Southern Oregon University

Public Meeting Notice

April 1, 2015

TO: Academic and Student Affairs Committee

FROM: Susan Walsh, Provost & Vice President for Academic and Student Affairs

RE: Notice of Regular Meeting

The Academic and Student Affairs Committee of the Southern Oregon University Board of Trustees will hold a regular committee meeting on the date and at the location set forth below.

Topics of the meeting will include discussion of Southern Oregon University's Retrenchment Plan, including the impact of the plan on academic programs, reporting, and planning; and a discussion of Accelerated Learning, which will include information regarding the various senate bills and other initiatives that are under consideration for partnerships between High Schools, Community Colleges and Universities.

The meeting will occur as follows:

Wednesday, April 15, 2015
1:30 p.m. to 3:30 p.m. (or until business is concluded)
Hannon Library, DeBoer Boardroom, 3rd Floor (Room 303)

The Hannon Library is located at 1290 Ashland Street, on the campus of Southern Oregon University. **If special accommodations are required, please contact Jennifer Athanas at (541) 552-6111 at least 72 hours in advance.**

Southern Oregon University

Southern Oregon University Board of Trustees

Academic and Student Affairs Committee
Regular Meeting

Wednesday, April 15, 2015
DeBoer Boardroom, Hannon Library, 3rd Floor, Room 303
1:30 p.m. to 3:30 p.m. (or until business is concluded)

Agenda

Call to order

Roll Call

Public Comment

Consent Agenda
- Minutes from March 18, 2015 Regular Meeting

Discussion Items
- Discussion of Retrenchment Plan—Dr. Karen Stone (AVP for Academic Resource Management) will lead the committee in a detailed discussion regarding the impact of the plan on academic programs, reporting, and planning.

- Discussion of Accelerated Learning--Dr. Steve Thorpe (Special Assistant to the Provost) will present information regarding the various senate bills and other initiatives that are under consideration for partnerships between High Schools, Community Colleges and Universities.

Adjourn

Academic and Student Affairs Committee
March 18, 2015
2:00 p.m. to 3:31 p.m., Hannon Library DeBoer Room

Roll Call:
Present: Les AuCoin (by phone), Filiberto Bencomo, Teresa Sayre, Judy Shih, Joanna Steinman, Steve Vincent; Susan Walsh.

Absent: Shea Washington

Guests: Mary Ann Gardner, Donna Holtz, Deborah Lovern, Roy Saigo, Ryan Brown, student visitor

Chair Sayre called the meeting to order at 2:00 p.m.

1. Overview of Today's Agenda – Susan Walsh
Those present introduced themselves and the position they hold. Walsh said this introductory meeting would be to provide background structure of the Academic Affairs and Student Affairs areas.

2. Overview of Academic and Student Affairs Departments – Susan Walsh
The organizational structure and responsibilities of Academic Affairs was described, with the current Organizational Chart displayed and distributed. Walsh gave instructions on how to navigate to and within SOU Provost's Office website. She explained that two years ago we reorganized and integrated Academic Affairs and Student Affairs, which has created efficiencies and better services for students. We have a good communication network and the right people in positions. The second piece of reorganization is the academic reorganization that took place last year; we changed the former School/College structure to academic Divisions, with Division Directors instead of Deans. Walsh highlighted several key positions and areas.

3. Introduction of Key Personnel and discussion of Oversight Responsibilities

Karen Stone (AVP for Curricular Management):
Dr. Stone has held previous positions as a faculty member in Biology, department chair, and Associate Dean of the College of Arts and Sciences. Her current position deals with management of academic resources, including faculty contracts, scheduling courses, and analyzing the frequency of course offerings and class sizes to use our faculty resources more efficiently. She works closely with Division Directors as they manage their resources; if a faculty member is under-utilized, they can discuss how to better utilize the faculty member. Stone also works with Susan Walsh, Craig Morris, and Chris Stanek in executing the retrenchment plan. We can't replace positions that were eliminated in the retrenchment plan. Walsh said Stone will know right away if a course is low-enrolled or a faculty member needs to be reassigned. Vincent asked if cost analysis is used, and Walsh said it is. Stone said there are many pieces involved in the actual cost of teaching a course. The faculty Collective Bargaining Agreement

governs some of these costs. Walsh says we now have a faculty loading report which shows the distribution of faculty instruction and other duties. Vincent asked what we do about a course that shows a significant drop in enrollment as the term goes on; Stone said we would provide some pedagogical help to the faculty member to address issues that may cause the enrollment decrease. We try to look at the enrollments early enough to address faculty utilization appropriately.

Jody Waters (Associate Provost and Director of Graduate Studies):
Dr. Waters works at the intersection of Academic and Student Affairs. She oversees the curriculum for the university, the McNair Post-Baccalaureate Achievement Program, Grants and Contracts, graduate programs, academic policies, and student support. Waters oversees curriculum at both the macro and micro level, and works with accreditation and assessment. We now have a seven-year accreditation cycle; we will start working on our comprehensive report next year. Waters is the liaison between faculty and policy issues, and she deals with student complaints and problems. She is a Deputy Title IX Coordinator and works with our protections and pathways for solving issues of gender discrimination, bias, and sexual violence. For faculty development, Waters works with the Center for Instructional Support to provide continuing professional development for faculty.

Sayre welcomed Trustees Filiberto Bencomo and Steve Vincent, who both arrived after the roll call was taken at the beginning of the meeting.

AuCoin asked the date of our last accreditation report. Our last comprehensive report and evaluation was in 2007. Walsh reported that following 2007, NWCCU (Northwest Commission on Colleges and Universities) changed the accreditation review structure; what had been a ten-year cycle is now a seven-year cycle with annual reports for different areas of review, culminating in a comprehensive report in Year Seven. AuCoin asked that the last accreditation evaluation be sent to the Trustees so they can familiarize themselves with the university's challenges and know what NWCCU has recommended for improvement. Walsh said we will send the report and also send a link to this information. SOU has completed all the reports leading up to Year Seven; our Year Seven report is due in 2017. Walsh said we should spend most of one meeting on accreditation and assessment. AuCoin said that would be good to dig deeper into the issues we face; he would like to see the NWCCU evaluations as well as SOU's self-evaluation.

Vincent asked about the sexual assault policies in place, and whether there is an outside audit to see how we're doing and whether there is institutional risk. Walsh said we report to certain external entities, and we provide training for Title IX officers and coordinators. Craig Morris added that we will be hiring an Internal Auditor who will report to the SOU President and the Board of Trustees. The auditor will look at this area of compliance as well as other areas. Vincent also asked about the Director of Grants and Contracts; does this include the possibility of SOU having equity in spin outs? Vincent described a situation at another university where he and other visitors were shown new technology, but there was no confidentiality disclosure statement required, and no contractual protection. Morris said that is one reason we will be

hiring an internal auditor; to make sure we are in compliance where we need to be. Waters added that our Grants and Contracts office is well aware of the boundaries we need to keep.

Lisa Garcia-Hanson (AVP for Enrollment and Retention):
Ms. Garcia-Hanson shared the organizational chart for her area and described the various functions performed. She shared the vision statement of the area and summarized the main components, which are Admissions (including student recruiting), Financial Aid, Student Life, Disability Resources, Outreach and Engagement, Registrar and Enrollment Services, Academic Advising, Success at Southern (a Trio program), and the Schneider Children's Center. AuCoin asked about "boot camp" programs for students who need it; Walsh responded that we have writing, math, and science tutoring available, and have a proactive approach for students. We are in the process of creating a bridge program which is a better approach, and catches students on the front end. Student Life sponsors co-curricular programs that promote student engagement and contribute to well-rounded students. Our Director of Admissions and Director of Student Life collaborate on recruitment and retention efforts, and faculty members are increasingly involved in encouraging prospective students and in retaining students. Our Admissions staff includes four staff members dedicated to new student recruiting. Our orientation for new students includes class registration and addresses transition issues for students and families, and connects students to resources on campus to academic pathways and social avenues. Vincent asked if there is a nexus in external efforts to recruit students, and help for students who don't know how to navigate the system. There was discussion about how to convert a segment of the population for whom higher education may have seemed unattainable into something that is within reach for them. Garcia-Hanson said they try to identify students early on who may need some of our special resources. Walsh added that we have had an increased need for counseling, and Waters described the early intervention system (SOU Cares) that is working very well to identify potential problems (academic, physical, financial, or psycho-social) for students and to provide help at an early stage.

The Schneider Childcare Center is open to the public, after needs of students and SOU staff members are met. Morris said the business model for the childcare center allows for this, and it helps us cover the costs of operation. We never have to turn away a student or staff member who needs this service. Trustee Shih asked whether the increased use of the SOU Cares system is a result of improvement in outreach, or if we are admitting more students who need assistance; Walsh said both are factors.

Morris described the state's 40-40-20 program, which means that 40% of Oregon residents would have a college degree, 40% would have an associate's degree, and 20% would have a high school diploma. In order to achieve that, we have to start reaching out to new populations of students, and this also requires providing student services the new population may need to succeed. Student fees pay for some of the services students receive, but not all.

Chris Stanek (Director of Institutional Research):
Mr. Stanek described the two-person Institutional Research office as a service department that provides data retrieval and analysis; it is data-neutral. He described the typical research they

do, which includes internal research and reporting (such as enrollment, projections, capacity studies); external surveys (reports to federal government and state, Oregon University System or HECC); Survey Administration; and information for assessment and accreditation.

Steinman asked about the IR office being data-neutral; Stanek said they don't editorialize; they let the data tell the story and others can interpret the data. Vincent asked whether data is used to help decide what degree programs SOU should offer; Stanek said this is a big issue. Stone added that sometimes the local community has a need for certain skills, but we can't always attract enough students to that academic area.

4. <u>Planning Topics for Discussion and Decision at Future Committee meetings</u>

Sayre reminded trustees about upcoming meetings in April and May, with the suggested topics. Walsh said some of the topics are driven by conversations at the HECC or state level; others are not so time sensitive. Walsh may invite Craig Morris to attend some of these meetings. AuCoin, referring to a proposed future agenda item, commented that the easiest student to enroll is the one you already have; Walsh agreed and said everybody's job is retention. In response to Mission Alignment, Vincent reported that the HECC sees its role to work with the institutions' missions; what about the economy? There was discussion about roles of the HECC and institutional boards and the legislature. Morris said this is a broader conversation for the Board about how it is involved with the HECC and legislature; he will discuss this with Liz Shelby. Steinman said she is trying to understand the different roles of the different groups.

Saigo said that Walsh's comment about Mission is correct; the internet has changed everything. If we try to keep to our physical territory we won't succeed. The trustees need to think about where they want to drive this institution at the time the world has become so much smaller. We need to be very nimble. Au Coin added that we need to think at a high level, and then on the ground. What makes SOU strong and compelling? What inherent strengths do we have, and what weaknesses do we need to overcome? There are strengths that we haven't nourished enough.

Sayre and Walsh thanked everyone for attending. Walsh will follow-up with a link to documents, and make sure that trustees participating remotely have access to all materials.

Sayre adjourned the meeting at 3:31 p.m.

Southern Oregon University

Living with Retrenchment

Pre-Retrenchment

▸ **Capacity Study – internal study (July 2012)**
  ◦ Curriculum too diverse; not able to maintain current class size ratios
  ◦ Find a more effective and efficient way to organize academic programs

▸ **Program Prioritization – internal process (October 2012-June 2013)**
  ◦ Programs ranked into Four Quintiles: Enhance, Maintain & Possibly Enhance, Maintain, Review and Restructure

▸ **Workforce Analysis – internal study (August 2013)**
  ◦ Unaccounted faculty release was identified and underscored the need for systematic tracking of faculty loading

▸ **Delaware Cost Study – commissioned by OUS (January 2014)**
  ◦ $6.86M in non-course related activities identified

Major Changes in Academic Affairs

▸ **Reorganization of Academic Departments**

  ◦ Replaced the College of Arts & Sciences, School of Education, and the School of Business with 7 academic divisions of more equal size

  ◦ Eliminated 3 Deans and reduced department chair release by replacing them with 7 Directors and 1 Assoc. VP for Curricular Management

  ◦ Departments were recombined into the 7 division structure allowing for better managerial oversight as well as staff reductions

  ◦ 7 Divisions with Director and roughly 40 faculty FTE per Division

    • Business, Communication and the Environment

    • Science, Technology, Engineering and Mathematics

    • Education, Health and Leadership

    • Oregon Center for the Arts

    • Humanities and Culture

    • Undergraduate Studies

    • Social Sciences
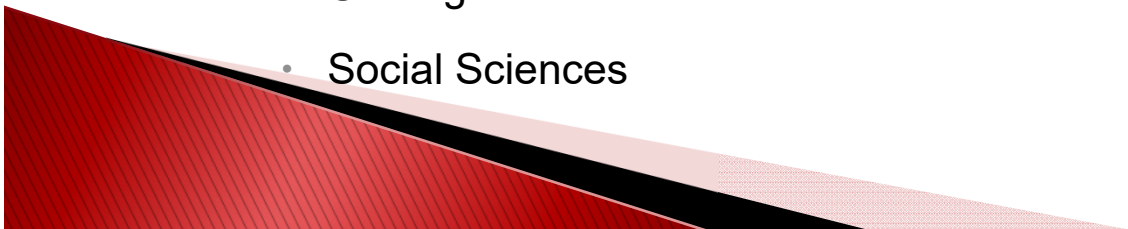
Major Changes in Academic Affairs

▸ **Reduced faculty positions (Retrenchment Plan, March 2014)**

Faculty type	FTE
Known retirements	24.19
Permanent	12.58
Adjunct (yearlongs)	11.52
Anticipated retirements	10.00
Adjunct (txt)	3.31
TOTAL	61.60
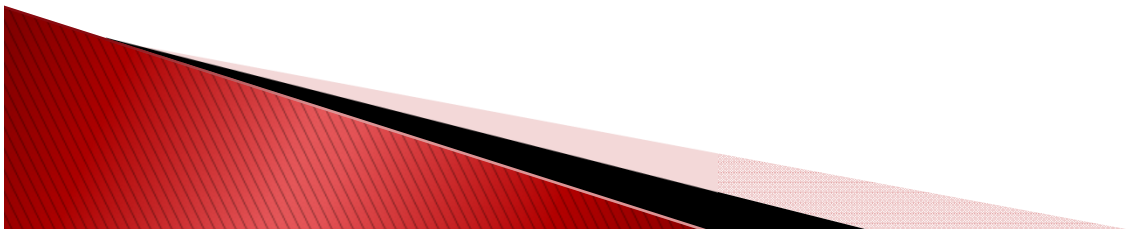
Retrenchment Metrics

▸ **Financials:** Build the fund balance and ensure financial viability

▸ **Enrollment:** Strengthen the application funnel and grow overall enrollment

▸ **Retention:** Improve the 1st to 2nd year and 1st to 3rd year retention rates

▸ **Course Sizing:** Increase average class size and reduce low enrolled courses

▸ **Faculty Loading:** Manage efficiencies and accountability of faculty assignments

Retention Metrics

Student class	Target F'13 to F'14	Actual F'13 to F'14
All admitted UGs Fall to next Fall	77.0%	77.1%
All newly admitted UGs Fall to next Fall	70.0%	72.7%
All newly admitted first–time full–time freshmen	68.0%	73.8%
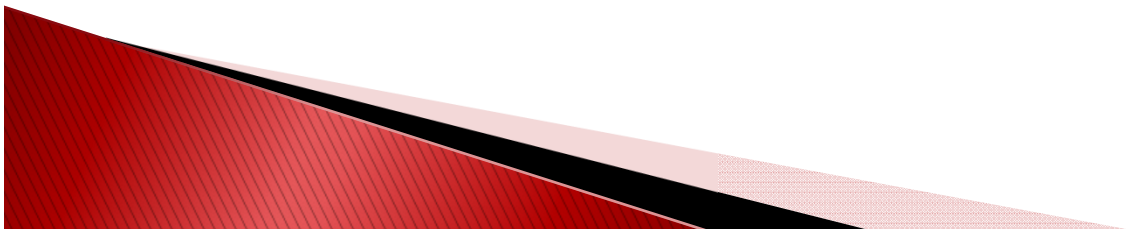
Course Sizing Metrics

Average class size:

Class type	Target Fall'14	Actual Fall'14
All	25.3	27.1
Lower division	30.5	32.1
Upper division	22.1	22.8
Graduate	15.0	16.4

Number of low enrolled courses:

Class type	Target Fall'14	Actual Fall'14
All	47	25
Lower division	10	7
Upper division	19	9
Graduate	18	9
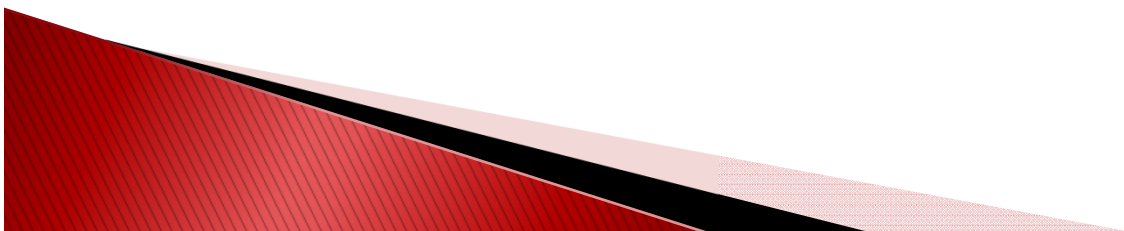
Upper Division Courses

Fall 2012
mean=22.2
n=185
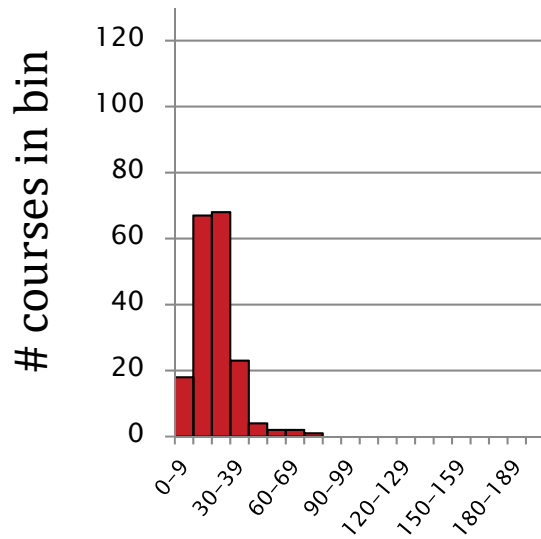
Fall 2013
mean=22.0
n=183
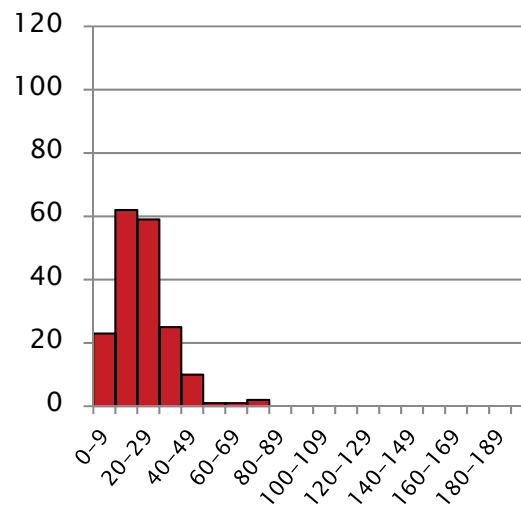
Fall 2014
mean=22.7
n=163
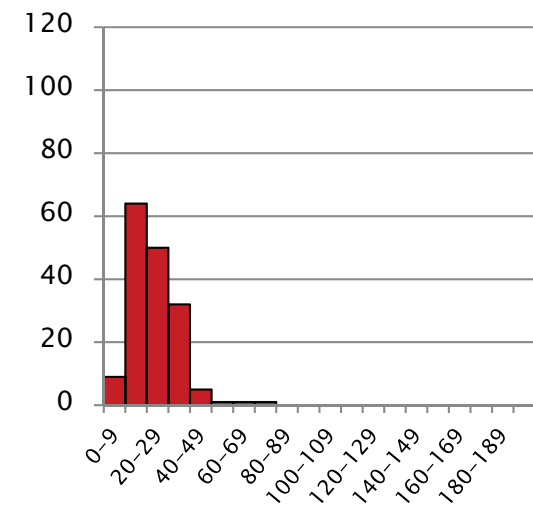
Class size bin

From enrollment report – August 11, 2014

Course#	Enrollment	Max
301	13*	35
302	15	25
303	11	25
304	10	25
305	11	25
306	10	25
307	14	25
308	25*	25
401	10*	20
402	7	25
403	5	25
	*cross list enrollment	

Mean class size = 11.9

From enrollment report – October 27, 2014

Course#	Enrollment	Max
301	18*	35
302	22	25
305	15	25
306	14	25
307	27	25
308	26*	25
401	12*	20
404	25	30
	*cross list enrollment	

Mean class size = 19.9

Courses cancelled for Fall 2014

Course number and title	Enroll	Loading (ELU)	Reassignment
PHL323:Moral Theory	3	4	New course added, PHL207, with 24 students
CS295:Web Development II	7	4	New course added, CS256, with 23 students
BI318:Invertebrate Natural History and lab	8	8	New course added, BI101 and 101L, with 99 students in lecture
MTH111:Precalculus I	8	4	Reduced adjunct need and therefore expenses
CW320:Contemporary Literary Culture	3	4	New course added, CW282, with 20 students
HST476:American West to 1865	6	4	New course added, HST421, with 25 students
HST484:1960s US	5	4	Faculty reassigned to winter term course
SOC337:Racial and Ethnic Relationships	6	4	Faculty reassigned to SOC343 with 24 students and reduced adjunct annual contract

Example of <u>Faculty</u> <u>Loading</u> from Report:

SOU Faculty Loading - Academic Year 2014-2015

Division	Faculty's home program	FTE	Faculty Type	ELU Basis	Term code	Type	Workload (ELU)	Notes	Index Code
SS	CCJ	1.00	Professorial	36	201401	Teaching (with standard loading)	4	CCJ231	CRM001
SS	CCJ	1.00	Professorial	36	201401	Teaching (with standard loading)	4	CCJ361	CRM001
SS	CCJ	1.00	Professorial	36	201401	Program Chair	4	CCJ	CRM001
SS	CCJ	1.00	Professorial	36	201402	Teaching (with standard loading)	4	CCJ361	CRM002
SS	CCJ	1.00	Professorial	36	201402	Overload Paid	-4	CCJ399	CRM002
SS	CCJ	1.00	Professorial	36	201402	Teaching (with standard loading)	4	CCJ399	CRM002
SS	CCJ	1.00	Professorial	36	201402	Teaching (with standard loading)	4	CCJ430	CRM002
SS	CCJ	1.00	Professorial	36	201402	Program Chair	4	CCJ	CRM001
SS	CCJ	1.00	Professorial	36	201403	Teaching (with standard loading)	4	CCJ361	CRM001
SS	CCJ	1.00	Professorial	36	201403	Teaching (with standard loading)	4	CCJ430	CRM002
SS	CCJ	1.00	Professorial	36	201403	Program Chair	4	CCJ	CRM001
SS	CCJ	1.00	Professorial	36	201403	Scholarly Activity	4	research	CRM002
SS	CCJ	1.00	Professorial	36	201403	Bank Deposit	-4		CRM002
							36		

Example of Faculty Loading from Report:

Division	Faculty's home program	FTE	Faculty Type	ELU Basis	Term code	Type	Workload (ELU)	Notes	Index Code
SOU Faculty Loading - Academic Year 2014-2015									
STEM	MTH	1.00	Professorial	36	201401	Teaching (with standard loading)	4	MTH112	MTH001
STEM	MTH	1.00	Professorial	36	201401	Teaching (with standard loading)	4	MTH251	MTH001
STEM	MTH	1.00	Professorial	36	201401	Teaching (with standard loading)	4	MTH331	MTH001
STEM	MTH	1.00	Professorial	36	201402	Teaching (with standard loading)	4	MTH251	MTH001
STEM	MTH	1.00	Professorial	36	201402	Teaching (with standard loading)	4	MTH431/531	MTH001
STEM	MTH	1.00	Professorial	36	201402	Bank Withdrawal	4		MTH001
STEM	MTH	1.00	Professorial	36	201403	Teaching (with standard loading)	4	MTH252	MTH001
STEM	MTH	1.00	Professorial	36	201403	Teaching (with standard loading)	4	MTH261	MTH001
STEM	MTH	1.00	Professorial	36	201403	Teaching (with standard loading)	4	MTH421/521	MTH001
							36		

Example of Administrative Release from Faculty Loading Report:

SOU Faculty Loading - Academic Year 2014-2015									
Division	Faculty's home program	FTE	Faculty Type	ELU Basis	Term code	Type	Workload (ELU)	Notes	Index Code
DEHL	ED	1.00	Professorial	36	201401	Coordination of Graduate Program	3	MAT Middle/High School	EDU001
CFA	THR	1.00	Professorial	36	201401	Program Chair	5	Theatre	THR001
BCE	ES	1.00	Professorial	36	201401	Program Chair	4	Environmental Studies	ENV001
CFA	MUS	1.00	Professorial	36	201401	Program Chair	3	Music	MUS001
UND	USEM	1.00	Professional	44	201401	Program Chair	4	University Seminar	CURFRS
SS	CCJ	1.00	Professorial	36	201401	Program Chair	4	Criminology & Criminal Justice	CRM001
HC	PHL	1.00	Professorial	36	201401	Program Chair	4	Philosophy	PHL001
HC	FL	1.00	Professorial	36	201401	Coordination of Graduate Program	4	Summer Language Institute, Spanish	FLASLI
DEHL	ED	1.00	Professorial	44	201401	Coordination of Undergraduate Program	3	Elementary Education	EDU001
DEHL	ED	1.00	Professorial	36	201401	Coordination of Graduate Program	2	Special Education	EDU001
STEM	MTH	1.00	Professorial	44	201401	Program Chair	4	Mathematics	MTH001
STEM	CHEM	0.85	Professorial	36	201401	Program Chair	3	Chemistry	CHEM001

Questions?

SOU Faculty Loading

In years past, faculty loading was only maintained internally within the academic departments. Last year, SOU created a Faculty Loading Report (FLR) which allowed for tracking, standardizing, and scrutinizing faculty loads done for the first time centrally within the Provost's Office. The 2013-14 FLR was not verified and therefore does not provide reliable data for the first year of retrenchment reporting. However, this pilot FLR for 2013-14 has positioned the institution to systematically record accurate faculty loading data for this academic year across all academic programs.

The FLR is a "living" document in that it is updated as loading changes occur. It includes tracking information such as faculty name, ID, position number and contract type. It also includes FTE, expected equated load units (ELU), assigned loading for faculty activities by type and by associated budget index codes. The latter splits a faculty member's FTE and salary appropriately across programs involved to more accurately track the cost of a program while the activity types categorize how faculty time is being allocated. The FLR uses the following activity types:

- teaching (with standard loading)
- individualized instruction
- high instructional demand
- team teaching
- course development
- undergraduate advising
- graduate advising
- professional development activity
- grant work
- scholarly activity
- program chair
- coordination of undergraduate program
- coordination of graduate program
- other programmatic assignment
- governance duties,
- other institutional assignment,
- professional service
- community service
- ELU bank withdrawal
- ELU bank deposit
- overload paid
- sabbatical leave

Each academic program reports faculty loading by term to account for each faculty member's expected ELUs. Data entry for Fall '14 and Winter '15 term courses have been verified by the Associate Vice President for Curriculum Management and verification of Spring '15 data will be completed soon. Additionally this new FLR process defines the amount of course release to be assigned by each program for various tasks (e.g., coordination of a graduate program and program chair) and these numbers are also being verified.

Final Retrenchment Plan

Southern Oregon University

March 2014

Table of Contents

Introduction

After years of state disinvestment, Southern Oregon University (SOU) relies on student tuition for the largest percentage of its revenue. Thus, an unexpected drop in fall enrollment, coupled with two of the largest graduation classes in university history and a significant change in an Oregon University System (OUS) accounting policy, led to university reserves dropping below the 5% minimum required by the State Board of Higher Education.

Serious cost decreases, including furlough days, staffing reductions, and structural changes, as well as fund transfers, were included in a budgeting plan that would assist the university in achieving a 5% fund balance (reserve) by the end of the 2013-15 biennium and a 10% fund balance by the end of the 2015-17 biennium. Nonetheless, it became clear that, in order to achieve financial goals, reductions in faculty were also needed.

The need to reduce faculty led to the official declaration of retrenchment: *Retrenchment* is a technical term in Article 11 of the Collective Bargaining Agreement between SOU and the Associated Professors of SOU (APSOU). The term refers to the "declaration of a need requiring reduction and/or elimination of a program or faculty positions after fulfilling the requirements of OAR 580-021-0315 'Termination Not for Cause' and this article."

This document is the finalized University Retrenchment Plan. Resulting from the work of many individuals, the plan reflects priorities established in 2008 through SOU's strategic plan. It also reflects the strategic thinking that informed SOU's prioritization process in 2012-2013. In recent weeks, the plan has been considered and molded by thoughtful ideas and suggestions from students, staff, faculty, University Planning Board (UPB), Chancellor's office staff, and State Board of Higher Education members as well as members of our external communities.

The plan particularly reflects input received during the comment periods that preceded and followed publication of the provisional plan in February 2014. We received feedback from APSOU and the Faculty Senate. SOU faculty, staff, students, external community members, State Board of Higher Education members, and the Chancellor's Office staff provided recommendations and suggestions. We held open forums, met with groups of faculty, held Q & A sessions with the Student Senate and other student groups, and spoke with community members such as the SOU Foundation Board and the President's Advisory Board.

Substantive input was received also from UPB after board members met with individual academic program representatives. In these meetings, program heads and department chairs presented analyses of staffing needs and possible curricular changes, reviewed known and possible retirements and sabbaticals, and explored areas in which their respective programs were critical to the curriculum of other programs. Program heads also examined areas in which faculty can and do teach in more than one discipline or program.

A major change to the plan occurred during the visit of the Interim Chancellor and Chancellor's Office staff on March 5 and 6. The APSOU Board agreed to a proposal that would remove a "very worst case" scenario that had been required by the Chancellor's Office in the provisional retrenchment plan. That scenario would have required reducing costs by an additional $2 million

in academic areas. In the agreement between APSOU and the university, the "very worst case" is removed from this final plan, but a fast-track process would be put in place in fall 2014 or fall 2015 if financial benchmarks are not achieved. (For the entire Memorandum of Agreement, please see the additional documents listed on the stateoftheuniversity website.)

Particular thanks are due to the Institutional Research Office and budget staff in several offices who have worked hard to gather data, run complex financial projections, and ensure the accuracy of financial analyses in this final plan.

Overall Retrenchment Outcomes

This final retrenchment plan lays out a process to achieve our overall goal of financial sustainability: a 5% fund balance by the end of the 2013-15 biennium and a 10% fund balance by the end of the 2015-17 biennium. The plan calls for $6.1 million in permanent savings and $7.8 million in one-time savings. Implementation of the plan eventually reduces permanent faculty lines by 12.58 FTE (not counting retirements) with the goal of increasing the overall student/faculty ratio from 17:1 to 21:1.

Responses to Comments

Comments from all sources were considered in the creation of this final plan. The most significant change from the Provisional Plan is the elimination of the "very worst case" scenario. The implications of that scenario were disturbing to many constituents; thus, the agreement with APSOU described in the Introduction to this plan is very welcome. Eliminating the very worst case addresses many of the concerns that came forward in the comment periods.

A number of comments from APSOU members and also from the Chancellor's Office stressed the importance of including the reductions and re-structuring work that has taken place outside of Academic Affairs. Sections on strategic planning and enrollment planning were also included as a result of comments received.

It was not possible to meet financial goals and retain all the programs that received supportive comments. However, this final plan retains the International Studies major and minor, and the Art BFA in light of input that stressed the very minimal cost of the program. Although the Physics major and options will be eliminated, as indicated in the Provisional Plan, comments from current and emeritus faculty as well as business leaders will form the foundation for a serious review and re-thinking of that program for the future in light of students' and employers' needs.

A number of very useful comments were received from UPB and from program faculty, particularly regarding programs that will not be eliminated but will be streamlined or restructured. Many of those comments and ideas will be incorporated into division plans as they are prepared this spring.

Below is a summary of the 239 unduplicated comments SOU received in writing during the 20-university day comment period following distribution of the February 6th Provisional Plan. Other comments were received in meetings and individual conversations.

Comments in Response to the Provisional Retrenchment Plan
(Summarized on March 8th, 2014)

Contributors sent comments to a variety of email addresses and sites. The State of the University "declarecomments" email address received 156 comments during the period. The President and Provost received 83 unduplicated emails and letters. (Many comments were sent to both the President and the Provost via email and letter.)

Physics Major
The largest number of total comments (70) pertained to the proposed elimination of the Physics major. We heard from scientists, doctoral candidates, and instructors from as close as Rogue Community College and the University of Oregon and as far away as New Zealand. (Many of the messages used the same form letter.) Local business owners and professionals wrote to us about the importance of STEM programs to the University community and to employers in the Rogue Valley and beyond. Several SOU alumni (all gainfully employed) expressed their support for the Physics program.

"I consider the physics department at SOU to be the jewel of the Siskiyous. SOU has become the hard science oasis in the technological desert between San Francisco and the Willamette Valley."

"With the SOU physics program, I was able to study both theoretical and experimental physics at a school uniquely situated in a crossroads of literary, artistic, and scientific creativity – as well as being located in one of the most beautiful places on earth. The small class sizes and personal teaching I found in the SOU physics program were essential to my academic growth, and the unique opportunities to do research in a stimulating environment - with professors that both helped guide my work and that encouraged me to pursue independent, novel projects – were vital to me."

"While I understand that without sufficient financial support the University cannot function, reducing the physics department to such an extent harms the quality of all STEM education at SOU. An education in any scientific field cannot be reduced to a single discipline; Chemistry and Biology rely on the Physics department to make their graduates strong applicants for both medical and academic doctoral programs."

Art/Fine Arts
We received 23 comments related to the proposed reduction or elimination of the Art History BA and the Art BFA. A few alumni provided comments, but most of the comments were from community members who were upset to hear that SOU was proposing to eliminate arts programs in general (an inaccurate assumption). A faculty member commented:

There is no money saved by eliminating the BFA degree. Its loss will cost SOU in recruitment, retention and image. The BFA is highly regarded, as an "honors" program.

French
Forty-five comments were received regarding the potential elimination of the French major. Comments came from prospective, current and former students, community members and scholars. Several comments encouraged the continuation of both French and German majors.

From an alumna:
"Learning French was a direct connecting piece for me in understanding how closely intertwined local and global concerns are…..studying a language creates an opportunity to study abroad, an experience which opens up immeasurable growth opportunities."

From a parent of a prospective student:
"As a parent who is on the college circuit tour with my child, one of the key features I look for in a college or university is a rich offering of and engagement with languages and cultures representing the kind of global perspective I desire for my child."

Biology
One comment was received regarding the Botany Certificate in Biology, which appeared in the 5th quintile during prioritization and was recommended for elimination by program faculty. Eight additional comments were received supporting the biology program and faculty in general.

Various
We received 62 comments regarding a wide variety of programs, most of which were not being considered for elimination. Many of these comments were prompted by nervous faculty who had sent anxious communiqués to patrons regarding potential reductions in their areas even though the programs were not mentioned in the Provisional Retrenchment Plan for reductions.

Other
We received 13 comments asking that we retain specific faculty.

We received 17 comments that were generally about retrenchment. A few expressed concern about SOU needing to enact the Retrenchment article in the faculty contract. One expressed confusion about the data used. Several were supportive of the need to review our program offerings in light of the need for budget reductions but cautioned that we cannot retrench our way to sustainability. Two suggested that we sell facilities or cut athletics.

University Planning Board
As UPB includes representation from all sectors of the university, the board was asked to provide feedback on the provisional retrenchment plan as was done in 2007. UPB members met with representatives of affected programs to review and consider responses to the provisional plan. On March 7, 2014, UPB submitted a document entitled *Overview of Provisional Plan*. Recommendations from UPB have been woven into the Final Retrenchment Plan.

Summary of Programs to Be Eliminated

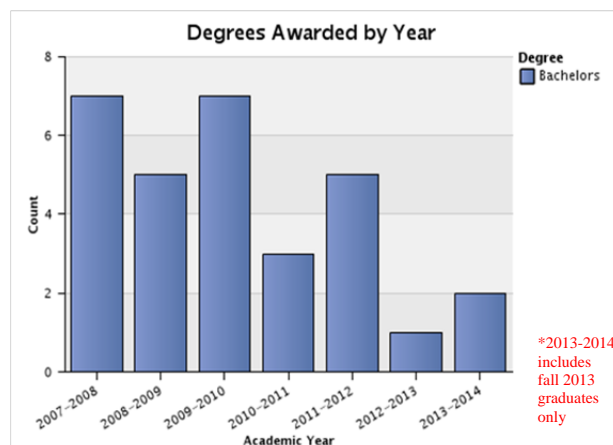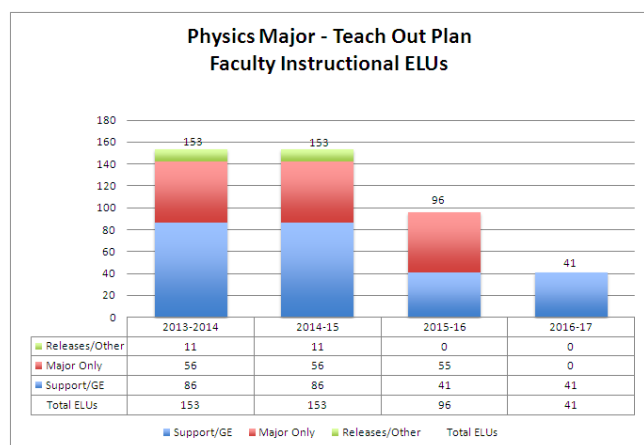| Program	5-yr avg. grad rate
Art History BA	2.4
Business-Chemistry co-major	0
Business-Physics co-major	0
Music-Business co-major	2.8
Language and Culture, French Language and Culture Option, BA	3.2
Physics, Applied Option BA/BS	1.4
Physics, Standard Option BA/BS	1.6
Physics, Material Science Option BA/BS	1.4
Physics, Physics-Engineering Dual Degree Option BS	0.2
Physics, Engineering Physics Option BA/BS	0
Digital Art and Design minor	2.3
Film Techniques minor	0.8
French minor	2.8
Geography minor	3.2
Geology minor	0.4
German minor	2.4
Land Use Planning minor	4
Musical Theatre minor	0.0
Photography minor	2.6
Physics minor	0.6
Professional Writing minor	0.0
Biology, Botany certificate	1.0
Business, International Business certificate	3.8
Criminology & Criminal Justice, Forensics concentration	11.4
English & Writing, Special Studies concentration	2.6
Environmental Studies, Cultural Resource Management concentration	0.2
Environmental Studies, Ecology and Conservation concentration	6.0
Environmental Studies, Land Use Planning concentration	2.8
Environmental Studies, Sustainability and Policy concentration	4.0
Environmental Studies, Watershed Science concentration	0.0
Music, Music Composition concentration	0.0
Physics, Pre-Engineering Program	*

* This is a 2-year transfer program; therefore graduation rates are not applicable.

Teach-Out

Normally, affected programs will be taught out in two years or less. In some cases, individual exceptions will be made. Program representatives will contact affected students and work with them to create a plan. Students with questions about affected programs should contact the Provost's Office at provostsoffice@sou.edu or at 541-552- 6114. Students must declare a program by April 1, 2014, to be included in the teach-out process.

Major Programs to Be Eliminated

Physics has a small number of majors and low graduation rates (4.6 graduates on average across all options combined for the last 5 years). The major and minor will be suspended and the various options taught out. Additionally the Pre-Engineering program will be eliminated. Continuing general physics support courses for Biology and Chemistry and the Astronomy general education course requires 63.5 ELU of the 153 ELU available. Following the teach-out and reducing general education courses, we will save approximately 3 FTE in permanent Physics faculty lines.

Physics Major - Teach Out Plan
Faculty Instructional ELUs

	2013-2014	2014-15	2015-16	2016-17
Releases/Other	11	11	0	0
Major Only	56	56	55	0
Support/GE	86	86	41	41
Total ELUs	153	153	96	41

Degrees Awarded by Year

*2013-2014 includes fall 2013 graduates only

Although ranked in the fourth quintile in the Prioritization process, the Physics program received a large number of comments urging its continuation. Creating a streamlined, updated single option Physics major could be valuable to meeting SOU's mission as a regional university that provides access for place-bound students. The Director for the Division of Science, Technology, Engineering and Math (STEM) will work with emeritus and current Physics faculty and others (including community employers) to explore that option. Depending on the outcome of this process, we will consider whether a single option major will provide sufficient coursework for a Physics minor as well as articulation options for student transfers to engineering programs at Oregon Tech, Oregon State University, and other universities.

Art History is also a program with a small number of majors and very few graduates (2.4 graduates per year over the last 5 years) and was ranked in the fourth quintile in the Prioritization process. However, many students take courses in this area, and the Art History minor is well enrolled. There will be efficiency in rotation of courses and fewer course topics offered each year with the elimination of this major.
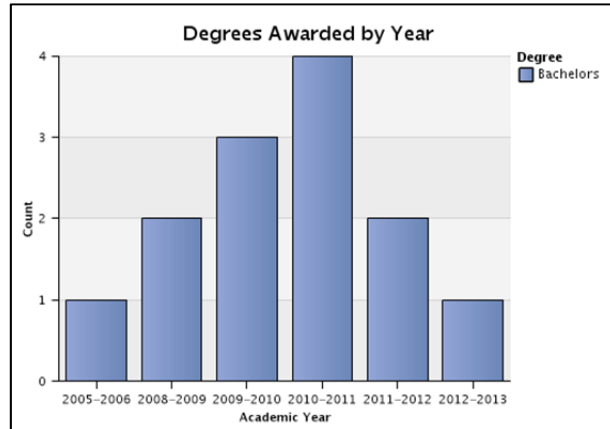
French has historically had a small number of majors and a low graduation rate (3.2 graduates per year over the last 5 years). However, we are committed to offering students a variety of language options to support international studies, study abroad, and students wishing to work overseas. We will retain a major and minor in Spanish as well as language studies in French, German, International Sign Language, Japanese, and Spanish. These language studies will change as student interest and needs change. We are keeping the Japanese minor because of our geographical position on the Pacific Rim.

This will allow a 1.0 FTE reduction in a permanent French faculty lines along with elimination of some contingent faculty that currently support the program.
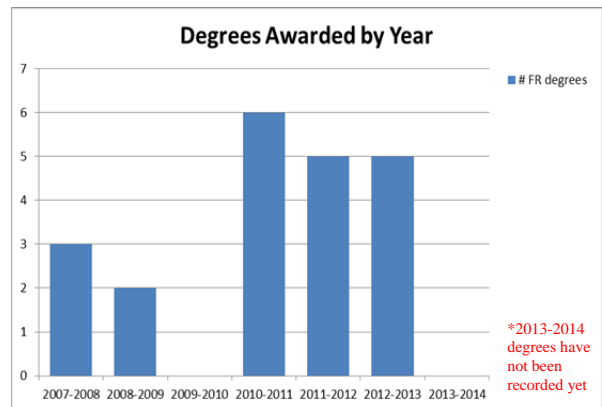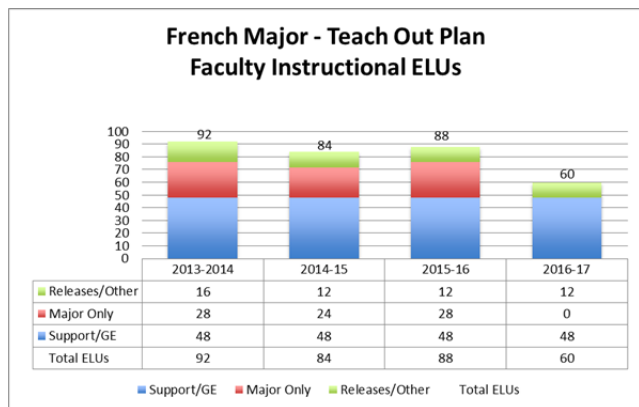
The **Geography**, **Geology**, and **German** majors were eliminated in the 2007 Retrenchment Plan. The associated minors are eliminated in this plan. German language will continue to be offered as discussed above. Some geology and geography content will be offered through the Environmental Studies major. This will allow for a reduction of 1.0 FTE in a permanent Geography faculty line (retirement).

Reductions in Continuing Programs

Environmental Studies faculty have been actively working to focus and strengthen their major through elimination of the Land Use Planning minor along with the following concentrations: Cultural Resource Management, Ecology and Conservation, Land Use Planning, Sustainability and Policy, and Watershed Science. This streamlining will result in the savings of 0.78 FTE of permanent faculty. The current concentrations are being transitioned into the new program.

Curricular growth in several programs over time has resulted in loss of cohesion and clarity of purpose. Reductions are being made in anticipation of those programs consolidating and focusing to meet current student interests and career trends. Reductions in permanent faculty lines include: 1.0 FTE in Art, 1.47 FTE in Biology, 1.0 FTE in Chemistry, 1.0 FTE in History, and 0.33 FTE in Economics.

With the introduction of alternatives in general education and new freshmen students bringing Advanced Placement and transfer credit, fewer traditional first-year courses are needed. Additionally, the newly formed Division of Undergraduate Studies will streamline offerings and enable scheduling efficiencies. Therefore, it is anticipated that fewer sections of University Seminar will be needed for first-year students. This will allow savings of 3 FTE in permanent faculty lines in this area.

Three co-majors in business (Business Chemistry, Business Physics, and Music Business) are being eliminated since they are not recognized by the Accrediting Council for Business Schools and Programs, the accrediting body for the SOU business program. These co-majors, also, have not been attracting sufficient student numbers for continuation.

The following programs have been offered for elimination as a result of the Prioritization process, declining student interest, and the availability of other curricular alternatives:

- ❖ **Digital Art and Design** is being discontinued in favor of the new Emerging Media and Digital Arts major.
- ❖ **Film Technologies**
- ❖ The **Photography** minor has been used to support the former Journalism major. With the advent of the Film, Television, and Convergent Media minor and concentration, and declining interest in the Photography minor, the program is being discontinued.
- ❖ **Professional Writing** minor no longer has the staffing or student interest to sustain it and is being eliminated.
- ❖ **Botany Certificate**
- ❖ **International Business Certificate**
- ❖ **Forensics Concentration** in Criminology and Criminal Justice (the concentration will remain in Chemistry)
- ❖ **Special Studies Concentration** in English and Writing

Other Reductions

Other programs are adjusting their staffing to better meet current student interests and achieve budget reductions. Although permanent faculty lines are not affected, these adjustments result in reductions of contingent faculty (yearlong and term-by-term) totaling 14.83 FTE spread across the university.

Music and Theatre are central to serving the southern Oregon region. However, in responding to cost projections in the recent OUS Cost Study, both programs are looking closely at cost drivers and ways to reduce expenses while maintaining program quality. Music has already engaged their faculty in an aggressive student recruitment program. Also, in spring 2014, the Music program eliminated contingent faculty for core courses, returning permanent faculty to those courses.

Theatre Arts, an impacted program, is expanding its new student cohort by sixteen students without adding additional teaching resources. Theatre Arts is also eliminating a significant portion of release time and making curricular changes to meet budget goals that will save 0.95 FTE in contingent faculty. Moreover, low-enrolled programs such as Music Composition are being eliminated. With the merging of the Music and Theatre Departments into a Performing Arts Department, Musical Theatre minor was added to the program portfolio. The faculty have chosen to continue musical theatre productions but not continue the minor.

Computer Science has significantly revised the major program based on employer feedback and advice from a consultant. This revision resulted in consolidation of several tracks into a single degree program that better meets the needs of the regional workforce and saves 0.92 FTE in contingent faculty.

Education needs to be more efficient in offering a program that relies on a significant component of individualized instruction across different endorsement and licensure areas. Eliminating course sections through program realignment, decreasing low enrolled courses, re-examining cohort curriculum development, providing more efficient supervision of interns, and reducing permanent faculty release time will increase faculty productivity and result in a 5.33 FTE reduction in contingent faculty to meet budget needs.

In general, programs are looking at ways to streamline their curricula to reduce release time and numbers of sections and reduce contingent faculty by 1.0 FTE in Art, 0.5 FTE in Outdoor Adventure Leadership, 0.5 FTE in Economics, 1.5 FTE in Psychology, and 0.82 FTE in Foreign Languages.

Academic Reorganization Process

The resignations of two academic deans and a third dean returning to the faculty gave SOU an opportunity to re-think academic organization. With a university focused on preparing students for a fast-changing economy and changing workforce, it had become increasingly evident that SOU should not rely on the historical approach to academic departments that has characterized American universities for over a hundred years: 21st century academic programs need to be more

interdependent and collaborative, more flexible and responsive to changing needs. Moreover, in a world of greatly reduced resources, SOU's academic areas needed to be more cost-effective and efficient.

A significant concern for SOU has been freshman-to-sophomore retention as well as graduation rates. In overall academic planning, increased emphasis has been placed on first-year programing and national best practices that strengthen student connection and retention. The SOU House Experience, Honors College, and other general education programing need to be organized and administered together in order to ensure a unified, intentional set of academic experiences for incoming students.

As a result of these concerns, academic restructuring involved consideration of a more efficient and effectively managed approach to general education and an organization that promoted both administrative oversight and program collaboration. At the same time, the restructuring needed to reduce faculty release time for administrative duties and promote resource allocation processes to support programing and scheduling that most effectively meet students' needs.

Initial discussions regarding alternative administrative structures began among academic administrators and department chairs in July and August 2013. At the President's retreat in September 2013, participants discussed approaches to reorganization models consisting of 5-8 larger academic units that would replace the current school/college and department structure. In October, as an outgrowth of discussions of these models, five models for academic organization, together with their potential financial savings, were presented in an open forum followed by an online comment period. Based on campus feedback, components of the various models were combined into a new organizational model which was presented to various campus constituencies, including department chairs and the Faculty Senate. Once agreement began to solidify around this model, discussions with department chairs and the Faculty Senate moved to job descriptions for the new academic leadership and how programs would be distributed within the academic divisions.

A model for reorganization was formally presented to and approved by the Faculty Senate in January 2014 and was taken to UPB. The approved model includes six divisions, each representing 25-40 faculty FTE and 6,000-12,000 SCH per academic term. A seventh division provides leadership and coordination for general education areas, including University Studies, the House Experience, and the Honors College.

This extensive academic reorganization, in concert with a new service center and the recent integration of Academic and Student Affairs, contributes significantly to cost savings for SOU but also ensures both stronger administrative oversight and greatly needed collaboration among all areas in support of the mission and goals of the university.

Academic Reorganization: Strengthening Focus and Increasing Efficiency

It is important to note that the retrenchment process is only one part of the work in Academic Affairs to reduce costs, strengthen focus, and respond to students' needs and interests. A key distinctive element for SOU is balancing foundational knowledge with applied, hands-on learning

that connects students with the people and the issues affecting our communities, our state, and beyond. Each year, over 2,000 SOU students work on internships, capstones, and undergraduate research in our region. Every Honors College student is connected with a mentor in the community and works on an applied project. Our House Experiences provide an integrated outcomes-based approach to general education that involves students with agencies, non-profits, and businesses in southern Oregon. The proposed Innovation and Leadership program offered at the Higher Education Center in Medford enables working students to attain a university degree in a cohort model that recognizes credit for prior experience.

SOU's new academic reorganization, which replaces a traditional College and School organization with seven divisional areas, emerged as the answer to the following questions: What organizational structure will reduce administrative costs while increasing accountability and oversight of academic programs? What structure will increase and support program collaboration, promote curricular planning that is responsive to changing needs and interests, and strengthen focus on what students need to be successful? What structure will best enable resources to be used efficiently and in alignment with SOU's mission and vision?

The newly formed divisions strengthen SOU's focus on educational models that reflect the specific needs of the professional workforce of southern Oregon and the needs and interests of SOU students.

Undergraduate Studies. This division brings together programs that students experience outside of their major, the programs traditionally labeled "general education." These courses have been historically dispersed throughout the university with little supervision over course rotation, class size, or disciplinary emphasis. In the current financial environment, greater efficiency in managing these elements, along with a strong need to ensure strong learning outcomes, requires rethinking of how these programs are managed.

Now organized under one director, all general education programs (University Studies, University Seminar, House Experience, Accelerated Baccalaureate, and Honors College) will be streamlined and strategic in their offerings and also strongly aligned with the university focus on retention, student engagement, and skills needed to be successful in college and in the workforce. With these course scheduling efficiencies, there will be less need for faculty who teach only in University Seminar as more faculty from other disciplines will be teaching in the first-year program.

Business, Communication and the Environment. This division brings together one of SOU's largest majors (Business Administration) with programs that promote expanded skill sets for students and establish distinctive programming reflecting our location in one of the most diverse bioregions in the world.

This division will strengthen curricular synergies; expertise in the Communications program in conflict resolution, for example, will be aligned with needs for managing environmental conflict and business communication, areas grounded in theory-based practices. Similarly, opportunities for collaboration in international communication and cultural understanding will assist students

who will be working in the not-for-profit and profit sectors of the regional economy. This division will promote scheduling efficiencies by managing class size and course rotations.

Another area of opportunity in this division is expanding on-line and hybrid instructional programs to non-traditional adult populations in the workforce. The proposed Innovation and Leadership program is an example of an accelerated bachelor degree program that combines the disciplines of business and communication to develop leadership skills for future managers.

Education and Health. Combining programs that contribute to regional needs, this division enables our education programs to collaborate more closely with health, physical education, and one of our newest and fastest growing programs, Outdoor Adventure Leadership. The challenge for this division is to increase student credit hour production with fewer faculty and staff resources. While no programs are being eliminated, class size and supervision of interns will need to be addressed to increase efficiencies and meet budget expectations.

Science, Technology, Engineering, and Math. This division brings together the STEM programs crucial to student quantitative reasoning skills and understanding of the natural world. These programs prepare students for a wide range of careers, but there remains a need to rethink the program portfolio. A major renovation of the science building will help drive better collaboration with the division's programs to promote interdisciplinary undergraduate research opportunities, best practices in teaching and learning, and greater productivity with grant applications.

The science programs have very few contingent faculty and do not have staffing flexibility to adjust to enrollment fluctuations. Other efficiencies in course scheduling and rotation will reduce the need for one or more permanent faculty in biology and chemistry. The current physics major and its options will be eliminated; however, study in physics will be offered in lower division courses that serve general education and other science programs, and a general review of an optimal and viable physics program for SOU students will be undertaken.

Based on feedback from local employers, computer science has recently undergone a curricular revision that supports efficiency in course scheduling and rotation.

Math provides many service courses for all university majors, and its size will expand or contract with enrollment.

Center for the Arts. Jackson County is the second largest arts cluster in the state after the Portland metro area. Major arts organizations such as the Oregon Shakespeare Festival, the Britt Festival, Oregon Cabaret Theatre, Craterian Theatre, and Camelot Theatre all depend on talent developed at SOU for internships, understudies, actors, technical personnel, and musicians for these various venues. Additionally, SOU has been named a Center of Excellence for the Fine and Performing Arts in the Oregon University System and has a reputation for excellent academic programs that goes well beyond the region.

This Center emphasizes SOU's role as a key generator of and foundation for the powerful arts sector in our region. Supporting and fostering this cluster, this innovative program grouping

includes not only the traditional performing and visual arts but also creative writing and emerging media and digital arts.

Although this group of academic programs is central to serving the region, scheduling and staffing efficiencies are necessary. Low-enrolled programs are being eliminated and reductions in staffing and faculty release time will drive budget savings.

Language and Culture. This division brings together the areas of English Literature, Linguistics, Foreign Languages, Anthropology, International Studies, Native American Studies, Gender Sexuality, Women's Studies, and Philosophy. This division will be challenged to be more efficient with class size and course rotation to meet financial benchmarks. However, new synergies will bolster and enrich interdisciplinary approaches to each discipline. This retrenchment plan eliminates the French major; however, the International Studies major is maintained to develop new approaches and practices that will strengthen SOU's focus on responsible global citizenship.

Social Science and Public Affairs. This division brings together two of SOU's largest majors, Psychology and Criminology/Criminal Justice, with social science programs such as Economics, History, Political Science, and Sociology, that provide foundations for students' understanding of society and social systems.

All programs in this division are highly cost effective; they effectively manage course size and rotation. However, a reduction in release time for administration will place more faculty time into teaching activities and will help offset the current and anticipated retirements that will occur in this division. In planning for the future, the division will need to utilize more contingent faculty, examine new curricular initiatives, and update curricula as new faculty are hired into the division over the next several years.

Division Plans

Each division is required to develop a plan to reduce expenses, increase efficiencies, and further meet programmatic targets and goals as established by the institution and OUS.

A template will be developed by the Provost's Office, in consultation with the Chancellor's Office, that defines each division's budget allocation and enrollment targets as well as benchmarks and a timeline for attaining those targets. These plans, the first of which are due June 1, 2014, will be monitored quarterly to assure that divisions are meeting their respective targets through revenue enhancement (e.g., enrollment growth) and/or cost reductions (e.g., fewer numbers of contingent faculty).

Reporting metrics will be developed and monitored to measure and track student to faculty ratio, faculty release time, enrollment management (i.e., balancing student demand with frequency of course offerings), faculty loading, and financial targets. Progress of programs and opportunities for reinvestment within each division will be evaluated using the following indicators: student to faculty ratio, accountability for faculty release time, enrollment management (i.e., balancing

student demand with frequency of course offerings), equity in faculty loading, financial targets for savings and efficiencies, and curricular realignment.

Progress of programs within each division will use the following criteria:

❖ Class size information will be collected since it is an indicator of student demand, excess course offerings, and/or under-enrollment. The campus will calculate average class size and percent of maximum capacity in all courses, excluding labs, capstone courses, individual study, and similar type courses. The total number of low enrollment courses and their distribution will be collected and reported. Targets for minimum and average class sizes will be developed over spring term for general education courses, major courses, and graduate courses.

❖ Course release and non-teaching activities conducted by permanent faculty are necessary for effective teaching, scholarship, and research; however, excess release time necessitates the use and cost of overload and adjunct instruction. The AVP for Curricular Management will calculate and monitor the number of course release and non-teaching load units granted to permanent faculty relative to contractual expectations per the faculty collective bargaining agreement.

❖ Enrollment mix is directly related to tuition revenue. Overall measurements of enrollment will be shared with each division at the end of the 4th week of each term. Enrollment metrics will be monitored closely during the enrollment cycle (typically spanning spring through fall term).

❖ Programmatic savings outlined in the final retrenchment plan will be tracked to ensure execution of the plan as outlined. Expected and realized savings associated with academic personnel, services and supplies, and so on will be reported.

The performance metrics outlined above serve as progress indicators in meeting SOU's retrenchment goals. These metrics represent both operational and financial targets that, when met, will strongly support SOU's financial sustainability.

Strategic Planning

Overall, this retrenchment plan is designed to accomplish several major objectives. One objective is to eliminate programs that have low enrollments and low student interest. Another objective is to size all programs to their projected enrollments for the next five years; this recalibration provides the flexibility to allow investment in existing programs that have capacity to grow and new programs that meet regional needs and student interests.

Although this retrenchment plan is not designed to change the essential character of SOU as an institution, it does support re-focusing SOU's program portfolio to use more effectively the resources available. The plan enables the university to reflect more intentionally on the needs of students preparing for the shifting social and economic environment of the 21st century.

As we received comments and feedback regarding the Final Retrenchment Plan, we also received a letter from Interim Chancellor Rose that provided guidelines or concepts to help guide our process. The following are two key paragraphs from that letter:

"First, there is a desire to ensure that a holistic, deliberative retrenchment process is embraced. As I have said in a variety of settings, a campus facing such difficult circumstances could choose a tactic of solely cutting to a certain target outcome. Alternatively, the campus could employ a strategy of honing the institution's greatest contributions and strengths, preserving those things that hew most directly to them, and reducing/eliminating other curricular components which are not aligned with the campus' greatest programming and mission-related assets."

"The Board's and the Chancellor's Office collective recommendation is that you pursue the latter strategy, which will better serve to focus the institution's mission and direction. This will serve to enhance communications with existing and prospective students, faculty and staff, and external supporters. Statements within the preliminary plan that focus on reaching a certain fund balance suggest the prior approach. Although Board policy certainly has used a healthy fund balance as a kind of proxy for overall fiscal sustainability, they have moved to a more holistic methodology, with a healthy fund balance being merely a pre-condition for success in the retrenchment process and not an end in and of itself."

These paragraphs indicate a shift in Board policy that must influence our retrenchment process. We began our process by looking primarily at ways of "cutting to a certain target outcome." Our goal has been to achieve a 5% fund balance by the end of the next biennium and a 10% fund balance in the following biennium.

With a somewhat different approach, we should aim for a healthy 10% fund balance but also think strategically, "honing the institution's greatest contributions and strengths," reducing or eliminating components not so strongly aligned with SOU's strengths and mission, and creating reserves that enable us to invest strategically in programs that reflect our strengths, that enhance our distinctiveness as an institution, and that strategically serve our region and 40-40-20 goals.

In this Final Retrenchment Plan, we continue to propose elimination of programs that enroll very small numbers of students. However, at the same time, through academic reorganization and planning, we are focusing strongly on curricular reform: changes that strengthen our mission, refine our focus, and serve our students more efficiently and effectively. Academic planning processes will contribute substantially to cost savings but, importantly, also to forward-looking curricular approaches that attract and support today's students and prepare them for employment opportunities. It is vital that we create a springboard for future growth and for the development opportunities that will arise in the future.

The academic planning process includes the following components:

- ❖ Implementing the program elimination and reduction scenarios described in this plan.
- ❖ Establishing the academic reorganization in spring 2014 and implementing program metrics and accountability. Academic division directors, working with the AVP for Curricular Management, will ensure that program costs are reduced and enrollment strategies are in place to enhance revenue. (Although the first of regularly scheduled division plans are not due until June 2014, programs are already making adjustments for spring term, with more efficient course schedules, reductions in release time, reductions in supplies and services, and planning for more focused curricula attuned to today's students and career opportunities.)

SOU's ongoing sustainability and success, however, depend on a strong vision and strategic plan for the entire university. As the university's current strategic plan has an end-date of 2014, it is now time to initiate broad strategic planning, building on the work that has been done over the past five years. Moreover, the changing realities of our enrollment mix, tuition options, and local and national economy require that the university re-focus and plan in an intentional way that is simply not possible through a retrenchment process.

Beginning in spring 2014, we will design and begin a planning process that will engage the campus in updating and re-focusing SOU's strategic plan to ensure flexibility and aggressive, nimble tactics that respond to key benchmarks such as enrollment and state allocation, establish priorities for reinvestment, and ensure achievement and maintenance of a healthy fund balance.

Since the reorganization of Academic Affairs will consume the time and energy of academic areas in spring 2014, much of the planning work this spring and over the summer will focus on and involve other areas of the university. In fall 2014, the work will move forward with the entire university, beginning with a major planning retreat.

The strategic planning process will build on recommendations made in the prioritization process and data from the capacity study and other sources. It will establish long- and short-term goals as well as priorities. Importantly, strategic planning will establish priorities for investment as the university rebuilds its reserves.

Many comments received over past months emphasized the importance of investing in areas central to SOU's success even while reducing costs overall. Over time, with an ongoing fund balance of 10% or higher, we will have sufficient financial flexibility to invest regularly in the university's priorities. In the short run, however, with only limited or one-time funds available, it will be important to invest carefully and strategically in high priority areas while still maintaining sufficient reserves. Strong strategic planning will be a foundation for mission-driven and data-driven decision making.

University Re-Structuring

Southern Oregon University has been responding to state disinvestment for many years. Over the last five years as state allocations have significantly decreased, SOU has undertaken major cost reductions that have affected every administrative office of the university.
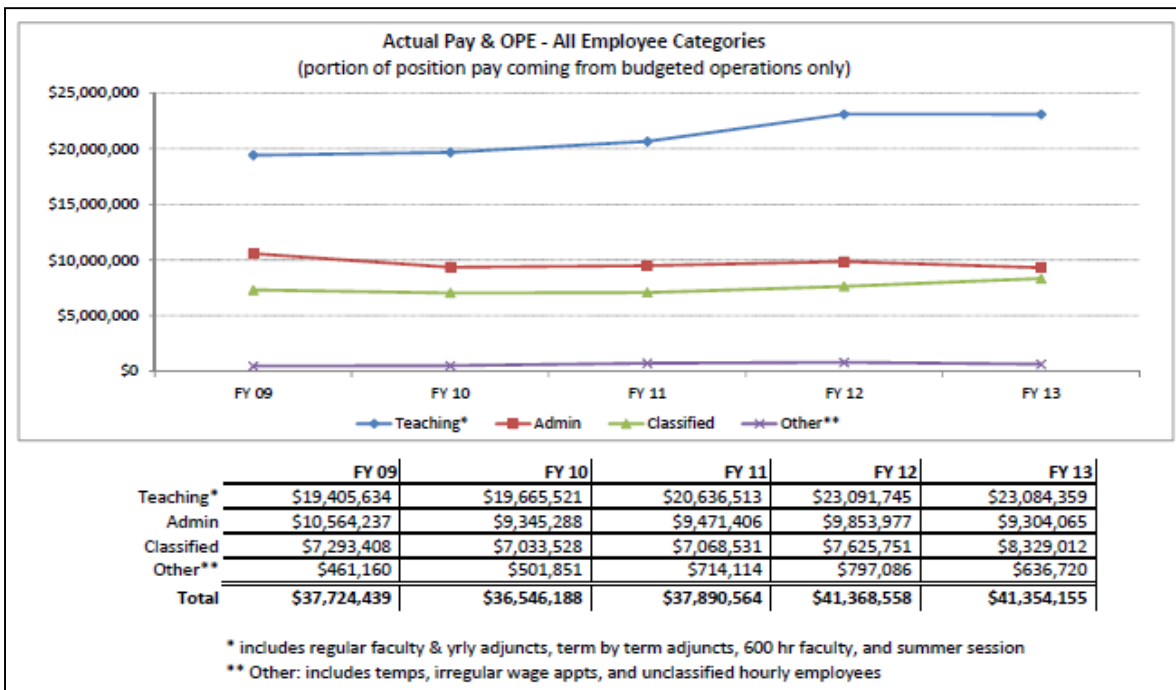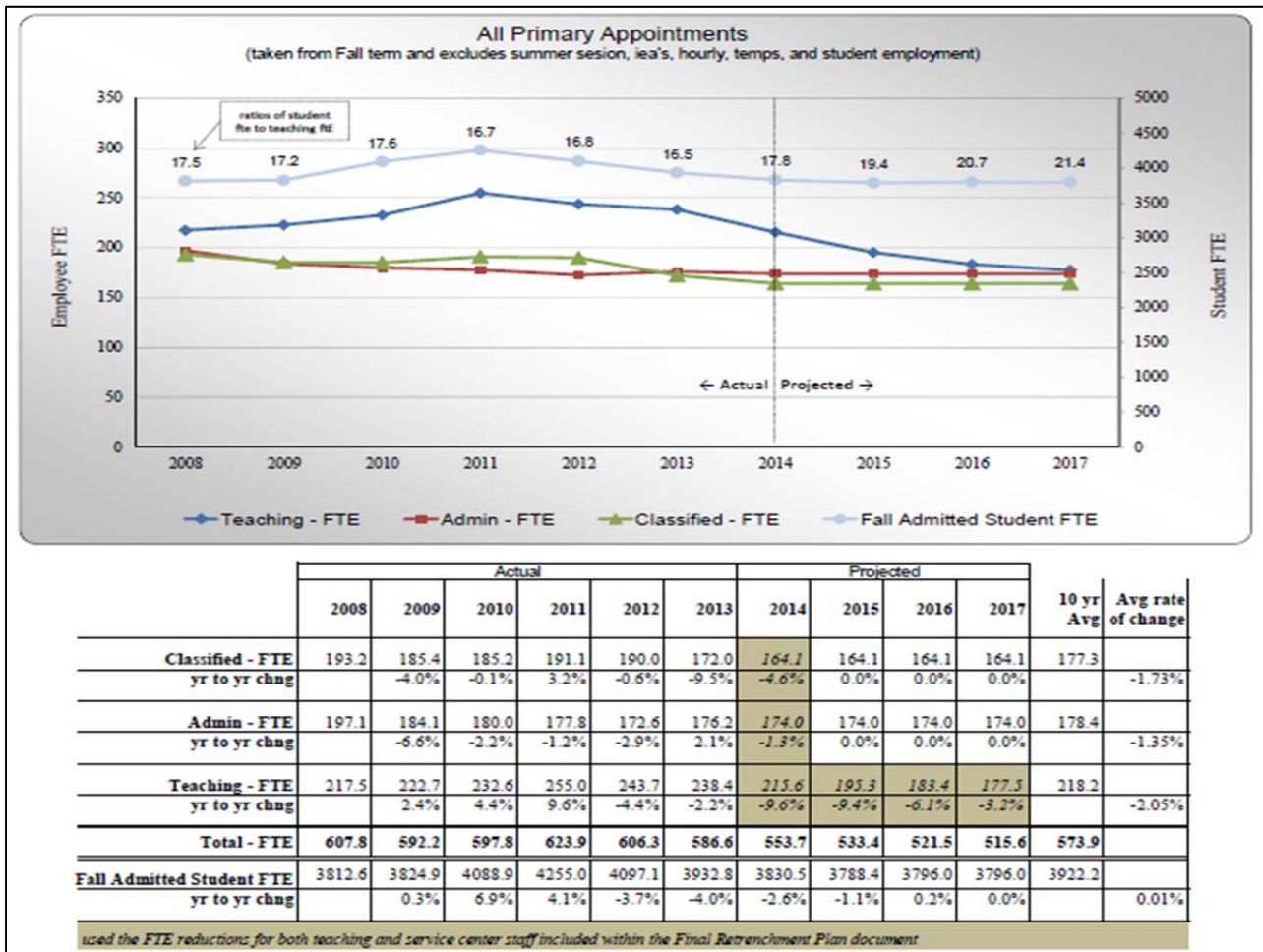
In 2009-10, the global economic downturn led to severe state reductions and reduction of SOU's reserves. Despite the need for deep reductions, the decision was made to preserve academic offerings and services that directly impact students. In that year, staff reductions totaled $1.485M: 10 admins and 4 classified staff were noticed, and 9 vacant positions were eliminated.

In 2012-13, continuing disinvestment from the state and significant PERS cost increases caused SOU again to significantly reduce expenses. In this period, Student Affairs and Academic Affairs were merged, and the Student Affairs areas were extensively reorganized. Staff reductions that year totaled $1.238M. These included 7 administrators, including the Vice President for Student Affairs and the Dean of Students, and 10 classified staff.

Across the campus, there have been staff reductions in areas such as the Student Health and Wellness Center, Human Resources, custodial and grounds staff, the bookstore, Marketing and Communications, and IT. We outsourced our food service. Administrative staff members are currently taking furlough days. Assessments of auxiliaries have increased, creating challenges in those areas.

With the creation of the academic divisions and the Service Center, SOU achieves budget savings from eliminating deans, moving to directors, and creating staffing efficiencies. Overall, we achieve a $304,000 savings from moving from deans to directors, $93,000 for reductions in faculty release time for administration, and $685,000 from staff reduction. These savings total $1.08M. With this reorganization, eleven currently budgeted staff lines are eliminated (2 administrative, 8 classified, 1 unclassified) through retirements, not filling open lines, and layoffs.

Staff reductions over time are illustrated by the following charts:

All Primary Appointments
(taken from Fall term and excludes summer sesion, iea's, hourly, temps, and student employment)

	Actual						Projected				10 yr Avg	Avg rate of change
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017		
Classified - FTE	193.2	185.4	185.2	191.1	190.0	172.0	164.1	164.1	164.1	164.1	177.3	
yr to yr chng		-4.0%	-0.1%	3.2%	-0.6%	-9.5%	-4.6%	0.0%	0.0%	0.0%		-1.73%
Admin - FTE	197.1	184.1	180.0	177.8	172.6	176.2	174.0	174.0	174.0	174.0	178.4	
yr to yr chng		-6.6%	-2.2%	-1.2%	-2.9%	2.1%	-1.3%	0.0%	0.0%	0.0%		-1.35%
Teaching - FTE	217.5	222.7	232.6	255.0	243.7	238.4	215.6	195.3	183.4	177.5	218.2	
yr to yr chng		2.4%	4.4%	9.6%	-4.4%	-2.2%	-9.6%	-9.4%	-6.1%	-3.2%		-2.05%
Total - FTE	607.8	592.2	597.8	623.9	606.3	586.6	553.7	533.4	521.5	515.6	573.9	
Fall Admitted Student FTE	3812.6	3824.9	4088.9	4255.0	4097.1	3932.8	3830.5	3788.4	3796.0	3796.0	3922.2	
yr to yr chng		0.3%	6.9%	4.1%	-3.7%	-4.0%	-2.6%	-1.1%	0.2%	0.0%		0.01%

used the FTE reductions for both teaching and service center staff included within the Final Retrenchment Plan document

Actual Pay & OPE - All Employee Categories
(portion of position pay coming from budgeted operations only)

	FY 09	FY 10	FY 11	FY 12	FY 13
Teaching*	$19,405,634	$19,665,521	$20,636,513	$23,091,745	$23,084,359
Admin	$10,564,237	$9,345,288	$9,471,406	$9,853,977	$9,304,065
Classified	$7,293,408	$7,033,528	$7,068,531	$7,625,751	$8,329,012
Other**	$461,160	$501,851	$714,114	$797,086	$636,720
Total	$37,724,439	$36,546,188	$37,890,564	$41,368,558	$41,354,155

* includes regular faculty & yrly adjuncts, term by term adjuncts, 600 hr faculty, and summer session
** Other: includes temps, irregular wage appts, and unclassified hourly employees

At this point, SOU cannot risk more staff reductions in most administrative areas. We are, in fact, too thinly staffed in a number of core offices. An internal OUS audit report in January 2013 notes that SOU's "ongoing budget reductions and increased workloads have contributed to a reduction in administrative and finance staff, which is a challenge considering the ongoing growth of accounting and compliance requirements."

Interim Chancellor Rose echoes this point in a recent memo: "The campus has been diligent for many years in holding the core program-related mission harmless, and focusing cuts on the non-academic side of the house. That said, OUS Internal Audits Division is concerned that your administrative support falls significantly below similar comparators, and cautions that potential 'segregation of duties' issues may arise. . . . The final plan needs to clearly communicate to the campus the level of non-academic cuts that have occurred in the past, and that the pathway forward must be now focused on the academic side of the house."

The creation of a service center (opening July 2014) will bolster administrative support by centralizing support services and cross-training staff. The service center, also, will provide needed assistance to the divisions in the newly formed academic organization.

Enrollment Management and Admission Strategies

A key factor in all budget and organizational planning has been consideration of enrollment patterns and recruitment as well as retention strategies. SOU is moving forward aggressively with powerful initiatives that connect us with potential and existing students, their families, and alumni in Oregon and around the country. We have combined a sophisticated array of strategies with a refined ability to retrieve, analyze, and apply data.

An SOU enrollment and marketing team has been working strategically to positively impact enrollment; Preview Day numbers and "funnel data" for fall 2014 are extremely positive.

- ❖ Communication plans and recruitment efforts have been enhanced so that students are aware of first-year experiences, faculty-student engagement, and distinctive programs such as Houses, Accelerated Baccalaureate, Honors College, and PEAK jobs.
- ❖ Recruiters for specific territories receive weekly assessments and goals within primary (southern Oregon), secondary (Portland and the rest of Oregon), and tertiary (out of state) areas.
- ❖ We are employing successful strategies to reach greater number of underrepresented prospective students in targeted regions (such as Latino communities in southern Oregon).
- ❖ With new automated marketing tools, we have consolidated and refined management of contact/prospect information for targeted audiences. This unifies key marketing campaigns across departments.
- ❖ Social media properties, the SOU website, digital media productions, advertising, print materials, and other communications have created an effective shared messaging platform that is driving awareness, interest, and consideration among our target audiences. We are tracking triple-digit increases in reach and engagement.

- ❖ The Raider Freshman Academy, a summer bridge program, has been developed to help prepare freshmen (primarily Oregonians) who have been given provisional admission.
- ❖ College fairs, social media messaging, and specific campaigns are targeting Portland, Colorado, Arizona, Nevada, southern California, Idaho, and Washington.
- ❖ Added Raider receptions, SOU2YOU events, and high school counselor sessions are focusing on northern California and Portland.
- ❖ Staff members at the Higher Education Center in Medford have significantly strengthened connections with Rogue Community College, providing SOU application workshops to our local markets and more quickly capturing and assisting prospective students.

Fall enrollment patterns demonstrate strong potential, particularly with resident freshmen. To date for resident freshman there is an 8.23% increase in applications, a 13.39% increase in admits, and 76.47% increase in paid deposits from this time last year. Overall, including all freshmen and all transfer students, there is a 10.95% increase in applications, a 12.22% increase in admits, and a 43.75% increase in paid deposits.

Clear goals are in place for recruitment of new incoming freshmen and transfer students. Reasonable, achievable expectations demonstrate a 6.2% increase in new freshmen (40 students) and 3.4% in new transfers (18 students). Moreover, powerful new strategies are in place that could very positively affect retention for fall 2014 and beyond.

Despite these promising signals, we continue to use very conservative enrollment projections in our planning. The most current (but highly preliminary) OUS projections for fall 2014, for example, show a 2.6% decrease from fall 2013 and a 1.1% decrease between fall 2014 and fall 2015. After that, projections indicate flat or slightly increased enrollment for SOU through fall 2018.

As we strengthen the SOU brand, we will continue working on plans regarding WUE and differential tuition. In fall 2013, we implemented differential tuition for three programs: undergraduate programs in theatre arts and music and a graduate program in education. Further planning will being in summer 2014 as we plan for fall 2015.

Altogether, data-supported initiatives are creating stronger enrollment planning, more coordinated recruiting and retention strategies, and a stronger plan linking enrollment and budget planning for SOU.

Retrenchment Reduction Distribution

	FY 14	FY 15	FY 16	FY 17	FY 18		Total	FTE	
One-Time Savings									
Fund Transfers	$3,000	$3,200					$6,200		
Faculty Furlough Days		$253					$253		
Annual Assessment Savings (Aux and Des Ops)		$300	$300	$300	$300		$1,200		(1)
Administrator Furlough Days	$94	$94					$188		
Total One-Time Savings	$3,094	$3,847	$300	$300	$300		$7,841		
Permanent Savings									
Academic Reorganization	$227	$854					$1,081	19.25	(2)
Assumed Retirements			$316	$316	$316		$948	10.00	(3)
Term-by-Term Adjuncts		$100					$100	3.31	(4)
Undergraduate Studies			$124	$152			$276	3.67	(5)
Business, Communication, & the Environment		$160	$145	$46	$75		$426	5.45	(5)
Education & Health		$244	$228	$174	$111		$757	9.16	(5)
Science, Technology, Engineering, & Math		$278	$430	$161	$37		$906	10.39	(5)
Center for the Arts		$122	$160	$68	$68		$418	5.28	(5)
Language & Culture		$14	$96	$198	$53		$361	3.66	(5)
Social Sciences & Public Affairs		$230	$475	$151	$36		$892	10.68	(5)
Total Permanent Incremental Savings	$227	$2,002	$1,974	$1,266	$696		$6,165	80.85	(6)
Total Cumulative Permanent Savings	$227	$2,229	$4,203	$5,469	$6,165				

(in thousands of dollars)

Notes:

1) Annual assessment for auxilliary departments and programs in designated operations increased to 10% of revenues. Savings impact is by year.

2) Savings result primarily from classified and administrator reductions.

3) Assumed retirements equals 10 FTE at estimated $95,000 annual salary and benefits over 3 years.

4) Term-by-term adjuncts equal 3.31 FTE at estimated $30,200 annual salary and benefits.

5) Division reductions include known retirements, permanent faculty, and year-long adjuncts.

6) Total permanent incremental savings includes $5.084M (61.59 FTE) in program elimination or reduction and $1.081M (19.25 FTE) in academic reorganization.

Faculty Reductions

	FY14 AY2013-4	FY15 AY2014-5	FY16 AY2015-6	FY17 AY2016-7	FY18 AY2017-8	Totals
Center for the Arts (5.28 FTE)						
Known retirements	0	0.83	0.50	0.50	0.50	2.33
Permanent	0	0	1.00	0	0	1.00
Adjunct (yearlong)	0.45	0.50	1.00	0	0	1.95
Subtotal for Arts	0.45	1.33	2.50	0.50	0.50	5.28
Division of STEM (10.39 FTE)						
Known retirements	0	2.61	0.39	0.67	0.33	4.00
Permanent	1.00	0	3.47	1.00	0	5.47
Adjunct (yearlong)	0	0.46	0.46	0	0	0.92
Subtotal for STEM	1.00	3.07	4.32	1.67	0.33	10.39
Division of Education and Health (9.16 FTE)						
Known retirements	0.83	0.50	0	1.22	0.78	3.33
Permanent	0	0	0	0	0	0
Adjunct (yearlong)	0	2.68	3.15	0	0	5.83
Subtotal for ED/Health	0.83	3.18	3.15	1.22	0.78	9.16
Division of Business, Communication and the Environment (5.45 FTE)						
Known retirements	1.62	1.45	0.61	0.33	0.66	4.67
Permanent	0	0	0.78	0	0	0.78
Adjunct (yearlong)	0	0	0	0	0	0
Subtotal for BCE	1.62	1.45	1.39	0.33	0.66	5.45
Division of Social Science and Public Affairs (10.68 FTE)						
Known retirements	2.17	1.62	2.56	0.72	0.28	7.35
Permanent	0	0.33	1.00	0	0	1.33
Adjunct (yearlong)	0.5	0	0.50	1.00	0	2.00
Subtotal for SS/PA	2.67	1.95	4.06	1.72	0.28	10.68
Division of Language and Culture (3.66 FTE)						
Known retirements	0.40	0.11	0.33	0.61	0.39	1.84
Permanent	0	0	0	1.00	0	1.00
Adjunct (yearlong)	0	0	0.82	0	0	0.82
Subtotal Lang/Culture	0.40	0.11	1.15	1.61	0.39	3.66
Division of Undergraduate Studies (3.67 FTE)						
Known retirements	0	0	0.67	0	0	0.67
Permanent	0	0	1.00	2.00	0	3.00
Adjunct (yearlong)	0	0	0	0	0	0
Subtotal UG Studies	0	0	1.67	2.00	0	3.67
TOTALS (69.03 FTE)						
Known retirements	5.02	7.12	5.06	4.05	2.94	24.19
Permanent	1.00	0.33	7.25	4.00	0	12.58
Adjunct (yearlong)	0.95	3.64	5.93	1.00	0	11.52
Anticipated retirements	0	0	3.33	3.33	3.34	10.00
Adjunct (txt)	0	3.31	0	0	0	3.31
TOTAL	6.97	14.40	21.57	12.38	6.28	61.60

Budget Pro Forma

(in thousands of dollars)	2011-13 Biennium		2013-15 Biennium		2015-17 Biennium		
	2011-12 Actual (000's)	2012-13 ACTUAL (000's)	2013-14 FORECAST (000's)	2014-15 FORECAST (000's)	2015-16 FORECAST (000's)	2016-17 FORECAST (000's)	2017-18 FORECAST (000's)
Budgeted Operations							
State Appropriations	12,642	13,195	13,775	15,200	14,624	15,666	15,287
Special State Allocation for Investment				500			
Tuition, net of Remissions	32,837	33,526	32,708	31,563	32,123	33,078	33,991
Other	1,657	1,851	1,823	2,101	2,135	2,195	2,258
Total Revenues & Transfers In	47,136	48,572	48,306	49,364	48,882	50,939	51,536
Personnel Services	(42,343)	(42,360)	(43,846)	(43,283)	(42,320)	(42,639)	(43,635)
Supplies & Services	(6,534)	(9,200)	(6,751)	(5,587)	(5,619)	(6,021)	(6,570)
Program Investment				(250)	(250)	(250)	(250)
Capital Outlay	(275)	(188)	(188)	(125)	(125)	(125)	(125)
Total Expenditures & Transfers Out	(49,152)	(51,748)	(50,785)	(49,245)	(48,314)	(49,035)	(50,580)
Net from Operations and Transfers	(2,016)	(3,176)	(2,479)	119	568	1,904	956
Transfers In	500	0	2,938	3,200	0	0	0
Transfers Out	(166)	328	(565)	(501)	(501)	(501)	(501)
Change in Fund Balance	(2,182)	(2,848)	(106)	2,818	67	1,403	455
Beginning Fund Balance	5,551	3,869	1,019	913	3,731	3,798	5,201
Ending Fund Balance	3,869	1,019	913	3,731	3,798	5,201	5,656
% Operating Revenues	8.1%	2.1%	1.9%	7.6%	7.8%	10.2%	11.0%

Primary Assumptions:

Goal of 5% ending fund balance by FY15 and 10% or better by FY17

State Allocations FY16 and beyond - 3% per biennium

Enrollment (decrease) - FY15 (2.6%), FY16 (1.1%), FY17 .2%, FY18 0 (1% = approximately 45 student FTE)

Tuition increase - 0% FY15, 3% FY16 & 17, 3% FY18

Salary Increase pool - 3% FY16, 4% FY17, 5% FY18

Assumes worst case

Benchmarks

The following benchmark timeline will indicate specific points at which data will be gathered, either by the campus or by Chancellor's Office staff, and compared against pre-established goals.

- ❖ **March 2014** Final Retrenchment Plan—finalized timeline, metrics, and benchmarks submitted to Chancellors' Office
- ❖ **April 2014** Initiate strategic planning process (primarily academic support areas)
- ❖ **June 2014** Business plans due from academic divisions
  - o Enrollment funnel report for Fall 2014
- ❖ **July 2014** Fund balance status report
- ❖ **August 2014** Enrollment funnel report for Fall 2014
  - o State allocation determined
- ❖ **September 2014** Initiate all-campus strategic planning
- ❖ **November 2014** Fall Term enrollment and retention report
  - o Recalibration of Retrenchment Plan based on 4th week enrollment data
  - o Quarterly benchmarking report to Board
  - o Consultation with Chancellor's Office and Board
- ❖ **February 2015** Quarterly benchmarking report to Board
- ❖ **May 2015** Quarterly benchmarking report to Board
- ❖ **July 2015** Fund balance status report
- ❖ **September 2015** Quarterly benchmarking report to Board

Conclusion: Building on the Past, Moving Into the Future

Founded over 140 years ago as a teachers' college, Southern Oregon University is committed to serving our region and the State of Oregon. SOU serves a large percentage of Oregonians. Many are the first in their families to attend college. It is our moral imperative to maintain access and affordability. As a small university experiencing the "new normal" of public higher education, we are forced to cut costs and narrow offerings. Nonetheless, SOU remains committed to regional stewardship and outstanding academic programming as well as to nationally recognized best practices that promote student success and retention.

As a powerful economic engine of our local communities, over 85% of our graduates remain to work in Oregon. The most important contribution SOU makes to the region and to the state is graduating well-prepared students with skill sets that are crucial to civic and economic success. The most important contribution we make to students is enabling them to graduate with strong communication and problem-solving expertise as well as knowledge and experiences that enable them to be successful in current and future careers.

Strategic Planning. In 2008, following extensive planning processes, SOU published a five-year strategic plan entitled *Building the New SOU: Strategic Plan for Distinction and Sustainability 2009-2014*. This plan and the university's mission statement form the foundation for our department and area planning and for our NWCCU accreditation, which was reaffirmed in February 2014.

The strategies and tactics of our strategic plan have been regularly updated in light of annual goals and benchmarks; however, the four strategic goals of the plan remain in place:

- ❖ **Academic Distinctiveness and Quality**: Heighten and sustain a powerful university culture that supports and inspires intellectual creativity, connected learning, and a passion for making a difference.
- ❖ **Commitment to the Arts and the Region**: Ensure that curricula, research, and outreach reflect the environmental, economic, and cultural priorities of our region.
- ❖ **Community Partner and Catalyst**: Strengthen the University's role as economic and cultural partner and catalyst for external communities.
- ❖ **Financial Sustainability**: Increase the University's fiscal stability through enrollment management, budget development and alignment, strategic partnerships, and fundraising.

Data-Gathering. In 2011-2012, SOU issued a *Report on Capacity*, developed by staff and faculty that analyzed data from program areas across campus. The analyses were intended to help us build a "sustainable fiscal environment that reflects the realities of our declining state support and limitations on our ability to replace declining state resources with enrollment revenue." In concluding remarks, the report states that SOU's curriculum "is too diverse for our current and near future student body. Tightening all aspects of the curriculum could lead to better use of scarce resources. Given the reductions in state support and a limited ability to raise tuition, we may not be able to maintain current class size ratios."

A number of the findings in the *Report on Capacity* were underscored and expanded in 2013-14 with the report from OUS entitled *Southern Oregon University Departmental Enrollment, Revenues & Costs 2012-2013*.

Prioritization. In 2012-13, SOU undertook prioritization of academic and academic support programs, a process that involved broad participation across campus. This process was designed to help inform the next iteration of SOU strategic planning since the plan currently extends only through 2014. The Introduction to the *Academic Program Prioritization Report* highlights the centrality of SOU's mission and strategic goals to the prioritization process:

> [I]nstitutions, particularly regional, comprehensive institutions like Southern Oregon University, increasingly find themselves in the midst of budget crises that drive critical decisions and planning processes. It is within this context that the process of academic program prioritization was developed. The objective of this process is to find the proper balance in allocating resources among programs deemed essential to achieving the mission and strategic goals of the institution. It is our hope that the work represented by this report will contribute to a strategic planning process that achieves such a balance and results in a more distinctive and sustainable SOU.

Based upon agreed-upon criteria, particularly centrality to mission, the prioritization report listed academic programs in quintiles of 33 each. Although the prioritization process was not specifically directed at cost-cutting, programs in lower quintiles were understood to be candidates for review, restructuring, consolidation, or elimination.

Retrenchment. This final retrenchment plan is a significant stage of an ongoing consultative process. The plan has been informed by strategic planning and data-gathering initiatives as well as by comments received throughout the process. It is important to state that, unlike the prioritization process, retrenchment is not intended primarily as a foundation for strategic planning or a vehicle for re-shaping the university's mission and goals. However, the retrenchment process does provide an opportunity to strengthen the university's focus, to implement recommendations from the *Report on Capacity* and the *Academic Program Prioritization Report*, and to achieve the financial sustainability that is and will continue to be a key goal of the university's strategic planning.

The programs slated for elimination in this plan have not attracted sufficient numbers of students to be viable in this challenging economic environment. However, even while going through the difficult process of eliminating some academic programs, we will continue to support and invest in an array of offerings that prepare students effectively for a variety of opportunities after graduation.

SOU's distinctive curriculum will continue to include a balanced mix of programs appropriate to a small regional university:

- ❖ Programs that prepare students for professional careers in areas such as business, education, criminal justice, and health-related fields;
- ❖ Programs that respond directly to our unique region, which cares deeply about and provides employment opportunities related to the arts and the environment; and
- ❖ Programs that prepare students to understand the human and natural world while also connecting them with career opportunities through undergraduate research, capstone experiences, hands-on learning, and interdisciplinary approaches.

In the new environment of public higher education, SOU must ensure that our programming brings significant and measurable value to our region and our state. The difficult decisions embedded in this retrenchment plan reflect not only what we can no longer afford but also what SOU *is* and will continue to be as we serve the students and citizens of Oregon.

This final retrenchment plan is the culmination of a complex and difficult process. We have used strategies that will create financial sustainability with minimal impacts on students while maintaining and enhancing the core values and strengths of Southern Oregon University.

The strategies outlined in this plan involve hard choices and difficult decisions. We recognize that our faculty and staff care deeply about our university. There will be impacts to them personally, to their families and to our community. We have made every possible effort to mitigate these impacts to the greatest degree possible while ensuring the long-term viability of SOU.

We will continue through a collaborative process to construct a new academic organization and will continue to ensure that SOU meets the needs and interests of a diverse and changing student body.

Despite challenges, Southern Oregon University will emerge from this process a stronger organization, nimble and proactive, as we look forward to a promising future.

Report to the SOU Board of Trustees
on Accelerated Learning Current Activities and Proposed New Activities in Oregon

by Steve Thorpe
Special Assistant to the Provost
Southern Oregon University
April 6, 2015

1) As stated in the "Senate Bill 222 Legislative Report" issued in October 2014, the Oregon Education Investment Board (OEIB) is advocating for an expansion of accelerated learning for high school students in Oregon to accomplish the goals listed below.

- Increased high school graduation rates to reach the state's 40-40-20 goal

- Increased post-secondary attendance

- Increased post-secondary certificate completion and degree completion to reach the state's 40-40-20 goal

- Enhanced knowledge and skills plus certificate and degree completion that contributes to the economic and social development of individuals plus the economic and social development of our communities

See the "Senate Bill 222 Legislative Report" for details about the Accelerated Learning Committee's purpose, research process, and findings.

2) Based on the findings and proposals represented in the "Senate Bill 222 Legislative Report," the OEIB leadership group and some Oregon state senators proposed Senate Bill (SB) 84 for the 2015 Oregon Legislative Session. In general, the aims of SB 84 are the following.

- Make 9 credits of dual credit available in each high in Oregon

- Establish statewide standards for dual credit programs

- Establish statewide funding mechanism for dual credit programs

Read SB 84 for the complete text of the proposed legislation, and read the "Accelerated Learning Funding Recommendations" for information about the proposed funding mechanism.

3) Additionally, based on the findings represented in the "Senate Bill 222 Legislative Report," the OEIB leadership group and some Oregon state senators proposed SB 81 for the 2015 Oregon Legislative Session. The aim of SB 81 is to provide free community college tuition and books in a "last dollar" approach in which the state would pay after a student had exhausted other funding sources.

4) Please note that accelerated learning is a comprehensive concept for the ways in which a high school student can earn college credit. The "Senate Bill 222 Legislative Report" identifies 7 types of accelerated learning in which a high school student can obtain college credit while in high school. For example, there is dual credit, AP credit, IB credit, Two-plus-Two credit, etc.

5) Oregon has been promoting the expansion of dual credit opportunities for students since 2005 when the Oregon Legislature passed SB 342 to enhance alignment among postsecondary institutions in Oregon for dual credit work by students in Oregon high schools. A dual credit standards and program approval process was created and approved in 2009 by the Joint Boards of Education. In this effort, Oregon developed its own state standards through which Oregon postsecondary institutions would get state approval for offering dual credit courses. These "Oregon Dual Credit Standards" were based on the National Alliance of Concurrent Enrollment Partnerships (NACEP) accreditation standards. Southern Oregon University's dual credit program, the Advanced Southern Credit (ASC) program, received state approval in 2012.

With the demise of the Oregon University System (OUS), the Higher Education Coordinating Commission (HECC) has now taken control of the dual credit approval process. After the national standards for dual credit were revised, the "Oregon Dual Credit Standards" were updated and the new state standards were adopted in June 2014. Each Oregon post-secondary institution that wants to offer dual credit must apply to the state and receive certification to offer dual credit. The HECC has authorized the Dual Credit Oversight Committee to enact this application and certification program. SOU's Advanced Southern Credit (ASC) program will need to go through this approval process in 2016.

Please note that the "Oregon Dual Credit Standards" describe "dual credit" with the definition below.

> "Awarding secondary and postsecondary credit for a course offered in a high school during regular school hours, as determined by local school board and community college policy."

6) There is a difference between the 2005 movement in Oregon for dual credit and the current push in Oregon for accelerated learning.   The earlier movement was available for a small number of ambitious high school students who wanted to get ahead by earning college credit. Now, Oregon educational leaders want to use accelerated learning to provide a broad range of high school students with opportunities to earn college credit that will motivate them to graduate from high school and move on to post-secondary success.

The key aims of the current movement are as follows.

- High schools in conjunction with post-secondary institutions should provide at least three courses of accelerated learning college credit opportunities and support systems to help convince a broad range of high school students they can successfully do college-level work.

- As part of the expansion of accelerated learning opportunities, high schools in conjunction with post-secondary institutions should organize the college credit opportunities into pathways that will get high school students started toward avenues of

post-secondary success. These pathways should be linked to career opportunities and/or post-secondary educational opportunities. The aim is that the high school work and the high school diploma is a step towards a greater end and not the end in itself.

Research has shown that high schools that use accelerated learning in this expansive manner and support it with good guidance have achieved better high school graduation rates and their students have attained better post-secondary success. The "Senate Bill 222 Legislative Report" mentions these research-based points. Additionally, educators from southern Oregon have visited the Pharr-San Juan School District in south Texas to investigate their expanded accelerated learning program. This district has increased its high school graduation rate from 67% to 91%. Also, the local community college in south Texas that works with the Pharr-San Juan School District says its developmental education rate has dropped from 66% to 19%. That is, the overwhelming majority of students coming out of the Pharr-San Juan School District now are able to do college-level work and they do not need remediation in the numbers they needed prior to this new expansion of accelerated learning in their school district.

7) A group of educational organizations, human service agencies, social service agencies, health organizations, etc. in southern Oregon have created the Southern Oregon Success (SORS) collaborative to create a collective impact network to help achieve K-12 student success and post-secondary success for young people in our region. A key component of the SORS collective impact work is to provide an enhanced set of accelerated learning opportunities for high school students bolstered by a good support network.

Southern Oregon University (SOU) is very actively involved in this SORS collective impact work through SOU's Advanced Southern Credit (ASC) program and special efforts by the various academic divisions on the SOU campus.

In January 2015, Governor Kitzhaber gave special recognition to the Southern Oregon Success (SORS) collaborative for its collective impact work. Recently, in a statewide meeting Mr. Lindsey Capps (Governor Brown's new Education Policy Adviser) identified the SORS collaborative as a model in Oregon for regional collective impact work. Finally, this past Friday, Nancy Golden (Chief Education Officer for OEIB) praised SORS as one of three collective impact groups in Oregon that is doing the kind of work that is expected by the leadership in Oregon.

Thus, the Southern Oregon Success (SORS) collaborative has a good plan through which it can expand accelerated learning opportunities to high school students in our region, and it has a model for a support system. SORS has implemented the first stage of this plan. But, it needs additional resources to move into the next stages of the plan.

8) People and units in Oregon are waiting to see if SB 84 will be approved, if SB 81 will be approved, and in what forms. Some potential issues are listed below.

a) The provosts of the public universities in Oregon took a public stand in favor of SB 84 as long as certain amendments would be adopted. The amendments they recommended would limit the control the HECC would have over the dual credit standardization process so that the universities could maintain academic governance over the dual credit process as is expected in a professional governance process and is expected in our Northwest Commission on College and Universities

(NWCCU) accreditation process. See the letter from the university provosts to the Oregon Senate Education Committee.

b) The administrations and faculties of community colleges have taken positions that seriously question the HECC's standardization process for dual credit in SB 84. See the white paper about dual credit produced by the Community College Council of the Oregon Education Association for an example of the community college perspective on SB 84.

c) At this time, it is unclear whether SB 84 will pass along with the funding mechanism for the proposed expansion of 9 credits accelerated learning in each high school in Oregon. It is unclear if SB 81 will pass with the provision to provide free tuition and books for Oregon community college students in a "last dollar" model. It is unclear if politically and financially one bill might be passed while the other is withdrawn.

d) SOU has a successful Advanced Southern Credit (ASC) program that probably can be expanded if additional resources are made available from external sources.

e) SOU is participating in the Southern Oregon Success (SORS) collective impact collaborative to help build a network and find resources for expanding accelerated learning in our region.

f) There is the potential for increased opportunities with accelerated learning in our region. But, we are waiting to see how the political process pans out and what resources might be available to us at SOU and our colleagues in the southern Oregon region.

Senate Bill 84

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Senate Interim Committee on Education and Workforce Development)

SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure **as introduced.**

Establishes statewide standards and funding mechanisms for accelerated college credit programs for high school students.

Declares emergency, effective July 1, 2015.

A BILL FOR AN ACT

1

2 Relating to accelerated learning; creating new provisions; amending ORS 337.150, 338.025, 338.115,

3   340.300, 340.305, 340.310, 340.320 and 340.330 and section 10, chapter 519, Oregon Laws 2011; and

4   declaring an emergency.

5   Whereas the benefits from increased access to college-level coursework by high school students

6 include improved high school graduation rates, improved attainment of college-ready skills, reduced

7 need for remedial courses in the first year at a post-secondary institution of education, improved

8 expectations by students of post-secondary institutions of education, improved transitions between

9 high schools and post-secondary institutions of education, improved success rates of students at

10 post-secondary institutions of education, and reduced time spent and debt accrued for completion

11 of studies at post-secondary institutions of education; and

12   Whereas this state is committed to the goal that by 2025 at least 40 percent of adult Oregonians

13 will have earned a bachelor's degree or higher degree, at least 40 percent of adult Oregonians will

14 have earned an associate's degree or post-secondary credential as their highest level of educational

15 attainment, and the remaining 20 percent or less of all adult Oregonians will have earned a high

16 school diploma, an extended or modified high school diploma or the equivalent of a high school di-

17 ploma as their highest level of educational attainment; and

18   Whereas this state can more readily achieve the 40-40-20 goal by better aligning state funding,

19 standards and assessments, better supporting shared resources for high schools and post-secondary

20 institutions of education, better encouraging efficiencies and cost savings in high schools and post-

21 secondary institutions of education, better reducing barriers to participation in post-secondary edu-

22 cation and better improving equitable access to college-level coursework for high school students;

23 and

24   Whereas this state must support further development of a collaborative culture among all sec-

25 ondary schools and post-secondary institutions in order to improve course alignment, student suc-

26 cess and shared professional development; and

27   Whereas this state needs a consistent means by which to measure the impact that increased

28 access to college-level coursework by high school students will have toward achieving the 40-40-20

29 goal; and

30   Whereas improved access to college-level coursework by high school students will expose tra-

NOTE: Matter in **boldfaced** type in an amended section is new; matter [*italic and bracketed*] is existing law to be omitted.
New sections are in **boldfaced** type.

1 ditionally underrepresented students to higher education and increase the likelihood that the stu-

2 dents will continue to pursue college-level coursework in higher education; and

3   Whereas this state intends to enable students to access all forms of accelerated college credit

4 programs and must ensure that Oregon-oriented programs meet specified standards and provide

5 consistency to students; now, therefore,

6 **Be It Enacted by the People of the State of Oregon:**

7   <u>SECTION 1.</u> **As used in ORS 340.300 to 340.330:**

8   **(1) "Accelerated college credit programs" includes dual credit programs, two-plus-two**

9 **programs, advanced placement programs, International Baccalaureate programs and any**

10 **other programs meeting criteria specified by the State Board of Education by rule as enabl-**

11 **ing high school students to earn college credit.**

12   **(2) "Post-secondary institution of education" means a community college in this state or**

13 **a public university listed in ORS 352.002.**

14   <u>SECTION 2.</u> ORS 340.300 is amended to read:

15   340.300. [*(1) As used in this section, "accelerated college credit programs" includes dual credit*

16 *programs, two-plus-two programs, advanced placement programs and International Baccalaureate pro-*

17 *grams.*]

18   [*(2) Each school district shall:*]

19   [*(a) Provide students in grades 9 through 12 with accelerated college credit programs including,*

20 *but not limited to, accelerated college credit programs related to English, mathematics and science;*

21 *or*]

22   [*(b) Ensure that students in grades 9 through 12 have online access to accelerated college credit*

23 *programs including, but not limited to, accelerated college credit programs related to English, math-*

24 *ematics and science.*]

25   **(1) Each school district must provide an accelerated college credit program at each high**

26 **school in the school district. The program must enable all students in grades 9 through 12**

27 **to earn college credit while in high school.**

28   **(2)(a) An accelerated college credit program:**

29   **(A) Must include, at a minimum, the greater of:**

30   **(i) Three college-level courses; or**

31   **(ii) Nine quarter hours of college-level courses;**

32   **(B) Must include courses for which college credit is transferable to a post-secondary in-**

33 **stitution of education; and**

34   **(C) May include courses in mathematics, writing, speech, the sciences, arts, humanities,**

35 **social sciences and other courses that satisfy the requirement described in subparagraph (B)**

36 **of this paragraph.**

37   **(b) For the purpose of this subsection, a college credit is transferable if a post-secondary**

38 **institution of education or an Oregon-based, generally accredited, not-for-profit private in-**

39 **stitution of higher education accepts the credit for application toward the requirements of**

40 **a post-secondary degree or the prerequisites for career and technical education.**

41   **(3)(a) Courses offered through an accelerated college credit program may be supported**

42 **by online resources, but a course may not be exclusively provided online.**

43   **(b) When a post-secondary institution of education provides a course supported by online**

44 **resources as described in paragraph (a) of this subsection, the post-secondary institution of**

45 **education must make reasonable efforts to enter into agreements to enable students in**

1 grades 9 through 12 to take the course if space is available in the course. Efforts must be
2 made under this subsection to serve all students regardless of the community college district
3 that serves the students.

4   (4) Except as provided by subsection (5) of this section, a student participating in an ac-
5 celerated college credit program may not be required to pay any expenses, including charges
6 for tuition, fees and instructional materials, imposed by a post-secondary institution of edu-
7 cation.

8   (5) A student participating in an accelerated college credit program may be required to
9 pay any of the following expenses that are:

10   (a) Imposed by an entity that is neither a school district nor a post-secondary institution
11 of education, including examination costs.

12   (b) Incurred for courses that are in excess of the three college-level courses or nine
13 quarter hours of college-level courses that a school district is required to provide under
14 subsection (2) of this section. A school district may charge a minimal fee per course for
15 college-level courses that are in excess of the requirement under subsection (2) of this sec-
16 tion.

17   (6) Each school district that provides an accelerated college credit program shall collab-
18 orate with a post-secondary institution of education to ensure that:

19   (a) Courses offered through an accelerated college credit program meet the institution's
20 standards for transferable credits;

21   (b) Students receive technical assistance in applying for admission and financial aid at a
22 post-secondary institution of education; and

23   (c) Students receive instructional support and other nonmonetary support that are tar-
24 geted to improve the success of the students at a post-secondary institution of education.

25   SECTION 3. Notwithstanding ORS 340.300, a school district that did not provide an ac-
26 celerated college credit program at each high school in the school district during the
27 2014-2015 school year is not required to first comply with the requirements of ORS 340.300
28 until the 2016-2017 school year.

29   SECTION 4. ORS 340.305 is amended to read:
30   340.305. [(1) As used in this section:]
31   [(a) "Accelerated learning entity" means an entity that:]
32   [(A) Assists school districts and high schools in providing accelerated learning options that lead
33 to college credit; or]
34   [(B) Provides standardized testing related to accelerated learning options that lead to college
35 credit.]
36   [(b) "Accelerated learning options" has the meaning given that term in rules adopted by the State
37 Board of Education.]
38   (1) As used in this section, "accelerated college credit program entity" means an entity
39 that:
40   (a) Assists school districts in providing accelerated college credit programs required un-
41 der ORS 340.300; or
42   (b) Provides standardized testing, including examinations, related to accelerated college
43 credit programs.
44   (2) For the purpose of assisting school districts [and high schools in increasing the availability
45 of accelerated learning options] offering accelerated college credit programs, the Superintendent

1   of Public Instruction shall make available the information described in subsections (3) and (4) of this

2   section.

3   (3) To the extent that [*accelerated learning entities*] **accelerated college credit program enti-**

4   **ties** provide information to the Superintendent of Public Instruction about resources and the various

5   means for offering or providing access to [*accelerated learning options*] **accelerated college credit**

6   **programs**, the superintendent shall ensure that the information is published on the website of the

7   Department of Education and is updated annually.

8   (4) To the extent that [*accelerated learning entities*] **accelerated college credit program enti-**

9   **ties** provide information to the Superintendent of Public Instruction about [*accelerated learning*

10   *options*] **accelerated college credit programs** made available by [*high schools*] **school districts**, the

11   superintendent shall ensure that each [*high school*] **school district** that offers or provides access to

12   [*accelerated learning options in three or fewer subjects*] **courses through accelerated college credit**

13   **programs** is contacted annually and is provided with information about resources and the various

14   means for offering or providing access to [*accelerated learning options*] **accelerated college credit**

15   **programs**.

16   **SECTION 5.** ORS 340.310, as amended by section 1, chapter 23, Oregon Laws 2014, is amended

17   to read:

18   340.310. [*(1) The Higher Education Coordinating Commission shall develop statewide standards for*

19   *dual credit programs to be implemented by public high schools, community colleges and public uni-*

20   *versities listed in ORS 352.002. The standards must establish the manner by which:*]

21   **(1) The Higher Education Coordinating Commission, in consultation with the State Board**

22   **of Education, shall provide statewide standards for accelerated college credit programs that**

23   **do not have nationally established standards. The standards must be implemented by school**

24   **districts and post-secondary institutions of education and must establish the manner by**

25   **which:**

26   (a) A student in any grade from 9 through 12 may, upon completion of a course, earn course

27   credit both for high school and for [*a community college or public university; and*] **general education**

28   **or career and technical education at a post-secondary institution of education.**

29   (b) [*Teachers of courses that are part of a dual credit program will work together to determine*]

30   **Faculty at post-secondary institutions of education will collaborate with teachers in school**

31   **districts to ensure** the quality of the **accelerated college credit** program and [*to ensure*] the

32   alignment of the content, objectives and outcomes of individual courses.

33   **(c) Teachers of courses that are part of an accelerated college credit program must be**

34   **approved by a post-secondary institution of education based on a process established by the**

35   **Higher Education Coordinating Commission, in consultation with the State Board of Educa-**

36   **tion. The process must:**

37   **(A) Result in the same outcome regardless of the approving post-secondary institution**

38   **of education; and**

39   **(B) Identify teaching criteria specific to entry-level courses that are part of an acceler-**

40   **ated college credit program and that are offered as required by ORS 340.300 (2)(a).**

41   **(d) Payment for accelerated college credit programs is distributed by school districts to**

42   **high schools and to post-secondary institutions of education, including designating acceptable**

43   **uses of moneys received from the State School Fund for accelerated college credit programs**

44   **and establishing a minimum rate and a maximum rate for payment to a post-secondary in-**

45   **stitution of education for an accelerated college credit program.**

1   (2) Each [*public high school, community college and public university*] **school district and post-**

2   **secondary institution of education** that provides [*a dual credit program*] **an accelerated college**

3   **credit program** must implement the statewide standards [*developed*] **adopted** under subsection (1)

4   of this section **and must annually review the program to ensure compliance with the stan-**

5   **dards**.

6   [*(3) Each school district, community college and public university that provides a dual credit pro-*

7   *gram shall submit an annual report to the Higher Education Coordinating Commission on the academic*

8   *performance of students enrolled in a dual credit program. The Higher Education Coordinating Com-*

9   *mission shall establish the required contents of the report, which must provide sufficient information*

10   *to allow the commission to determine the quality of the dual credit program.*]

11   **(3)(a) Each school district and post-secondary institution of education that provides an**

12   **accelerated college credit program shall submit to the Higher Education Coordinating Com-**

13   **mission a biennial report on the academic performance of students participating in the pro-**

14   **gram and the participation level of underrepresented students in the program. A school**

15   **district must provide a separate report for each high school in the school district.**

16   **(b) The Higher Education Coordinating Commission shall establish the required contents**

17   **of the report required by this subsection. The report must provide sufficient information to**

18   **allow the commission to determine the quality of the program and to document progress**

19   **toward meeting the mission described in ORS 351.009.**

20   **(c) For purposes of the report required by this subsection, the commission shall identify**

21   **the characteristics of underrepresented students.**

22   **(4) Based on the reports submitted under subsection (3) of this section, the Higher Edu-**

23   **cation Coordinating Commission shall submit a biennial report to the Governor, the legisla-**

24   **tive committees on education and the State Board of Education.**

25   **SECTION 6.** ORS 340.320 is amended to read:

26   340.320. [*(1) As used in this section, "accelerated college credit programs" includes dual credit*

27   *programs, two-plus-two programs, advanced placement programs and International Baccalaureate pro-*

28   *grams.*]

29   [*(2)*] **(1)** The Department of Education shall administer a grant program that provides grants for

30   the purposes of:

31   (a) Providing education or training to teachers who will provide or are providing instruction in

32   accelerated college credit programs;

33   (b) Assisting students in paying for [*books,*] **instructional** materials and other costs[*, other than*

34   *test fees,*] related to accelerated college credit programs **that are incurred by a student for**

35   **courses that are in excess of three college-level courses or nine quarter hours of college-level**

36   **courses**; and

37   (c) Providing classroom supplies for accelerated college credit programs.

38   [*(3)*] **(2)** Any school district, [*community college district or state institution of higher education in*

39   *this state*] **education service district or post-secondary institution of education** may individually

40   or jointly apply for a grant under this section.

41   [*(4)*] **(3)** If a grant is awarded for the purpose of providing education or training to teachers who

42   will provide or are providing instruction in an accelerated college credit program:

43   (a) The amount of the grant may not exceed one-third of the total cost of the education or

44   training; and

45   (b) The department may award the grant on the condition that the teacher, school district,

1 [*community college district and state institution of higher education*] **education service district and**

2 **post-secondary institution of education** pay the balance of the cost of the education or training

3 in a proportion agreed to by the teacher, [*districts*] **the district** and **the** institution.

4 [*(5)*] **(4)** For the purposes described in subsection [*(2)*] **(1)** of this section, the department may:

5 (a) Accept contributions of funds and assistance from the United States Government and its

6 agencies or from any other source, public or private, and agree to conditions placed on the funds

7 not inconsistent with the purposes of subsection [*(2)*] **(1)** of this section; and

8 (b) Enter into agreements with school districts, [*community college districts and state institutions*

9 *of higher education*] **education service districts and post-secondary institutions of education**

10 related to the funding to provide education or training to teachers who will provide or are providing

11 instruction in an accelerated college credit program.

12 [*(6)*] **(5)** All funds received by the department under this section shall be paid into the **Supple-**

13 **mental** Accelerated College Credit Account established under ORS 340.330 to be used for the pur-

14 poses described in subsection [*(2)*] **(1)** of this section.

15 **SECTION 7.** ORS 340.330 is amended to read:

16 340.330. The **Supplemental** Accelerated College Credit Account is established in the State

17 Treasury, separate and distinct from the General Fund. Interest earned by the **Supplemental** Ac-

18 celerated College Credit Account shall be credited to the account. Moneys in the **Supplemental**

19 Accelerated College Credit Account are continuously appropriated to the Department of Education

20 for the purposes described in ORS 340.320 [*(2)*] **(1)**.

21 **SECTION 8. Section 9 of this 2015 Act is added to and made a part of ORS 340.300 to**

22 **340.330.**

23 **SECTION 9. (1) The Oregon Education Investment Board shall identify model programs**

24 **and best practices for a school district to implement to encourage the students of the school**

25 **district to participate in an accelerated college credit program and enroll in a post-secondary**

26 **institution of education. The board may identify programs and practices tailored for students**

27 **with specific backgrounds or characteristics.**

28 **(2) Each school district shall annually inform the parents of its students in grades 9**

29 **through 12 of the availability and transferability of accelerated college credit program cred-**

30 **its, including the student eligibility requirements and the financial and academic benefits of**

31 **earning college credit while in high school.**

32 **SECTION 10.** Section 9 of this 2015 Act is amended to read:

33 **Sec. 9.** (1) The [*Oregon Education Investment Board*] **State Board of Education** shall identify

34 model programs and best practices for a school district to implement to encourage the students of

35 the school district to participate in an accelerated college credit program and enroll in a post-

36 secondary institution of education. The board may identify programs and practices tailored for stu-

37 dents with specific backgrounds or characteristics.

38 (2) Each school district shall annually inform the parents of its students in grades 9 through 12

39 of the availability and transferability of accelerated college credit program credits, including the

40 student eligibility requirements and the financial and academic benefits of earning college credit

41 while in high school.

42 **SECTION 11.** Section 10, chapter 519, Oregon Laws 2011, as amended by section 1, chapter 37,

43 Oregon Laws 2012, section 5, chapter 286, Oregon Laws 2013, section 89, chapter 624, Oregon Laws

44 2013, section 9, chapter 660, Oregon Laws 2013, section 3, chapter 661, Oregon Laws 2013, section

45 5, chapter 739, Oregon Laws 2013, section 194, chapter 747, Oregon Laws 2013, and section 6,

1 chapter 778, Oregon Laws 2013, is amended to read:

2   **Sec. 10.** (1) Sections 1, 2, 3, 5 and 7, chapter 519, Oregon Laws 2011, are repealed on March 15,

3 2016.

4   (2) The amendments to [*section 2 of this 2013 Act*] **ORS 342.208** by section 4**, chapter 286,**

5 **Oregon Laws 2013,** [*of this 2013 Act*] become operative on March 15, 2016.

6   (3) The amendments to ORS 326.021 by section 88**, chapter 624, Oregon Laws 2013,** [*of this 2013*

7 *Act*] become operative on March 15, 2016.

8   (4) The amendments to [*sections 1, 2, 3 and 4 of this 2013 Act*] **ORS 327.800, 327.810, 327.815**

9 **and 327.820** by sections 5, 6, 7 and 8**, chapter 660, Oregon Laws 2013,** [*of this 2013 Act*] become

10 operative on March 15, 2016.

11   (5) The amendments to [*section 1 of this 2013 Act*] **ORS 342.950** by section 2**, chapter 661,**

12 **Oregon Laws 2013,** [*of this 2013 Act*] become operative on March 15, 2016.

13   (6) The amendments to [*section 1 of this 2013 Act*] **ORS 326.500** by section 4**, chapter 739,**

14 **Oregon Laws 2013,** [*of this 2013 Act*] become operative on March 15, 2016.

15   (7) The amendments to [*section 7 of this 2013 Act*] **ORS 327.380** by section 8**, chapter 739,**

16 **Oregon Laws 2013,** [*of this 2013 Act*] become operative on March 15, 2016.

17   (8) The amendments to ORS 342.443 by section 5**, chapter 778, Oregon Laws 2013,** [*of this 2013*

18 *Act*] become operative on March 15, 2016.

19   **(9) The amendments to section 9 of this 2015 Act by section 10 of this 2015 Act become**

20 **operative on March 15, 2016.**

21   [*(9)*] **(10)** The amendments to [*section 1 of this 2013 Act*] **ORS 326.500** by section 6**, chapter 739,**

22 **Oregon Laws 2013,** [*of this 2013 Act*] become operative on July 1, 2025.

23   <u>**SECTION 12.**</u> ORS 338.115 is amended to read:

24   338.115. (1) Statutes and rules that apply only to school district boards, school districts or other

25 public schools do not apply to public charter schools. However, the following laws do apply to public

26 charter schools:

27   (a) Federal law;

28   (b) ORS 30.260 to 30.300 (tort claims);

29   (c) ORS 192.410 to 192.505 (public records law);

30   (d) ORS 192.610 to 192.690 (public meetings law);

31   (e) ORS chapters 279A, 279B and 279C (Public Contracting Code);

32   (f) ORS 297.405 to 297.555 and 297.990 (Municipal Audit Law);

33   (g) ORS 326.565, 326.575 and 326.580 (student records);

34   (h) ORS 181.534, 326.603, 326.607, 342.223 and 342.232 (criminal records checks);

35   (i) ORS 329.045 (academic content standards and instruction);

36   (j) ORS 329.451 (high school diploma, modified diploma, extended diploma and alternative cer-

37 tificate);

38   (k) The statewide assessment system developed by the Department of Education for mathematics,

39 science and English under ORS 329.485 (2);

40   (L) ORS 337.150 (textbooks);

41   (m) ORS 339.119 (consideration for educational services);

42   (n) ORS 339.141, 339.147 and 339.155 (tuition and fees);

43   (o) ORS 339.250 (9) (prohibition on infliction of corporal punishment);

44   (p) ORS 339.326 (notice concerning students subject to juvenile court petitions);

45   (q) ORS 339.370, 339.372, 339.388 and 339.400 (reporting of abuse and sexual conduct and training

1 on prevention and identification of abuse and sexual conduct);

2 (r) ORS chapter 657 (Employment Department Law);

3 (s) ORS 659.850, 659.855 and 659.860 (discrimination);

4 (t) Any statute or rule that establishes requirements for instructional time provided by a school

5 during each day or during a year;

6 (u) Statutes and rules that expressly apply to public charter schools;

7 (v) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or a

8 public body, as defined in ORS 174.109;

9 (w) Health and safety statutes and rules;

10 (x) Any statute or rule that is listed in the charter;

11 (y) ORS 336.840 (use of personal electronic devices); [*and*]

12 **(z) ORS 340.300 to 340.330 (accelerated college credit programs); and**

13 [*(z)*] **(aa)** This chapter.

14 (2) Notwithstanding subsection (1) of this section, a charter may specify that statutes and rules

15 that apply only to school district boards, school districts and other public schools may apply to a

16 public charter school.

17 (3) If a statute or rule applies to a public charter school, then the terms "school district" and

18 "public school" include public charter school as those terms are used in that statute or rule.

19 (4) A public charter school may not violate the Establishment Clause of the First Amendment

20 to the United States Constitution or section 5, Article I of the Oregon Constitution, or be religion

21 based.

22 (5)(a) A public charter school shall maintain an active enrollment of at least 25 students.

23 (b) For a public charter school that provides educational services under a cooperative agree-

24 ment described in ORS 338.080, the public charter school is in compliance with the requirements of

25 this subsection if the public charter school provides educational services under the cooperative

26 agreement to at least 25 students, without regard to the school districts in which the students are

27 residents.

28 (6) A public charter school may sue or be sued as a separate legal entity.

29 (7) The sponsor, members of the governing board of the sponsor acting in their official capacities

30 and employees of a sponsor acting in their official capacities are immune from civil liability with

31 respect to all activities related to a public charter school within the scope of their duties or em-

32 ployment.

33 (8) A public charter school may enter into contracts and may lease facilities and services from

34 a school district, education service district, public university listed in ORS 352.002, other govern-

35 mental unit or any person or legal entity.

36 (9) A public charter school may not levy taxes or issue bonds under which the public incurs li-

37 ability.

38 (10) A public charter school may receive and accept gifts, grants and donations from any source

39 for expenditure to carry out the lawful functions of the school.

40 (11) The school district in which the public charter school is located shall offer a high school

41 diploma, a modified diploma, an extended diploma or an alternative certificate to any public charter

42 school student who meets the district's and state's standards for a high school diploma, a modified

43 diploma, an extended diploma or an alternative certificate.

44 (12) A high school diploma, a modified diploma, an extended diploma or an alternative certificate

45 issued by a public charter school grants to the holder the same rights and privileges as a high

1 school diploma, a modified diploma, an extended diploma or an alternative certificate issued by a
2 nonchartered public school.

3 (13) Prior to beginning operation, the public charter school shall show proof of insurance to the
4 sponsor as specified in the charter.

5 (14) A public charter school may receive services from an education service district in the same
6 manner as a nonchartered public school in the school district in which the public charter school is
7 located.

8 **SECTION 13.** ORS 338.115, as amended by section 7, chapter 839, Oregon Laws 2007, section
9 12, chapter 50, Oregon Laws 2008, section 4, chapter 618, Oregon Laws 2009, section 3, chapter 53,
10 Oregon Laws 2010, section 3, chapter 94, Oregon Laws 2011, section 118, chapter 637, Oregon Laws
11 2011, section 5, chapter 682, Oregon Laws 2011, section 10, chapter 92, Oregon Laws 2012, section
12 7, chapter 98, Oregon Laws 2013, section 14, chapter 265, Oregon Laws 2013, and section 9, chapter
13 267, Oregon Laws 2013, is amended to read:

14 338.115. (1) Statutes and rules that apply only to school district boards, school districts or other
15 public schools do not apply to public charter schools. However, the following laws do apply to public
16 charter schools:

17 (a) Federal law;

18 (b) ORS 30.260 to 30.300 (tort claims);

19 (c) ORS 192.410 to 192.505 (public records law);

20 (d) ORS 192.610 to 192.690 (public meetings law);

21 (e) ORS chapters 279A, 279B and 279C (Public Contracting Code);

22 (f) ORS 297.405 to 297.555 and 297.990 (Municipal Audit Law);

23 (g) ORS 326.565, 326.575 and 326.580 (student records);

24 (h) ORS 181.534, 326.603, 326.607, 342.223 and 342.232 (criminal records checks);

25 (i) ORS 329.045 (academic content standards and instruction);

26 (j) ORS 329.451 (high school diploma, modified diploma, extended diploma and alternative cer-
27 tificate);

28 (k) ORS 329.496 (physical education);

29 (L) The statewide assessment system developed by the Department of Education for mathemat-
30 ics, science and English under ORS 329.485 (2);

31 (m) ORS 337.150 (textbooks);

32 (n) ORS 339.119 (consideration for educational services);

33 (o) ORS 339.141, 339.147 and 339.155 (tuition and fees);

34 (p) ORS 339.250 (9) (prohibition on infliction of corporal punishment);

35 (q) ORS 339.326 (notice concerning students subject to juvenile court petitions);

36 (r) ORS 339.370, 339.372, 339.388 and 339.400 (reporting of abuse and sexual conduct and training
37 on prevention and identification of abuse and sexual conduct);

38 (s) ORS chapter 657 (Employment Department Law);

39 (t) ORS 659.850, 659.855 and 659.860 (discrimination);

40 (u) Any statute or rule that establishes requirements for instructional time provided by a school
41 during each day or during a year;

42 (v) Statutes and rules that expressly apply to public charter schools;

43 (w) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or
44 a public body, as defined in ORS 174.109;

45 (x) Health and safety statutes and rules;

1   (y) Any statute or rule that is listed in the charter;

2   (z) ORS 336.840 (use of personal electronic devices); [*and*]

3   **(aa) ORS 340.300 to 340.330 (accelerated college credit programs); and**

4   [*(aa)*] **(bb)** This chapter.

5   (2) Notwithstanding subsection (1) of this section, a charter may specify that statutes and rules

6 that apply only to school district boards, school districts and other public schools may apply to a

7 public charter school.

8   (3) If a statute or rule applies to a public charter school, then the terms "school district" and

9 "public school" include public charter school as those terms are used in that statute or rule.

10   (4) A public charter school may not violate the Establishment Clause of the First Amendment

11 to the United States Constitution or section 5, Article I of the Oregon Constitution, or be religion

12 based.

13   (5)(a) A public charter school shall maintain an active enrollment of at least 25 students.

14   (b) For a public charter school that provides educational services under a cooperative agree-

15 ment described in ORS 338.080, the public charter school is in compliance with the requirements of

16 this subsection if the public charter school provides educational services under the cooperative

17 agreement to at least 25 students, without regard to the school districts in which the students are

18 residents.

19   (6) A public charter school may sue or be sued as a separate legal entity.

20   (7) The sponsor, members of the governing board of the sponsor acting in their official capacities

21 and employees of a sponsor acting in their official capacities are immune from civil liability with

22 respect to all activities related to a public charter school within the scope of their duties or em-

23 ployment.

24   (8) A public charter school may enter into contracts and may lease facilities and services from

25 a school district, education service district, public university listed in ORS 352.002, other govern-

26 mental unit or any person or legal entity.

27   (9) A public charter school may not levy taxes or issue bonds under which the public incurs li-

28 ability.

29   (10) A public charter school may receive and accept gifts, grants and donations from any source

30 for expenditure to carry out the lawful functions of the school.

31   (11) The school district in which the public charter school is located shall offer a high school

32 diploma, a modified diploma, an extended diploma or an alternative certificate to any public charter

33 school student who meets the district's and state's standards for a high school diploma, a modified

34 diploma, an extended diploma or an alternative certificate.

35   (12) A high school diploma, a modified diploma, an extended diploma or an alternative certificate

36 issued by a public charter school grants to the holder the same rights and privileges as a high

37 school diploma, a modified diploma, an extended diploma or an alternative certificate issued by a

38 nonchartered public school.

39   (13) Prior to beginning operation, the public charter school shall show proof of insurance to the

40 sponsor as specified in the charter.

41   (14) A public charter school may receive services from an education service district in the same

42 manner as a nonchartered public school in the school district in which the public charter school is

43 located.

44   **SECTION 14.** ORS 338.025 is amended to read:

45   338.025. (1) The State Board of Education may adopt any rules necessary for the implementation

1 of this chapter. The rules shall follow the intent of this chapter.

2 (2) Upon application by a public charter school, the State Board of Education may grant a

3 waiver of any provision of this chapter if the waiver promotes the development of programs by

4 providers, enhances the equitable access by underserved families to the public education of their

5 choice, extends the equitable access to public support by all students or permits high quality pro-

6 grams of unusual cost. The State Board of Education may not waive any appeal provision in this

7 chapter or any provision under ORS 338.115 (1)(a) to [*(y)*] **(z)**, 338.120, 338.125 (4), 338.135 (2)(b) or

8 339.122.

9 **SECTION 15.** ORS 338.025, as amended by section 8, chapter 839, Oregon Laws 2007, section

10 14, chapter 50, Oregon Laws 2008, section 5, chapter 53, Oregon Laws 2010, section 4, chapter 72,

11 Oregon Laws 2010, section 5, chapter 94, Oregon Laws 2011, section 4, chapter 649, Oregon Laws

12 2011, section 27, chapter 718, Oregon Laws 2011, section 9, chapter 98, Oregon Laws 2013, and sec-

13 tion 16, chapter 265, Oregon Laws 2013, is amended to read:

14 338.025. (1) The State Board of Education may adopt any rules necessary for the implementation

15 of this chapter. The rules shall follow the intent of this chapter.

16 (2) Upon application by a public charter school, the State Board of Education may grant a

17 waiver of any provision of this chapter if the waiver promotes the development of programs by

18 providers, enhances the equitable access by underserved families to the public education of their

19 choice, extends the equitable access to public support by all students or permits high quality pro-

20 grams of unusual cost. The State Board of Education may not waive any appeal provision in this

21 chapter or any provision under ORS 338.115 (1)(a) to [*(z)*] **(aa)**, 338.120, 338.125 (4), 338.135 (2)(b) or

22 339.122.

23 **SECTION 16.** ORS 337.150 is amended to read:

24 337.150. (1) Subject to ORS 339.155, each district school board shall provide [*textbooks*] **in-**

25 **structional materials**, prescribed or authorized by law, for free use by all resident public school

26 [*pupils*] **students** enrolled in kindergarten through grade 12.

27 (2) Subject to ORS 339.155, each public charter school**,** as defined in ORS 338.005**,** shall provide

28 [*textbooks*] **instructional materials**, prescribed or authorized by law, for free use by all [*pupils*]

29 **students** enrolled in the public charter school.

30 **(3) Instructional materials required for an accelerated college credit program, as defined**

31 **in section 1 of this 2015 Act, must be provided to students in the same manner that in-**

32 **structional materials are provided to students under subsections (1) and (2) of this section,**

33 **except that the instructional materials do not need to be on a list adopted under ORS 337.050,**

34 **337.120 or 337.141 and do not need to meet any of the guidelines and criteria for the review**

35 **and selection of instructional materials that are established under ORS 337.035.**

36 **SECTION 17. Sections 18 and 19 of this 2015 Act are added to and made a part of ORS**

37 **340.300 to 340.330.**

38 **SECTION 18. (1) In addition to any state moneys distributed to school districts and**

39 **post-secondary institutions of education, the Department of Education shall distribute mon-**

40 **eys to school districts and post-secondary institutions of education for costs incurred for**

41 **accelerated college credit programs.**

42 **(2) Distributions under this section shall be as follows:**

43 **(a) For college-level courses provided as required under ORS 340.300:**

44 **(A) $10 to a school district for each quarter hour of high school credit earned by a stu-**

45 **dent for a college-level course, for a maximum of nine quarter hours per student; and**

(B) $10 to a post-secondary institution of education for each quarter hour of high school credit earned by a student for a college-level course provided by the institution or a faculty member of the institution, for a maximum of nine quarter hours per student.

(b) For college-level courses provided as required under ORS 340.300 that are career and technical education, as determined by the Department of Education based on rules adopted by the State Board of Education, $10 to a school district for each quarter hour of high school credit earned by a student for a career and technical education college-level course, for a maximum of nine quarter hours per student. Amounts distributed as provided by this paragraph are in addition to amounts distributed as provided by paragraph (a)(A) of this subsection.

(c) For college-level courses provided as required under ORS 340.300 to underserved students, as determined by the Department of Education based on rules adopted by the State Board of Education in consultation with the Higher Education Coordinating Commission, $10 to a school district for each quarter hour of high school credit earned by an underserved student for a college-level course, for a maximum of nine quarter hours per student. Amounts distributed as provided by this paragraph are in addition to amounts distributed as provided by paragraphs (a)(A) and (b) of this subsection.

(d) For advanced placement programs and International Baccalaureate programs, $20 to a school district for each student enrolled in the program to be used for textbooks of the program.

(e) For advanced placement programs and International Baccalaureate programs provided to underserved students, as determined by the Department of Education based on rules adopted by the State Board of Education in consultation with the Higher Education Coordinating Commission, $10 to a school district for each quarter hour of high school credit earned by an underserved student, for a maximum of nine quarter hours per student. Amounts distributed as provided by this paragraph are in addition to amounts distributed as provided by paragraph (d) of this subsection.

(3) The State Board of Education shall establish by rule:

(a) The form and timelines by which a school district or institution of higher education shall submit requests for distributions under this section; and

(b) The methods and timelines for making distributions under this section.

(4) If the total amount to be distributed as provided by this section exceeds the amount available for distribution, the Department of Education shall pay in full the amounts to be distributed as provided by subsection (2)(c) and (e) of this section and prorate the amounts available for distribution under subsection (2)(a), (b) and (d) of this section.

SECTION 19. The Accelerated College Credit Account is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Accelerated College Credit Account shall be credited to the account. Moneys in the account are continuously appropriated to the Department of Education for the purposes described in section 18 of this 2015 Act.

SECTION 20. In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Education, for the biennium beginning July 1, 2015, out of the General Fund, the amount of $15 million, which shall be deposited in the Accelerated College Credit Account established by section 19 of this 2015 Act.

SECTION 21. In addition to and not in lieu of any other appropriation, there is appro-

1 priated to the Department of Education, for the biennium beginning July 1, 2015, out of the

2 General Fund, the amount of $_____, which may be expended for the grant program de-

3 scribed in ORS 340.320.

4 SECTION 22. This 2015 Act being necessary for the immediate preservation of the public

5 peace, health and safety, an emergency is declared to exist, and this 2015 Act takes effect

6 July 1, 2015.

7 ———————————

Senate Bill 222 Legislative Report

Accelerated Learning Committee

October 1, 2014

Senate Bill 222: Accelerated Learning Committee Legislative Report

Executive Summary October 1 2014

Passed during the 2013 Oregon legislative session, Section 1 of Senate Bill 222 (Appendix A) established an Accelerated Learning Committee to examine methods to encourage and enable students to obtain college credits while still in high school. In accordance, the following committee members were appointed:

> Nancy Golden, Chief Education Officer (Chair)
> Senator Mark Hass (D-Tigard)
> Senator Bruce Starr (R-Hillsboro)
> Representative Lew Frederick (D-Portland)
> Representative John Huffman (R-The Dalles)
> Peyton Chapman, Principal of Lincoln High School
> Nori Juba, Managing Partner of Bend Capital Partners

The Committee met between October 2013 and October 2104 to address their charge and was supported by Oregon Education Investment Board staff. During their eight meetings, the committee focused on high school and postsecondary institutional alignment of funding, assessments and procedures to encourage efficiencies and ways to make post-secondary education more affordable for families.

The Committee has proposed recommendations, some of which will require legislation during the 2015-2017 session in order to 1) create more seamless and equitable pathways for every Oregon student and 2) support a sustainable collaborative culture engaging K-12 and postsecondary educators to create and offer college level coursework for high school students. An additional state appropriation of at least $15 million for the 2015-2017 biennium is recommended to implement the following:

- Provide access at every Oregon high school to at least three college credit courses at no cost to students and their families; increasing participation of students typically underrepresented in postsecondary education;
- Support alignment of curriculum with postsecondary expectations through clearly agreed upon learning outcomes and assessments coordinated across high schools and postsecondary institutions;
- Ensure that college credit courses offered to high school students not only meet the   expected rigor of college credit but are accepted by an Oregon institution towards requirements for a postsecondary degree or technical education certificate;
- Support earlier college-going practices in schools and communities that effectively engage students and their families to obtain the information, tools, and perspective to enhance access to and success in postsecondary education;
- Address shortages and approval process limitations that impact the supply of

qualified high school instructors of dual credit courses in the high schools;

- Define an equitable funding model for both K-12 and postsecondary partners to be used for student support and advising, staffing, initial and ongoing assurances of course alignment, as well as program administration, outreach efforts, data collection, and evaluation;
- Identify outcome data that Oregon should be collecting, analyzing, and sharing on all programs offering college credit to high school students and that document progress towards Oregon's 40-40-20 goal; and
- Support further development of a K-12 and postsecondary collaborative engagement that continuously addresses course alignment, student success, and shared professional development.

This Legislative Report was received, accepted, and approved for submission to the legislature by October 1, 2014. It includes highlights from the research evidence, data, public testimony, lingering issues, recommended best practices, and potential solutions discussed by the members. As the Accelerated Learning Committee concludes its charge, it has also developed a draft Legislative Concept 274 to be introduced during the 2015-2017 legislative session.

An electronic copy of the full report and all meeting agendas, materials, notes, formal testimony, and reports are archived at: http://education.oregon.gov/Pages/Accelerated-Learning-Committee.aspx.

Table of Contents

Introduction and Charge

Oregon's 40-40-20 Goal has focused increased attention on access for Oregon students to college-bearing credits while still in high school. Although many Oregon districts and postsecondary institutions already collaborate on agreements to offer and honor Advanced Placement classes, International Baccalaureate coursework, dual credit/dual enrollment courses, and other options including Expanded Options and Career Technical Education, the offerings are still fragmented and often vary substantially by district and even by school within a district. Of grave concern is the potential for inequities across the state that limit access for students sometimes based on geographic locations, economic factors, or knowledge of how these offerings operate. To achieve the 40-40-20 Goal, it will be necessary to pursue significant improvements redefining the shared space of Oregon's education system for high school and the first two years of college (grades 9-14). Thus, the intent of the Accelerated Learning Committee's recommendations was fourfold:

1. Support attainment of Oregon's 40-40-20 goal by providing more financial support for high school students pursuing college courses
2. Create more equitable access and affordable postsecondary options for all eligible Oregon students, particularly those in the Opportunity Gap[1]
3. Encourage efficiencies for students and remove unintended barriers
4. Better align state funding, standards and assessments, and shared supports involving high schools and postsecondary institutions

Defining Terminology

The term *"Accelerated Learning"* in this paper refers to Oregon program offerings including:

- Dual credit awarding secondary and postsecondary credit for a course offered in a high school during regular school hours and taught by high school instructors (also called College Now in some areas of the state)
- Expanded Options which allow students to attend an eligible postsecondary institution either full- or part-time to complete their high school diplomas and earn college credits with costs paid for by the local school district (such as Expanded Options, Early and Middle College)
- Career Technical Education (CTE) programs sometimes referred to as "Two Plus Two" or Tech Preparation that offer career-focused pathways aligning curriculum and articulation of credit between high schools and postsecondary programs
- Online college courses specifically targeted for high school students
- Credit by proficiency courses that employ collaboratively developed learning outcome assessments to award college credit to high school students, such as Eastern Promise
- Advanced Placement programs using copyrighted curriculum, materials, and examinations from The College Board.
- International Baccalaureate pre-university course of study that using copyrighted curriculum, materials, and examinations.

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[1] Opportunity Gap is a term that refers to students for whom their race, ethnicity, socioeconomic status, English proficiency, community wealth, familial situations, or other factors contribute to or perpetuate lower educational

What About Advanced Placement and International Baccalaureate Programs?
The Committee recognizes formalized programs like Advanced Placement (AP) and International Baccalaureate (IB) for which students receive college credit based on exam results once they have transferred to a postsecondary institution that accepts the credit. Although there is not the same level of collaboration expected between high schools and postsecondary institutions given that AP and IB curriculums are pre-determined, exams are externally scored, and postsecondary institutions do not approve or provide professional development to instructors., these programs provide a valuable opportunity for students to experience college rigor. As such, the Committee recommends funding help address the rising cost of IB and AP textbooks and instructional materials, and support for enrolling more students in the Opportunity Gap.

Committee Process
Members started by reaching agreement on philosophical parameters and a Big Idea or goal for the Committee to guide their work as well. Committee member read articles, reviewed research, state policies, and data related to accelerated learning. They brought in policy leaders from other states, as well as analysts from the Education Commission of the States and they reviewed legislation passed by Washington, Colorado, Ohio and Texas. Staff consulted with the Western Interstate Commission for Higher Education, Northwest Commission on Colleges and Universities and the National Alliance of Concurrent Enrollment Partnerships. In May 2014, a Concept Paper[2] was drafted, reviewed, and then vetted with dozens of individuals and stakeholder groups (Appendix D). In August, a draft Legislative Concept was drafted reviewed and vetted by various stakeholders.

> *Accelerated Learning Committee Goal*
>
> *Early on in their deliberations, the Committee reached agreement on a common goal to guide their recommendations:*
>
> *In order to meet the Oregon 40-40-20 Goal, students within Oregon's public education system are able to earn up to nine college credits at no cost while still in high school to help them seamlessly transition from K---12 to postsecondary options without incurring debt.*

Compelling Research Evidence
Research results from local, state, regional, and national studies overwhelmingly support a variety of benefits resulting from increased access to college level coursework for high school students and, in particular, students in the Opportunity Gap. Benefits of dual enrollment programs extend beyond simple performance differences. Researchers have found that students shift their conceptions of the role of college and develop a greater awareness of the

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[2] The full Concept Paper can be accessed at the Accelerated Learning Committee website.

requirements of college and skills conducive to college success[3].

The impact of dual enrollment on college degree attainment for low socio-economic students has been confirmed by a number of studies. In 2013, a study using the National Educational Longitudinal Study showed that students who earned six credits (i.e., two courses) and students who earned seven or more credits were significantly more likely to attain any college degree or a bachelor's degree than comparison student[4].

One pivotal 2012 study conducted by Rodríguez, Hughes, & Belfield[5] involved 3,000 underrepresented minority students (60% students of color, 40% living in non-English speaking households, and nearly 33% first in their families to attend college) who were participating in eight different dual enrollment efforts in California. The researchers found that underrepresented minority students who participated in dual enrollment had higher graduation rates, were less likely to take basic skills courses once they enrolled in college, were more likely to attend and persist in college once they completed high school, and were more likely to earn more college credits than their peers who did not participate in dual enrollment.

Research conducted by the American Institutes for Research[6] on ten Early College sites revealed that participants had significantly better outcomes than comparison groups: 86% of the students graduated from high school, 80% enrolled in college, and 22% graduated from college and graduated earlier. Eight of the ten Early Colleges were on located college campuses.

Studies conducted by the Oregon University System twice showed that Oregon students who participate in Dual Credit programs have higher college participation rates, higher retention rates, higher GPAs, and earn more college credits[7]. Additional research on accelerated learning programs is posted on the OEIB website[8].

Probably the most compelling evidence promoting earlier exposure to college credits for high school students is found in data on Oregon students' participation in postsecondary remedial education[9].

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[3] M. Karp, *Learning About the Role of College Students Through Dual Enrollment Participation*, Working paper 007 (New York City, NY: Community College Research Center, Teachers College, Columbia University, 2007).

[4] U.S. Department of Education, Institute of Education Sciences, What Works Clearinghouse. (2013, December). WWC review of the report: The impact of dual enrollment on college degree attainment: Do low-SES students benefit? Retrieved from http://whatworks.ed.gov

[5] Rodríguez, O., Hughes, K. L., & Belfield, C. (2012). *Bridging college and careers: Using dual enrollment to enhance career and technical education pathways.* Retrieved from http://www.postsecondaryresearch.org/i/a/document/NCPRBrief_RodriguezHughesBelfield_DualEnrollment.pdf

[6] American Institutes for Research (2013). Early College High School Initiative Impact Study. Retrieved from http://www.air.org/sites/default/files/downloads/report/ECHSI_Impact_Study_Report_Final1_0.pdf

[7] Oregon University System. "2011 Legislative Issue Brief Higher Education." Retrieved from http://www.ous.edu/sites/default/files/dept/govrel/files/Day1C_IssueBriefDualCredit.pdf)

[8] http://education.oregon.gov/Documents/archive/Research%20Summary%20on%20Accelerated%20Learning.pdf.

[9] Remedial education refers to development education classes (primarily in math, reading, and writing) required of students considered academically underprepared for college-level coursework. The courses are prerequisites to college-level courses and don't count toward all degree programs but cost students time and money/financial aid.

- Oregon student participation in remedial education has increased from 47% in 2005 to 67% in 2010 for recent Oregon high school graduates enrolled in community colleges in the past.
- Within two years of high school graduation, two out of three Oregon students who received federal aid participated in developmental education.
- Black, Hispanic, and American Indian students are much more likely than white students to be enrolled in developmental education classes in Oregon community colleges.
- Students' college persistence and completion decreases based on the level of math and English classes in which students are first enrolled

Oregon Statistics on Accelerated Program Course Offerings and Participation

Dual Credit
Data from the Division of Community Colleges and Workforce Development (CCWD) show that in 2012-13, Oregon high school students earned 157,731 community college credits in Dual Credit Programs, a 10.2% increase from the 143,157 dual credits earned from 2011-2012. Likewise, Career and Technical Education (CTE) course credits earned increased from 48,843 to 51,517 for the same time period (a 5.5% increase). A total of 27,367 students were enrolled in either Lower Division Collegiate or CTE courses in 2012-2013, an increase of 7.9% from the 2011-2012 year. Combined, these 209,248 credits earned represented a conservative estimated cost savings to Oregon students and their families of over $21 million, based on community college costs. However, when disaggregated by race and ethnicity, the data showed that only nine of the seventeen community colleges reported significant increases in the number of Hispanic students enrolled in dual credit courses during that same time period.

Recent high school graduates who took dual-credit math were 33 percentage points less likely to enroll in developmental math at community college than their peers who did not take dual-credit math, and students who took dual-credit English were 15 percentage points less likely to enroll in developmental reading and/or writing at community college than their peers who did not. These findings have a simple explanation: The most common dual-credit math and English courses are college-level algebra and English composition. Students who take college algebra in high school do not need to take developmental math in college, unless they did not pass the dual-credit college algebra course. Similarly, students who take college English composition in high school do not need to take developmental reading or writing in college, unless they did not pass the dual-credit college English composition course.

Dual-credit participation in other subject areas was also associated with enrolling in college-level math and English. Recent high school graduates who took a dual-credit course in college English, social science, history, world languages, science, and three career technical education (CTE) areas were 2 to 8 percentage points less likely to enroll in developmental math than their peers who did not. Recent high school graduates who took a dual-credit course in college math, social science, history, world languages, and the CTE area, business and

management, were 2 to 7 percentage points less likely to enroll in developmental reading and writing than their peers who did not.[10]

Advanced Placement

In 2013, Oregon high school students took a total of 26,158 Advanced Placement (AP) exams that resulted in scores of three or higher. Based on most students' opportunity to earn at least three college credits for each AP exam score of three or higher, this represents an estimated 48,168 college credits, or a potential cost savings to Oregon students and families of over well over $5 million.

According to a 2014 College Board Report[11], over 8,300 Oregon students (24% of the 2013 graduating class) took at least one AP course during high school. However, the state still lags behind the national average. Although College Board reported that more public school students in Oregon took Advanced Placement exams in 2013-14 than the previous year (5.18%), only a third of students in the 2013 graduating class with demonstrated potential for Advanced Placement took an AP exam, with lower rates for Native American, African American, and Hispanic students. While the number of white students taking AP exams increased by 7.81% from 2012 to 2013, the number of black students taking AP exams only grew 1.2% and there was no positive gain for Mexican American students[12].

Early College

A number of other promising programs exist in some areas of the state that are part of Expanded Options. In about a dozen Oregon communities, the Early and Middle College model combines high school and college, most often situated on college campuses, in a rigorous, supportive environment that enables struggling students to graduate with college credit and tools for postsecondary success.

> **NAYA Early College Academy**
>
> Serving Portland, Douglas, and Centennial school districts, the Native American Youth and Family Center (NAYA) Early College Academy offers a blended high school and postsecondary curriculum for 9th to 12th graders aged 14 to 20. Students can earn a high school diploma and earn college credit. Academic programming integrates local Native culture, family and community outreach, and partnerships with Portland Community College and other postsecondary institutions.

However, there are still high schools in Oregon where students have little to no opportunity to enroll in and earn college credits while still in high school.   A report provided by Education Northwest using Oregon Department of Education data showed that over 200 schools serving high school age students in 2011-12 offered fewer than three dual credit courses taught by

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[10] Hodara, M. (2014). *What predicts developmental education participation? Lessons from Oregon.* (REL 2014). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Northwest. Retrieved from http://ies.ed.gov/ncee/edlabs.

[11] College Board (2014). The 10th Annual AP Report to the Nation. Retrieved from http://apreport.collegeboard.org.

[12] College Board (2013). AP Program Participation and Performance Data 2013. Retrieved from http://research.collegeboard.org/programs/ap/data/participation/2013

approved high school instructors affiliated with an Oregon community college (M. Hodara, personal communication, August 12, 2014).

Furthermore, 13 high schools and 15 charter schools serving high school aged students had absolutely no dual credit courses offered at local high schools during regular school hours and taught by approved high school instructors affiliated with an Oregon community college. Although the state still does not have the ability to aggregate data for all accelerated learning program data, an informal analysis indicated that most of these same schools also lacked offerings in AP, IB, CTE, and Expanded Options.

Review of Recent Legislative Action

Compared to other states in the nation, Oregon has been forward thinking in terms of accelerated college credit opportunities as is shown in the Chronology of Related Legislation in Appendix B. The early versions of SB 222 during the 2013 legislative session included appropriations: a) $3.0 million for assistance with accelerated college credit programs; and b) $5.0 million for consortiums of school districts and post-secondary institutions for flexible and innovative ways of providing accelerated credits and developmental education. These were removed because HB 3232 had $3 million for dual or accelerated learning credits.

Although HB 3232 originally included approximately $3 million to create a scholarship fund aimed at increasing access for underserved students to postsecondary institutions by paying for first year college courses or accelerated college credit programs, a legislative budget note within SB 5518 stipulated that the entire amount be awarded as grants to pay Advanced Placement and International Baccalaureate exam fees for students.

HB 3232 also included $4 million to scale up and replicate the Eastern Promise model that has was been accruing sizable benefits for Oregon students and their families.

Eastern Promise Model

In 2010, high schools and their partnering postsecondary institutions in Eastern Oregon launched the Eastern Promise initiative and began collaborating in new ways to:

1) Increase cross sector collaboration
2) Provide students with a variety of accelerated learning opportunities,
3) Build a college-going culture,
4) Develop cross-sector professional learning involved in establishing appropriate curriculum and shared assessment.

Unique to the Eastern Promise model is a proficiency-based approach that helps students demonstrate achievement of the course credits. Between dual credit and proficiency based classes, the number of early college credits earned in Eastern Promise increased from 14,000+ in 2012-13 to over 27,000 in 2013-14 involving 45 high schools, two community colleges, and one university.

HB 3232 specifically directed the Oregon Department of Education to distribute monies to consortiums to design and deliver individualized, innovative and flexible ways of delivering content, awarding high school and college credit and providing developmental education for

students in high school or in the first two years of postsecondary education. As of April of 2014, all but 18 counties in Oregon have at least one high school replicating four pillars of the Eastern Promise model.

Lingering Barriers

Despite the efforts described, Oregon still ranks among the states with the lowest high school graduation rates and falls short in closing equity and opportunity gaps for students typically underrepresented in postsecondary programs. As was noted in testimony provided by the Confederation of School Administrators,

> *"The traditional high school experience—in which the senior year is a less than challenging year for many students and a high school's responsibilities toward students end at the annual graduation ceremony—be reimagined as part of a larger and more flexible continuum of formal education designed to ensure students with differing aspirations and abilities are prepared to continue their learning after high school."*

As such, the Accelerated Learning Committee is seeking to address the following issues:
- Uneven college course offerings in high school settings and participation by all student groups across the state
- More opportunities for students who may not be view themselves as "college-going" to try out college level coursework and become college and career ready either in their home schools or on college campuses
- Uneven and unsustainable funding models for accelerated learning models that shortchange supports and quality assurances
- Inadequate numbers of qualified instructors able to teach college courses in high schools
- Need for clear alignment of high school curriculum and new state standards with college expectations to improve statewide transfer of college credits earned by students while in high school.

Instructor Qualifications

A persistent barrier to providing sustainable access to dual credit courses in all high schools lies in the dearth of qualified instructors. The Northwest Commission on Colleges and Universities which accredits institutions in our region has three standards related to this issue:
- Standard 2.C.17 The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs, or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution's continuing education and special learning activities.

- Standard 2.C.5 Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation, and revision of the curriculum, and have an active role in the selection of new faculty. Faculty with teaching responsibilities take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.

- Standard 2.B.4 Consistent with its mission, core themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and assure the integrity and continuity of its academic programs, wherever offered and however delivered.

However, at least one other regional accreditor provides more latitude as seen in this excerpt from the North Central Association of the Higher Learning Commission:

"Instructors must possess an academic degree relevant to what they are teaching and at least one level above the level at which they teach, except in programs for terminal degrees or when equivalent experience is established."

Currently, the majority of community colleges in Oregon require:
- A Master's degree in the content area, or
- Graduate quarter credit hours (24 to 30) along with a Master's degree in a related field

The Committee heard and reviewed testimony from both K-12 and postsecondary institutions on issues surrounding instructor qualifications which are summarized in the table below:

K-12 Issues
Impact of approval process timeline on scheduling classes
Consistency of approvals—varies across institutions, no reciprocity, and can be inconsistent at the same institution or across departments
Overemphasis on degree qualifications and graduate coursework in content - Currently no consideration of teacher's proficiency in teaching the course (IB/AP test results, co-teaching experience, proficiency)
More online graduate coursework in content area needed for high school teachers
Community College Issues
OARS related to faculty qualifications for community colleges are not consistent with requirements for those who teach at the universities- universities don't have to require a Master's degree in the content area.
Approval of faculty is part of faculty governance control and part of union contracts
Regional accreditation requires the same qualifications for full-time/part-time faculty or high school instructors
Colleges can't give instructors approval to teach courses at another college
The postsecondary institution requirements for high school instructors of dual credit

> courses exceeds licensure requirement from Oregon Teacher Standards and Practices Commission for high school teachers. Graduate programs that prepare teachers to teach in high schools should include sufficient graduate subject area coursework to meet postsecondary teaching qualifications.
>
> Certification issues and contract language limit part-time faculty interested in teaching at the high school level

The Committee reaffirmed the role of postsecondary institutions to approve instructors but recommended:

- Consideration of other qualifications that could be considered equivalent to the Master's degree in the content area and that include demonstrated proficiency in addition to degree qualifications (Appendix E)
- A more streamlined application process, consideration of timelines for course scheduling, and more consistency in approval decisions across campuses
- A predictable schedule and offering of summer online graduate courses for high school teachers seeking to enhance their degree qualifications for teaching dual credit courses

Funding Issues

Considerable time was spent examining how different kinds of accelerated learning programs are funded. It became clear that some accelerated learning options require more extensive collaboration than others between both high schools and a partnering postsecondary institution. Unlike Advanced Placement and International Baccalaureate programs where the curriculum is developed, teachers are trained, and exams are scored by the parent company, dual credit courses involve costs for both the high school and the postsecondary institution.

Currently, there are many approaches used by community colleges to charge for dual credits:

- Six of the colleges do not charge anything for dual credit
- Three charge a one-time transcription fee ($25 to $35)
- Ones charges an annual $25 fee
- Some charge per credit ($10 to $40)
- Others charge per course ($30 to $45) and may or may not also charge a transcription fee.

Although sometimes viewed by universities as a recruitment pipeline, the charges and tuition rates do not reflect costs for faculty time for collaboration with high school instructors on course outcomes and assessment alignments. When a high school teacher teaches a course, college faculty time is still required to approve instructors, provide course and institutional orientation, and ongoing professional development. In addition, costs affiliated with program planning, course development, textbooks, student advising, instructional supports, and transcription add to actual costs per course.

Furthermore, there are salient differences between high school and community college funding formulas, as summarized below by Jim Middleton, a former community college president:

- School districts receive revenue through State funding equalized based on varied local property taxes. Thus, fundamentally, more students means more income; fewer students, less income.
- Community colleges receive revenue both through tuition (approximately 50% on a statewide basis) and State funding equalized based on varied local property taxes. Thus, more students do not necessarily mean more State funding for the community college.
- The current enrollment based funding distribution system calculates College X's percentage of the total state Full Time Equivalent (FTE) enrollment and the college receives that percentage of allocated CCWD Support Fund (increases or decreases are rolled in over three years – 40/30/30%).
- However, should all 17 community college increase (or decrease) enrollment by exactly 10% through Accelerated Learning or some other mechanism, no college would realize any change in State funding.
- Additionally, over the past several years, CCWD has had a State Board-approved enrollment management system that caps the number of funded FTE. This was intended to recognize the decline in revenue per FTE and was designed to diminish the competitive enrollment "race." Under this system, additional enrollment expansion for many colleges has been irrelevant.

> *"Thus, while on face value, there may seem to be a State funding incentive/reward for community colleges to expand Accelerated Learning; in fact, there may be little or no fiscal benefit. In fact, added expense for curriculum alignment, faculty mentoring and other college expenses may exceed any revenue realized."*
>
> Jim Middleton, former president
> Central Oregon Community College

According to the Education Commission on the States, the national trend in accelerated college programs is for the state to provide dual funding to both participating districts and their higher education partners. Although some are concerned that the state is paying twice for dual credit, the undergirding rationale is that rather than paying twice, the state is actually paying early _if_ the course is transferable to the postsecondary institution. For example, when a high school student is enrolled in a Calculus 101 course, the state may be reducing its costs on remedial education costs if taking the college course while in high school helps avoid placement into remedial education later in college. Given that participation in remedial education has increased from 47% to 67% for recent Oregon high school graduates enrolled in community colleges and that students' college persistence and completion decreases based on the level of math and English classes in which students are first enrolled[13], there are compelling reasons for reversing course.

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[13] Hodara (2014) "Oregon HS Graduates at Community College: Developmental Education Participation & Postsecondary Outcomes" Retrieved from http://education.oregon.gov/Documents/OEIBsubs/BP4_8_14matsV2.pdf

Funding Design: A Supposal

A new model of funding is proposed by the Accelerated Learning Committee to address uneven and unsustainable funding models for accelerated learning models that are shortchanging supports and quality assurances. The model applies to the first three (3) college credit-bearing courses that high school students take and is designed to fund a more equitable model of access to college coursework in every Oregon high school, particularly for students in the Opportunity Gap. For AP and IB programs, only feature 8 applies.

1) Districts continue to receive ADM for all students in accelerated learning courses.

2) Postsecondary institutions continue to receive FTE as defined by their current respective budget model for accelerated options in which they partner.

3) For partnering districts and post-secondary providers providing dual credit opportunities a fee agreement is negotiated:
    a. Floor (minimum per-credit charge for any negotiated agreement): Districts directly pay 15% of the per-credit cost to the post-secondary institution when the instructor is provided by the high school.
    b. Ceiling (maximum per-credit charge for any negotiated agreement): Districts directly pay 90% of the per-credit cost to the post-secondary institution when the postsecondary partner provides the instructor.

4) No high school students are charged any tuition or fee for textbooks or materials for the first three courses in which they enroll. Districts and their postsecondary partners can negotiate the students' shared responsibilities beyond the first three courses in which they enroll.

5) For the first 3 college courses that a student completes in an accelerated learning program (excluding IB and AP), additional funding per credit earned is paid by the state to each school district and postsecondary partnership annually. The funding is to be divided evenly between the high school and the postsecondary partners to help fund expenses related to:
    a. Student advising/instructional supports and outreach
    b. Faculty engagement in course and assessment development
    c. Textbooks
    d. State reporting
    e. Teacher tuition for graduate coursework in the content area that qualifies them as dual credit instructors
    f. Periodic calibration of student performance to ensure college rigor of the coursework

6) Two weighting factors apply:

a. An additional amount is paid annually to the school district for the first three accelerated learning credits earned by Opportunity Gap students that is used to:
   i. Develop and offer instructional skill supports for students
   ii. Fund a course that provides an orientation to college
   iii. Expand earlier exposure and advising for students and their families to make choices among available accelerated learning options and create plans for future post-secondary training and life goals
b. An additional amount is paid annually to the school district for the first CTE dual credits earned by students that is used to:
   i. Provide for additional costs of CTE instructional costs
   ii. Pay teacher tuition for coursework that results in CTE licensure

7) Current models of funding still apply to any credits earned beyond the first three courses.

8) Advanced Placement and International Baccalaureate programs would earn an additional amount per student per AP or IB course offered that is to be used for class sets of textbooks and other materials.

9) When adopted for use in Oregon's postsecondary funding models, performance-based elements linked to course completion should apply to the FTE payment to institutions for students in accelerated learning programs.

10) In addition to considering how to create a sustainable funding model, the Accelerated Learning Committee considered three areas of one-time investments that they recommended to the OEIB Outcomes and Investments Subcommittee in June 2014:
   a. One-time seed funds to convene professional learning communities of college faculty, high school instructors and administrators to assess local needs and operationalize offerings for high schools where students have fewer than three college credit-bearing courses available at the high school level. These funds could also be used to develop high quality online courses, supported at the school site, for students in rural and remote areas.
   b. Seed funding to university faculty teams to collaborate on development of online graduate course sequences in Math, Writing and Speech available during the summer for high school instructors seeking to teach dual credit courses in their respective high schools.
   c. Support for OEIB to facilitate a K-12 and postsecondary workgroup to refine and scale up an advising continuum model that helps students make choices among available accelerated learning options and create plans for future post-secondary training and life goals.

Estimated Fiscal Costs

Item Explanation	Amounts
Cost factor $20 per dual credit paid by the state to each high school and postsecondary partnership in addition to existing ADM and FTE	$5,400,000
Additional Weighting Factor of $15 for each dual credit earned assuming 10,000 students (1/3) participating in program represent Opportunity Gap and take a full 9 hours	900,000
Additional Weighting Factor of $10 for each AP/IB credit earned assuming 5,000 students (16%) participating in program represent Opportunity Gap and take a full 9 hours	450,000
Additional Weighting Factor of $10 for each CTE dual credit earned assuming roughly 1/3 of the courses offered will be CTE and 1/3 of the participating 30,000 students participating in the program take an average of one CTE course	300,000
Cost factor of $20 per AP/IB student for textbook costs assuming approximately 20,000 students participating	200,000
Per year additional costs	$7,250,000
Per Biennium	$7,250,000
Strategic Investments	500,000
Total Package	$15,000,000

Scenario Assumptions

$300	Average Oregon Community College tuition cost per three credit course (in state rate for fulltime student based on full carrying load of 45 credits annually) and does not include fees. Tuition rates for universities are higher.
$170	Average Negotiated Price for Accelerated Learning—cost per 3 credit class assuming $60 is the floor and $270 is the ceiling
30,000	Estimated number of students participating in Dual Credit and assuming similar gains based on incremental Dual Credit growth over the last several years
10,000	Estimated number of students participating in AP/IB with some anticipated growth

Program Recommendations from the Accelerated Learning Committee

In addition to the funding models proposed, the Committee offered recommendations that may be included in legislation or interpreted through Oregon Administrative Rules to enhance how Accelerated Learning options are provided in Oregon. These are summarized below:

- Every public high school in Oregon should provide students with the opportunity to:
  - Determine their individual level of College and Career Readiness
  - Access supports that help close College and Career Readiness gaps
- While still in high school, every eligible Oregon student should be able to enroll, at no cost, in at least three transferable college credit bearing classes.

- Priority for additional course offerings should be for core subject areas that an Oregon-based, generally accredited, public institution of higher education accepts towards the requirements of a post-secondary degree or the prerequisites for career and technical education.
- Models of accelerated learning should complement the Common Core State Standards movement with its goals of strengthening rigor and raising expectations.
- Districts should identify and work with postsecondary partners to best meet the needs of the students they are serving.
- Districts should intensify efforts to expand existing AP and IB offerings and enroll more students, particularly those in the Opportunity Gap.
- A statewide equivalency table should be developed to help provide guidance and consistency for approval of high school instructors to teach dual credit courses that also considers demonstrated proficiency in addition to degree qualifications.
- Ongoing professional development that engages high school instructors and postsecondary faculty should not only address course expectations and levels of rigor but engage both partners in understanding more about students' performance as it relates to college course expectations and the new expectations of new state standards.
- Districts and public post-secondary providers should negotiate a per credit rate depending on local conditions, the delivery models, who teaches the course, and other consideration that encompass additional costs of sustainable rigorous implementation.
- A portion of K-12 funding for dual enrollment courses should be directed to the post-secondary partners to support faculty involvement in assuring college rigor even when they are not the instructors of record.
- Partners in accelerated learning programs need to adopt cost saving measures that help address the rising costs of textbooks, including increased use of open source materials. (Higher Education Coordinating Commission 2012 Textbook Affordability Report.)
- Districts need to develop and offer more specific interventions for high school juniors and seniors who are assessed as under-prepared for entry-level, credit-bearing college courses per SAT, ACT or SBAC before they graduate from high school.
- Students who may not see themselves as "college-going" should have access to a college course option that can be taken during the senior year, or earlier, that helps them learn about college rigor, benefits and expectations and supports their navigation of college applications and financial aid procedures.
- Counselors, teachers, and support staff/volunteers should provide early communication and advising that:
  - Helps students learn about options for their future, careers, the education required and how to make plans for future postsecondary training and life goals
  - Conveys the expectation that all students can prepare for the opportunity to attend and be successful in post-secondary education
  - Ensures all students get the same message of high expectations for their future
- ODE and HECC should submit a report every two years to the OEIB, the governor's office, legislative leaders and the State Board of Education on program participation by

high school and postsecondary partners, disaggregated by student demographics and by course type (academic, remedial/developmental education, career and technical).

Next Steps

Senate Bill 222 tasked the Accelerated Learning Committee with examining methods to encourage and enable students to obtain college credits while still in high school.

- A number of specific tasks outlined in Appendix F need to be addressed. Some of these will require additional FTE for personnel to oversee and provide coordination.
- An initial draft of Legislative Concept 274, intended to capture the intent of the Accelerated Learning Committee's recommendations, needs to be further refined and vetted prior to the start of the 2015 legislative session.
- Regular collection and analysis of data across all accelerated learning options will be essential to gain a complete picture of student enrollment patterns across the state.
- To the greatest extent possible, the State Longitudinal Data System needs to incorporate aspects of the data referenced in Appendix G.
- Like any good idea, effective communication is key and will be needed to reach students, parents, instructors, administrators, and potential partners.

77th OREGON LEGISLATIVE ASSEMBLY--2013 Regular Session

Enrolled

Senate Bill 222

Sponsored by Senator HASS, Representatives DEMBROW, READ, Senator BATES; Senators BEYER, STARR, STEINER HAYWARD, Representatives BENTZ, GELSER, JOHNSON (Presession filed.)

AN ACT

Relating to accelerated college credit programs; creating new provisions; amending ORS 329.451 and 341.450; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. (1) The Accelerated Learning Committee is established.

(2) The committee consists of the following seven members:
(a) The Chief Education Officer.
(b) Six members appointed as follows:
(A) The President of the Senate shall appoint two members from among members of the Senate.
(B) The Speaker of the House of Representatives shall appoint two members from among members of the House of Representatives.
(C) The Governor shall appoint two members.

(3) The committee shall examine methods to encourage and enable students to obtain college credits while still in high school. The committee shall emphasize the alignment of funding, assessments and procedures between high schools and post-secondary institutions of higher education to encourage efficiencies and to make post-secondary education more affordable for families.

(4) A majority of the members of the committee constitutes a quorum for the trans- action of business.

(5) Official action by the committee requires the approval of a majority of the members of the committee.

(6) The committee shall elect one of its members to serve as chairperson.

(7) If there is a vacancy for any cause, the appointing authority shall make an appointment to become immediately effective.

(8) The committee shall meet at times and places specified by the call of the chairperson or of a majority of the members of the committee.

(9) The committee may adopt rules necessary for the operation of the committee.

(10) The committee shall submit a report, and may include recommendations for legislation, to the interim legislative committees on education no later than October 1, 2014.

(11) The Oregon Education Investment Board shall provide staff support to the committee.

(12) Notwithstanding ORS 171.072, members of the committee who are members of the Legislative Assembly are not entitled to mileage expenses or a per diem and serve as volunteers on the committee. Other members of the committee are not entitled to compensation or reimbursement for expenses and serve as volunteers on the committee.

(13) All agencies of state government, as defined in ORS 174.111, are directed to assist the committee in the performance of its duties and, to the extent permitted by laws relating to confidentiality, to furnish such information and advice as the members of the committee consider necessary to perform their duties.

SECTION 2. Section 1 of this 2013 Act is repealed on the date of the convening of the 2015 regular session of the Legislative Assembly as specified in ORS 171.010.

SECTION 3. ORS 329.451 is amended to read:

329.451. (1)(a) At or before grade 12, a school district or public charter school shall award a high school diploma to a student who completes the requirements established by subsection (2) of this section.

(b) A school district or public charter school shall award a modified diploma to a student who satisfies the requirements established by subsection (6) of this section, an extended diploma to a student who satisfies the requirements established by subsection (7) of this section or an alternative certificate to a student who satisfies the requirements established by subsection (8) of this section.

(c) A school district or public charter school may not deny a student who has the documented history described in subsection (6)(b) or (7)(b) and (c) of this section the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason that the student has the documented history.

(d) A school district or public charter school may award a modified diploma or extended diploma to a student only upon receiving consent as provided by subsection (5) of this section.

(2)**(a)** In order to receive a high school diploma from a school district or public charter school, a student must satisfy the requirements established by the State Board of Education and the school district or public charter school and, while in grades 9 through 12, must complete at least:

[(a)] **(A)** Twenty-four total credits; [(b)] **(B)** Three credits of mathematics; and [(c)] **(C)** Four credits of English. **(b) If a school district or public charter school requires a student to complete more than 24 total credits, as provided by paragraph (a)(A) of this subsection, the school district or public charter school may only require the student to complete additional credits for:**

(A) Subjects for which the State Board of Education has established academic content standards under ORS 329.045;

(B) Courses provided as part of a career and technical education program; or

(C) Courses that provide, or qualify to provide, credit at post-secondary institutions of education.

(3) A student may satisfy the requirements of subsection (2) of this section in less than four years. If a student satisfies the requirements of subsection (2) of this section and a school district or public charter

school has received consent as provided by subsection (5) of this section, the school district or public charter school shall award a high school diploma to the student.

(4) If a school district or public charter school has received consent as provided by subsection (5) of this section, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

(5)(a) For the purpose of receiving consent as provided by subsections (1)(d), (3) and (4) of this section, consent shall be provided by:

(A) The parent or guardian of the student, if the student: (i) Is under 18 years of age and is not emancipated pursuant to ORS 419B.550 to 419B.558; or (ii) Has been determined not to have the ability to give informed consent regarding the student's education pursuant to a protective proceeding under ORS chapter 125; or

 (B) The student, if the student is 18 years of age or older or is emancipated pursuant to ORS 419B.550 to 419B.558.

(b) For the purpose of awarding a modified diploma or extended diploma as provided by sub- section (1)(d) of this section or of awarding a high school diploma as provided by subsection (3) of this section, consent must be received during the school year for which the diploma will be awarded.

(6) A school district or public charter school shall award a modified diploma only to students who have demonstrated the inability to meet the full set of academic content standards for a high school diploma with reasonable modifications and accommodations. To be eligible for a modified diploma, a student must:

(a) Satisfy the requirements for a modified diploma established by the State Board of Education; and

(b) Have a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers or have a documented history of a medical condition that creates a barrier to achievement.

(7) A school district or public charter school shall award an extended diploma only to students who have demonstrated the inability to meet the full set of academic content standards for a high school diploma with reasonable modifications and accommodations. To be eligible for an extended diploma, a student must:

(a) While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits earned in a self-contained special education classroom and shall include:

(A) Two credits of mathematics; (B) Two credits of English; (C) Two credits of science; (D) Three credits of history, geography, economics or civics; (E) One credit of health;

(F) One credit of physical education; and (G) One credit of the arts or a second language; (b) Have a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers or have a documented history of a medical condition that creates a barrier to achievement; and

(c)(A) Participate in an alternate assessment beginning no later than grade six and lasting for two or more assessment cycles; or

(B) Have a serious illness or injury that occurs after grade eight, that changes the student's ability to participate in grade level activities and that results in the student participating in alternate assessments.

(8) A school district or public charter school shall award an alternative certificate to a student who does not satisfy the requirements for a high school diploma, a modified diploma or an extended diploma if the student meets requirements established by the board of the school district or public charter school.

(9) A student shall have the opportunity to satisfy the requirements of subsection (6), (7) or (8) of this section by the later of:

(a) Four years after starting grade nine; or

(b) The student reaching the age of 21 years, if the student is entitled to a public education until the age of 21 years under state or federal law.

(10)(a) A student may satisfy the requirements described in subsection (6), (7) or (8) of this section in less than four years if consent is provided in the manner described in subsection (5)(a) of this section.

(b) The consent provided under this subsection must be written and must clearly state that the parent, guardian or student is waiving the time allowed under subsection (9) of this section. A con- sent may not be used to allow a student to satisfy the requirements of subsection (6), (7) or (8) of this section in less than three years.

 (c) A copy of all consents provided under this subsection for students in a school district must be forwarded to the district superintendent.

(d) Each school district must provide to the Superintendent of Public Instruction information about the number of consents provided during a school year.

(11)(a) A student who receives a modified diploma, an extended diploma or an alternative certificate shall:

(A) Have the option of participating in a high school graduation ceremony with the class of the student; and

(B) Have access to instructional hours, hours of transition services and hours of other services that are designed to:

(i) Meet the unique needs of the student; and

(ii) When added together, provide a total number of hours of instruction and services to the student that equals at least the total number of instructional hours that is required to be provided to students who are attending a public high school.

(b)(A) The number of instructional hours, hours of transition services and hours of other services that are appropriate for a student shall be determined by the student's individualized education program team. Based on the student's needs and performance level, the student's individualized education program team may decide that the student will not access the total number of hours of instruction and services to which the student has access under paragraph (a)(B) of this subsection.

(B) A school district may not unilaterally decrease the total number of hours of instruction and services to which the student has access under paragraph (a)(B) of this subsection, regardless of the age of the student.

(c) If a student's individualized education program team decides that the student will not access the total number of hours of instruction and services to which the student has access under paragraph (a)(B) of this subsection, the school district shall annually:

(A) Provide the following information in writing to the parent or guardian of the student:

(i) The school district's duty to comply with the requirements of paragraph (a)(B) of this sub- section; and

(ii) The prohibition against a school district's unilaterally decreasing the total number of hours of instruction and services to which the student has access.

(B) Obtain a signed acknowledgment from the parent or guardian of the student that the parent or guardian received the information described in subparagraph (A) of this paragraph.

(C) Include in the individualized education program for the student a written statement that explains the reasons the student is not accessing the total number of hours of instruction and services to which the student has access under paragraph (a)(B) of this subsection.

(d) For purposes of paragraph (a)(B) of this subsection, transition services and other services designed to meet the unique needs of the student may be provided to the student through an inter- agency agreement entered into by the school district if the individualized education program developed for the student indicates that the services may be provided by another agency. A school district that enters into an interagency agreement as allowed under this paragraph retains the responsibility for ensuring that the student has access to the number of service hours required to be provided to the student under this subsection. An agency is not required to change any eligibility criteria or enrollment standards prior to entering into an interagency agreement as provided by this paragraph.

(12) A school district or public charter school shall:

(a) Ensure that students have on-site access to the appropriate resources to achieve a high school diploma, a modified diploma, an extended diploma or an alternative certificate at each high school in the school district or at the public charter school.

(b) Provide literacy instruction to all students until graduation.

(c) Beginning in grade five, annually provide information to the parents or guardians of a student taking an alternate assessment of the availability of a modified diploma, an extended diploma and an alternative certificate and the requirements for the diplomas and certificate.

SECTION 4. (1) The amendments to ORS 329.451 by section 3 of this 2013 Act become operative July 1, 2015.

(2) The amendments to ORS 329.451 by section 3 of this 2013 Act first apply to students graduating on or after July 1, 2015.

SECTION 5. ORS 341.450 is amended to read:

341.450. Every community college district shall encourage high school students to start early on a college education by**:**

(1) Implementing two-plus-two programs and other related programs[. Each community college district shall make] **and making** at least one such program available to each interested school district that is within

the boundaries of the community college district.

(2) Collaborating with interested school districts that are within the boundaries of the community college district to facilitate the delivery of two-plus-two programs and other related programs.

SECTION 6. ORS 341.450, as amended by section 5, chapter 639, Oregon Laws 2011, is amended to read:

341.450. Every community college district shall encourage high school students to start early on a college education by**:**

(1) Implementing a dual credit program, a two-plus-two program or another accelerated college credit program[. Each community college district shall make] **and making** at least one such program available to each interested school district that is within the boundaries of the community college district.

(2) Collaborating with interested school districts that are within the boundaries of the community college district to facilitate the delivery of a dual credit program, a two-plus-two program or other accelerated college credit program.

SECTION 7. This 2013 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2013 Act takes effect on its passage.

In 1997, Oregon Revised Statute 341.450 stated every community college district must make at least one such program available to each interested school district that is within the boundaries of the community college district.

In 2005, the Oregon Legislature passed Senate Bill 342 with the express intent of improving student progress through postsecondary education by encouraging cooperation among the postsecondary education sectors on articulation and transfer alignment statewide to ensure that postsecondary education needs of students are met without unnecessary duplication of courses. Reports on the progress made by education sectors related to SB 342 included:
- AAOT revisions,
- Degree pathways,
- Course transfers for 100 and 200 level courses,
- Use of a statewide online degree audit program (ATLAS),
- Adoption of statewide standards for awarding credit for AP and IB exam scores,
- Use of the National Alliance of Concurrent Enrollment Partnerships accreditations standards for Oregon's Dual Credit programs, and
- Expansion of Early College Programs.

Oregon Revised Statutes 340.005 to 340.090 spelled out details intended to:
(1) Create a seamless education system for students enrolled in grades 11 and 12 to:
    (a) Have additional options to continue or complete their education;
    (b) Earn concurrent high school and college credits; and
    (c) Gain early entry into post-secondary education
(2) Promote and support existing accelerated college credit programs, and support the development of new programs that are unique to a community's secondary and post-secondary relationships and resources.
(3) Allow eligible students who participate in the Expanded Options Program to enroll full-time or part-time in an eligible post-secondary institution.
(4) Provide public funding to the eligible post-secondary institutions for educational services to eligible students to offset the cost of tuition, fees, textbooks, equipment and materials for students who participate in the Expanded Options Program.
(5) Increase the number of at-risk students earning college credits or preparing to enroll in post-secondary institutions. [2005 c.674 §2; 2011 c.456 §1]

In 2007, SB 23 was passed creating new provisions related to the Expanded Options Program and amending ORS 340.005, 340.015, 340.025, 340.030, 340.037, 340.045 and 340.065 to support high school students' early entry into postsecondary studies for dual credit by providing public funding to the postsecondary institutions to offset the cost of tuition, fees, textbooks, equipment and materials for students who participate in the program. Postsecondary institutions receiving state funds for participating students were not permitted to charge students any tuition or fees, and the postsecondary and secondary institutions were to negotiate a financial agreement to cover the actual instructional costs. The law required that all high school students and their parents

were to be informed of the program, and outreach to dropouts was emphasized. The law also sets some limits on the amount of time students may participate and on the number of credit hours awarded to students at any one high school (330 for a school of 1000 students). The Oregon Department of Education was asked provide an annual report on the Expanded Options Program to the Joint Boards of Education and the House and Senate committees relating to education. House Bill 3160 required districts to apply for waivers if they were not offering this option based on financial hardship or other program offerings.

In 2011, SB 254 was passed to promote additional accelerated learning opportunities and create an Accelerated College Credit Account in the state Treasury seeded with $250,000 biennially administered by the Oregon Department of Education to award grants to school districts, community colleges, and four-year institutions supporting:

- Education or training for teachers to provide instruction in accelerated college credit programs,
- Assisting students in costs for books, materials and other costs and fees, and
- Paying for classroom materials.

The bill also allowed for waivers from school districts that could document adverse financial impact or that could document that at-risk students participating in accelerated college credit programs were not required to make any payments and that there was a process for participation that allowed all eligible at-risk students to participate.

Of particular interest, SB 254 specified that starting in 2014-2015, every school district is to:
a. Provide students in grades 9 through 12 with accelerated college credit programs including, but not limited to, accelerated college credit programs related to English, mathematics and science; or
b. Ensure that students in grades 9 through 12 have online access to accelerated college credit programs including, but not limited to, accelerated college credit programs related to English, mathematics and science.

Also in the 2014-2015 year, all community colleges are to implement at least one accelerated college credit program available to each school district within its boundaries (ORS 341.450). The Superintendent of Public Instruction is charged with ensuring that each high school that provides access to accelerated learning options in three or fewer subjects is contacted annually by the department and provided with information about ways they can offer or provide access to accelerated learning options (ORS 340.305).

Appendix C: Invited and Public Testimony

Accelerated Learning Committee Meetings October 2013-September 2014

- Randy Spaulding, Director of Academic Affairs and Policy,
  - Washington Student Achievement Council
- Jim West, Associate Director, Academic Affairs and Policy
  - Washington Student Achievement Council
- Noreen Light, Associate Director, Academic Affairs and Policy,
  - Washington Student Achievement Council
- Matt Gianneschi, Vice President of Policy and Programs
  - Education Commission of the States
- Margaret DeLacey
  - Oregon Association for Talented and Gifted
- Sally Hudson, Director
  - Portland State University Challenge Program
- Craig Hawkins, Executive Director
  - Confederation of School Administrators
- Shelley Berman, Superintendent
  - Eugene School District
- Gerald Hamilton, Interim Executive Director
  - Oregon Department of Community Colleges and Workforce Development
- Marla Edge, Committee Chair of Dual Credit Oversight Committee
  - Director of Academic Agreements and Articulations, Oregon Institute of Technology
- Andrea Henderson, Executive Director
  - Oregon Community College Association
- Mark Mulvihill, Superintendent
  - InterMountain Education Service District
- Don Domes, Dual Credit High School Instructor in Engineering and Technology
  - Hillsboro High School
- Traci Hodgson, President - Faculty Association
  - Chemeketa Community College
- Shay James, Principal
  - Franklin High School
- Richard Donavan, Committee Administrator
  - Oregon State Legislature
- Elizabeth Cox-Brand, Research and Communication Director
  - Oregon Department of Community Colleges and Workforce Development
- David Edwards, Director of Policy
  - Oregon Education Investment Board
- Laura Paxton Kluthe, Social Studies teacher
  - Lake Oswego High School

Appendix D: Summary of Feedback on Accelerated Learning Committee Concepts

<u>Confederation of School Administrators Summer Institute- June 20, 2014</u>

a. Pluses—
- Time & tuition savings for students,
- Increases likelihood in graduating from High School & on to college
- Needs to be available statewide
- Like that there is a plan for funding and structure for implementation
- Begins good discussion on rigor, gaps, assessment, etc.
- Helps close achievement gap

b. Concerns/Questions
- Needs to include CTE focus
- Need to make sure students can succeed
- Need equity of resources statewide
- What will happen for students not ready for college courses
- Need clearer curriculum articulation between High School & beyond
- Will this dilute K-12 ADM
- Make sure there are enough qualified instructors
- Need to make sure that courses transfer
- Does this nullify existing agreements between K-12 & postsecondary

<u>OEIB Outcomes and Investments Subcommittee presentation June 12, 2014</u>

- Interest in what courses make the most sense
- Why not just offer the courses online
- What about technical colleges and courses
- Would like to see Return on Investment
- What will be different in 10 years?

<u>OEA and AFT faculty meeting -- July 23, 2014</u>

- Focus on faculty leadership/input with a focus area specifically on ALC
- Agreement on two key issues: Transfer issue and quality of courses
- Concern that there are many college instructors who are not fully employed who would be willing to teach—TSPC licensure issue
- Additional work load issue for faculty
- Need for a minimum and maximum set of criteria for instructor qualifications for courses offered to high school students
- Questions about Eastern Promise instructor approval model
- Four members will be working with OEIB on draft of chart to bring back to next meeting.
- Frank Goulard is surveying current instructor qualifications for Biology 101,102,103, Math 111, 112, Speech 111, Wr121
- Majority approved to move forward with this discussion

Appendix E: Sample Equivalency Chart for High School Instructor Approval Process

This chart proposes sample equivalencies, some of which are already used by community college in Oregon, to determine a high school instructor's qualifications for teaching a dual credit course.

Bachelor's	**plus**	Masters in subject area	**plus**	College approval		
Bachelor's	**plus**	XX graduate credit hours in subject area	**plus**	College approval		
Bachelor's	**plus**	An education related Masters	**plus**	XX sem. Hrs./XX qtr. Hrs. in content area	**plus**	College approval
Bachelor's in Subject Area	**plus**	An education related Masters	**plus**	Successful teaching experience teaching at college level.	**plus**	College approval
Bachelor's	**plus**	An education related Masters	**plus**	XX sem hrs/XX qtr hrs earned through professional development offered by IHE related to content being taught	**plus**	College approval
Bachelor's	**plus**	Master of Arts in Teaching	**plus**	High score on Praxis or NES content test AND One term of successful co-teaching of the course	**plus**	College approval

Appendix F: Key Tasks

The following key tasks are necessary to develop the Accelerated Learning Options as conceived. It is expected that agencies will involve engagement from both high school and postsecondary communities to ensure input on these tasks.

Category/Task	Collaborating Agencies
Program Basics	
Create job---embedded, targeted professional development opportunities for districts and postsecondary institutions on course outcomes and assessments and which help qualify more high school teachers for dual credit instruction	CCWD, ODE, HECC, OEIB
Develop a policy that specifies under which conditions remedial or developmental education courses qualify for both high school and post---secondary credit and when they do not	ODE, CCWD, SBE, HECC
Urge Oregon's congressional delegation to revise qualifications for E---Rate program funding to allow post---secondary institutions working directly with districts on the delivery of dual credit courses to benefit from the program's discounted Internet and telecommunications infrastructure options	Governor's office, OEIB, HECC
Access	
Develop and share a statewide equivalency chart of acceptable qualifications and waivers for qualifying high school instructors	ODE, CCWD, HECC, SBE
Create a concordance table to show placement test cut---score equivalencies	CCWD, SBE, HECC, CIA
Develop print and online program guides for students and their families and incorporate information into students' individual plans	ODE, CCWD, HECC
Create a student counseling model that ensures students and families receive the most appropriate advice re: program participation, transferability, etc.	ODE, DCOC, CSSA, CCWD
Establish funding guidelines and oversee appropriation distribution	HECC, SBE, ODE, CCWD
Program Quality	
Assure course quality using recognized guidelines such as those established by NACEP, the Dual Credit Oversight Committee, and the Revised Oregon Dual Credit Standards	ODE, CCWD, HECC, SBE, College and HS faculty, CIA
Transferability	
Update and maintain a first year transfer guide and communicate to students and families which key academic dual credit course sequences and regionally appropriate (CTE) courses transfer to which postsecondary institutions.	ODE, CCWD, HECC, OED, JBAC
Institutional Reporting Requirements	
Develop biennial state reports on student progress outcomes across options.	HECC, SBE, OEIB
Strategic Investments	
Draft strategic investment guidelines for scaling up a blended advising model, developing accessible statewide online dual credit course materials, and creation of more professional development opportunities for high school teachers seeking dual credit qualifications (either through PLC work or online graduate coursework).	OEIB w/partners from state agencies, K-12, IHEs, and community partners

KEY: OEIB---Oregon Education Investment Board, ODE---Oregon Department of Education, CCWD---Division of Community Colleges and Workforce Development, HECC---Higher Education Coordinating Council, SBE---State Board of Education, JBAC---Joint Board Articulation Committee, DCOC---Dual Credit Oversight Committee, SBHE---State Board of Higher Education, CIA-Council of Instructional Administrators, CSSA---Council of Student Services Administrators, OED---Oregon Employment Division

Appendix G: Proposed Reporting Requirements

Each biennium, the Oregon Department of Education and the Higher Education Coordinating Commission would submit a report to the governor's office, legislative leaders, State Board of Education and Higher Education Coordinating Commission that includes:

- The number and names of districts and post-secondary institutions that have entered into cooperative service agreements for accelerated college offerings;

- The number of accelerated college instructors by content area and type, e.g., qualified high school teacher or college faculty;

- The number of students who participated in an accelerated college program, including subtotals for each district and postsecondary institution, along with their course grades and grade point average (GPA) to date;

- The total number of accelerated college students in the aggregate and disaggregated by student demographics and by course type;

- The total number of credit hours in which students enroll and in which programs (including IB and AP);

- Enrollment to completion ratios by district and postsecondary institution, course type (academic, remedial/developmental education, career and technical), instructor type (qualified high school instructor vs. adjunct faculty) and delivery method (in-person vs. online);

- A general narrative on the types of courses or programs in which students were enrolled, with particular attention to online offerings;

- Any new or revised courses introduced into the Oregon Transfer Model; and

- Program costs in the aggregate and disaggregated by district and postsecondary institution, course type and delivery method.

- Summaries of course and instructor evaluations

Program accountability at the state level would also include biennial studies of outcomes including:
- Impact of options on high school completion
- Academic achievement and performance of participating students
- Impact of options on subsequent enrollment in postsecondary education
- Academic achievement/performance of students who continue in postsecondary programs with comparisons to non-accelerated students
- Impact of options on completion of college certificates or degrees

Oregon Public University Council

Post Office Box 751   503-725-4411
Portland, OR 97207

EASTERN OREGON UNIVERSITY

Oregon TECH

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Portland State UNIVERSITY

SOU
Southern OREGON UNIVERSITY

O | UNIVERSITY OF OREGON

Western Oregon UNIVERSITY

To: Chair Arnie Roblan and Members of the Senate Committee on Education
From: The Provosts of Oregon's Public Universities
Subject: Senate Bill 84
Date: February 24, 2015

Dear Chair Roblan and Members of the Committee,

Oregon's Public Universities support SB84, and will work together with our high school and community college partners to ensure that all Oregon students have access to accelerated college credit before they leave high school. We are all aware of the many benefits of accelerated credit in terms of student preparation, matriculation, and affordability. In addition to offering dual credit, many of our universities are actively engaged in strategic partnerships, such as STEM Hubs and Promise Initiatives that have advanced accelerated credit for many years. We welcome the state's support for this important work.

In the spirit of collaboration, we'd like to offer some suggested clarifications or amendments to SB84.

Section 1: **Include "credit by exam programs" in the definition of "accelerated college credit programs."** Project Lead the Way is an example of a credit-by-exam program where students can complete a class, demonstrate proficiency through an exam, and receive college credit.

The public universities believe that "credit by exam programs" should be explicitly included in the definition, along with AP and IB programs.

Section 2, Subsection 4 and Section 5, Subsection 1(d): Allowable cost of programs. The expenses of some universities for accelerated credit programs may exceed the range of the maximum established by the HECC.
The public universities seek clarity on whether the minimum and maximum limits have been established while taking into consideration their costs for offering the programs. Higher cost programs at some institutions may make them unattractive to students who have lower cost alternatives; however some students may prefer to select a higher cost program due to the level of support services, convenience or other market factors.
Section 2, Subsection 3 (A): Online limitations. This section provides that an accelerated credit course may not be provided exclusively online.

The public universities support encouraging students to take on-site courses, but rural students may be

Eastern Oregon University
President Jay Kenton

Oregon Institute of Technology
President Chris Maples

Oregon State University
President Ed Ray

Portland State University
President Wim Wiewel

Southern Oregon University
President Roy H. Saigo

University of Oregon
President Scott Coltrane

Western Oregon University
President Mark Weiss

disadvantaged if online courses are excluded from their options. Nationally, many dual credit programs utilize on-line delivery.

Section 5, Subsection 1 (b): **Standards for faculty.** Directs the HECC, in consultation with the State Board of Education, to provide standards for how faculty will collaborate with teachers on the alignment of course content, objectives and outcomes.

The public universities are working collaboratively with hundreds of teachers who are qualified to teach accelerated credit courses. The process of meeting, alignment course outcomes, and conducting ongoing mentoring is well-developed and collaborative in nature.   This relationship does not require regulatory oversight, and may result in contract issues for both post-secondary and secondary teachers. We respectfully ask for this provision to be deleted from the bill.

Section 5, Subsection 1 (c): **Process for approving teachers applies to all institutions.** Directs the HECC, in consultation with the State Board of Education, to develop a process for post-secondary institutions to follow for approving teachers who are qualified to teach dual credit, and

Section 5, Subsection 1 (c) (A): will result in the same outcomes, regardless of the approving post-secondary institution.

Each public universities has a process for approving teachers, in alignment with its program accreditation and institutional accreditation standards. In fact, the post-secondary institutions have more flexibility to approve qualified teachers than community colleges, because the standards are not in statute and are based on an analysis of teacher experience, educational background, course content, and other factors. Each institution must work with its faculty and its accrediting agencies, and establish a culture of collaboration and support for accelerated credit. We respectfully request that both of these subsections be deleted from the bill.

We fully support the intent of SB84 and are interested in discussing how our suggestions for amendments can be incorporated into the bill.

Sincerely,

Dr. Sona Andrews
Provost and Vice President for Academic Affairs
Portland State University
sona.andrews@pdx.edu

Dr. Frances Bronet
Acting Senior Vice President and Provost
University of Oregon
fbronet@uoregon.edu

Bradley Burda
Provost and Vice President of Academic Affairs
Oregon Tech
Bradley.Burda@oit.edu

Dr. Sabah Randhawa
Provost and Executive Vice President
Oregon State University
Randhawa@oregonstate.edu

Dr. Steven Scheck
Provost and Vice President for Academic Affairs
Western Oregon University
schecks@wou.edu

Dr. Susan Walsh
Provost and Vice President for Academic and Student Affairs
Southern Oregon University
walsh@sou.edu

Dr. Sarah Witte
Interim Provost and Senior Vice President for Academic Affairs
Eastern Oregon University
switte@eou.edu

CC:
Hilda Rosselli, Deputy Director, College and Career Readiness, OEIB
Salam Noor, Director of Academic Planning and Policy, HECC
Dana Richardson, Deputy Director for Policy and Legislative Affairs, HECC

COMMUNITY COLLEGES AND WORKFORCE DEVELOPMENT

WORKSOURCE OREGON

OREGON DEPARTMENT OF **EDUCATION**

Oregon Dual Credit
Program Approval and Renewal

Guide and Procedures

Revised, Dual Credit Oversight Committee: November 4, 2014

Approved, Dual Credit Oversight Committee:

Approved, Student Success and Institutional Collaboration Subcommittee:

Approved, Higher Education Coordination Commission:

Table of Contents

PART 1: GENERAL OVERVIEW OF PROGRAM RENEWAL

Purpose

The purpose of the Oregon Dual Credit Program Approval and Renewal Guide is to provide a tool for use by college/university staff. This document identifies the essential processes and information required to meet the Higher Education Coordinating Commission standards for a Dual Credit Program in Oregon. Dual credit is defined as awarding secondary and postsecondary credit for a course offered in a high school during regular school hours, as determined by local school board and community college/university board policy.

In 2005, the Legislature passed Senate Bill 342 with the express intent of improving student progress through postsecondary education by encouraging cooperation among the postsecondary education sectors on specific alignment initiatives. The Joint Boards of Education created a framework for all of the alignment work and used its Unified Education Enterprise subcommittee to fulfill the requests in SB 342 and other alignment efforts identified by leadership. The Dual Credit Standards and the Program Approval Process were established in response to the requirements of Senate Bill 342. See "Recommendations for Improving and Expanding Dual Credit Programs," a motion approved by the Joint Boards of Education in 2009, for additional background information.

Following a revision in the national standards to which Oregon Dual Credit Standards are benchmarked, the standards were revised and were adopted in June 2014 by the Higher Education Coordinating Commission (HECC). HECC assumed the role of the Joint Boards in statute in 2012.

The Oregon Dual Credit Program Approval and Renewal Process provides for a programmatic self-study to demonstrate continuing assurance that the Oregon Standards are being met and to document program changes since initial program approval.

The Unified Education Enterprise (UEE) recommends that the Joint Boards of Education endorse the state standards proposed by the Dual Credit Task Force and adopt a workplan for implementing these standards.

Oregon's Dual Credit programs create the opportunity for our students to take college-level courses while still in high school. The Dual Credit Task Force found that, in 2005-06, one in seven Oregon juniors and seniors took advantage of this opportunity, saving some $9 million in tuition. Through its pilot analysis of the subsequent academic performance of these students, the Task Force also found that "in most cases, Dual Credit students match or outperform their college-prepared counterparts in both community college and university settings."

Thus, Dual Credit is currently a viable option for qualified students to begin post secondary learning early, and it can contribute significantly to meeting Oregon's 40-40-20 goal. As Dual Credit programs grow, it is important to have a consistent set of standards and ways to ensure the standards are met. This is the impetus for adopting the attached Oregon Standards for Dual Credit/"College Now" Programs (Appendix A). Guided by those standards over the next 5 years, the Task Force specifically recommends

1. **Strengthening faculty connections**
   - Regular, collegial interactions between high school faculty and their counterparts at sponsoring colleges and universities are key to the success of these programs. Such interactions characterize some programs already, but they need to be developed and maintained throughout the state.

   - The pool of high school teachers qualified to participate in Dual Credit programs should be expanded.

2. **Adopting systematic application and review processes for Dual Credit programs**
   - A standardized application process for new programs is needed

   - Individual programs should take advantage of system-level (CCWD and OUS) studies of the subsequent academic performance of Dual Credit students. These biennial studies, which were piloted in AY2007-08, will be supplemented on the "off year" by more focused analyses of questions or trends that emerge from the data (for example: persistence of dual credit students in math or writing).

   - A sustainable means for verifying program quality is needed.

3. **Enhancing public understanding of Dual Credit programs**
   - Dual Credit programs should be continued and effectively publicized. They should be recognized as one of the key paths for academic acceleration.

   - Evidence of best practices and student success should be gathered systematically and shared regularly – both with faculty in the programs and with the public.

The Dual Credit Oversight Committee and Guiding Principles

The Dual Credit Oversight Committee implements the program application and certification process for Oregon's dual credit programs to align with the Oregon Dual Credit Standards. The Oregon standards are based upon the National Alliance of Concurrent Enrollment Partnerships (NACEP) accreditation standards. The committee is comprised of administrators, faculty, and program coordinators from Oregon's high schools, community colleges, and public universities/colleges (Appendix B). The committee is guided by the following principles:

Oregon's dual credit programs:
- Focus on transitioning college-ready students into a postsecondary education program by providing college credit that is intentional, programmatically coherent, and fits individual needs of the students

- Assist Oregon's high schools, community colleges, and public universities/colleges in meeting the postsecondary attainment goals of the state (40-40-20)

- Have potential to build broader curriculum alignment from high schools through community colleges and Oregon universities

- Are sustainable and add value to the campus

- Help to facilitate smooth transitions for students in accelerated learning options to a postsecondary institution through transcripted college credit which is expected to be transferable consistent with policies regulating standard Lower Division Collegiate and Career Technical Education courses in public postsecondary institutions in Oregon and many other institutions in and out of state

- Provide an authentic college-level experience as a result of clearly implemented standards

- Build upon other accelerated college credit options or Carl Perkins initiatives and use data gathered at the local and statewide level to assess delivery and improvement

Specifically, the program approval and renewal process:
- Is evidence-based (uses data)

- Builds feedback for continuous improvement

- Promotes improved communication between all stakeholders

- Should result in consistent messages about dual credit to all stakeholders (students, parents/guardians, teachers, counselors, administrators, policymakers, business, media, etc.)

- Is intended to be a process that does not create undue burden and is not cumbersome or expensive

- Helps to ensure alignment, consistency and quality in curriculum, outcomes and grading in courses offered

QUICK REFERENCE ON PROGRAM APPROVAL AND RENEWAL

The Higher Education Coordinating Commission (HECC), Oregon Department of Education (ODE), and Oregon Department of Community Colleges and Workforce Development (CCWD) will provide results to local programs upon completion of the program evaluation.

Adjustments to the Program Renewal Process will be made on an as-needed basis for colleges or universities who did not receive initial Dual Credit Program approval in 2010-2014.

Program Submission for Approval and Renewal Timeline

Starting in 2016, applications for approval of program renewal will be submitted by colleges and universities to the Oregon Dual Credit Oversight Committee (DC-OC). Programs are expected to be reviewed and reapproved within six years of their initial approval (see Appendix F). CCWD and ODE provide staffing to the DC-OC for all Oregon public postsecondary programs. Note: Programs which are NACEP accredited are regarded as having met the Oregon Dual Credit Standards and are exempt from this process.

Programs which were provisionally approved in 2014 or earlier are expected to resubmit for Program Approval in accordance with the calendar below in 2015. Beginning in 2016, this calendar will guide the Program Renewal Process for all programs.

May 1:	Program application due
May-July:	Staff review, prescreen and preparations for Oregon Dual Credit Oversight Committee review
August:	Oregon Dual Credit Oversight Committee (DC-OC) meets to review the submitted programs and to provide recommendations for resubmission or forwarding of program to the Higher Education Coordinating Commission for review/approval.
	A representative from the program under review will be expected to meet with the DC-OC to discuss the program renewal application and to provide clarification as needed. Coordinators from other institutions may be invited to observe.
	Members of the DC-OC whose programs are under review will not evaluate their own programs.
August 30:	Programs will be notified of the committee's recommendations.
September:	Following the notification of programs, the committee's recommendations for approval will be carried forward to the Higher Education Coordinating Commission's Student Success and Institutional Collaboration Subcommittee.

Dual Credit Program Renewal Applications should be addressed to:

Lisa Reynolds
Community College Education and Workforce Specialist
Oregon Department of Community Colleges and Workforce Development
255 Capitol Street NE, 3rd Floor
Salem, OR 97310
Lisa.Reynolds@state.or.us

(503) 947-2427

CCWD/ODE Staffing			
Title	**Name**	**Telephone Number**	**E-mail address**
CCWD Director: Education Division	Shalee Hodgson	(503) 947-2409	*shalee.l.hodgson@state.or.us*
CCWD Education Specialist-Dual Credit	Lisa Reynolds	(503) 947-2427	*Lisa.Reynolds@state.or.us*
ODE Education Specialist- Dual Credit	Reynold Gardner	(503) 947-5615	*reynold.gardner@state.or.us*

KEY ELEMENTS

The Program Approval and Renewal Application

The Program Approval and Renewal Application form provides the content for review and approval to the Department of Community Colleges and Workforce Development specialist to be submitted to the Oregon Dual Credit Oversight Committee. The submitted Program application is expected to include a concise and comprehensive overview of how the program meets the approval standards and provide samples of evidence.

Program Summary

The program summary is a brief overview of the program, e.g., the size, scope and quality. A summary narrative and Program Fact Sheet provide a succinct introduction to the program and its components.

Program Standards

The Oregon Dual Credit Standards were developed in collaboration with community college representatives, university representatives, and secondary school representatives with Oregon Department of Education and Department of Community Colleges and Workforce Development staff. The current standards were revised in 2013-14 and adopted by the Higher Education Coordinating Commission in June 2014 to help assure the establishment of a quality program and to comply with Oregon Revised Statute 340.310 (Appendix D). The standards provide broad expectations for program design, implementation, management and continuous improvement. The Oregon Dual Credit Standards were informed and are heavily influenced by the national norms set by the National Alliance of Concurrent Enrollment Partnerships. The standards are also aligned with Oregon Administrative Rule 589-007-0200 (Appendix C).

Required Elements

Essential to the success of a Dual Credit program are both documentation of policies and procedures as well as a commitment to activities that support the professional development of stakeholders in the Dual Credit program. The combination of Documentation/Evidence and Program Highlight responses

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provides the information necessary to create an overview of the Dual Credit program. After initial staff review, the information is presented to the Dual Credit Oversight Committee to affirm that the Dual Credit program standards have been met. As part of the approval process, the submitting Coordinator will meet with the Oversight Committee to discuss the program application. Upon approval the DC-OC will make an approval recommendation to the Higher Education Coordinating Commission. Materials should be submitted or linked electronically.

Documentation/Evidence elements include:

- Dual credit program manual, guidebook, handbook, etc.
- Dual credit program student handbook, guidebook, etc.
- At least three examples of course outline, course description, and course syllabus pairs (including both secondary and post-secondary documents to demonstrate comparability of the courses). The examples must be drawn from different departments within the college/university; if the institution's Dual Credit program includes Career Technical Education and Lower Division Collegiate courses, both should be represented.
- At least three examples of materials from general program orientation and faculty to faculty meetings/discipline specific training, within the past academic year (e.g. agendas, presentation slides or handouts, worksheets, notes, etc.)
- Examples of communications about the Dual Credit program or course sent to students, families, and high school staff as specified.
- Examples of course evaluations and reports
- Additional documents generated, collected, or used by the program for accountability purposes (e.g. student surveys, program evaluations, evidence of student achievement of learning outcomes, etc.)

Guiding Questions

Questions have been provided to assist in interpreting the meaning and implications of the standards and elements. These are the kinds of inquiries the Dual Credit Oversight Committee will investigate during program renewal review.

Program Highlights

Program Highlights are concise, bulleted statements which describe the program in relation to the standards, elements and questions. The CCWD staff can provide guidance in determining the information that best describes the program. These statements will become the essential descriptive content of the program application.

Assurances and Signatures

The chief academic officer assures that all state and federal requirements have been met and that the program is expected to meet the HECC approval standards for quality.

PART 2: PROGRAM APPROVAL AND RENEWAL APPLICATION

Complete the following information for initial program approval or subsequent renewal. The boxes will expand. Information added to the Program Highlights boxes should be provided as brief statements pointing to key information in supporting documents. This information may also point to promising practices.

The Guiding Questions are intended to be used as a framework for submissions. They are provided so that applicants may see the criteria by which the Dual Credit Oversight Committee will analyze submissions. Be sure to provide evidence to affirm the information outlined.

Program Summary
Name of college/university: Name of Program: Program coordinator and contact information: Summary narrative of program. Include Program Fact Sheet with courses, enrollment, # students, # of schools, etc. If applying for renewal, highlight in the narrative any significant program changes since initial approval.:

Curriculum 1 (C1)	College or university courses administered through a Dual Credit Program are catalogued courses and approved through the regular course approval process of the sponsoring college or university. These courses have the same departmental designation, number, title, and credits as their college counterparts, and they adhere to the same course descriptions.

Required Elements	• **Dual Credit Program Manual** - hyperlink to/ page number of
	   a. Page number of the manual which contains detailed instructions on articulated course approval procedures.
	   b. Page number of the detailed sample course description.
	   c. Page number of the explicit expectations concerning procedures relating to textbooks, curriculum alignment, course outcomes, etc.
	• **Course catalog** - hyperlink to online catalog
	• Comprehensive list of all **courses offered through the Dual Credit Program**, identified by course prefix and number, title. List should include descriptions that are publicly available from the college or university.

Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Where are the courses cataloged? Does the comprehensive list of courses include required elements? 2. Does the program manual contain detailed instructions on articulated course approval procedures? 3. Does the program manual include a detailed sample course description? 4. Are procedures for textbook, curriculum alignment, course outcomes, etc. explicit in the program manual?
Program Highlights	Summary narrative of the program highlights and significant changes for C1:
Curriculum 2 (C2)	College or university courses administered through a Dual Credit Program are recorded on the official academic record for students at the sponsoring college or university.
Required Elements	• **Program Manual**: Hyperlink to/ page number of transcript policies, including specifications on student access to transcripts. • **Student Handbook**: Hyperlink to/ page number of transcript policies, including specific guidance on accessing transcripts. • **Sample communication** to students/families

Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. How are courses transcripted? 2. Do students receive a transcript or have access to view transcript online? 3. Are transcript policies identified in a student handbook? 4. Are transcript policies explained to students? Are they made aware of the college grading policies and the possibility of "D" or "F" on their college transcript?
Program Highlights	Summary narrative of program highlights and significant changes for C2:
Curriculum 3 (C3)	College or university courses administered through a Dual Credit Program reflect the pedagogical, theoretical and philosophical orientation of the college's or university's sponsoring academic departments.
Required Elements	• **Documentation of training / orientation** provided to the high school teachers as they strive to meet the college/university pedagogical, theoretical and philosophical orientation. Could include presentation slides or handouts, worksheets, agendas, notes, etc. • At least **three examples of matching course syllabi** (3 each from secondary and postsecondary and must be from different departments within your college/university) • Instructions for course submission and approval process (hyperlink/page # in the **Program Manual**).
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Are course policies, recommendations, etc. outlined in the program manual? 2. Are course learning outcomes clearly stated? 3. Are syllabi clear and concise? Are they in college's accepted format (including student responsibilities, grade requirements, assessment criteria, etc.)? Are examples included in the program manual?
Program Highlights	Summary narrative of program highlights and significant changes for C3:

Faculty 1 (F1)	Instructors teaching college or university courses through Dual Credit meet the academic requirements for faculty and instructors teaching in the college or university.
Required Elements	• **Program Manual**: Institution's approval standards and procedures for instructors. • **Sample Communications** with instructors.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Are approval standards and procedures for instructors clearly stated in Program Manual? 2. Are instructors formally notified of approval status? 3. Are there provisional and/or alternative instructor approval processes? If so, what are they? <u>Describe any significant changes in the past five years.</u>
Program Highlights	Summary narrative of program highlights and significant changes for F1:
Faculty 2 (F2)	The college or university provides high school instructors with training and orientation in course curriculum, assessment criteria, course philosophy, and Dual Credit administrative requirements as part of certifying the instructors to teach the college or university courses.
Required Elements	• **Documentation of training / orientation** that is provided to the high school teachers as they strive to meet the College or university pedagogical, theoretical and philosophical orientation. Could include presentation slides or handouts, worksheets, agendas, calendars, attendance rosters, notes, etc. for orientation training and articulation meetings.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Does program manual clearly include details about faculty orientation and expectations? 2. Are orientation, training, articulation meetings, etc. regularly scheduled between secondary and post-secondary faculty? 3. <u>Describe any significant changes in the past five years.</u>
Program Highlights	Summary narrative of program highlights and significant changes for F2:

Faculty (F3)	Instructors teaching Dual Credit sections are part of a continuing collegial interaction through professional development, seminars, site visits, and ongoing communication with the college's or university's faculty and Dual Credit administrators. This interaction must occur at least annually and address issues such as course content, course delivery, assessment, evaluation, and professional development in the field of study.
Required Elements	• **Documentation of training / orientation** that is provided to the high school teachers as they strive to meet the College or university pedagogical, theoretical and philosophical **orientation from at least three different disciplinary areas.** Could include presentation slides or handouts, worksheets, agendas, calendars, attendance rosters, notes, etc. which exemplify professional development practices.
Guiding Questions	*Identify the page number and/or* <u>*provide direct reference to the relevant evidence*</u> *respective to each guiding question.* 1. Are articulation meetings regularly scheduled? 2. Do secondary instructors have access to postsecondary colleagues on an "as needed" basis? 3. Do postsecondary faculty members conduct site visits to secondary programs? 4. Is further professional development (seminars, workshops, etc.) available to ensure educational alignment, in addition to collegial meetings (if so, describe)? 5. <u>Describe any significant changes in the past five years.</u>
Program Highlights	Summary narrative of program highlights and significant changes for F3:
Faculty 4 (F4)	Dual Credit Program policies address instructor non-compliance with the college/university's expectations for courses offered through the Dual Credit Program (for example, non-participation in Dual Credit Program training and/or activities).
Required Elements	• **Program Manual:** Includes expectations for instructor participation. • **Sample Communications** which address instructor non-compliance.
Guiding Questions	*Identify the page number and/or* <u>*provide direct reference to the relevant evidence*</u> *respective to each guiding question.* 1. Upon approval, is the Dual Credit instructor aware of program participation requirements? 2. What is the dismissal process (including timeframe)?

	3. Are stakeholders informed of the potential impact of instructor non-compliance?
Program Highlights	Summary narrative of program highlights and significant changes for F4:
Students 1 (S1)	The college or university officially registers or admits Dual Credit Program students as degree-seeking, non-degree seeking, or non-matriculated students of the college or university and records courses administered through a Dual Credit Program on official sponsoring college or university transcripts.
Required Elements	• **Student Handbook**: Where and how do students get information concerning student enrollment status? • **Sample enrollment communications** with students.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Is the status of a dual credit student clearly detailed in a student handbook (including grading, registration, important dates, etc.)? 2. Do students receive information about the institution beyond a handbook (e.g. a letter confirming completion, etc.)? 3. Are students issued an identification number? Which campus services are they allowed to access? If none, why not? 4. Are samples of all appropriate forms available in the student handbook?
Program Highlights	Summary narrative of program highlights and significant changes for S1:
Students 2 (S2)	Colleges or universities outline specific course requirements and prerequisites for students.
Required Elements	• **Student Handbook:** Where do students get information concerning expectations to meet college course requirements? • **Program Manual:** Course policies and procedures for dropping, withdrawal and incomplete grades identified. • **Sample communications** with students. • **Placement assessments and/or placement process** for students in Dual Credit courses.
Guiding	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.*

Questions	1. Where are prerequisites and course requirements clearly detailed? (e.g. syllabi,course catalog, student handbook, other online resources) 2. Are expectations and procedures for student placement testing consistent and clearly stated in the student handbook (where applicable)? 3. Are the policies and procedures for dropping, withdrawal and incomplete grades clearly stated?
Program Highlights	Summary narrative of program highlights and significant changes for S2:
Students 3 (S3)	High school students are provided with a student guide that outlines students' rights and responsibilities as well as providing guidelines for the transfer of credit.
Required Elements	• **Student Handbook:** Student rights and responsibilities? • **Program Manual:** Student rights and responsibilities? • **Sample communications** with students • **Transcripting and requests process** for students in Dual Credit courses. • **Special needs accommodations** • **Program availability to underserved students**
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. How is the student handbook provided? (by mail, online, etc) 2. Are there procedures for students with limited resources/access to participate in the program included in student handbook? 3. Are responsibilities clearly delineated for providing academic adjustments (accommodations) for HS students with special needs? 4. What practices or methods does your program use to collaborate with high schools to provide opportunities for participation to students from underserved populations?
Program Highlights	Summary narrative of program highlights and significant changes for S3:
Assessment 1 (A1)	Dual credit students are held to comparable standards of achievement as those expected of students in on-campus sections.

Required Elements	• **Student Handbook** and **Program Manual:** Expectations for course enrollment, attendance, grading, assessment and completion. • **Documentation of discipline-specific orientation, training and ongoing curriculum and collegial interactions** provided to the high school teachers to reinforce comparable quality and rigor. Could include presentation slides or handouts, worksheets, agendas, calendars, attendance rosters, notes, etc. • **Sample communications** to student concerning grading and course standards achievement (e.g. syllabus, handbook, college catalog). • **Matching course syllabi** to document grading policies.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Are student enrollment and performance expectations (learning outcomes, etc.) clear on syllabi? 2. Where are grading standards and the appeals process clear and available to students? 3. How is alignment of standards an element of regular discussion between faculties at participating institutions?
Program Highlights	Summary narrative of program highlights and significant changes for A1:
Assessment 2 (A2)	The college or university ensures that Dual Credit Program students are held to comparable grading standards as those expected of students in on-campus sections.
Required Elements	• **Student Handbook** and **Program Manual:** Expectations for course grading standards. • **Documentation of training / orientation** that is provided to the high school teachers to reinforce aligned grading and assessment. Could include presentation slides or handouts, worksheets, agendas, notes, etc. • **Faculty site-visit documentation** such as evaluation forms, notes, etc.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Are courses regularly reviewed (and modified if necessary) by the respective faculties at participating institutions? 2. Is course review consistent with procedures pertaining to on-campus courses?
Program	Summary narrative of program highlights and significant changes for A2:

Highlights	
Assessment 3 (A3)	Dual Credit students are assessed using comparable methods (e.g. papers, portfolios, quizzes, labs, etc.) as their on-campus counterparts.
Required Elements	**Student Handbook and Program Manual**: Expectations for course grading, assessment and assignments. **Documentation of training / orientation** that is provided to the high school teachers to reinforce comparable standards of achievement. Could include presentation slides or handouts, worksheets, agendas, notes, etc. **Sample communications** students concerning grading and course standards achievement. **Matching course syllabi** to document grading policies. **Special needs accommodations** policies and procedures.
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. Are assessment criteria detailed in course syllabi and in student handbook? 2. Are assessment methods a regular topic for alignment meetings? 3. Are alternative assessments available for students with special needs?
Program Highlights	Summary narrative of program highlights and significant changes for A3:
Evaluation 1 (E1)	The college or university conducts an end-of-term student course evaluation for courses offered through the Dual Credit Program. The course evaluation is intended to influence program improvement rather than instructor evaluation. Names (of the instructor or students) should not be included in the evaluation report.
Required Elements	- Three Paired **End-of-Term Course Evaluations (departmental on-campus evaluation and Dual Credit evaluation)** **Sample of an evaluation report** instructors receive regarding the college/university course. (If there is variation between courses or departments, submit a minimum of two.)
Guiding Questions	*Identify the page number and/or <u>provide direct reference to the relevant evidence</u> respective to each guiding question.* 1. What is the method used for collecting end of term student evaluations of the course? 2. What is the method used to develop evaluation reports?

	3. How are evaluation reports circulated to instructors? 4. How are course evaluations used for program improvement? (e.g., are student responses aggregated by discipline in order to indicate collective professional development needs?)
Program Highlights	Summary narrative of program highlights for E1:

Assurances and Signature

The Program Approval/Renewal Application provides for signature by the chief academic officer or the president. This person assures that the requirements of the following:

1. The Dual Credit program described in the renewal application has been approved by the college/university,

2. State and federal laws and the Oregon Dual Credit standards have been met, and

3. The Program Application is complete and ready to be reviewed by the Dual Credit Oversight Committee.

College Authority Signature
(Applications must be signed by the chief academic officer or the president)

I, (college/university CAO or President) have reviewed this application and supporting documents and attest to the accuracy, clarity, and completeness. The college/university will comply with the following assurances:

1. **Oversight.** The college/university will provide curriculum and assessment guidance through a formal agreement with high school partners.

2. **Access.** The high school is responsible to provide access, accommodations, flexibility, and additional/supplemental services for special populations and protected classes of students.

3. **Continuous improvement**. The college/university has assessment, evaluation, feedback, and continuous improvement processes or systems in place. For the dual credit program, there are opportunities for input from and concerning the instructor(s), students, employers, and other partners/stakeholders.

4. **Program records maintenance & congruence.** The college/university acknowledges that the records concerning the program title, curriculum, credit hours, and other identifying and descriptive information will remain consistent with the program renewal status that is confirmed.

5. **Sustainability.** The college/university has processes/resources committed to ensure ongoing support of the program.

Our staff has worked with CCWD/HECC staff in the development of the proposed program and completion of this application. The dual credit program described in this application:

- Has been approved by the appropriate institutional board;
- Complies with all local campus procedures; and
- Is considered ready to be reviewed by the Dual Credit Oversight Committee and to meet HECC approval standards for dual credit programs in Oregon.

It is understood that documentation or evidence may be requested by CCWD staff and/or the Dual Credit Oversight Committee if additional information is needed.

Signature_____Date_____

Name_____Title_____

PART 3: APPENDICES

Appendix A- Revised Oregon Dual Credit Program Standards (2014)

Curriculum	
Curriculum 1 (C1)	(C1) - College or university courses administered through a Dual Credit Program are catalogued courses and approved through the regular course approval process of the sponsoring college or university. These courses have the same departmental designation, number, title, and credits as their college counterparts, and they adhere to the same course descriptions.
Curriculum 2 (C2)	(C2) - College or university courses administered through a Dual Credit Program are recorded on the official academic record for students at the sponsoring college or university.
Curriculum 3 (C3)	(C3) - College or university courses administered through a Dual Credit Program reflect the pedagogical, theoretical and philosophical orientation of the college's or university's sponsoring academic departments.
Faculty	
Faculty 1 (F1)	(F1) - Instructors teaching college or university courses through Dual Credit meet the academic requirements for faculty and instructors teaching in the college or university.
Faculty 2 (F2)	(F2) - The college or university provides high school instructors with training and orientation in course curriculum, assessment criteria, course philosophy, and Dual Credit administrative requirements as part of certifying the instructors to teach the college or university courses.
Faculty 3 (F3)	(F3) - Instructors teaching Dual Credit sections are part of a continuing collegial interaction through professional development, seminars, site visits, and ongoing communication with the college's or university's faculty and Dual Credit administrators. This interaction must occur at least annually and address issues such as course content, course delivery, assessment, evaluation, and professional development in the field of study.
Faculty 4 (F4)	(F4) – Dual Credit Program policies address instructor non-compliance with the college's or university's expectations for courses offered through the Dual Credit Program (for example, non-participation in Dual Credit Program training and/or activities).
Student	
Student 1 (S1)	(S1) - The college or university officially registers or admits Dual Credit Program students as degree-seeking, non-degree seeking, or non-matriculated students of the college or university and records courses administered through

	a Dual Credit Program on official sponsoring college or university transcripts.
Student 2 (S2)	(S2) - Colleges or universities outline specific course requirements and prerequisites for students.
Student 3 (S3)	(S3) - High school students are provided with a student guide that outlines students' rights and responsibilities as well as providing guidelines for the transfer of credit.
Assessment	
Assessment 1 (A1)	(A1) - Dual credit students are held to comparable standards of achievement as those expected of students in on-campus sections.
Assessment 2 (A2)	(A2) - The college or university ensures that Dual Credit Program students are held to comparable grading standards as those expected of students in on-campus sections.
Assessment 3 (A3)	(A3) - Dual Credit students are assessed using comparable methods (e.g. papers, portfolios, quizzes, labs, etc.) as their on-campus counterparts.
Evaluation	
Evaluation 1 (E1)	(E1) - The college or university conducts an end-of-term student course evaluation for courses offered through the Dual Credit Program. The course evaluation is intended to influence program improvement rather than instructor evaluation. Names (of the instructor or students) should not be included in the evaluation report.

A NOTE ON PROGRAM EVALUATION

The Dual Credit Program Renewal Process does not include data analysis on student outcomes. However, in accordance with ORS 340.310 it is expected that regular program assessment will be conducted at the system level (the Oregon Higher Education Coordinating Commission) and will compare Dual Credit students and their non-Dual Credit peers with respect to subsequent academic performance and persistence to goal. Focused system-level research will also be used to examine specific questions or trends that emerge from the full study, with the aim of identifying successful practices.

The Oregon Standards closely align with, and are heavily indebted to, the national norms established by the National Alliance of Concurrent Enrollment Partnerships accreditation standards.

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Appendix B- Dual Credit Oversight Committee, 2014-15

Committee Chair

Marla R. Edge
Director of Academic Agreements and Articulations
Oregon Institute of Technology
3201 Campus Drive
Klamath Falls, Oregon 97601-8801
541-885-1034
Marla.Edge@oit.edu

Standing members
- Larry Cheyne, Director, Office of Education Partnerships – Clackamas Community College
- Kuli'a Ferguson, Assistant Principal – Arts and Communication Magnet Academy (Beaverton)
- Deron Fort, Director of High School Connections – Lane Community College
- Debbie Hagan, Director of Secondary Programs – Central Oregon Community College
- Sally Hudson, Challenge and LINK Programs Director – Portland State University

Standing ad-hoc members
- Reynold Gardner, Education Specialist – Oregon Department of Education
- Lisa Reynolds, Education Specialist – Oregon Department of Community Colleges & Workforce Development

Bylaws
In accordance with the educational goals of Oregon's 40-40-20 and the OEIB Educational Compacts the Dual Credit Oversight Committee provides support for the universities and community colleges as they develop their dual credit programs within the state.

The Dual Credit Oversight Committee provides on an annual basis a review of the dual credit programs and offers recommendations based upon the needs as identified. The committee is active in implementing the dual credit standards as adopted by the Boards of Education.

Article I—Membership
A. Shall consist of at least five members who will be nominated by the standing committee and will be approved by the Higher Education Coordinating Commission.
    a. At least 2 members representing Secondary Education, including Career Technical Education
    b. At least 1 member representing Oregon Public Universities
    c. At least 2 members representing the Oregon Community Colleges

    Standing Ad Hoc members representing:
    a. Community College and Workforce Development (CCWD)
    b. Oregon Department of Education (ODE)
B. The term of membership shall be three years in length
    a. Terms of membership shall be staggered so that no more than one-half of the membership is renewed each year.

C. Members shall begin their term of office effective October 1st of the year in which they were nominated to the Dual Credit Oversight Committee.

D. The committee shall elect a Chair and a Secretary at its first meeting of each school year.
   a. Ad Hoc committee members may serve in a Chair and/or Secretary position.

E. In the event of a committee member that needs to be replaced, the replacement nominee will assume the remainder of the term of the vacated committee member.

Article II—Purpose and goals

A. Establish and publish the dual credit program approval submission timelines.

B. Provide systematic review of approved programs as identified by the Oregon Dual Credit Standards.

C. Provide recommendations for program approval to the Higher Education Coordinating Commission.

D. Conduct a review of the dual credit standards in a systematic manner.

E. Collect input from the Dual Credit Coordinating Council concerning the dual credit programs and related standards.

Article III—Voting

A. A simple majority of the membership shall constitute a quorum. For purposes of calculating a quorum the size of the body shall exclude unfilled vacancies. At no time, however, shall a quorum fall below three.

B. Ad Hoc member may not vote in program approval.

Article IV—Meetings

A. The committee will meet at least four times annually.
   a. Meetings may be conducted through conference call, webinar, and/or in a face-to-face format.

B. Meeting agendas shall be distributed by the chair at least two working days in advance of any meeting.

C. The Secretary shall compile meeting minutes and document actions and/or the recommendations offered by the committee.

Appendix C- Oregon Administrative Rules

589-007-0200 – Two Plus Two and Dual Credit Programs

Outlines policy for Career Technical Education (2+2) and Lower Division Collegiate Dual Credit Programs in Oregon community colleges.

(1) For purposes of this rule, the following definitions apply:

(a) "Two Plus Two" means planned career and professional technical programs articulated between high schools and community colleges.

(b) "Dual Credit" means awarding secondary and postsecondary credit for a course offered in a high school during regular school hours, as determined by local school board and community college board policy.

(2) Before developing programs with high schools, each college shall file with the Department a policy for governing Two Plus Two and Dual Credit programs. Policies must include the following:

(a) Institutional standards for instructor qualifications (standards for teachers of lower division collegiate courses must include a master's degree in a subject area closely related to that in which the instructor will be teaching; however, in subject areas in which individuals have demonstrated their competencies and served in professional fields, and in cases in which documentation to support the individual's proficiency and high level of competency can be assembled, the master's degree requirement may be waived by the college president or substituted according to the community college's personnel policy);

(b) Methods for selecting student participants, including limiting classes to seniors and qualified juniors, and in exceptional cases other qualified students. Qualifications must be defined;

(c) Assurances that classes will be transcripted by the community college;

(d) Assurances that materials and subject matter are community college level.

(3) On or before October 1 of each year, community colleges shall submit an annual evaluation of the previous school year's Two Plus Two and Dual Credit programs, including but not limited to descriptions of:

(a) Programs and courses offered;

(b) Student outcomes;

(c) Instructors' qualifications; and

(d) Program costs.

(4) Participating school districts and post-secondary institutions shall develop written agreements based on the policies described in this rule regarding Two Plus Two and Dual Credit programs, which include:

(a) Criteria regarding approval of courses, selection and approval of instructors, admissions, procedures, counseling, monitoring, and evaluation; and
(b) The provision that all agreements and policies shall be available to all staff members involved in the

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programs and to parents and students.

(5) Participating school districts and postsecondary institutions shall, in consultation with appropriate staff members, determine that course content and instructional quality are consistent with that offered by the community colleges.

(6) The Commissioner shall require an accounting of FTE consistent with these rules.

Stat. Auth.: ORS 326.051
Stats. Implemented: ORS 329.475, 329.855, 341.42, 341.450, 341.525(3) & 341.535
Hist.: 1EB 10-1981, f. 5-6-81, ef. 5-7-81; EB 14-1991, f. & cert. ef. 7-19-91; Renumbered from 581-042-0088; DCCWD 1-2001, f. & cert. ef. 3-21-01, Renumbered from 581-043-0510; DCCWD 1-2003, f. & cert. ef. 1-9-03; DCCWD 5-2003, f. & cert. ef. 10-20-03; DCCWD 4-2013, f. & cert. ef. 6-25-13

Special Note: Instructor qualifications are further defined by OAR **589-008-0100 (excerpt below)**

Guidelines for Formation of Community College Personnel Policies

(1) Each community college Board of Education shall establish a personnel policy statement, including a policy on instructor selection and development that must include, but need not be limited to, the following:

(a) Definitions of the main terms used in the policy;

(b) Institutional standards for instructor qualifications (standards for teachers of lower division collegiate courses must include a master's degree in a subject area closely related to that in which the instructor will be teaching; however in subject areas in which individuals have demonstrated their competencies and served in professional fields, and in cases in which documentation to support the individual's proficiency and high level of competency can be assembled, the master's degree requirement may be waived by the college president or substituted according to the community college's personnel policy).

Appendix D- Oregon Revised Statutes

340.310 Statewide standards for dual credit programs; report.

(1) The Higher Education Coordinating Commission shall develop statewide standards for dual credit programs to be implemented by public high schools, community colleges and public universities listed in ORS 352.002. The standards must establish the manner by which:

(a) A student **in any grade from 9 through 12*** may, upon completion of a course, earn course credit both for high school and for a community college or public university; and

(b) Teachers of courses that are part of a dual credit program will work together to determine the quality of the program and to ensure the alignment of the content, objectives and outcomes of individual courses.

(2) Each public high school, community college and public university that provides a dual credit program must implement the statewide standards developed under subsection (1) of this section.

(3) Each school district, community college and public university that provides a dual credit program shall submit an annual report to the Higher Education Coordinating Commission on the academic performance of students enrolled in a dual credit program. The Higher Education Coordinating Commission shall establish the required contents of the report, which must provide sufficient information to allow the commission to determine the quality of the dual credit program. [2011 c.639 §2; 2012 c.104 §10; 2013 c.768 §134; 2014 c.23 §1]

* effective January 1, 2015

341.450 Accelerated college credit programs. Every community college district shall encourage high school students to start early on a college education by:

(1) Implementing a dual credit program, a two-plus-two program or another accelerated college credit program and making at least one such program available to each interested school district that is within the boundaries of the community college district.

(2) Collaborating with interested school districts that are within the boundaries of the community college district to facilitate the delivery of a dual credit program, a two-plus-two program or other accelerated college credit program. [1997 c.521 §2; 2011 c.639 §5; 2013 c.761 §§5,6]

40-40-20 Goal: Education initiative of Oregon. Senate Bill 253, passed by the 2011 Oregon legislature, determines that the mission of Oregon education is to ensure that, by 2025, at least 40 percent of adult Oregonians have a bachelor's degree or higher, at least 40 percent of adult Oregonians have an associate's degree or post-secondary credential, and the remaining 20 percent of adult Oregonians have earned a high school diploma or its equivalent.

Career and Technical Education (CTE): A program of study at the secondary and postsecondary levels that is a key component of Oregon's education and workforce development system. CTE integrates technical career skill proficiencies with academic content and prepares students for the workplace, further education, training, and family and community roles. At the postsecondary level, CTE helps students complete Associate of Applied Science (AAS) degree and certificate of completion programs, preparing them for workplace entry and career success.

Dual Credit: Awarding secondary and postsecondary credit for a course offered in a high school during regular school hours, as determined by local school board and community college board policy. (*OAR 589-007-0200*).

Higher Education Coordinating Commission (HECC): The governing authority for the Student Success and Institutional Collaboration Subcommittee, to whom the Dual Credit Oversight Committee reports (established 2014).

Senate Bill 242 (2011) created the HECC. Senate Bill 1538 (2012) expanded and clarified its duties. House Bill 3120 (2013) re-chartered the HECC to perform the following functions: advise the Oregon Education Investment Board (OEIB) on state goals for higher education, strategic investments and coordination of data collection; adopt strategic plans for achieving state post-secondary education goals; recommend consolidated higher education budgets biennially to the Governor and OEIB; distribute appropriations to community colleges, public universities and student access programs; approve significant changes to academic programs offered by community colleges and public universities; adopt changes to mission statements of public universities; authorize degrees offered by independent post-secondary institutions; and oversee licensing of career schools. Furthermore, House Bill 3120 transferred the State Board of Education's authority for community colleges to the HECC beginning July 2014. House Bill 3120 was developed in concert with Senate Bill 270, which established independent governing boards for Oregon universities.

House Bill 4018 (2014) established the Department of Community Colleges and Workforce Development (CCWD) within the HECC.

Joint Boards of Education: The Joint Boards, comprised of the Oregon State Board of Higher Education and the Oregon State Board of Education, met to explore topics of mutual concern and seek positive resolution. Until 2012 the Dual Credit Oversight Committee reported to the Unified Education Enterprise, a working group of the Joint Boards of Education. In 2012 the Oregon Higher Education Coordinating Commission assumed the role of the Joint Boards in statute and the Joint Boards of Education was discontinued.

Note: the Joint Boards of Education should not be confused with the **Joint Boards Articulation Commission** (JBAC), a policy group created and appointed by the State Board of Education and the State Board of Higher Education to encourage active cooperation and collaboration among sectors and within systems (K-12, community colleges, and baccalaureate-granting institutions) in order to achieve the most efficient and effective articulation possible. Under the authority of the HECC, JBAC continues its work and is comprised

of chief education officers and appointed representatives from each of the education sectors and staffed by HECC and CCWD liaisons.

Lower Division Collegiate (LDC) Courses: Collegiate level work in areas of instruction that parallel the offerings of the first two years of Oregon's four-year institutions, and are generally accepted for transfer by Oregon's public higher education institutions. (OAR 581-006-0050(29))

National Alliance of Concurrent Enrollment Partnerships (NACEP): A professional organization for high schools and colleges that fosters and supports rigorous concurrent enrollment. Established in 1999 in response to the dramatic increase in concurrent enrollment courses throughout the country, NACEP serves as a national accrediting body and supports all members by providing standards of excellence, research, communication, and advocacy (http://www.nacep.org/).

Northwest Commission on Colleges and Universities: One of six regional associations in the United States which accredits schools and colleges. Its purpose is the improvement of educational institutions and the development of better working relationships among schools and postsecondary institutions. http://www.nwccu.org/

Program Manual: A Dual Credit program manual details the policies and procedures for faculty and administrators. It often includes curriculum guidelines, instructor approval procedures, important dates to remember, schedule of professional development/meetings, and other important information for programs.

Senate Bill 222: In 2013, the Legislature passed Senate Bill 222 to establish the Accelerated Learning Committee, comprised of the Oregon Chief Education Officer, two members of the House of Representatives, two members of the Senate, and two Governor's appointees. The committee was charged with examining methods to encourage and enable students to obtain college credits while still in high school, and expected to emphasize the alignment of funding, assessments and procedures between high schools and post-secondary institutions of higher education to encourage efficiencies and to make post-secondary education more affordable for families, with a report to the Legislature due October 1, 2014.

Senate Bill 342: In 2005, the Legislature passed Senate Bill 342 with the express intent of improving student progress through postsecondary education by encouraging cooperation among the postsecondary education sectors on specific alignment initiatives. The Joint Boards of Education created a framework for all of the alignment work and used its Unified Education Enterprise subcommittee to fulfill the requests in SB 342 and other alignment efforts identified by leadership.

Student Handbook: A Dual Credit student handbook is an informational and resource guide for students and parents/guardian, etc. regarding the dual credit program. It often contains information on student expectations, responsibilities, grading, registration procedures, and cost.

Tech Prep (also known as Two Plus Two programs): An approved coherent sequence of academic and occupational courses within a CTE program that is articulated to a two-year certificate, degree, technical diploma or apprenticeship program at a postsecondary institution.

Unified Education Enterprise (UEE): The reporting authority for the Dual Credit Oversight Committee through 2012. This working group of the Joint Boards of Education was tasked with the implementation of Senate Bill 342.

Appendix F – Timeline of Approved Dual Credit programs

2010

Lane Community College
Central Oregon Community College

2011

Portland State University (also is NACEP accredited)
Clackamas Community College
Oregon Institute of Technology
Rogue Community College
Portland Community College

2012

Chemeketa Community College
Southern Oregon University
Tillamook Bay Community College
Southwestern Oregon Community College
Umpqua Community College

2013

Blue Mountain Community College
Columbia Gorge Community College
Mt. Hood Community College
Klamath Community College
Clatsop Community College

2014

Treasure Valley Community College (provisionally approved)
Western Oregon University (provisionally approved as pilot)
Linn-Benton Community College (provisionally approved)

Pending

Eastern Oregon University
Oregon Coast Community College (tabled in 2013)

Oregon's Dual Credit Options: Analysis and Recommendations

by

Oregon Education Association's Community College Council's

January 2015

Summary

To facilitate and promote high quality dual credit options in Oregon, this paper evaluates and ranks nine options currently in use or under consideration and makes recommendations for their success, expansion, or curtailment.

Introduction

As a part of a movement for statewide educational reform, state officials have launched a major initiative to expand the options for making college courses available to prepared high school students. Citing studies that indicate that students who take college courses in high school are more successful in college, state education leaders seek to expand that success to a broader range of students. While the studies cited are not actually very compelling,[1] the basic vision is that if students have a successful college experience while in high school, more of them will begin to see a college education as a real possibility, will be far better prepared for the transition to college, and will have started earning credits toward a degree.

To date, this initiative has had minimal college faculty input. This paper seeks to remedy this by identifying the best methods to expand college opportunities while maintaining rigor and an authentic college experience for students.

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[1] The studies did not receive the academic vetting process for quality involved in submission to a peer-reviewed journal. They also conflate correlation with causation, assuming that because students who take dual credit courses in high school are more likely to do well in college, one caused the other. We believe these two characteristics of successful students are correlated instead. Therefore, getting more students in dual credit courses will not necessarily lead to more successful college students.

What is a True College Experience?

The primary goal of the dual credit expansion effort is to increase opportunities for high school students to take college courses. But what are the unique features of a college class that distinguish it from a high school course?   There are a number of common elements of a college course that can be used to evaluate the various dual credit options available in Oregon.

1. College courses combine objective knowledge with a focus on the development of students' analytical and critical thinking skills. These skills will not only help them succeed academically, but also are in high demand in the professional world and in life.

2. College courses introduce students to how scholars in the discipline construct meaning and analyze the world. Students are introduced to the different schools of thought in the discipline and get a sample of the discipline's focus, aiding them in their decision on a college major and a career choice.

3. College courses occasionally use adult material and topics to enhance this adult learning experience.

4. In college courses, the content expert is the instructor in the front of the classroom. As a result, much of the content in college courses comes from outside the bounds of the textbook. It relies on the expertise of the instructor.

In addition to the contours of the curriculum of a college course, there is a unique college educational culture. Exposing high school students to this college culture will give them a better sense of what they can expect if they continue their college studies. This college culture includes:

1. Attending class with a wide variety of students, with differences that include ethnicity, race, class, gender, geography, age and life experience. As a result the classroom discussions will be richer and more complex than one might see in most high school classroom.

2. Completing a majority of the course work outside of class time, including the reading of textbooks.

3. Learning at a fast pace, particularly in Oregon where public colleges are on the quarter system. There are no slow moments in a term. It is an accelerated learning experience where an entire course is completed in ten weeks. For example, the college Math 95 course is roughly equivalent to the high school Algebra 2 class; while MTH 095 is taught in ten weeks at colleges, the material in Algebra 2 is taught over an entire year.

4. Completing assignments on time, even when absent from class, as self-disciplined learners. As in the adult work world, students are expected to perform like responsible professionals, and those who don't pay the price. And as adults, students may not seek parental assistance to intervene on their behalf.

Dual Credit Options

There are many options available for high school students wanting to take on the challenge of college courses. These are presented below, ranked from the most likely to replicate college-level rigor and a college educational culture to the least. Also, we note that some proponents of dual credit argue that more rural school districts will be unable to implement the highest quality options, and therefore out of fairness that all school districts should be limited to the options available to all. We categorically reject such thinking: school districts should be able to choose the best option or options available to them. Indeed, we

believe that even the most rural school districts have the ability to choose one of the better options. Finally, we strongly recommend that students and their school districts be allowed to choose the highest-ranking option available, and to limit the use of less promising options only to situations where no better option is available.

A. *The Whole College Immersion Experience*

To give high school students an authentic sense of what they can expect at college, providing a way for them to take college courses from college instructors on a college campus is ideal. Washington State's long-running *Running Start* program is a good example of this model. [2] We believe that the State of Oregon should devise strategies that make this high quality option available to as many students as possible who live within a short distance from a community college or university.

B. *Early or Middle College*

Many community colleges have partnered with local high schools to develop Early or Middle College educational programs that combine the high school and college experience. The success of these programs in effectively transitioning students to college has been well established. At many colleges, the structure of this program allows high school students to receive intensive counseling and other services at both the high school and the college. Once deemed ready, these students can then take regular college courses. This model would be equivalent to the *Whole College Immersion Experience* in Section A above. With alternative

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[2]Information on this program can be found at
https://www.k12.wa.us/SecondaryEducation/CareerCollegeReadiness/RunningStart.aspx

models, college courses may be taught exclusively to high school-aged students within the program, being slightly less representative of the diversity of a college student population.

This approach does have advantages but also disadvantages: while Early College offers students intensive counseling, increasing chances for student success, this type of counseling will not be present once the students enters college, so it does not simulate the self-directed nature of the educational experience in higher education institutions in the U.S.

No matter what the structure of the program, we believe this is an excellent model for high school students taking college courses and that the State should look at expanding this option for high school students who are in close proximity to a community college or university.

C. *College Comes to the High School*

Many state documents on dual credit have argued that the state lacks educators who have the educational qualifications to teach college courses to high school students, and concluded that we need to lower the college instructor qualifications in order to expand dual credit options. Nothing could be farther from the truth. Oregon is blessed with thousands of qualified college instructors, teaching both full-time and part-time at the state's educational institutions. Many of them would be eager to travel to the high schools, even if that means travelling large distances, to teach college courses on the high school campuses, and would be open to teaching at alternate locations that are accessible to high school students as well. The result would be a course that reflects both the academic rigor and some of the culture of a college course.

Such college-within-a-high school experiences would *not* provide high school students with a full sense of the college culture. For example, while some high schools certainly

provide significant ethnic and social class diversity, many others don't and they virtually all lack the age, geographic and life experience diversity that students find at Oregon's community colleges. However, on the whole, we believe this approach does offer excellent option for Oregon, and that Oregon should pursue strategies to eliminate barriers that currently prevent school districts from using the *College Comes to the High School* model.

D. Supported Online College Courses with a High School Mentor – The Columbia Gorge Model

Another model for extending college courses to high school students entails having them take online courses from college faculty. College online courses already exist at every college in the state, and if financially supported by the local high school, this can be an easy option for students and schools that may be particularly appealing for students who live far from a college campus. However, online courses have a number of limitations, including less student contact with the more diverse adult learners that occurs in a face-to-face course and limited interaction with faculty. More importantly, many students do not learn well in an online environment.

To overcome these limitations, one option would be to follow a model developed at Columbia Gorge Community College to bring educational opportunities to more remote school districts. In this model, high school students take one of the online courses offered by the college. At the high school, the students have a mentor—one of their high school teachers—who conducts classes on this subject a couple of times a week. The mentor is in contact with the college instructor, and together they discuss, in general, what materials should be presented in the mentoring sessions. In addition, since the mentor is on site they can detect where students are struggling with the material and devise exercises or lectures to help students. Even a model where the high school mentor does not supplement the educational

experience and merely provides structure and technical support would enhance the likelihood of student success in a new learning environment.

This model has all the advantages of an online class, plus it has a face-to-face component for those students who have difficulties with purely online classes. Furthermore, since the college faculty is the instructor of record—it is truly their class—the instructional qualifications of the high school teacher are not an issue. This model also ensures college-level rigor and exposure to some elements of the college educational culture.

Most importantly, this model is available for *all* high schools, no matter how remote the location, opening up educational opportunities for all in a way that does not require the creation of new courses or new proficiency exams. It simply piggybacks on existing college online courses.

E. *Experiencing College Online*

One of the stated goals of Oregon's dual credit expansion is to give each prepared high school student the opportunity to take three college courses for free. The focus has been on standard introductory courses such Math 111 or Writing 121. These courses would attract large numbers of students and the Columbia Gorge model works well in those situations because all high schools have Math and English teachers. But what if a student wants to take a course like the *Geography of the U.S. and Canada* (GEG 207)? A fifth option that addresses this problem is to have high school students enroll in an online college course without a high school support network. Such an approach will expand other courses to students, who will learn the importance of self-discipline and organization that will be crucial for their future success in college. They will experience the academic rigor of a college course and some of the college culture in an online learning environment.

This option is readily available for all high schools, no matter how remote the location, but currently lacks methods to fund it. We recommend that Oregon develop mechanisms to reimburse high school students who take one of their three dual credit courses online.

F. *College Credit Now and Two-Plus-Two Dual Credit Programs*

Many community colleges in Oregon already operate extensive dual credit programs called College Credit Now or, for career-technical courses, Two-Plus-Two. College faculty are expected to ensure the academic quality of these programs and there is close collaboration between high school and college faculty. High school faculty meet the college instructor qualification standards so are able to teach an authentic college course where the instructor is a content expert. This program can be administered even at significant distance from a college, as the bulk of the collaboration between high school teachers and college professors can occur online or by phone with only infrequent face-to-face meetings. Downsides to these programs include the slower pace of learning as it is integrated into a high school learning environment, lower levels of student diversity (especially age and geographic), and potentially low levels of support for the high school/college educator.

If high school teachers don't have the necessary educational qualifications to teach in this type of program, Oregon should make available summer online graduate courses and funding to allow teachers to gain the credentials they need to teach.

G. *Proficiency-Based Model -- AP and IB programs*

A proficiency based model is one where students takes a class at the high school from a high school teacher. Whether the student receives college credit depends on their passing a proficiency assessment. A major drawback of this model is that it does not give the student

the opportunity to experience the culture of a college education. For proficiency-based programs to be an effective dual credit option, the proficiencies must be constructed and evaluated in a manner that insures that the class has college-level rigor. The Advanced Placement and International Baccalaureate programs are well-accepted proficiency models. These programs have national boards to construct their proficiency assessments to assure college equivalency. These boards also design the rubric and oversee the grading, which is done on a national level by a large group of high school teachers and college instructors. AP and IB exam results are generally accepted for college credit at all colleges across the nation.

H. *Eastern Promise Program—Regional Proficiency-Based Model*

The Eastern Promise program developed in Eastern Oregon operates on a regional proficiency-based model. Some state officials see this as a model that can be replicated across the state and Replication Grants are working on that goal. One that is particularly advanced is coordinated with Western Oregon University in the Mid-Willamette Valley and is called the Willamette Promise project. We are impressed by the great efforts made by those in the Eastern Promise to ensure college-level rigor of their courses, but we worry that as the excitement, and potentially the funding, for this new program fades whether this level of effort and commitment can be maintained into the indefinite future. As for attempts to replicate the Eastern Promise model across the state, there are serious concerns about the quality of the proficiency assessments based on what we have seen of the Willamette Promise project.

The Eastern Promise model connects college professors and high school teachers in Professional Learning Communities (PLC's) that meet throughout the year. They discuss the content and proficiency assessments for the course. As with the AP or IB model, the courses

are taught in the high schools by high school teachers but unlike the AP and IB model, these high school instructors must meet the same instructor qualifications that are in place for all faculty at the college. In this way, it is equivalent to a College Credit Now program.

The students who enroll in these college courses take a proficiency exam or submit a portfolio of work at the end of the course. College and high school teachers jointly grade the assessments using a variety of models depending on the discipline. The emphasis is on consistency and quality in the grading models and college professors are attentive to maintaining college-level rigor. For example, in Writing every student's portfolio is anonymously read by at least two different evaluators. If a student receives a high enough score on the assessment then they receive college credit.

This Eastern Promise model was constructed to meet the needs of a rural area of the state where access to college campuses is limited. But extending this model to the rest of the state – where most students do not face the same constraints -- should be given serious thought.   Indeed, there are a host of concerns about this model that make it an undesirable choice that should be used sparingly if at all.

First, this model greatly increases the workload of participating college faculty and high school educators. College faculty will be required to create quality proficiency assessments equivalent to those offered by AP and IB. When creating AP exams, the College Board utilizes the expertise of dozens of academics and support staff and has tremendous resources annually invested in the creation of an assessment recognized as an indicator of college-level work. In the Eastern Promise model, one or two professors in each discipline will complete this enormous task for each region.

In addition, the required cross-grading of student assessments - a key quality control - will itself require a tremendous investment of time for college faculty. The workload for high

school instructors would be negatively impacted as well, as they prepare to teach a new course, attend Professional Learning Committee meetings periodically and participate in grading for the course. When grant money disappears, this work may be a permanent addition to the workloads of all educators with additional compensation uncertain. And the additional workload is significant. For example, in 2014 twenty-two Eastern Promise Writing evaluators (college and high school educators) collectively read 694 pieces of student writing. The lead college professor alone spent 221 hours reading 129 portfolios for quality control.[3]

Second, from what we have seen of the Willamette Promise and the Accelerated Learning Committee's legislative report, if the Eastern Promise model is expanded statewide, it will likely be constructed in a fashion that would negatively impact the quality of the proficiency assessments.[4] Without any state standards for proficiency, each school district or Educational Service District would be able to negotiate with their partner college about the content and rigor of the proficiency assessments as well as the standards to be used to evaluate those assessments. If the school district or ESD doesn't like proficiency assessments proposed by their partner college, then they could negotiate with other colleges until they find a set of proficiencies to their liking. This might happen if the school district perceives that too few high school students are passing the proficiency assessments. The result will likely be greatly differing standards throughout the state.

The incentive for school districts to shop among colleges for the lowest proficiency standards and the incentive for colleges to reduce proficiency standards to attract school districts is enhanced by the state Accelerated Learning Committee's suggested new legislation,

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[3] *2014 Portfolio Report*, 23 September 2014, Eastern Promise Language Arts PLC.
[4] Senate Bill 222 Legislative Report, Accelerated Learning Committee, 1 October 2014, http://education.oregon.gov/Documents/archive/CORRECTED%20ALCLegReport11.1.14.pdf.

which proposes that the state pay each school district and its partnering college extra money for every student who <u>passes</u> a dual credit class.[5]

Defenders argue that colleges would never lower their standards, and that professors and college administrators are unaffected by monetary and other incentives. We believe this is magical thinking. Creating a system that forces colleges to compete for the school districts' business based on ease of their proficiency exams will only lead to a degradation of the quality of college education in the state.

Third, the Eastern Promise model could be easily constructed in a way that eliminates the important quality control of having college instructors cross-grade proficiency exams. Indeed, this is the current grading model planned for the Willamette Promise Replication Project in 2014-2015.[6] This quality control is important because college faculty are the experts on what constitutes college-level work. Further, they are disinterested graders and will ensure that high school teachers are fairly and objectively evaluating student work. There is a reason that College Board has a cross-grading method utilizing both high school and college educators in the evaluation of AP exams. It ensures objectivity and earns the program legitimacy in the eyes of college admissions offices. Given all the pressure that superintendents, principals and high school teachers will feel from politicians and parents to award college credit, such a quality measure will be crucial to ensure an objective evaluation of a student's college work.

Overall, as a vehicle for delivering college level courses to high school students, the Eastern Promise model has many potential pitfalls and will require significant accountability

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[5] Senate Bill 222 Legislative Report, 1 October 2014.
[6] As reported by Keith Ussery of Willamette Promise at a Eastern Promise Replication Project meeting in Keizer, Oregon on January 14, 2015.

and quality measures to maintain quality. This will require an ongoing and high level of commitment of college and high school educators and significant additional funding to pay for ongoing professional learning communities, continuous development of new assessments, and extensive cross grading. There are serious questions as to whether the necessary level of commitment can be maintained into the indefinite future. Of equal concern is the fact that the Accelerated Learning Committee's funding model has a number of incentives built into the system that would tend to lead to actions that would undermine the quality of the proficiency assessments. Overall, the Columbia Gorge Online Model is a far superior choice for rural districts and this superiority would be true even if one had confidence in the long-term quality of the Eastern Promise's proficiency assessments. Using the Columbia Gorge model it is far easier to insure college-level rigor.

I. Lowering College Instructor Qualifications to Expand Dual Credit Programs

As concerning as the Eastern Promise model of proficiency assessment is, the Willamette Promise Replication Project and the state Accelerated Learning Committee's recommendations to the OEIB and state legislature offer the possibility of the creation of a dual credit program with even more quality concerns.

College professors are the state's experts in what constitutes a quality college course and what qualifications are needed to teach those courses effectively. Their expertise in this area has been recognized since the time there have been colleges over a thousand years ago. Oregon's colleges and universities currently align with national standards for setting college instructor qualification. They require instructors to have a master's degree in the academic discipline, or a related master's degree with a substantial number of graduate hours in the discipline. This standard ensures instructors understand not only the content of a course, but

can introduce students to how the discipline analyzes the world and its different schools of thought. Educators with a graduate education have a deep knowledge of the subject from which they can answer student questions and direct more in-depth student assignments. They know where to search to find the latest studies and academic work to keep their course current and relevant, and finally, having experience reading professional journal articles, they have the ability to understand and to place these works in their proper context.

Yet in the Willamette Promise Replication Grant, the college instructor qualifications required in the Eastern Promise program have been dropped. Instead, high school principals have been given the power to determine which of their teachers are qualified to teach a college-level course.[7] The only guidelines they have been given is that a qualified college instructor must have taught the subject matter at least three years in high school.[8] Even these inadequate qualifications were ignored in the assignments of a few of the instructors.

Further, the Accelerated Learning Committee has recommended that alternative college instructor qualifications be approved as statewide standards that are binding on all higher educational institutions. These proposed alternative qualifications will minimize the exposure of instructors to a graduate education in the academic discipline, thus weakening their ability to provide a college-level education to their students beyond those already delineated in Sections F and H above.

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[7] This is technically in violation of OAR 589-008-0100 and OAR 589-007-0200. In both OARs it states "Institutional standards for instructor qualification (standards for teachers of lower division collegiate courses must include a master's degree in a subject area closely related to that in which the instructor will teaching; however in subject areas in which individuals have demonstrated their competencies and served in professional fields and in cases in which documentation to support the individual's proficiency and high level of competency can be assembled, the master's degree requirement may be waived by the college president or substituted according to the community college's personnel policy);" [underlining added]

[8] Willamette Promise teacher qualifications can be found in the FAQ document on the Willamette Education Service District website at http://www.wesd.org/Page/342.

The reason given for lowering the educational requirements for teaching a college course is that without an expansion in the pool of qualified instructors we will be unable to expand dual-credit programs sufficiently to meet the needs of our students. This is empirically false. There are ample college instructors in Oregon (many currently underemployed) to expand *The Whole College Immersion Experience, Early or Middle College, College Comes to the High School, The Columbia Gorge Model* and *Entering College Online.* In addition, AP and IB could also expand because these courses don't require a master's in the content area in order to teach them.

If the State's goal is to give students an authentic college experience that prepares them for further college study, lowering college instructor qualifications should not even be contemplated.[9]

Conclusion

Our recommendations represent the professional assessment of the community college educators represented by the Oregon Education Association's Community College Council. In order for dual credit courses to work as a bridge from high school to a successful college experience, these courses must mirror actual college courses in both academic rigor, college educational culture, and instructor qualification. We believe that the best option would be for high school students to take college courses on college campuses, and therefore we strongly recommend that the State develop strategies to expand what we have called the:

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[9] In addition, some have argued that because college standards for instructor qualification vary from college to college, high school faculty are discouraged from pursuing opportunities to teach dual credit courses. It has led some state officials to suggest that the State should not only lower instructor qualifications, but create uniform instructor qualifications across the state. We believe such a strategy constitutes a serious threat to the quality of collegiate education in Oregon, and offers a false solution to a minor problem. Clearly, in order to ensure that high schools do have qualified instructors, Oregon should promote and support methods for faculty members to become qualified, not *lower* such qualifications.

A. *Whole College Immersion Experience*; and

B. *Early or Middle College* options.

We also recognize that many high schools are not physically close enough to have their students take classes directly on college campuses, so we recommend that the State also develop strategies to create and expand:

C. *College Comes to the High School*; and

D. *Supported Online College Courses with a High School Mentor* options.

In addition, the State should find a way to reimburse students who want to enroll in online college courses.

To expand the College Credit Now option, the State should make available summer online graduate courses and funding to allow teachers to gain the credentials they need to teach these courses.

Finally, we believe that the Eastern Promise model should be used sparingly if at all. There are a number of potential problems with the proficiency assessments. Quality concerns would multiply with the lowering of instructor qualification standards. There are better options for Oregon's students, both urban and rural, that more effectively introduce them to college.

Accelerated Learning Funding Recommendations

OEIB

SB 84 establishes statewide guidance and funding mechanisms for accelerated college credit programs for high school students to support free access to the equivalent of either three college courses or nine college credits. This chart articulates funding that will be allocated for students enrolled in their first nine credits of dual credit courses **or** first three high school credits of advanced placement (AP) and International Baccalaureate (IB) courses, whichever occurs first for a high school student.

Dual Credit Courses

From State School Fund

New funding specified in SB 84
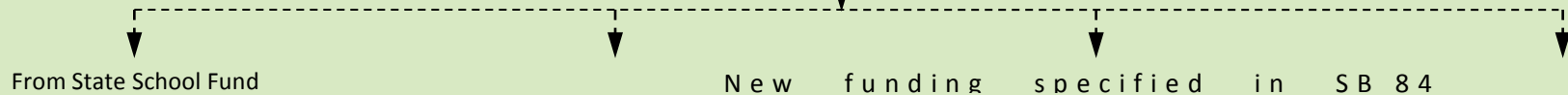
State school fund distributed to school districts for students in dual credit courses. Funding is to be shared with post secondary institutions via MOU (range from $15 to $90 per credit). Institutions earn FTE for dual credit courses unless enrollment is capped.

High schools receive an additional $20 per credit for the first 9 dual credits earned by students. The funds are shared evenly with postsecondary partners to help pay for textbooks, biennial reporting, student supports/advising, and regular meetings of educators to ensure college rigor and student

High schools earn an additional $10 for first 9 dual credits earned by students from low-income families or students of color traditionally underrepresented in postsecondary education to help develop and offer instructional student skill supports; fund a course that provides an orientation to college; and expand earlier awareness/advising for students and their families of college credit options.

High schools receive an additional $10 per credit for first 9 Career and Technical Education dual credits earned by students to help cover costs of textbooks and materials.
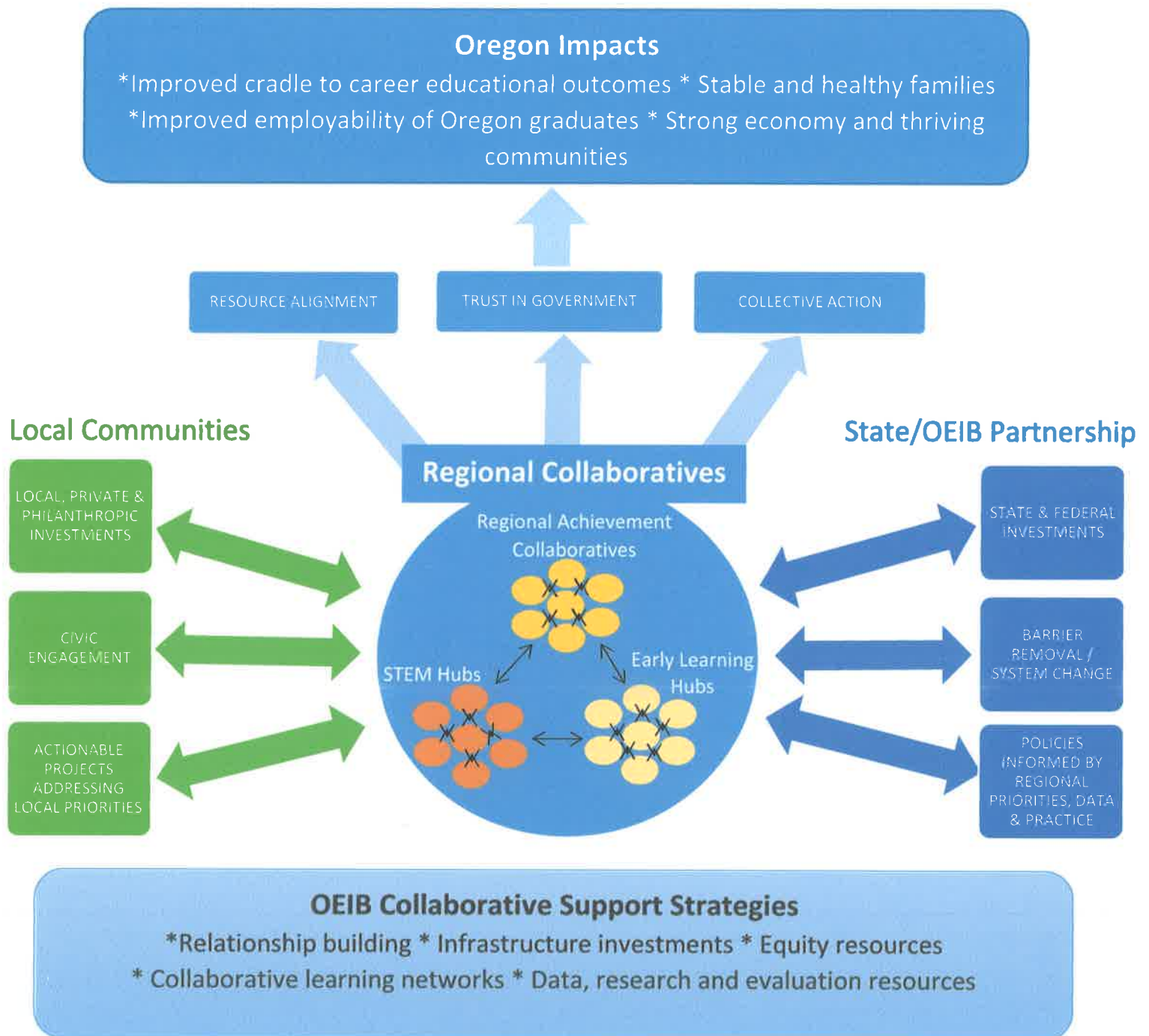
Advanced Placement (AP) and International Baccalaureate (IB) Courses

State school fund distributed to school districts for students taking Advanced Placement and International Baccalaureate courses.

High schools receive an additional $10 per credit for first 3 high school credits of AP or IB earned by students from low-income families or students of color traditionally underrepresented in postsecondary education to provide instructional student skill supports and a course that provides an orientation to college; and to expand earlier awareness/advising for students and their families of college credit options.

High schools receive an additional $10 per credit for first 3 high school credits for AP or IB courses for textbooks and materials.

Draft Visual Framework for Oregon's Regional Collaboratives

Oregon Impacts
*Improved cradle to career educational outcomes * Stable and healthy families
*Improved employability of Oregon graduates * Strong economy and thriving communities

RESOURCE ALIGNMENT

TRUST IN GOVERNMENT

COLLECTIVE ACTION

Local Communities

LOCAL, PRIVATE & PHILANTHROPIC INVESTMENTS

CIVIC ENGAGEMENT

ACTIONABLE PROJECTS ADDRESSING LOCAL PRIORITIES

Regional Collaboratives

Regional Achievement Collaboratives

STEM Hubs

Early Learning Hubs

State/OEIB Partnership

STATE & FEDERAL INVESTMENTS

BARRIER REMOVAL / SYSTEM CHANGE

POLICIES INFORMED BY REGIONAL PRIORITIES, DATA & PRACTICE

OEIB Collaborative Support Strategies
*Relationship building * Infrastructure investments * Equity resources
* Collaborative learning networks * Data, research and evaluation resources

Growing SORS Backbone

ACCESS
AllCare Health Plan
Ashland School District
Central Point School District
College Dreams
Community Works
Consumer Credit Counseling Center
Court-Appointed Special Advocates
OR Dept of Health and Human Svcs
Eagle Point High School
Family Nurturing Center
Family Solutions
Gordon Elwood Foundation
Grants Pass High School
Head Start
Healthcare Coalition of Southern OR
Hearts with a Mission
Hidden Valley High School
Illinois Valley High School
Illinois Valley Safe House Alliance
Jackson Care Connect
Jackson County (Co) Sexual Assault Response Team
Jackson Co Juvenile Justice
Jackson Co Library Foundation
Jackson Co Mental Health
Jackson Co Public Health
Jefferson Regional Health Alliance
Josephine Co Juvenile Justice
Josephine Co Prevention Services
Job Corps
The Job Council/Rogue Workforce Partnership (RWP)
Junior Achievement (JA)
Kairos
Kids Unlimited
Magdalene Home
Maslow Project
Medford School District
Mediation Works
North Valley High School
On-Track, Inc.
Options for Southern Oregon
Oregon Health Authority
Phoenix/Talent School District
Planned Parenthood
PrimaryHealth
Rogue Community College (RCC)
Rogue River Middle/High School
Rogue Valley Family YMCA
Southern OR Early Learning Services (SOELS)/Early Learning Hub
Southern OR Education Service District (SOESD)
Southern OR Regional Environmental Education Leaders (SOREEL)
Southern OR Goodwill, Inc.
Southern Oregon University (SOU)
Sustainable Valley
United Way (UW)
Winterspring
Women's Crisis Support Team

Southern Oregon Success (SORS) Bulletin

Facilitating Continuous Communication across Jackson & Josephine Counties

January 2015

SORS is: We are a growing network of non-profits, schools, agencies, community groups and citizens committed to the success of all our children, youth and families, from prenatal-24 years old in Jackson and Josephine Counties, Oregon.

SORS does: We weave together the talent, expertise and resources of the entire community to promote the health, academic and life success of our children, youth and families.

SORS envisions: all of our families providing stable and nurturing homes for our children, all children being ready for kindergarten, and all youth succeeding in school, transitioning successfully to meaningful adult lives, and contributing to a thriving economy.

"We're not accepting outcomes such as a 65% cohort graduation rate in our schools anymore. We can do this differently."
– Kathy Bryon, Gordon Elwood Foundation

Collective Impact: A Systemic View
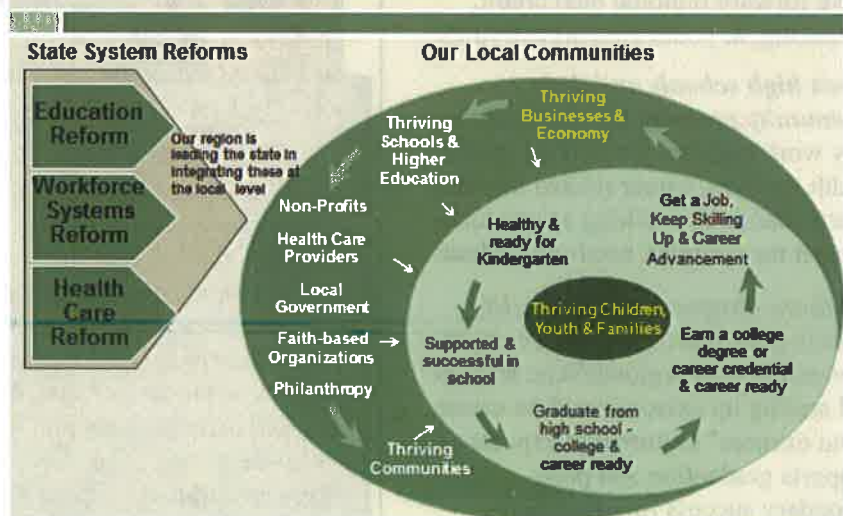
"We've got to start thinking of 0-24, of thriving humans – not as 'early learning', 'K-12', 'social services', etc."
– Mary-Curtis Gramley, Director, Early Learning Hub

For more information, contact: sue@parrishassociates.org

Backbone Support

Oregon Education Investment Board (OEIB): $45,000 to support the development of SORS' **Regional Achievement Collaborative (RAC).**

Northwest Health Foundation (NWHF): $30,000 to Jefferson Regional Health Alliance to partner with SORS to continue to organize a collective, aligned system supporting child, family and youth success.

Governor's Office: $40,000 to continue to align multiple state-initiated collaboratives.

Gordon Elwood Foundation: Over $34,000 to support formation of SORS' backbone.

Oregon Community Foundation (OCF): $120,000 to support youth career success.

Steps Forward Continue

Coordinated Care Organizations (CCOs) have **Community Health Improvement Plans (CHIPs)** and are working with SORS partners to improve the "social determinants of health."

Over $600,000 awarded to education and youth development partners to move forward regional dual credit, mentoring, & youth support activities.

Seven high schools and their community partners are changing how they work together, improving mental health services, career related learning or attendance by working as one team to meet the complex needs of students.

Southern Oregon College for All, modeling an approach from Texas, is advocating with regional/state leaders and scaling up existing work to create a "no excuses" culture that expects and supports graduation and post-secondary success for all students.

What do you want for Southern Oregon? Join this regional effort and bring your voice to the table!

A **growing number of regional organizations, agencies and collaboratives are joining forces** to change the status quo. Participate in SORS to collectively "change the game" so all our children and youth are:
- ✓ Healthy and receiving quality health care
- ✓ Entering kindergarten ready for school
- ✓ Engaging in school and succeeding in their learning
- ✓ Graduating from high school, and are ready for college &/or work
- ✓ Persisting in post-secondary training
- ✓ Effectively transitioning to successful adult lives

Southern Oregon Success Spotlights

Governor Kitzhaber joining SORS for Declaration of Cooperation (DoC) Signing Ceremony

Friday, January 23rd from 11:30-1pm, Location TBA

Governor Kitzhaber is joining Southern Oregon early learning, youth development, education, and school-to-work partners to celebrate two Declarations of Cooperation (DoC), one building multi-sector commitments for prenatal-3rd grade activities, the other building successful post-secondary transitions. SORS partners from across the prenatal- aged 24 spectrum will participate together, honoring the importance of all of us working together to successfully improve outcomes for children, youth and families in our region. It's being held from *11:30-1pm, location TBA - and you're invited!*

The Governor has expressed high interest in the work SORS is doing to coordinate the different regional collaboratives. He has thus scheduled time in the afternoon to meet with a few regional systems leaders from different sectors - health care, early learning, education, the workforce, etc- to hear about the different collaborative efforts underway, and our regional effort to connect them into a coordinated system. Each of these collaboratives has taken significant steps forward, setting the stage for rich dialogue between state and regional leaders.

Early Learning Hub Vital Component of Cradle to Career Success

Southern OR Early Learning Services (SOELS), the newly formed Regional Early Learning Hub, is responsible for redesigning the early childhood system of services in Jackson and Josephine Counties and has joined with parents, agencies, health care, and K-12 to focus on the needs of children and families, prenatally through six years old.

Major Hub projects were already initiated when the Hub was formalized in December. The *P-3 Project* (prenatally thru grade three), including six school districts and many preschool/child care programs, strengthens connections between early learning and K-12 to help families increase children's readiness for kindergarten. The Hub's Early Literacy Project brings books into the homes of young children, helping parents enrich literacy and language for their children. Responding to very convincing research on early childhood development, Southern OR is embracing early development and readiness for kindergarten, family stability, and coordinated services. *Contact Mary-Curtis Gramley,* SOELS' Director; mary-curtis_gramley@soesd.k12.or.us.

For more information, contact: sue@parrishassociates.org