

Interstate Passport Annual Report AY 2015-2016

Passport Review Board February 2017

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Interstate Passport^s is a program that facilitates block transfer of lower-division general education based on learning outcomes and proficiency criteria. Its overarching goal is simple – to eliminate unnecessary repetition of academic work after students transfer. Designed to improve graduation rates, shorten time to degree, and save students money, the program can also strengthen existing articulation agreements and support institutions' continuous improvement efforts. All components of the Interstate Passport have been designed by faculty, registrars, institutional researchers, and academic advisors.



The Interstate Passport is based at the Western Interstate Commission for Higher Education (WICHE), a non profit 501c3 organization, founded by the U.S. Congress in 1952 as one of four regional compacts dedicated to expanding educational access and excellence for the nation's citizens. WICHE's headquarters are in Boulder, CO.

This report recaps the work of the Interstate Passport during the academic year 2015-16.

Messages from Our Co-Chairs

The Interstate Passport continues to be a bright light of change and clarity for students seeking completion and placement into the workforce. It eliminates undue confusion and bureaucratic narcissism. I'm proud to be working with a dedicated group of colleagues on this project, a project that



now includes a growing number of states, many accomplished faculty and staff members at many institutions of higher education. The dedicated staff at WICHE should be commended for their unswerving focus on the strategic and operational challenges that have been faced and addressed. The success of this project has depended upon such leadership and dedication from so many, but also because it is propelled by a single clear idea: student success. The work is not yet finished, however. In their own bid to address student success, the states attempt to address pathways. This work is important but will be accelerated in one place while not evenly accomplished elsewhere; in addition, it will be a state-by-state solution leaving out again the needs of the student transferring across state lines. The compelling aspect of the Interstate Passport is that it addresses a number of initiatives at once: transfer, outcomes - not credits - as the goal, acceleration and completion. While the Interstate Passport is practical and focused on easing student movement forward, the work of discipline faculty around these issues - on what it means to be accomplished in a discipline and at what level - is one of the extraordinary elements of the Interstate Passport that needs more applause, attention, and continuing development.

Dr. Peter Quigley Associate Vice President University of Hawai'i System



At its core the Interstate Passport asks faculty to define institutional general education quality expectations based on a common framework that provides the basis for block transfer of general education outcomes at regional and national scales. The program's unique approach



and focus on outcomes, not course credits, uses institutional and National Student Clearinghouse expertise and resources but provides much needed flexibility in addressing a fundamental barrier to student completion: the lack of a seamless transfer mechanism. The transfer issue is becoming increasingly important as student mobility continues to grow (the majority of college graduates now earn credit from more than one institution) along with college costs. By reducing both time and cost of education, the Interstate Passport will make a significant contribution to student success. Transfer issues rank just behind inadequate academic preparation as a barrier to student completion. Agreement on general education issues at the institution level can be challenging enough, let alone at state, regional and national levels. Completing construction of the Interstate Passport framework with institutional adoption by 21 institutions in six states to date, however, strongly demonstrates that the framework can work. The process also underscored the need for ongoing expert project management, training, communication and structure under the capable guidance of WICHE. The Interstate Passport effort has been very successful, providing proof of concept, and we welcome additional states and institutions to join us as we scale the network nationally. Together, we can make a significant impact on the success and completion of transfer students.

Dr. Michel Hillman State Policy/Transfer Advisor

A Message from the Director

What an exciting year! Interstate Passport transitioned from a five-year work in progress to a completed program with the launch of the Interstate Passport Network on July 1, 2016. All regionally accredited not-for-profit institutions in the nation can apply to participate.



Along the way, our project staff had the great privilege of working with so many talented academic leaders and others who conceived of the idea for the Interstate Passport and helped to shape it. From the scores of dedicated faculty members who developed the Passport Learning Outcomes and proficiency criteria, to the many forward thinking registrars and institutional researchers who designed the academic progress tracking system, to the growing number of academic advisers and campus marketing staff – these stakeholders were united in their desire to make the transfer student experience a better one – one that eliminates the unnecessary repetition of learning already achieved to reduce student debt while ensuring academic quality and student success. We continue to collaborate with several outstanding partners in trailblazing activities including The National Student Clearinghouse, which is building the academic progress tracking system, and the National Center for Higher Education Management Systems and Taskstream, which are supporting our assignment mapping pilot. You will read more about their important roles in this report.

Without the strong support of our funders, however, none of this would have been possible. With deepest gratitude, we thank the Bill & Melinda Gates Foundation, Carnegie Corporation of New York, Lumina Foundation, and the U.S. Department of Education for their generous financial support and for the expert advice and support of their program officers.

Finally, my sincerest appreciation goes to the members of our Passport Review Board for their steady and inspired leadership and to the Interstate Passport's extraordinary staff whose members have brought so much expertise, dedication and passion to this work.

Patricia A. Shea Director, Academic Leadership Initiatives Western Interstate Commission for Higher Education



Introduction

This past year has seen significant accomplishments and progress in the Interstate Passport program. Phase II of the program's development began in October 2014 with the award of grants from the Bill & Melinda Gates Foundation and Lumina Foundation totaling \$2.8 million over 24 months. The grant funds supported development of the Passport Learning Outcomes (PLOs) and transfer-level proficiency criteria (PC) in the remaining six lower-division general education areas for the Passport; piloting an electronic data collection process through the National Student Clearinghouse; development of a business plan, an application system, and a plan for a longitudinal study, plus expansion to states/institutions outside the WICHE region. Both funders – Gates and Lumina – granted a no-cost extension to WICHE through June 30, 2017 to allow participating institutions to complete construction of Passport Blocks and to deliver case studies about their Interstate Passport work. In addition, the Gates Foundation awarded the program a two-year supplemental grant of \$750,000 that will support institutions to better prepare for the program's implementation, including advising and marketing/ communication efforts, and support staff efforts to assist new states and institutions. Partners in the work, supported by sub-awards, include institutions and organizations in seven Western states (CA, HI, ND, OR, SD, UT, WY) as well as the three other regional compacts and close to 70 institutions in six states within their borders (AR, ID, IN, KY, OH, and VA).

In October 2015 we began work on a four-year grant received from the U.S. Department of Education, one of 17 First in the World (FITW) grant awards that seek to drive innovation and keep access to higher education within reach for all Americans. The Interstate Passport's FITW project encompasses four components: (1) building a more robust and automated national data collection and transfer student tracking infrastructure in partnership with the National Student Clearinghouse (NSC); (2) modeling the mapping of critical assignments to Passport Learning Outcomes. (3) scaling participation in the Interstate Passport Network; and (4) researching the impact of the Interstate Passport on transfer students. Considerable progress has been made on all four areas, as reported below.

Major Activities

Completion of the Passport Learning Outcomes

Framework. A major accomplishment of Phase II is completion of the full PLO framework consisting of all nine lower-division general education areas (LDGE), known as the Passport-LDGE. Faculty members from the seven states collaborated to develop PLOs and PC in the final six lower-division general education knowledge and crosscutting skill areas. This work built on that accomplished by faculty from participating institutions in five states (CA, HI, ND, OR, and UT) during Phase I (funded by Carnegie Corporation of New York, 2011-2014) in which the PLOs and PC in three foundational areas were developed. These nine areas were derived from the Liberal Education and America's Promise (LEAP) initiative's Essential Learning Outcomes, developed by the Association of American Colleges & Universities, that many institutions had been using to structure their institutional general education framework.

Passport: Lower-Division General Education

Phase I (2011-2014)	Foundational Skills Oral Communication Written Communication Quantitative Literacy
Phase II (2014-2016)	 Knowledge of Concepts Natural Sciences Human Cultures Creative Expression Human Society and the Individual
	Crosscutting Skills • Critical Thinking • Teamwork and Value Systems

The process of completing the framework involved a series of both intrastate and interstate faculty negotiation meetings. During this reporting period, Passport State Facilitators (PSFs) convened faculty members from two- and four-year institutions in their states to develop the "state set" of learning outcomes or proficiency criteria in a specific content or skill area. The state set represented a consensus among faculty in the individual state for the lowerdivision general education learning outcomes in a specific area. All of the state sets were presented together in a "crosswalk" at the interstate faculty negotiation meeting to serve as the starting point in the discussion to develop the Passport Learning Outcomes. For both the PLOs and proficiency criteria, faculty recognized the commonalities among the states, and discussed the essential elements for inclusion in the Passport LOs and PC.

Three interstate faculty negotiation meetings were held at which PLOs and PC were developed by faculty from participating institutions in four knowledge and skill areas, as follows:

- October 1-2, 2015: PC Faculty Negotiation Meeting for creative expression and critical thinking
- November 5-6, 2015: PLO Faculty Negotiation Meeting for human society and the individual and teamwork/value systems
- February 11-12, 2016: PC Faculty Negotiation Meeting for human society and the individual and teamwork/value systems

A total of 63 faculty representatives, with expertise and experience in the selected knowledge and skill areas, attended the three meetings in Boulder and engaged in productive and in-depth discussions about learning outcomes, course assignments and activities, language, and communicating clear expectations. Each faculty team in the knowledge/skill areas selected a chairperson to oversee the work, who was supported by project staff. Faculty members departed the meetings with an agreed-upon draft of the PLOs or PC to solicit feedback from colleagues back home. Each team participated in a series of conference calls to report on feedback and to revise, fine-tune and finalize the draft PLOs or PC.

To assist the faculty in its role of developing the PLOs and PC, staff produced the <u>Faculty Handbook:</u> <u>Creating the Passport Learning Outcomes and</u> <u>Transfer-Level Proficiency Criteria</u>, which will also be useful in the future as the teams conduct their periodic reviews. Once the PLOs and PC were



completed, staff created two other publications summarizing this seminal work: <u>Passport Learning</u> <u>Outcomes</u> and <u>Passport Learning Outcomes and</u> <u>Proficiency Criteria</u>.

Completion of the framework and the launch of the Interstate Passport Network in July 2016 opened the door to any regionally accredited two-year or fouryear public or private not-for-profit institutions in the U.S. to construct their Passport Block – a list of courses and/or learning experiences by which their students can earn the Passport – and be positioned to award the Passport for the first time in fall 2016. Indeed, several of the participating institutions constructed and submitted their blocks to begin awarding the Passport-LDGE in the 2016-17 academic year.

Construction of Passport Blocks. Completion of the PLO framework allowed participating institutions to begin constructing their Passport Blocks – the list of courses, course sequences, and/or learning experiences through which students achieve the Passport Learning Outcomes. Construction of the blocks is an essential step in preparing institutions to award the Passport to students. To guide faculty with this task, the staff produced the *Faculty Handbook: Constructing Your Institution's Passport Block*, which includes the conditions that should be in place

for creating a block, a step-by-step description of constructing the block, and worksheets to facilitate the process.

The Passport State Facilitators (PSFs) in six of the participating states (HI, ND, OR, SD, UT and WY) worked with faculty groups at participating institutions to closely examine their lower-division general education curriculum to identify which courses in each discipline address the Passport Learning Outcomes. The institutions approached this task in different ways – looking at the entire lower-division general education requirements as a whole, or constructing the block discipline area by discipline area. The process took some time, with faculty having to identify and specify not only which courses address the learning outcomes but also the number of courses, or the combination of courses, in a knowledge or skill area required to achieve all of the learning outcomes in that area. Blocks must be approved by the institution's faculty senate, general education committee, or other entity per the institution's established procedures and policies. To date, we have signed Memoranda of Agreement approving participation in the Interstate Passport Network for a five-year term with 21 institutions in six states (see page 18). Starting with the fall 2016 term some of these institutions will award the Passport-LDGE to students who achieve all of the learning outcomes. We anticipate signing MOAs with other institutions from these six states and possibly California in spring 2017.

A new Passport State Facilitator was selected to oversee Interstate Passport activities in California in September 2015. The focus in California during this reporting period was to generate interest in the Interstate Passport among the California Community Colleges, and ultimately to engage some of these institutions in the Interstate Passport project activities. In August 2016, in consultation with staff in the Office of the Chancellor for the California Community Colleges, we announced a competition for two \$25,000 grants to participate in an Interstate Passport pilot, with a deadline of October 2016 for applications. The selected institutions (College of the Canyons and Cerritos College) will review the Passport Learning Outcomes for alignment with their own, construct their institution's Passport Block, determine their capacity to participate in the Interstate

Passport's academic progress tracking services, and write a case study about the process they used to accomplish these tasks.

Expansion of the Interstate Passport through the Regional Compacts. Staff members have been successful in bringing on additional states and institutions from outside the WICHE region, working with representatives of the three other regional compacts (Midwestern Higher Education Compact, New England Board of Higher Education, and Southern Regional Education Board) to identify and engage at least 12 institutions (per the objective) in the Interstate Passport. Nearly 70 institutions from five states outside of the WICHE region – Arkansas, Indiana, Kentucky, Ohio, and Virginia – and from Idaho, a WICHE state, are participating in this scope of work.

A Passport State Facilitator has been identified in each state to lead faculty members at the participating institutions with responsibility for the nine knowledge and skill areas within lowerdivision general education. These faculty members will map the campus's learning outcomes to the Passport Learning Outcomes and Proficiency Criteria to determine if they are acceptable and congruent with their own learning outcomes. They will also create the institution's Passport Block by identifying the courses and/or other learning opportunities that the institution provides for students to achieve transfer-level proficiency with the Passport Learning Outcomes. Ultimately the PSF and institution liaisons in each state will document their efforts to accomplish these tasks in case studies to be submitted to Interstate Passport staff. The case studies will help Passport staff in continuous improvement efforts for the application and implementation processes.

The number of institutions and structure of support varies in these six states. Two PSFs in Ohio are coleading a statewide effort among the public two- and four-year institutions, with 22 community colleges and 13 universities participating, for a total of 35. In Arkansas, 10 institutions are engaged – six community colleges and four universities. In Kentucky, the community college system (five institutions) and four universities are engaged. Seven institutions in Indiana are participating. One two-year and one four-year institution in Idaho are participating, and Virginia has 11 institutions involved: six community colleges and five universities.

Two meetings of the PSFs from these six states were held, one in November 2015 for half of the group, and one in January 2016. With the Lumina Foundation's permission to use funds in the grant originally designated for implementation teams from these states to instead focus on the faculty (at the recommendation of the PSFs), we held a Faculty Orientation Workshop in March 2016 for the PSFs and faculty members from these "new" or "Wave II" states, who learned from the PSFs and faculty members from the "veteran" states about how the PLOs and PC were developed. All 75 participants at the workshop were very engaged, albeit representatives from the new states were a bit overwhelmed with the amount of information to process. Thus, the timeline for delivery of their Passport Blocks and case studies has been extended to spring 2017.

Pilot Project with the National Student Clearinghouse (NSC). The intent of the pilot was to establish the specifications for the online PassportVerify service, which is the first step in transitioning the data collection and reporting process from the Passport's Central Data Repository at Utah State University to the National Student Clearinghouse in order to provide more functionality and scalability for data collection and student tracking. During the pilot project, which ended in June 2016, NSC conducted data collection for two two-month periods when participating institutions uploaded data to NSC via a secure FTP account; during one of those terms institutions could query NSC to find out if incoming transfer students had earned a Passport and if so, when and where. Registrars at Interstate Passport institutions extract and upload data on Passport students to NSC in the same fashion that they currently upload student data to NSC for its DegreeVerify service, thus minimizing any additional work. Data elements for PassportVerify include the number of Passports awarded and term, number of institution credits (not transfer credits), and GPA for total institution credits earned at the time Passport is awarded. The pilot project has set the stage for the streamlined data collection processes - not only for the PassportVerify service, but also for the Academic

Progress Tracking service under development with First in the World grant funds. The automated processes reduce the burden on registrars to track and submit data manually, and enable them to get immediate verification of Passport status for incoming transfer students 24-hours a day every day of the year.

Prior to the NSC pilot project (2015-16), the Passport Central Data Repository collection and tracking functions were conducted in the fall of each year, and Passport data was collected manually. The final CDR data collection was conducted in November 2015 and presented in last year's Annual Report. The NSC pilot project, in which 11 institutions participated, collected only the number of Passports awarded by institution and term. Consequently this year's Annual Report does not include findings on Passport students. However, construction of the PassportVerify and Academic Progress Tracking services by NSC will produce comprehensive data for next year's Annual Report, in particular the first reports on students awarded the completed Passport-LDGE. Through the new services institutions will also receive reports from NSC on how their previous students performed after transfer.

Workshop for Passport Registrars and Institutional **Researchers.** As part of our efforts to prepare participating institutions to award the Passport to students achieving the learning outcomes, a workshop was held for registrars and institutional researchers to inform these groups about their roles and responsibilities for implementation of the Passport. Over 45 representatives from six Passport states attended the registrar/IR workshop in February 2016 to discuss in detail the tasks and responsibilities for recording the Passport on student records, tracking Passport students, and submitting data to NSC. Staff members from the National Student Clearinghouse were on hand to present information about the NSC processes, and to help finalize the data elements for collection and the components of the reports to be sent to institutions. Two outcomes resulting from suggestions during the workshop included the creation of a listserv for all Passport registrars/IR representatives that will facilitate timely communication, and also establishment of an advisory committee, comprised of one registrar

and one institutional researcher from each state, that will oversee issues that pertain to these groups, make recommendations, and communicate to their counterparts in their states.

In preparation for the registrar/IR workshop, staff produced the *Handbook for Registrars and* Institutional Researchers, which provides background information on the Passport as well as detailed descriptions of the specific tasks and responsibilities of registrars and institutional researchers, guiding principles, and the data elements for data collection. The Handbook has been and will continue to be updated as necessary as the Interstate Passport evolves and expands. In addition to the handbook, the Passport Data Management Plan was produced and distributed at the registrar/IR workshop. The plan (a deliverable for the Gates Foundation grant) describes the data management activities for the first phase of the project and the changes to be made after data collection and reporting transitions from the Central Data Repository to the National Student Clearinghouse. It also features the Core Principles for Passport Data Management, which addresses privacy issues, FERPA compliance, and data ownership.

Workshop for Academic Advisors and Marketing Representatives. The May 2016 workshop for academic advisors and marketing representatives was designed as a train-the-trainer meeting in which participants would take back to their colleagues the information and materials acquired at the meeting. The agenda was developed by a six-member planning committee of advisors and marketing reps, and provided ample time for the two groups to meet separately. Participants learned about their roles in educating students about the Interstate Passport and the benefits of this program for students – both native and incoming transfers. For some students earning a Passport can serve as a milestone on the way to a degree and increase retention, and, of course, for students planning to transfer it can streamline that process. Earning a Passport also can be incorporated into academic pathways offered by institutions. Marketing and communications representatives shared ideas, templates and language for promoting the Interstate Passport in campus posters, brochures, websites and catalogs. A listserv has been established along with an advisory

committee made up of representatives from both role groups who will oversee and discuss issues of concern and communicate information about the Interstate Passport to their counterparts in the state.

Staff produced and distributed a draft of the <u>Handbook for Academic Advisors and Marketing/</u> <u>Communications Representatives</u> at the workshop. It provides background information on the Interstate Passport along with descriptions of the specific tasks and responsibilities of academic advisors and marketing representatives. The handbook was updated after the workshop with materials shared at the workshop.

Pilot: Mapping Critical Assignments to Passport Learning Outcomes. The objectives and outcomes of this scope of work, supported by the First in the World grant, are designed to strengthen collaboration among faculty members and identify some best practices in competency assessment. In partnership with the National Center for Higher Education Management Systems (NCHEMS), we have engaged general education faculty at six institutions in three Western states (CO, MT, and NM) to map critical assignments in their courses to the PLOs and PC in four Passport knowledge and skill areas to verify that students possess transfer-level proficiency. Passport Mapping Specialists at these institutions attended a train-the-trainer workshop in August 2016 to learn how to use a rubric for scoring assignments and the responding student artifacts in Taskstream's online platform to which they will upload these items. These specialists will train their faculty to participate in the actual scoring exercise during the 2016-17 academic year.

Web-Based Application Repository. Interstate Passport staff, working with the WICHE web designer and a programming consultant, has developed the online application process for the Interstate Passport Network. Using a web connection, applicants will select a user name and password to provide all information electronically. The system will allow for application approval and renewal by the Passport Review Board. In addition, institution and state information provided by approved applicants will be captured to dynamically generate state and institution profiles on the Interstate Passport web pages. Click here for the *application web page*. Tasks to be completed include the financial transaction section and interface for the Passport Review Board.

Research and Evaluation. The draft plan for a sixyear longitudinal study of the academic progress of Passport students (submitted to the Gates Foundation as a deliverable in December 2015) has been a useful resource in developing the plan for the research project required by the First in the World grant. Rutger's Education and Employment Research Center (EERC) leads the research effort, for which a robust plan has been submitted for approval to the U.S. Department of Education. EERC will identify the commonalities and unique challenges of integrating the Interstate Passport program into institutions' transfer policies and procedures; examine the processes of ensuring quality and external validity for the new learning outcomes; and assess the impact of earning a Passport on transfer student retention and completion, especially for low-income students. EERC is working to secure data-sharing agreements with a number of Interstate Passport Network member institutions, and non-Network member institutions that will provide comparison data, in the participating states. A number of research questions have been developed along with the timeline for data collection. Surveys will be EERC's primary data source for the implementation evaluation. EERC will field two different types of surveys over the course of the grant: student focused and staff/faculty focused. Data collection will be fully underway in academic year 2017-18.



Dissemination and Communication

A key activity of the Interstate Passport is to produce and broadly disseminate information and products about the program through the <u>website</u>, along with reports and documents prepared for specific meetings and/or audiences. In addition, staff members, Passport State Facilitators, and campus representatives make presentations on the Interstate Passport at state, regional and national meetings. Staff members also seek opportunities to write or contribute to articles on student transfer and related topics.

General Information Publications. A number of general information documents about the Interstate Passport have been produced and are periodically updated. Click on the title to link to the document.

- Passport Brochure
- Interstate Passport Overview (updated)
- <u>Quality Assurance</u>
- <u>Benefits for Interstate Passport Network</u>
 <u>Member Institutions</u>
- Interstate Passport Guiding Principles
- Interstate Passport Glossary of Terms (updated)

Webinar Series. Funded by the First in the World grant, staff launched a series of webinars targeting three distinct audiences: faculty, registrars and institutional researchers, and academic advisors. Four webinars were held from June to September 2016, including an introduction to the program and an overview for registrars and institutional researchers:

- <u>Introducing the Interstate Passport: A</u> <u>New Transfer Framework Based on Learning</u> <u>Outcomes</u> – June 21, 2016
- Interstate Passport: An Overview for Registrars and Institutional Researchers – July 27, 2016

Additional webinars will be presented through the 2016-2017 academic year. Open to all interested in learning more about the Interstate Passport, the webinars are free and archived for viewing at any time at <u>www.wiche.edu/passport/webinars</u>.

Articles and Presentations

- Passport staff authored the cover story of the September/October issue of Change Magazine, <u>"Interstate Passport: A New Framework for</u> <u>Seamless Student Transfer.</u>" The article describes the significant impact of transfer on student completion rates and the need for and benefits of the Interstate Passport, especially for students transferring to other states. With the completion of the framework and the automated data collection and reporting system, the Interstate Passport is ready to expand across the country.
- At the request of the Office of Educational Technology (OET), U.S. Department of Education, Passport staff authored a brief article on the Interstate Passport for the <u>Higher Education</u> <u>Supplement</u>, released in January 2017. OET requested examples of innovation from the field.
- Information about the Interstate Passport is included in each issue of the WICHE electronic newsletter <u>Newscap</u>, which is distributed six times per year to over 2,500 subscribers including governors and legislators and their staffs, state and institution administrators, faculty and researchers in the WICHE region. Newscap is posted on the WICHE website homepage, and also on the Interstate Passport web page.
- Interstate Passport staff provide updates and information on the Interstate Passport to attendees at regular meetings each year of the WICHE Commission, the Western Academic Leadership Forum, and the Western Alliance of Community College Academic Leaders.
- As was done last year, we sent an update on the Interstate Passport to the presidents of all of the regional accrediting agencies in early June 2016.
- Staff visited several states with institutions participating in the Interstate Passport over the last year – including California, Hawai'i, Oregon, Arkansas, Ohio and Virginia – to meet with faculty and administrators. Staff also attended meetings and/or made presentations about the Interstate Passport at numerous events since fall 2015, including:

- Western Canada Commission on Articulation and Transfer Conference, Vancouver, B.C., Sept. 21, 2015
- Portland Community College Gen Ed /LEAP/ MSC Committee, Jan. 20, 2016
- Lumina Foundation: It's All About Learning Convening, Indianapolis, Feb. 2-3
- National Institute for Study of Transfer Annual Meeting, Atlanta, Feb. 3-5
- Association of American Colleges & Universities: Faculty Collaboratives, New Orleans, Feb. 16-19
- American Council on Education Annual Meeting, San Francisco, March 13-15
- Association of American Collegiate Registrars and Admissions Officers' Annual Meeting, Phoenix, March 20-22
- Commission on Articulation and Transfer in Ontario, CA, March 22
- First in the World Project Directors' Meeting, and Presentation on the Passport at the White House, by invitation, Washington, DC, April 3-5
- Western Academic Leadership Forum and Western Alliance of Community College Academic Leaders: Joint Annual Meeting, Missoula, MT, April 20-22
- Chief Information Officers, California Community Colleges, April 20-22
- WICHE Commission Meeting, Laramie, WY, May 16-17
- National Institute for Staff and Organizational Development, presentation by Wyoming PSF Kari Brown-Herbst, May 31
- California Community Colleges Academic Senate Curriculum Conference, Anaheim, CA, July 8
- Association of American Collegiate Registrars and Admissions Officers Tech and Transfer Conference Anaheim, CA, July 11-14
- National Conference of Academic Deans, University of Central Arkansas, Conway, July 15

Media Coverage

- Media Release: <u>Interstate Passport Initiative</u> <u>Framework Complete</u> (June 29, 2016)
- Media Release: <u>Department Awards \$60 Million</u> <u>in First in the World Grants to 17 Colleges,</u> <u>Universities and Organizations</u> (September 21, 2015)
- Media Release: <u>WICHE Awarded First in the</u> <u>World Federal Grant to Expand Interstate</u> <u>Passport</u> (September 28, 2015)
- Passport in the News:
 - <u>"In-state and Intrastate Initiatives aim to</u> <u>improve transfer pathways"</u> by Tara Garcia Mathewson, Education Dive, March 29, 2016.
 - <u>"The Interstate Passport: Improving the</u> <u>Transfer Intersection on the Road to a Four-</u> <u>Year Degree</u>" by Pat Shea, The EvoLLLution, June 10, 2016.
 - <u>The Scope and Reach of WICHE's Interstate</u> <u>Passport Expands</u> by Cathy Walker, NSC Blog, June 27, 2016, National Student Clearinghouse Research Services, Transcript and Data Exchange.
 - <u>"'Passport' for Transfer"</u> by Paul Fain, Inside Higher Education, July 5, 2016.
 - <u>"Interstate Passport Gives College Students the</u> <u>Means to Navigate Transfer Requirements"</u> by Eliana Osborn, Education News, July 20, 2016 https://www.goodcall.com/news/interstatepassport-gives-college-students-meansnavigate-transfer-requirements-08005

Passport Review Board

The *Passport Review Board* is comprised of the PSFs from the participating states and at-large members who are experts in academic quality, faculty roles and interactions, research and analysis, state policy and transfer, student affairs or other aspects of the higher education enterprise relevant to transfer. Participants at the February 2016 meeting included the PSFs from the new states in the other regions and also from the mapping pilot states. The Board revised the bylaws and the Memorandum of Agreement to accommodate the completed Passport framework, and also approved the 2014-2015 Passport Annual Report. The Board reviewed, discussed and approved the Communications Plan presented by BridgED Strategies, and the Business Plan and accompanying fee schedule for member institutions presented by Entangled Solutions (see Communications Plan and Business Plan below). In follow-up conference calls, the Board also discussed and approved the *Interstate* Passport Partners in Student Transfer Success Policy, which seeks to ensure that each institution's Passport Block is delivering acceptable results, i.e., students who transfer with Passports are equipped with the general education needed to be successful in their academic work at their new institution. Finally, as a result of feedback from many faculty members concerning two of the Passport Learning Outcomes in the natural sciences area, the Board directed the faculty team that developed the PLOs to reconvene to discuss making *modifications* to the PLOs in question. This directive was part of the process established for making modifications to PLOs and PC.

Communications Plan. BridgED Strategies developed the Interstate Passport Communications Plan, which outlines strategies to increase participation in the Interstate Passport Network and awareness of the Interstate Passport by the public. The report identifies the many different audiences and their characteristics to whom we would direct information about the Interstate Passport, and suggests strategies and tools for doing do. We have undertaken several of the recommendations in the report, including developing a new tag line, updating the Interstate Passport brochure, launching a series of webinars (supported by the FITW grant), and updating the website.

Business Plan/Marketing Strategy. Passport staff contracted with Entangled Solutions to produce the Interstate Passport Business Plan, a deliverable for the Gates Foundation grant. The final plan, delivered in February 2016 and approved by the Passport Review Board, includes an analysis of market challenges and opportunities; a description of Interstate Passport products and services; marketing strategies; key sales targets; an analysis of staffing, leadership and partnerships; and a projections summary. The underlying purpose of the plan is to devise strategies to scale and sustain the Interstate Passport as a selfsufficient operation over the next five years.

In addition, we have applied for two Service Marks: one for the Interstate Passport program's logo and one for the logo for members of the Interstate Passport Network. The latter can be used on pages on member's websites and in catalogs that describe the Interstate Passport program and display the institution's Passport Block. As an example, see the *Laramie County Community College Passport page*.

Looking Ahead

The increasingly mobile student population compels states and institutions to ensure that students are able to advance on their pathways without obstacles, while at the same time delivering high quality education. Interstate Passport addresses both of these priorities, and faculty and administrators beyond our participating institutions are recognizing the need for and benefits of such an instrument. The framework, developed by faculty members, ensures academic rigor and multi-institution concurrence of the learning outcomes while safeguarding institutional flexibility.

The sustainability plan for the Interstate Passport, developed as part of the business plan, anticipates that funding beyond the grant period would come primarily from institution membership fees once we had reached 100 members – the tipping point at which it is anticipated that we could readily demonstrate the value to both institutions and students. It became clear in this second year of the grant that our early adopter institutions require more time than we originally estimated to develop Passport Blocks and prepare for Interstate Passport implementation. The result is that the prospective timing for enrollment in the program and payment of membership fees has been delayed. The supplemental grant from the BMGF will support staff and consultants during this "ramp-up" time to provide more implementation assistance (advice/materials) for registrars, institutional researchers, academic advisors, and marketing staff to help ensure these early adopter institutions' are successful. Additionally, we will strengthen and expand our outreach efforts to continue to generate interest in participating in the Interstate Passport Network.

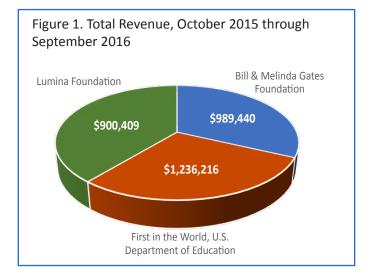
Once these early adopters have fully implemented the Interstate Passport on their campuses and the NSC services are in place, these institutions will be models for others. Case studies about their processes and lessons learned will help to guide prospective member institutions in ways that are expected to reduce the application period (constructing the Passport Block and implementing the student tracking system) from one year to about six months. This will allow more institutions to get involved sooner and as the number of institutions participating in the Network increases, its benefit to students expands.

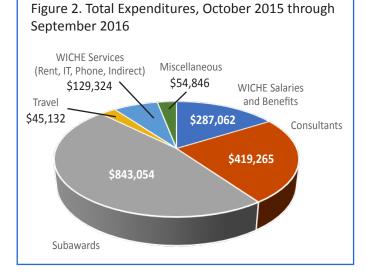


Financial Statement Project Year (October 1, 2015 – September 30, 2016)

During the project year (October 1, 2015-September 30, 2016), which closely aligns with the report period of this annual report, our generous funders – the Bill & Melinda Gates Foundation, Lumina Foundation, and the U.S. Department of Education – provided grant funding in the amount of \$3,126,065 to support the project. WICHE contributed in-kind support valued at \$155,712¹ during this period for the cost of its services that are not covered by the grants.

During this period, expenditures were allocated as follows: 47 percent for subawards, 24 percent for consulting, 16 percent for WICHE salaries and benefits, 7 percent for WICHE services, 3 percent for miscellaneous, and 3 percent for travel. In the salaries and benefits category, 75 percent goes to salaries and 25 percent goes to benefits.



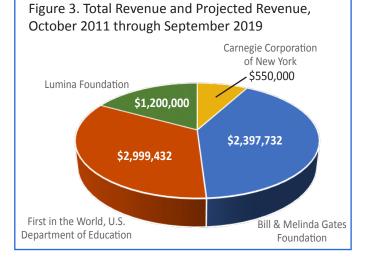


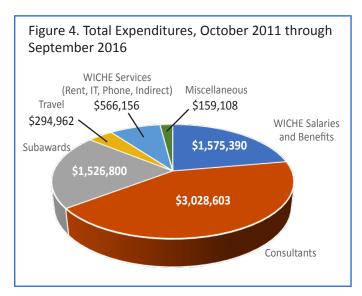
¹ Value of WICHE services not reimbursable by the funders: Lumina Foundation – WICHE's 15 percent indirect on all expenses; Bill & Melinda Gates Foundation – cost of conference calls, rent, phone, IT, and WICHE's 15 percent indirect on the same; FITW – indirect is limited to 8 percent on all expenses except for the contractual (consulting) category which is capped at 8 percent each vendor's first \$25,000 charge.

Financial Statement Overview of Grant Funding & Expenditures (October 2011 – September 2019)

The next two figures show overall revenue (actual) and expenditures (actual plus forecast) in support of the Interstate Passport from October 2011-September 2019. In Figure 3, Carnegie Corporation of New York, which provided the initial funding for the proof of concept, is added to our list of generous funders. The overall grant support for the project to date is \$7,147,164. Earned interest in the amount of \$3,856 in earned interest will also be rolled into the budget. Overall, WICHE will contribute in-kind support valued at \$651,701² for the cost of its services that are not covered by the grants.

Overall, expenditures are allocated among the following categories: 42 percent for consulting, 22 percent for WICHE salaries and benefits, 21 percent for subawards, 8 percent for WICHE services, 4 percent for travel, and 2 percent for miscellaneous. In the salaries and benefits category, 75 percent goes to salaries and 25 percent goes to benefits.





² Value of WICHE services not reimbursable by the funders: Carnegie Corporation – 10.8 percent of WICHE's 15 percent indirect fee; Lumina Foundation – WICHE's 15 percent indirect on all expenses; Bill & Melinda Gates Foundation – cost of conference calls, rent, phone, IT, and WICHE's 15 percent indirect on the same; FITW – indirect is limited to 8 percent on all expenses except for the contractual (consulting) category which is capped at 8 percent each vendor's first \$25,000 charge.

Interstate Faculty Teams

Faculty from institutions in seven states represented their colleagues back home in the interstate negotiation meetings to develop the Passport Learning Outcomes and proficiency criteria.

Oral Communication

Sharon Cox (Chair), Past Faculty Senate Chair, Assistant Professor, Accounting, University of Hawai'i West Oahu

Kevin Baaske, Professor of Communication Studies, California State University Los Angeles

JoAnne Benschop, Articulation Officer, MiraCosta College (California); Community College Representative, Statewide Senate GE Advisory Committee

Richard Dubanoski, State Facilitator; Dean Emeritus, College of Social Sciences, University of Hawai'i at Manoa

Becky Johns, Associate Professor of Communication, Weber State University (Utah)

Richard Parker, Department Chair, Art, Theater and Humanities, Columbia Gorge Community College (Oregon)

Phyllis "Teddi" Safman, State Facilitator; assistant commissioner for Academic Affairs, Utah State Board of Regents

Thomas Steen, Professor, Physical Education and Exercise Science/Director of Essential Studies Program, University of North Dakota

Terry Underwood, Professor, Teacher Education, Sacramento State University

Kim Weissman, Communication Department, Williston State College (North Dakota)

Written Communication

James Goodman (Chair), Dean of Arts and Sciences, Leeward Community College

Debra David, State Facilitator; Project Director, "Give Students a Compass," California State University System, Office of the Chancellor, California

Gloria Dohman, Associate Vice President of Institutional Effectiveness, North Dakota State College of Science

Donna Evans, Assistant Professor of English/Writing and Director of the Writing Center and Writing Across the Curriculum, Eastern Oregon University

Maureen Mathison, Associate Professor, Director, Writing Program, University of Utah

Larry Peterson, Director of Accreditation, Assessment and Academic Advising, North Dakota State University

Kate Sullivan, Faculty Instructor, Language-Literature and Communication, Lane Community College

Teresa Tande, Assistant Professor of English, Lake Region State College (North Dakota)

Quantitative Literacy

Jonathan Bodrero (Chair), Professor of Mathematics, Snow College (Utah)

Lisa Johnson, State Facilitator, North Dakota

Karen Marrongelle, State Facilitator, Oregon

Julia Myers, Assistant Professor; Chair, General Education Committee, University of Hawai'i West Oahu

Hal Sadofsky, Chair, Department of Mathematics, University of Oregon

Mark Van Selst, Professor, Psychology, San Jose State University; Chair, CSU Statewide Senate GE Advisory Committee

Kristi Wold-McCormick, University Registrar, North Dakota State University

Rick Woodmansee, Professor, Mathematics and Statistics, Sacramento City College

Ryan Zerr, Associate Professor, Mathematics, University of North Dakota

Natural Sciences

Thomas Krabacher (Chair), Professor, Geography, California State University, Sacramento

Fenny Cox, Associate Professor of Biology, University of Hawai'i West Oahu

Adam Dastrup, Associate Professor and Coordinator, Geosciences Department, Salt Lake Community College

Farah Firtha, Department Chair, Chemistry, Mt. San Jacinto College

Patricia Flatt, Associate Professor, Chemistry, Western Oregon University

Madhav Nepal, Assistant Professor, Biology & Microbiology, South Dakota State University

Michael Reese, Associate Professor of Chemistry and Science, Leeward Community College

Meredith Roehrs, Instructor Biology/Zoology, Laramie County Community College

Larry Smith, Professor of Physics, Snow College

Thomas B. Steen, Passport State Facilitator; Professor Emeritus, University of North Dakota

Human Cultures

Laura Vidler (Chair), Professor, Languages and Linguistics: Spanish, College of Arts & Sciences, University of South Dakota

Kari Brown-Herbst, Passport State Facilitator; Director, Center for Teaching & Learning, Laramie County Community College

Dolores Davison, Professor and Chair, History & Women's Studies, Foothill College; Academic Senate for California Community Colleges

Richard Dubanoski, Passport State Facilitator; Dean Emeritus, College of Social Sciences University of Hawai'i at Manoa

Suzanne Falgout, Professor of Anthropology, University of Hawai'i West Oahu

Stefan Frazier, Associate Professor, Linguistics & Language Development, San Jose State University

Isidore Lobnibe, Associate Professor of Anthropology, Western Oregon University

Paul Lococo, Professor of History, Leeward Community College

Melissa McAllister, Instructor, English as a Second Language, Laramie County Community College

Daniel McInerney, Professor & Associate Department Head History, Utah State University

Larry Peterson, Director of Accreditation, Assessment and Academic Advising, North Dakota State University

Creative Expression

Michael Phillips (Chair), Associate Professor of Theater, Western Oregon University

Greg Brister, Assistant Professor Language and Literature, Valley City State University

Miguel Chuaqui, Professor, University of Utah

Jessica Curran, Assistant Professor, Graphic Communications, Salt Lake Community College

Richard Dubanoski, Passport State Facilitator; Dean Emeritus, College of Social Sciences University of Hawai'i at Manoa

Wojciech Lorenc, Assistant Professor, University of Hawai'i West Oahu

Susan Lum, Professor of English Literature, Leeward Community College

Daniel Maw, Chair, Fine Arts, Humanities & Philosophy Instructor of Art, Laramie County Community College

Alan Montgomery, Professor of Art, Dakota State University

Charlette Moe, Assistant Professor of Music, North Dakota State University Diane Tarter, Professor of Art, Western Oregon University

Paul Wickline, Academic Senate President, Theatre Department Chair, College of the Canyons

Human Society & The Individual

Jonathan Carrier (Chair), Psychology Instructor, Laramie County Community College

Spencer Blake, Associate Dean; Associate Professor, Sociology, Salt Lake Community College

Richard Dubanoski, Passport State Facilitator; Dean Emeritus, College of Social Sciences, University of Hawai'i at Manoa

Donna Fairbanks, Associate Professor, Chair, Department of Music, Utah Valley University

David Foster, Professor of Psychology, Western Oregon University

Orlando Garcia-Santiago, Assistant Professor of Sociology, University of Hawai'i West Oahu

Beverly Grindstaff, Coordinator and Associate Professor, Design History, San Jose State University

John Leadley, Professor of Economics, Western Oregon University

Bruce Lindquist, Assistant Professor, Geography, Leeward Community College

Anne Marenco, Professor, Chair, Department of Sociology, College of the Canyons (California)

Richard Olson, Associate Professor, Psychology, Lake Region State College

Karyn Plumm, Associate Professor, Psychology, University of North Dakota

Frank Van Nuys, Professor of History, South Dakota School of Mines and Technology

Critical Thinking

Paul Disney (Chair), Adjunct Instructor of Business/ Economics, Western Oregon University

Daniel Crump, Librarian, American River College, Academic Senate for California Community Colleges

Olivia George, Assistant Professor of Biology, University of Hawai'i West Oahu

James A. West, Arts & Humanities Division Chair, Leeward Community College

Alan Church, Professor of English, Dickinson State University/NDGEC

Bill Shay, Associate Professor of Mathematics and Science, North Dakota State College of Science

Jacquelyn Ray, Director, Library and Media Services, Blue Mountain Community College Lynn Dilivio, Assistant Professor of Education, Northern State University

Ryan Thomas, Associate Provost and Dean of Undergraduate Studies, Weber State University

Kati Lewis, ePortfolio Coordinator; Adjunct Faculty Humanities and English, Salt Lake Community College

Eric Quade, Instructor of Math, Laramie County Community College

Teamwork and Value Systems

Rebekah Villafana (Chair), Adjunct Professor, Sociology, College of the Canyons

William Albritton, Assistant Professor, Information & Computer Science, Leeward Community College (Hawai'i)

Mary Brown, Associate Professor, Community Health, Utah Valley University

Claire Hitosugi, Assistant Professor, Business Administration, University of Hawai'i West Oahu

Jenny Linker, Assistant Professor, North Dakota State University

Lynda McCroskey, Associate Professor, Communications Studies, California State University, Long Beach

Tamra Phillips, Associate Professor, Communication, Salt Lake Community College

Teresa Tande, Associate Professor English/Humanities, Lake Region State College

Dan Dolan, Professor, Mechanical Engineering; Director, Center of Excellence for Advanced Manufacturing and Production (CAMP), South Dakota School of Mines and Technology

Ann Shelby, Faculty, Education, Laramie County Community College

Advisory Committees

Registrars/Institutional Researchers

Roland Squire (Chair), Registrar Expert; former registrar, Utah State University

Hawai'i

Grant Helgeson, Registrar, Leeward Community College

John Stanley, Associate Director, VCAA/Assessment and Institutional Research, University of Hawai'i-West Oahu

North Dakota

Daniel Johnson, Registrar, Lake Region State College

Christina Fargo, Assistant Registrar, University of North Dakota

Oregon

Amy Clark, Registrar, Western Oregon University

Josh Ellis, Institutional Research and Reporting Specialist, Blue Mountain Community College

South Dakota

Kathy Callies, Registrar, Dakota State University

Jana Hanson, Director of Institutional Assessment, South Dakota State University

Utah

Michael Torrens, Director, Analysis, Assessment and Accreditation, Utah State University

Ologa Iopu, Associate Registrar, Salt Lake Community College

Wyoming

Stacy Maestas, Registrar, Laramie County Community College

Ann Murray, Director of Institutional Research, Laramie County Community College

Academic Advisors/Marketing Staff

Judy Hay (Chair), Vice President of Student Services, Laramie County Community College, WY

Hawai'i

Blake Hunrick, Counselor, Leeward Community College

Oregon

Casey White-Zollman, Vice President Public Relations, Blue Mountain Community College

Karen Sullivan-Vance, Director, Academic Advising & Learning Center, Western Oregon University

South Dakota

Jody Owen, Academic Advisor Coordinator/Director, First Year Advising Center, South Dakota State University

Mike Lockrem, Director, University Marketing and Communications, South Dakota State University

Utah

Sidney McGuire Brown, Academic & Career Advisor 3, Salt Lake Community College

Wyoming

Josh Thein, Promotions & Video Production Specialist, Laramie County Community College

Wave II States

Passport State Facilitators

Arkansas

Ann Clemmer, Senior Associate Director, Academic Affairs, Department of Higher Education

Colorado

Ian Macgillivray, Director of Academic Affairs, Colorado Department of Higher Education

Idaho

Margaret Johnson, Associate Vice President for Undergraduate Affairs, Idaho State University

Indiana

Ken Sauer, Senior Associate Commissioner and Chief Academic Officer, Indiana Commission for Higher Education

Kentucky

Melissa Bell, Associate Vice President, Kentucky Council on Postsecondary Education

Montana

Elizabeth Ternes, Academic Policy Specialist, Montana University System

New Mexico

Diane Evans-Prior, Academic Affairs Director of Nursing, Central New Mexico Community College

Ohio

Paula Compton, Associate Vice Chancellor, Executive Director, Ohio Articulation and Transfer Network, Ohio Department of Education

Virginia

Paul Smith, Associate for Student Mobility Policy and Research, State Council of Higher Education for Virginia

Mapping Specialists

Colorado

Kim Black, Director of Assessment, University of Northern Colorado

Sarah Goodrum, Department Chair, University of Northern Colorado

Ross Perkins, Chair, Academic Assessment, Aims Community College

Montana

Leanne Frost, Director of General Education, Business, Technology & Transfer Division, Great Falls College – Montana State University

Nathan Lindsay, Associate Provost for Dynamic Learning, University of Montana

New Mexico

Colleen Lynch, Assistant Professor, Mathematics, Santa Fe Community College

David Smith, Director of Assessment, New Mexico State University

Interstate Passport Network

Current Members as of February 2017

Hawaiʻi

Leeward Community College University of Hawai'i West Oahu

North Dakota

Lake Region State College University of North Dakota

Oregon

Blue Mountain Community College Western Oregon University

South Dakota

Black Hills State University Dakota State University Northern State University South Dakota School of Mines & Technology South Dakota State University University of South Dakota

Utah

Dixie State University Salt Lake Community College Snow College Southern Utah University The University of Utah Utah State University Utah Valley University Weber State University

Wyoming

Laramie County Community College

Passport Review Board

Passport State Facilitator Members

California

Thomas Krabacher, Professor of Geology, California State University Sacramento

Hawai'i

Richard Dubanoski, Dean Emeritus, College of Social Sciences, University of Hawai'i at Manoa

North Dakota

Thomas B. Steen, Professor Emeritus and former Director, Office of Essential Studies; University of North Dakota

Oregon

Sean Pollack, Policy Specialist, Academic and Student Affairs, Oregon Higher Education Coordinating Commission

South Dakota

Paul Turman, System Vice President for Academic Affairs, South Dakota Board of Regents

Utah

Phyllis (Teddi) Safman, Assistant Commissioner for Academic Affairs, Utah State Board of Regents

Wyoming

Kari Brown-Herbst, Director, Center for Teaching & Learning, Laramie County Community College

At-Large Members

Michel Hillman, Co-chair PRB, State Policy/Transfer Advisor

Susan Neel, Faculty Expert, Associate Professor of History, Utah State University

Peter Quigley, Co-Chair PRB; Associate Vice President, Academic Affairs, University of Hawai'i; Western Alliance of Community College Academic Leaders Representative

Interstate Passport Staff

WICHE Staff



Patricia Shea, Director, Academic Leadership Initiatives & Principal Investigator for Interstate Passport, WICHE

Cathy Walker, Project Manager, Interstate Passport, WICHE



Kay Hulstrom, Administrative Manager, WICHE



Kate Springsteen, Member and Education Services Coordinator, Interstate Passport, WICHE

Consultants



Jane Sherman, Passport State Coordinator

Kobert Turner, Mapping Pilot Coordinator

For more information, contact Cathy Walker at cwalker@wiche.edu or see www.wiche.edu/ passport

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- 7 Passport Learning Outcomes http://www.wiche.edu/passport/interstate_passport_components
- 7 Passport Learning Outcomes and Proficiency Criteria http://www.wiche.edu/passport/interstate_passport_components
- 7 Faculty Handbook: Constructing your Institution's Passport Block http://www.wiche.edu/passport/facultyhandbook
- 9 Handbook for Registrars and Institutional Researchers http://www.wiche.edu/passport/registrarinfo
- 9 Passport Data Management Plan http://www.wiche.edu/passport/registrarinfo
- 10 Handbook for Academic Advisors and Marketing/Communications Representatives http://www.wiche.edu/passport/info-resources/academic-advisors-marketing-representatives
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- 11 Higher Education Supplement https://tech.ed.gov/files/2017/01/Higher-Ed-NETP.pdf
- 11 Newscap http://www.wiche.edu/newscap/edition
- 12 Interstate Passport Initiative Framework Complete http://wiche.edu/news/interstate-passport-initiative
- 12 Department Awards \$60 Million in First in the World Grants to 17 Colleges, Universities and Organizations <u>https://www.ed.gov/news/press-releases/department-awards-60-million-first-world-grants-17-colleges-universities-and-organizations</u>
- 12 WICHE Awarded First in the World Federal Grant to Expand Interstate Passport http://www.wiche.edu/passport/press-releases
- 12 In-state and Intrastate Initiatives aim to improve transfer pathways <u>http://www.educationdive.com/news/in-state-and-interstate-initiatives-aim-to-improve-transfer-pathways/416372/</u>
- 12 The Interstate Passport: Improving the Transfer Intersection on the Road to a Four-Year Degree <u>http://evolllution.com/programming/credentials/the-interstate-passport-improving-the-transfer-intersection-on-the-road-to-a-four-year-degree/</u>
- 12 The Scope and Reach of WICHE's Interstate Passport Expands https://nscblog.org/2016/06/the-scope-and-reach-of-wiches-interstate-passport-expands/
- 12 Passport for Transfer <u>https://www.insidehighered.com/news/2016/07/05/wiches-interstate-passport-seeks-help-students-</u> <u>transfer-while-preserving-colleges</u>
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