

MOA-Tennessee Revised Scope of Work

This revised scope of work is submitted pursuant to guidelines for the MOA Opportunity Grant Program Learning Year. Since submitting the initial scope of work with our learning year grant application, we have had three site visits and several telephone or email conversations with MOA-TN state advisor Nate Johnson. Based on those conversations, we do not foresee major changes to the original scope of work. The few anticipated revisions are summarized as follows:

- *Strategy groups.* Several so-called strategy groups were proposed as vehicles for acting on the public agenda emerging from the opportunity analysis conducted at the outset of the learning year. On further review, we have chosen not to convene the Efficiency Strategy Group that was initially proposed as a way of exploring cost-savings through deregulation, resource sharing, and efficiencies in administrative operations. The reason for this is that such work is already underway in the form of (1) the University of Tennessee's Task Force on Efficiency and Effectiveness and (2) Board of Regents activities surrounding the Chancellor's long-term productivity enhancement plan. Rather than organizing a separate group under the auspices of MOA-TN, we will leverage the aforementioned efforts.
- *Research studies.* Our original learning year application foresaw an affordability study commissioned from MOA-TN funds and conducted by external researchers. This work will now be done in-house and will be limited to analyses of net attendance costs (after financial aid) for dependent and independent students in each higher education sector across various levels of family income. MOA-TN funds will be used to commission a study of college dropouts; that is, students who do not appear as "successes" in prevailing standard graduation rate metrics. That study is described in further detail below.
- *Listening stops.* A series of "listening stops" described in the learning year application is now folded into the opportunity analysis plan, as described below.
- *MOA-TN website.* A website to serve as a clearinghouse for MOA-TN activities still will be developed, but the anticipated cost is now lower than originally proposed, based on a more workable plan for utilizing degree production scenarios derived from the student flows model developed by Tennessee Higher Education Commission (THEC) staff.
- *Articulation portal pilot.* MOA-TN funds will be used to support a pilot test of the AcademyOne transfer student web portal as a framework for implementing recent legislation aimed at improving articulation and transfer in Tennessee.

Purpose Statement

What is MOA-TN all about? As stated in the learning year proposal, MOA-TN fundamentally is about increasing educational attainment levels in Tennessee by improving input, through-put, and output from the state's postsecondary institutions. The MOA-TN learning year coincides with THEC's development of the 2010-2015 higher education master plan, a public agenda-setting document. MOA will serve as a framework for focusing the next master plan on the productivity agenda. This focus will be sustained over the next five years by strategic use of MOA implementation funds, reinforcement in the University of Tennessee (UT) and Tennessee Board of Regents (TBR) strategic plans, and performance incentives in the public higher education funding formula and in Tennessee's well-established Performance Funding program.

Learning Year Activities

The following is a summary of the subset of learning year activities with implications for the expenditure of MOA funds. These activities are reflected in the attached budget.

Opportunity analysis. Foundational to the planning year is an opportunity analysis, sometimes called a policy audit, to identify priorities for policy and practice that will have a significant impact on degree production within expected resources. For this work, we are engaging the National Center for Higher Education Management Systems (NCHEMS). In addition to a systematic review of state laws, system policies, and institutional practices, NCHEMS takes a grass roots approach to this work by engaging members of the higher education community and a variety of other stakeholders statewide in discussions designed to highlight areas where policies or resources are misaligned with the basic goals of MOA-TN. By so doing, the opportunity analysis becomes not only a diagnostic tool, but a master plan environmental scanning exercise that serves the dual purposes of:

- achieving awareness, receiving input, and building consensus around a policy agenda; and
- providing an advance reading on policy changes that are most likely to gain traction with policymakers and system and campus leaders.

Strategy groups. The opportunity analysis will be complemented by a limited number of working groups focused on change strategies within defined policy priority areas. Where possible, we will try to use existing groups that are already functioning within the state:

- *Funding Formula Review Committee* – This Committee, which formally revises the public higher education funding formula every five years in response to policy priorities articulated in the Master Plan, will continue the work begun in the last Master Plan cycle to recast state finance systems to reward institutions for graduating students, not just enrolling them.
- *Performance Funding Task Force* – This task force also routinely convenes every five years, to develop standards for the next performance funding cycle that are responsive to policy priorities outlined in the Master Plan.
- *Academic and Student Affairs Policies Group* – This group will critically examine institutional academic policies and student service practices that pose unnecessary barriers to student persistence and completion. For this work we will call on the task force of THEC, UT, and TBR system and institutional representatives recently convened for the purpose of facilitating universal articulation of lower division transfer paths to baccalaureate majors.
- *Adult Students Participation Group* – This is a new group that will be called on to develop a comprehensive approach to increasing successful postsecondary participation by non-traditional students, including program offerings, delivery modes, pricing, student services, assessment and recognition of prior credit and skills, and development of a “front end” to the www.CollegeforTN.org web portal that is geared to the needs of adult students. This group will use MOA funds to draw down on technical assistance by engaging (1) states that have made in-roads in this area (for instance, Oklahoma, Louisiana, and Kentucky) and (2) organizations experienced in policy development relative to this population (for instance, NCHEMS, CAEL, and SREB).

Research studies. Beyond the opportunity analysis described above, additional research will aid our understanding of affordability and efficiency from student and state perspectives:

- *Graduation rates study.* MOA-TN funds will be used to commission the Center for Business and Economic Research (CBER) at UT Knoxville to conduct a study that deepens our understanding of who does and does not graduate from Tennessee colleges and universities. Current standard graduation rate metrics leave important questions unanswered: How would our understanding of graduation rates be enhanced by extending the tracking period and the universe of institutions to which students might transfer (specifically, out-of-state institutions and in-state private institutions)? When students do not finish, when do we lose them? When students do drop out, how many find work in the state? In what employment sectors? At what wages? How do all these dynamics differ for different populations of students (for instance, traditional vs. adult)?
- *Affordability study.* THEC staff will produce a series of charts based on calculations of the average net attendance cost (after financial aid) for dependent and independent students in each higher education sector across various levels of family income. This will help identify populations that are the least well served by the state's various student aid programs and who are most likely to have degree completion barriers associated with affordability.
- *Delta Project white paper.* David Wright and Russ Deaton of THEC have been commissioned to write a white paper for the Delta Project on Postsecondary Costs. The paper, tentatively titled, "Costs and Benefits of Making Opportunity Affordable," explores increases in the average cost-to-degree associated with various transition points in the postsecondary pipeline, such as entering students' need for remedial or developmental coursework, student transfer, change of academic major, and extended time to degree. The paper, funded by the Delta Project, seeks to arrive at estimates of cost savings from improving policies that promote more efficient bachelor's degree completion.

MOA-TN summit. Following the 2009 legislative session, the project will host a summit event to: enhance public understanding of MOA-TN; tie together lessons learned from the opportunity analysis, commissioned research, and strategy groups; and arrive at consensus as to policy priorities and next steps. Our current thinking is to schedule this meeting around the dates for the ECS National Forum, July 8-10, 2009, in Nashville.

MOA-TN website. A local web development firm will create and maintain a website to serve as a clearinghouse for MOA-TN activities, reinforce central messages, and house relevant research and analysis tools (e.g., the simulation tool). This will aid in the branding of MOA-TN and serve as a communication strategy for building project awareness and sustaining momentum throughout the year.

Articulation web portal pilot. In 2008, the General Assembly directed THEC to work with the University of Tennessee and the Tennessee Board of Regents to facilitate universal articulation of lower division transfer paths to baccalaureate majors. We will use MOA-TN funds to pilot test the efficacy of the web portal framework developed by AcademyOne in providing a common location and format for publishing and updating program requirements and course equivalencies between feeder-receiver institutions.

APPENDIX A

MOA-TN REVISED SCOPE OF WORK 2008-09 Learning Year Timeline

The following timeline links MOA-TN planning activities to quarterly milestones throughout the learning year, October 2008 through September 2009.

1st quarter: October – December 2008 (completed)

- Received initial consultation and site visit from MOA-TN state advisor Nate Johnson
- Met with NCHEMS in Nashville regarding Opportunity Analysis strategy and costs
- Met with MOA-TN leadership team; added Ellen Thornton (Tennessee Business Roundtable) to team
- Met with Governor's Tennessee Diploma Project leader for lessons learned from broad-based K-12 policy reform
- THEC staff began engagement as part of College- and Career-Ready Policy Institute (CCRPI) leadership team to provide a P-16 connection to the MOA-TN work
- Completed simulation tool development; demonstrated model and vetted goal for increased degree production with MOA-TN leadership team

2nd quarter: January – March 2009

- Submit revised scope of work to JFF
- Work with Governor's staff on inclusion of MOA-TN agenda in State of State address
- Establish MOA-TN website
- Submit Delta College Costs Project white paper
- Second visit from MOA-TN state advisor around launch of Opportunity Analysis
- Facilitate MOA-TN discussion groups statewide with institutional leaders
- Facilitate MOA-TN discussions with Deputy Governor, legislative leadership, Tennessee Business Roundtable, and TBR and UT system senior staff
- Third visit from MOA-TN state advisor to hear summary of statewide facilitated Opportunity Analysis discussions
- Participate in MOA webinars on PF2.0 and student flow model development
- Continue regular meetings with MOA-TN leadership team
- Provide MOA-TN updates at quarterly meetings of UT, TBR, THEC, and state P-16 Council
- Conduct affordability analyses in-house; develop graphs for posting to MOA-TN website
- Sign off on study prospectus and data-sharing agreement with UT Center for Business & Economic Research for graduation rates study
- Convene initial meeting, via webinar, with TBR, UT, and THEC chief academic officers regarding AcademyOne pilot test of transfer web portal

3rd quarter: April – June 2009

- NCHEMS submits Opportunity Analysis final report
- Continue to consult with MOA-TN state advisor Nate Johnson
- UT CBER completes graduation rates study
- Meetings with MOA-TN leadership team
- Provide MOA-TN updates at quarterly meetings of UT, TBR, THEC, and state P-16 Council
- Strategy groups begin meeting to act on Opportunity Analysis findings and recommendations

- Develop framework and gather data for MOA-TN performance metrics
- Based on Opportunity Analysis, identify policy priorities for Master Plan and MOA implementation phase
- Attend MOA Policy Academy in Denver June 10-11

4th quarter: July – September 2009

- Host MOA-TN summit event in Nashville involving Governor, legislative leadership, higher education community, Business Roundtable, and media
- Continue to consult with MOA-TN state advisor Nate Johnson
- Continue regularly scheduled meetings with MOA-TN leadership team
- Strategy groups conclude meetings and make recommendations to MOA-TN leadership team for strategies actionable through the Master Plan, funding formula, and Performance Funding
- Provide MOA-TN updates at quarterly meetings of UT, TBR, THEC, and state P-16 Council
- Post performance metrics to MOA-TN website for longitudinal tracking
- Finalize policy priorities for 2010-2015 Master Plan
- Finalize plan for expenditures deployment during MOA implementation phase

APPENDIX B

**MOA-TN REVISED SCOPE OF WORK
2008-09 Learning Year Budget**

	MOA Funds	External Funds	In-Kind Contributions (staff time)	Total, All Sources
<i>Policy Development</i>				
Opportunity Analysis	50,000			50,000
Provide technical support for adult participation strategies group	5,000			5,000
Establish pilot sites for AcademyOne transfer web portal	13,000			13,000
Richard Rhoda (5% of time)			9,000	9,000
David Wright (state coordinator, 20% of time)			21,600	21,600
Russ Deaton (10% of time)			7,500	7,500
Christine Luce (10% of time)			4,500	4,500
Stephanie Steele (5% of time)			2,600	2,600
<i>Communications and Stakeholder Engagement</i>				
MOA-TN website development & maintenance	15,000			15,000
Staff and MOA-TN team member travel to regional and national meetings to present MOA-TN efforts and gain exposure to thought leaders, key concepts, and best practices	15,000			15,000
Summit convening, and in-state travel	10,000			10,000
Develop postsecondary success reports; present to 800 HS principals, chief instructional officers, & guidance counselors statewide; post to THEC website		9,000		9,000
<i>Goals and Measures</i>				
Nat'l Student Clearinghouse contract to support grad rate study and student flow model enhancement		15,000		15,000
Takeshi Yanagiura, initial student flow model development (7.5% of time)			4,500	4,500
AIR grant for student flow model enhancements: incorporate functionality to demonstrate fiscal implications of increased degree production (*funds applied for)		*40,000		40,000
<i>Research</i>				
Graduation rates study (Bill Fox, UT CBER)	30,000			30,000
Delta Costs Project white paper (Wright & Deaton)		5,000		5,000
Develop net cost analyses (Kyle Southern, grad ass't, 20% of time)			500	500
<i>Administration</i>				
THEC indirect costs	12,000			12,000
Total, All Activities	\$150,000	\$69,000	\$50,200	\$269,200