developed products with tools and resources to share their systems.

### **Principal Project Activities**

This project requires several distinct activities, and we anticipate it will take three years. The three phases include:

- Define and create criteria for the category of course management systems developed and formally provided by post-secondary institutions, as opposed to commercial software companies. Design and implement changes in the EduTools Web site to accommodate the category. Research, collect and implement information on qualifying systems. Duration of this phase is one year.

- Develop selected tools and decision aids to inform and support current and potential users of university-provided instructional management systems about the special considerations and impact of such systems. This will include a how-to guide with checklists and process guidelines, case studies, and best practices of both providers and users.
- Ongoing operation and product research for two subsequent years, to include service hosting, open access, and continued provider information updating, additions and purging.

### **Anticipated Project Outcomes**

The EduTools Web site ([www.edutools.info](http://www.edutools.info)) would include a broader set of resources that will be fully updated and expanded to serve higher education.

### **Budget**

The total budget for the two-year project will be approximately \$250,000-\$400,000. WICHE's indirect income ranges from about \$20,000 up to \$32,000.

### **Action Requested**

Approval to seek, receive, and expend funds from the Andrew W. Mellon Foundation.

# **ACTION ITEM**

## **Western Consortium for Accelerated Learning Opportunities (WCALO) - Phase 2**

### **Summary**

Staff request approval for WICHE to seek, receive and expend funds to continue the Western Consortium for Accelerated Learning Opportunities (WCALO). The purpose of this project is to increase the number of students who participate and succeed in accelerated-learning opportunities, especially Advanced Placement programs.

### **Relationship to WICHE Mission**

This project directly supports WICHE's mission to enhance access to higher education for all citizens of the West. The emphasis in this grant request is to increase the number of low-income students who are enrolling and succeeding in Advanced Placement courses and other accelerated-learning options. While most Western states provide accelerated-learning opportunities through dual enrollment and Advanced Placement courses, these options typically are accessible only to students in school districts offering strong college preparatory curricula and close ties to local postsecondary institutions. Students from low-income families, particularly if they live in areas far from a college or university, and school districts with a high proportion of students from low-income families usually do not have the same level of accessibility to accelerated-learning options. This project will allow WICHE to continue to work closely with state departments of education (SEAs) and State Higher Education Executive Officers (SHEEOs) to address access issues from several perspectives in order to achieve greater and more successful college participation among low-income high school students.

### **Background**

Fostering access to higher education for all students in the Western states has been central to WICHE's work since its inception. Providing college-level instruction to secondary school students is a K-16 issue, and one that helps bridge the gap between the sectors. The chances that a student will enter and succeed in college are greatly enhanced if the student has participated in accelerated-learning opportunities while still in high school and has been exposed to college preparatory curricula through middle and high school. While Advanced Placement (AP), dual enrollment, and related accelerated-learning activities have been important strategies to promote access and success in higher education, their availability and support varies significantly among WICHE states.

In October 2000, WICHE received a grant from the U.S. Dept. of Education under the Advanced Placement Incentive Program (APIP), with an initial award of \$800,000. We established the Western Consortium for Accelerated Learning Opportunities (WCALO) with the Colorado Dept. of Education as our partner state education agency (SEA) and nine participating states: Arizona, Colorado, Hawaii, Idaho, Montana, New Mexico, Oregon, South Dakota, and Utah. We also received continuation awards the next two years, with funding at approximately \$1.6 million in 2001 and \$800,000 in 2002.

APIP grants enable states to pay part or all of the cost of AP test fees on behalf of low-income individuals enrolled in AP classes and preparing to take an Advanced Placement examination; additionally, grant funds can be used for discretionary activities that increase the enrollment of low-income students in Advanced Placement courses. Our regional approach has been proven to be an effective and efficient way for some Western states to participate in Advanced Placement programs and broaden access to these accelerated-learning mechanisms for low-income and rural students. During the past two-and-one-half years, WICHE has received approximately \$3.2 million in funding from the federal APIP; of that amount

about \$2.5 million was allocated directly to the participating states to support fee reimbursements and state-specific activities. States did not spend all of their funds every year, nor did the consortium. WICHE and the Colorado Dept. of Education will request a one-year, no-cost extension to complete activities from Phase 1 and use remaining funds. In addition, we plan to submit a proposal to begin a new three-year cycle of API funding with different objectives and programmatic activities.

## **Project Description**

In concert with our ongoing emphasis on access, particularly among low-income and other underrepresented groups, we propose to reapply for a grant from the U.S. Dept. of Education's Advanced Placement Incentive Program to continue the regional consortium. Under revised guidelines, the department now allows any "national nonprofit educational entity with expertise in Advanced Placement services" to apply, whereas we were only able to secure funding by submitting through a state education agency, the Colorado Dept. of Education, in the past. WICHE is awaiting an opinion from the department to qualify under the new eligibility option. If that ruling is not favorable, we will again collaborate with a state education agency in a joint proposal.

Although the request for proposals (RFP) had not been released by the U.S. Dept. of Education at the time this action item was prepared, staff have been developing a proposal which, with some modification, can be submitted as an independent entity or in conjunction with an SEA. Our new three-year proposal will build on the network we have established; we will encourage the remaining six WICHE states to join the WCALO network and engage in several new activities in support of the program's goal of increasing the number of students who participate in Advanced Placement programs, especially those from low-income and rural families. Activities might include:

- Reimbursement for Advanced Placement and International Baccalaureate test fees for low-income students.
- Subcontracts to states that do not have separate API grants to support their activities, such as professional development for Advanced Placement teachers, teacher training for vertical team development for teachers across multiple grade levels of a particular subject area such as mathematics, and teacher training for pre-AP professional development.
- Reimbursement for online AP courses for low-income students.
- Counselor professional development.
- Principals and superintendents professional development.
- Annual regional forums.
- State round tables.
- Special studies to explore concerns that are shared among the states, such as serving Native American populations and leveraging foundation resources for student success.
- Special projects to expand or create new opportunities, particularly for professional development of teachers, counselors, principals, and superintendents.

Key outcomes of this project include an increase in the numbers of students enrolling in accelerated-learning programs and taking Advanced Placement and IB examinations; an increase in the numbers of teachers prepared to teach AP; an increase in the number of principals and superintendents who support accelerated-learning programs in their schools; an increase in the numbers of counselors who are better prepared to identify low-income and rural students who can benefit from accelerated-learning opportunities; and a better understanding among state policymakers and foundations of the value of accelerated-learning to all students. Over the three-year period, the WCALO project would have multiple deliverables in the form of special studies, Web-based information, longitudinal student tracking studies, and increased data on students utilizing accelerated-learning options among the WICHE states.

## Staff and Fiscal Impact

This project will be supported primarily by grant funds. Staff estimate the project will require approximately \$2,802,000 in external funding over the three-year period from October 2003 through September 2005.

<b>FISCAL IMPACT</b>			
Grant Activities	Internal Chargebacks <sup>a</sup>	Indirect Costs	Total Grant Request
\$2,389,000	\$47,500	\$365,500	\$2,802,000
<sup>a</sup> Office rent, telephone equipment, and network services fees.			

<b>STAFF IMPACT (annualized FTE)</b>			
Staff	Grant Funded	WICHE Contributed	Total
Existing Staff	1.5 FTE	.05 FTE	1.55 FTE
New Staff	—	—	—
Total:	1.5 FTE	.05 FTE	1.55 FTE

## Action Requested

Approval to seek, receive, and expend funds from the U. S. Dept. of Education's Advanced Placement Incentive Program to support continuation of our Western Consortium for Accelerated Learning Opportunities.



## **ACTION ITEM**

# **Development of Costing Tool for Distance Education and ICTs for Teacher Education and Support in Sub-Saharan Africa**

### **Summary**

In the face of huge and mounting pressures on education in sub-Saharan Africa (SSA), distance education and ICTs (information and communication technologies) for learning are increasingly seen as a necessary part of the solution for improved quality and access in educational provision in the region. The imminent launch of Education for All (EFA) initiatives and the devastating impact of the HIV/AIDS pandemic on the teaching profession have brought a new urgency to the need for distance education and other innovative approaches to meet the dramatic rise in teacher development and support requirements. However, in spite of Africa's considerable experience in the use of distance education, particularly for teacher education, there is limited data on its costs and cost-effectiveness, especially with integration of alternative ICTs.

Policymakers and education managers in Africa, as elsewhere, continually confront a range of questions relating to costs. Budget deficits and inadequate financial resources for investments have been identified as key impediments hindering the effectiveness and scale of distance education provision in SSA. At the macro level, African policymakers, faced with severe budget pressures, need reliable evidence on costs to justify decisions on investment. At the micro level, educational managers must make practical decisions about program size and technology options relative to costs.

WCET proposes refining the existing TCM costing instrument to enable policymakers, planners, and education managers as well as funding agencies working in Africa to more accurately determine total costs of different modes of distance education for pre-service teacher training and in-service support, including the use of state-of-the-art technologies.

### **Relationship to WICHE's Mission**

The project supports WICHE's mission of providing leadership and innovation in higher education.

### **Project Goal**

The project goal is to develop/refine a costing tool that will aid policymakers and higher education administrators in sub-Saharan Africa determine if investments in technology, distance education, and teacher education will aid in increasing K-12 teachers within the region.

### **Project Objective**

The project objective is to modify the existing *TCM Handbook* and *Tabulator* to reflect the sub-Saharan African experience, successfully collect data and synthesize said data in the form of a SSA casebook, conduct productive and informational on-site meetings in SSA, and finally create a policy guide and bibliography on costing studies in SSA.

### **Principal Project Activities**

The project is separated into three phases with the appropriate activities listed.

#### **Phase One**

WCET anticipates phase one taking approximately twelve weeks. Within Phase One there are three separate activities; each is listed below, and includes all tasks related to the initial reformatting of the

TCM costing tool, selection of the pilot sites, and training of the selected pilot sites. During Phase One the inception report will be completed and sent to the bank as requested in the RFP.

1. Development of costing methodology and costing instrument.

WCET has spent the last five years working on the development of the TCM costing tool and integrating the BRIDGE tool. In that time, WCET has gathered monetary support from both the Fund for the Improvement of Post Secondary Education (FIPSE) and from the Andrew W. Mellon Foundation in the amount of \$603,629 to develop, test, and refine the TCM. TCM is available in written form, as the TCM Handbook. There is also a handy electronic spreadsheet version that can be downloaded from the Web or distributed on CD-ROM or diskette. The current TCM is widely used in the United States. The unique feature of TCM is its ability to cost out courses that utilize all forms of teaching and learning. The TCM is capable of costing out all types of courses regardless of delivery mode: face-to-face, online, video based, TV based, utilizing regular mail for delivery of materials (written, cassettes, videos), radio delivery, and any combination of these.

The TCM will need to be converted in some areas for the African institutional experience. It is anticipated that the modifications needed for TCM will be minor and design implementation should take less than five to six weeks.

2. Identification of participating institutions and researchers in SSA.

WCET would recommend six pilot sites that would be identified through a consultative process with the bank. Given WCET's extensive experience with pilot sites (over 60 sites on the TCM project alone), it is quite possible that one site may not complete the data collection or in some rare instances not report any data whatsoever. Therefore, it is prudent to have the maximum allowed pilot sites to guarantee at least five complete data sets. WCET further understands that one pilot site must be a Francophone institution.

3. Data collection researchers briefing and consultation workshop in SSA.

A consultation/training workshop would be organized in SSA at the end of Phase One. The consultation/training workshop would be designed to train the researchers on TCM and allow for a discussion of data analysis and policy issues. WCET would send materials (or direct the researchers to the Web site if the technology is available), such as the *TCM Handbook*, the *TCM Casebook*, and the *TCM Tabulator* to the participants of the meeting so that they could become more familiar with the background of the TCM procedures.

WCET proposes to set up the meeting in the following manner. The pilot site representatives and researchers would travel to the meeting site; ideally, one of the institutions would host the consultation/training session on their campus. WCET would send two staff members to SSA to facilitate the face-to-face meeting. A video conference would then be established between the SSA institution and the WCET office in Boulder, Colorado, so that other members of the WCET team could join in the meeting.

## Phase Two

Phase Two will take approximately 18 weeks. Within the second phase, there are three activities listed as well as the tasks associated with each activity. During Phase Two the interim progress reports will be completed and sent to the bank as requested in the RFP. The first status report would be complete by the end of the fourth month of the project and the second status report would be complete by the end of the seven month of the project.

1. Field testing of costing tool and data collection.

Field testing of the costing tool (TCM) and the subsequent data collection by the six participating pilot sites will take up the bulk of the time for Phase Two. Each pilot site will be asked to collect costing data on preassigned courses (as determined at the research meeting during Phase One)

and to fill in the information into the TCM Tabulator. The Tabulator and BRIDGE Model are both available online through the World Wide Web, on disks for the computer, CD-ROMs for the computer, and as a written document. The final spreadsheets produced by the TCM Tabulator would be sent back to the WCET team for analysis and validity. WCET team members will be available throughout the field-testing phase to answer any questions or concerns that may arise during the data collection from both the researchers and the pilot site representatives.

## 2. Researchers Meeting 2 in SSA – Data Analysis & Synthesis

A second meeting in sub-Saharan Africa would be held during the middle of Phase Two for the specific purpose of data analysis and synthesis. WCET recommends having this meeting in the early to mid part of Phase Two as our past experience with pilot sites has taught us that many researchers attend a second meeting to ask questions about the tool and other problems they may have experienced once they begin to use it; rarely do the researchers come to the meeting with completed data sets. WCET would discuss the analysis and synthesis procedures to the pilot sites, but would anticipate completing those activities via e-mail/phone/mail.

## 3. Adjustments of Costing Tool

The final stage of Phase Two is making adjustments of TCM (both the handbook and the tabulator) based on the pilot sites and researchers experiences with the tools.

## Phase Three

Phase Three will take approximately six weeks. The third and final phase is dedicated to finalization of the project and report preparation.

## **Project Timeline**

The projected timeline is nine months. The anticipated start date is July 1, 2003, and the project will be complete by April 30, 2003.

## **Anticipated Project Outcomes**

The anticipated project outcomes are as follows:

1. Revised *TCM Handbook* and TCM Tabulator to include revisions based on the SSA region experience.
2. A casebook detailing the experiences of the six pilot sites in SSA.
3. A costing bibliography specifically designed to address costing issues in SSA.
4. A policy guide for higher education policymakers in SSA in regards to distance learning and technology.

## **Budget**

The budget for this proposal is \$180,160, of which \$25,000 is allocated to WICHE indirect. Funding for the project is to be sought from the World Bank, Ireland Trust Fund for Education in Africa.

## **Action Requested**

Approval to seek, receive, and expend funds received through grants to support this activity.



**WICHE FY 2003 - 2004 Workplan: Priority Themes & Activities**

**Existing Activities**  
(GF = general fund)

<b>Finance</b>	<b>Access</b>	<b>Innovation &amp; Info-technology</b>	<b>Workforce</b>	<b>Accountability</b>
Annual Tuition and Fees report (GF)	Student Exchange Programs: Professional Student Exchange Program (PSEP), Western Regional Graduate Program (WRGP), Western Undergraduate Exchange (WUE)	Support of the Northwest Academic Forum's regional initiatives (NWAFF)	Project on workforce issues and higher ed: nursing, teacher education, information technology, and faculty (Ford)	Regional Factbook: Policy Indicators for Higher Education (GF)
WCET's Technology Costing Methodology project handbook (FIPSE)	Accelerated Learning Initiatives (U.S. Dept. of Education)	NEON, the Northwest Educational Outreach Network (FIPSE)	Workforce Briefs (GF)	Policy Insights on a range of higher education issues (GF)
Multi-year policy projects on higher ed finance and financial aid (Lumina Foundation)	Pathways to College Network (GE Fund, James Irvine Foundation, FIPSE, and others)	Western Cooperative for Educational Telecommunications initiatives	Building partnerships for competency: public mental health workforce development	Development of guidelines in distance-delivered education for the regional accrediting agencies by WCET
Performance measurement improvement in the Western states: public mental health programs	Project on the collision between demand, access, and financial constraints (Ford)	WCET work to provide comparisons of electronic-learning resources (Hewlett)		Project on higher ed quality and accountability in a time of stable or declining enrollments (Ford)
	Multi-year policy projects on higher ed finance and financial aid (Lumina Foundation)	Building regional participation in the American TeleEd Communications Alliance (self-funding)		Facilitation of the Western States Decision Support Group for Public Mental Health (SAMHSA)
	High school graduates projections by state, race/ethnicity, and income	North American higher education portal expansion (FIPSE)		
	Children's Mental Health Improvement Projects in Wyoming and South Dakota	Financing of information technology (Ford)		
	North American Student Exchange Program (FIPSE)			
	U.S./U.K. Project (British Funding Council)			

**New Directions**

(proposals have been approved by the commission)

<b>Finance</b>	<b>Access</b>	<b>Innovation &amp; Info-technology</b>	<b>Workforce</b>	<b>Accountability</b>
<p>Expanding the Technology Costing Methodology project (FIPSE)</p> <p>Examination of the impact of revenue constraints on future viability of higher ed in the West (Ford and Lumina)</p> <p>Changing Direction — Phase 2 (Lumina)</p>	<p>PSEP revitalization</p> <p>Faculty diversity initiatives</p> <p>Research on student mobility</p> <p>Migration Patterns of College Students (AIR)</p> <p>Accelerated-Learning Initiatives — Phase 2 (U.S. Dept. of Ed)</p>	<p>Policy forum on financing information technology in a limited-resource environment (Ford)</p> <p>Acquiring a new WICHE facility and regional learning center</p>	<p>Developing Student Exchange Program responses to critical workforce shortages</p> <p>Expanding professional advisory councils (health professions, vet medicine)</p>	<p>Collaboration with NCHEMS, SHEEO, and WICHE on database maintenance and exchanges</p> <p>Institute for legislators and trustees on higher ed issues</p>

## On the Horizon

(proposals not yet submitted to the commission or past proposals that are being recast)

### Finance

Policy work on resident and nonresident tuition policies

An exploratory project on the pros and cons of vastly reducing, or eliminating entirely, the distinction between resident and nonresident tuition policies. This activity would include discussions and white papers how undifferentiated policies would impact tuition levels, financial aid, residency, admissions, and other policies and practices at the state and institutional level. The project might also look at how such policies might influence the role and mission of public institutions in the state.

### Access

Advisory council on K-20 interactions to enhance preparation

Almost every state is talking about improving K-12 and higher education relations. Many have established P-20 councils at the local and state level; others have statewide coalitions to improve communication and collaboration across the educational system. WICHE has a number of initiatives that involve a P-16 or P-20 approach, including our work on Standards for Success and the Pathways to College Network. This new activity would examine the potential role of an advisory group on K-20, similar to the Legislative Advisory Committee or Northwest Academic Forum (NNAF), to assist the commission in looking at the critical linkage points between K-12 and higher education.

### Innovation & Info-technology

Expansion of NEON

Seek additional external funding to support the Northwest Educational Outreach Network (NEON) in its efforts to help states and institutions to share electronically delivered degree programs. Explore expanding NEON beyond the nine-state NNAF region.

Exploring the development of portal technologies

Building on the experience WICHE has gained in developing CONAHEC's new portal to the Internet, this project would explore whether developing portal capabilities within WICHE could enhance service at cost-effective prices for other applications of service to the West.

XAP

Two options exist. (1) Work with AK, ID, MT, NM, ND, and WY to assess interest in developing Xap Mentor Systems to provide Internet-based information management systems for college-bound students. If two or more states want to proceed, seek external funding. (2) Follow the SREB approach ("Ways In") of developing specialized community portals for in-demand professions, such as teachers and nurses. Licensure requirements, access to programs, courses, degree information, and financial aid assistance could be provided for each area.

## On the Horizon (continued)

(proposals not yet submitted to the commission or past proposals that are being recast)

### Workforce

Convening regional and subregional forums on emerging workforce needs

Seek external funding to convene one or more workforce forums to assist states in planning for emerging workforce needs and to discuss the potential of developing multi-institutional approaches to meeting these needs.

Recruiting leaders for Western higher education

A new service to be offered by WICHE, which would provide institutions of higher education within member states with professional search services to help fill senior administrative positions. This service would seek not to replicate the services provided by the bevy of fine search firms operating to serve American higher education today. Rather, this service would focus on providing less expensive searches, focused primarily on filling positions in smaller, more remote colleges and universities.

Assisting states in identifying academic program development needs

Activity in this area could be in conjunction with, or independent of, the regional and subregional forums on workforce needs. Work with state-level academic affairs officers to create an inventory of anticipated new academic programs and explore opportunities for interstate and interinstitutional collaborations for the new programs or in lieu of the new programs.

### Accountability

Follow-up initiatives responding to the National Center on Public Policy and Higher Education's report cards

The release of **Measuring Up 2002** has again activated conversation in the states on how well they are providing access in an affordable way. The weakened state economies have created a more difficult, sometimes acrimonious, environment for these discussions, forcing states policymakers and leaders to think carefully about their ability to sustain access and affordability goals. This activity would examine ways that the commission and staff could provide technical assistance to states and support an informed, thoughtful dialogue on the likelihood of making progress on **Measuring Up** goals.