Agenda Materials
General Academic Institution Formula Advisory Committee (GAIFAC) for the 2016-2017 Biennial Appropriations

September 2013
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Agenda

Meeting of the General Academic Institution Formula Advisory Committee
Texas Higher Education Coordinating Board
Board Room, First Floor
1200 East Anderson Lane, Austin
Monday, September 16, 2013
1:00 p.m.

I. Call to Order

II. Consideration and approval of the minutes from August 14, 2013 meeting

III. Discussion, review, and consideration of the Commissioner’s

IV. 2016-2017 Biennium charges

V. Planning for subsequent meetings

VI. Adjournment
Meeting of the General Academic Formula Advisory Committee  
Texas Higher Education Coordinating Board  
Board Room, First Floor  
1200 East Anderson Lane, Austin  
Wednesday, August 14, 2013  
1:00 p.m.

Minutes

Attendees: Mr. Martin V. Baylor, Ms. B.J. Crain, Dr. F. Dominic Dottavio, Dr. Dana L. Gibson,  
Ms. Martha Hilley, Dr. Edward T. Hugetz, Dr. Rodney H. Mabry, Dr. Perry Moore, Dr. Robert  
Neely, Dr. Marc A. Nigluzzo, Dr. John Opperman, Dr. Paula M. Short, and Ms. Cynthia V. Villa  
Absent: Ms. Jean R. Bush and Mr. Jim McShan

Staff: Dr. Raymund Paredes, Dr. David Gardner, Ms. Susan Brown, and Mr. Paul Turcotte

1. The meeting was called to order at 1:15 p.m.

2. Ms. Crain, convening chair called for a nomination for chair. Dr. Nigluzzo nominated Dr.  
Opperman, Dr. Dottavio seconded the nomination, and the members present unanimously  
voted Dr. Opperman as committee chair.

3. The chair requested Dr. Paredes provide explanatory comments on the charges.

4. Mr. Turcotte provided a brief overview of the funding formulas and a review of supporting  
documentation.

5. The chair reviewed the Commissioner’s 2016-2017 Biennium charges.
   a. Charge 1 - Outcomes-Based Funding
      i. The committee requested staff interview states that discontinued the use of  
an outcomes-based model to determine why.
      ii. Identify if the discontinued models were performance funding or outcomes-  
based funding models.
      iii. The chair pointed out the chart on page seven of the prior committee’s  
report, which identified the 11 NCHEMS principles for outcomes-based  
funding and advised the members to consider these when recommending  
changes to the model recommended by the prior committee. He noted  
comments during the session of simplifying the model by reducing the  
number of metrics.
      iv. Ms. Brown provided an update on the progress in revising the critical fields  
list. It is anticipated staff will have something for this committee to consider.  
The Legislature passed three bills relating to workforce needs and the staff  
plans to coordinate efforts to answer these bills and revise the critical fields  
list. Including all STEM fields in the model was considered.

b. Charge 2 – Funding Levels
i. The chair requested members review the baseline funding levels included in the advance materials and bring recommendations on an appropriate funding level to the next meeting.

ii. The chair requested staff present the funding levels necessary to increase the rate to the $62.19 funded in the 2010-2011 biennium.

iii. The chair requested members bring any recommended changes to the formulas to the next meeting.

c. Charge 3 – Funding Competency-Based Courses

i. The chair asked members with institutions with these programs to bring information about the programs to the next meeting.

ii. The chair requested staff interview states currently offering competency-based programs and determine the level of funding provided and which, if any, body granted the accreditation.

iii. It was noted the federal government is having issues with granting Pell awards to students in these programs.

d. The chair announced the next meeting will focus on charges two and three and with time permitting charge one would be considered.

6. The committee reviewed the future meeting tentative dates provided by staff.

a. The committee agreed September 16 at 1:00 was acceptable.

b. The chair requested staff send out alternative dates to the committee for the October, November, and December meetings. Members were not able to meet on Mondays and Tuesdays.

7. The chair called for a nomination for vice chair. Dr. Dottavio nominated Dr. Nigliozzo, Ms. Crain seconded the nomination, and the members present unanimously voted Dr. Nigliozzo as committee vice chair.

8. The meeting was adjourned at 2:08 p.m. until September 16, 2013 at 1:00 p.m.
Commissioner’s Charges

The GAIFAC, conducted in an open and public forum, is charged with proposing a set of formulas that provide the appropriate funding levels and financial incentives necessary to best achieve the four major goals of Closing the Gaps. A preliminary written report of its activities and recommendations is due to the Commissioner by December 3, 2013, and a final written report by February 3, 2014. The GAIFAC’s specific charges are to:

1. Study and make recommendations for alternative approaches to incorporating undergraduate student success measures into the funding formulas and compare the effects on funding the success measures within the formula versus applying the success measures as a separate formula. (TEC, Section 61.0593)

2. Study and make recommendations for the appropriate funding levels for the I&O and infrastructure formulas and the percent split between the “utilities” and “operations and maintenance” (O&M) components of the infrastructure formula. (TEC, Section 61.059 (b))

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<tr>
<th>Name</th>
<th>Institution</th>
<th>Contacts</th>
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<tbody>
<tr>
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**Charge 1** – Study and make recommendations for alternative approaches to incorporating undergraduate student success measures into the funding formulas and compare the effects on funding the success measures within the formula versus applying the success measures as a separate formula. (TEC, Section 61.0593)

Discontinued the use of outcomes-based funding – 7 states

Did your state discontinue a performance or outcomes-based funding model? If outcomes-based funding, why was the use of the model discontinued?

**California** Cliff Bowen (510) 987-9819
Administrators have no record of a performance-based funding previously in use. There were compacts and partnerships with prior governors that involved performance metrics. This year, Jerry Brown proposed employing a model that was not implemented by legislation.

**Connecticut** – (860) 723-0000
Finance office looking at new allocation models.

**Kansas** – Kelley Oliver (785) 296-5235 left message

**New Jersey** –Ms. Garlatti (609) 292-3235
The state is currently working a legislative initiative to consider an outcome-based funding model. In 1994, the governor determined formulaic based systems did not allow enough autonomy to the institutions and removed the prior model. That model’s metrics inaccurately portray institutions progress and there was insufficient funding in the model to make an impact.

**North Carolina** - Jonathon Pruitt (919) 962-4600
The state’s performance-funding model remains unfunded due to a lack of resources.

**Oregon** - Janice Lewis (541) 737-4605
This state is currently pursuing an outcomes-based model. Administrators have no record of a prior model. The higher education system itself uses an incentive-based funding model to reallocate 1 percent of the institutions’ state funding. The model distributes funding on the number of graduate and undergraduate degrees awarded to all students with a bonus for rural and underrepresented degree recipients. A taskforce is looking into funding up to 25 percent of state funding for the universities through a separate outcomes-based funding model.

**South Carolina** - Gary Glenn (803) 737-2244
The state does have a model but it remains unfunded. Despite an interest in measurement, competing for additional resources is difficult without increasing taxes. Institutions agreed with the model for distributing additional funding, but not redistributing existing funding.

Fact Sheet on the President’s Plan to Make College More Affordable: A Better Bargain for the Middle Class
THE WHITE HOUSE  
Office of the Press Secretary

FOR IMMEDIATE RELEASE  
August 22, 2013

FACT SHEET on the President’s Plan to Make College More Affordable:  
A Better Bargain for the Middle Class

A higher education is the single most important investment students can make in their own futures. At the same time, it has never been more expensive. That’s why since taking office, President Obama has made historic investments in college affordability, increasing the maximum Pell Grant award for working and middle class families by more than $900, creating the American Opportunity Tax Credit, and enacting effective student loan reforms eliminating bank subsidies and making college more affordable.

However, despite these measures, college tuition keeps rising. The average tuition at a public four-year college has increased by more than 250 percent over the past three decades, while incomes for typical families grew by only 16 percent, according to College Board and Census data. Declining state funding has forced students to shoulder a bigger proportion of college costs; tuition has almost doubled as a share of public college revenues over the past 25 years from 25 percent to 47 percent. While a college education remains a worthwhile investment overall, the average borrower now graduates with over $26,000 in debt. Only 58 percent of full-time students who began college in 2004 earned a four-year degree within six years. Loan default rates are rising, and too many young adults are burdened with debt as they seek to start a family, buy a home, launch a business, or save for retirement.

Today, President Obama outlined an ambitious new agenda to combat rising college costs and make college affordable for American families. His plan will measure college performance through a new ratings system so students and families have the information to select schools that provide the best value. And after this ratings system is well established, Congress can tie federal student aid to college performance so that students maximize their federal aid at institutions providing the best value. The President’s plan will also take down barriers that stand in the way of competition and innovation, particularly in the use of new technology, and shine a light on the most cutting-edge college practices for providing high value at low costs. And to help student borrowers struggling with their existing debt, the President is committed to ensuring that all borrowers who need it can have access to the Pay As You Earn plan that caps loan payments at 10 percent of income and is directing the Department of Education to ramp up its efforts to reach out to students struggling with their loans to make sure they know and understand all their repayment options.
A Better Bargain for the Middle Class: Making College More Affordable

Paying for Performance
• Tie financial aid to college performance, starting with publishing new college ratings before the 2015 school year.
• Challenge states to fund public colleges based on performance.
• Hold students and colleges receiving student aid responsible for making progress toward a degree.

Promoting Innovation and Competition
• Challenge colleges to offer students a greater range of affordable, high-quality options than they do today.
• Give consumers clear, transparent information on college performance to help them make the decisions that work best for them.
• Encourage innovation by stripping away unnecessary regulations.

Ensuring that Student Debt Remains Affordable
• Help ensure borrowers can afford their federal student loan debt by allowing all borrowers to cap their payments at 10 percent of their monthly income.
• Reach out to struggling borrowers to ensure that they are aware of the flexible options available to help them to repay their debt.

PAY COLLEGES AND STUDENTS FOR PERFORMANCE

The federal government provides over $150 billion each year in student financial aid, while states collectively invest over $70 billion in public colleges and universities. Almost all of these resources are allocated among colleges based on the number of students who enroll, not the number who earn degrees or what they learn. President Obama’s plan will connect student aid to outcomes, which will in turn drive a better, more affordable education for all students:

• Tie Financial Aid to College Value: To identify colleges for providing the best value and encourage all colleges to improve, President Obama is directing the Department of Education to develop and publish a new college ratings system that would be available for students and families before the 2015 college year. In the upcoming reauthorization of the Higher Education Act, the President will seek legislation allocating financial aid based upon these college ratings by 2018, once the ratings system is well established. Students can continue to choose whichever college they want, but taxpayer dollars will be steered toward high-performing colleges that provide the best value.
New College Ratings before 2015. Before the 2015 school year, the Department of Education will develop a new ratings system to help students compare the value offered by colleges and encourage colleges to improve. These ratings will compare colleges with similar missions and identify colleges that do the most to help students from disadvantaged backgrounds as well as colleges that are improving their performance. The results will be published on the College Scorecard. The Department will develop these ratings through public hearings around the country to gather the input of students and parents, state leaders, college presidents, and others with ideas on how to publish excellent ratings that put a fundamental premium on measuring value and ensure that access for those with economic or other disadvantages are encouraged, not discouraged. The ratings will be based upon such measures as:

- Access, such as percentage of students receiving Pell grants;
- Affordability, such as average tuition, scholarships, and loan debt; and
- Outcomes, such as graduation and transfer rates, graduate earnings, and advanced degrees of college graduates.

Base Student Aid on College Value by 2018. Over the next four years, the Department of Education will refine these measurements, while colleges have an opportunity to improve their performance and ratings. The Administration will seek legislation using this new rating system to transform the way federal aid is awarded to colleges once the ratings are well developed. Students attending high-performing colleges could receive larger Pell Grants and more affordable student loans.

Engage States with a Race to the Top for Higher Education that Has Higher Value and Lower Costs: The President requested $1 billion in Race to the Top funding to spur state higher education reforms and reshape the federal-state partnership by ensuring that states maintain funding for public higher education. About three-quarters of college students attend a community college or public university, and declining state funding has been the biggest reason for rising tuition at public institutions. The Race to the Top competition will have a special focus on promoting paying for value as opposed to enrollment or just seat time. States typically fund colleges based on enrollment rather than on their success at graduating students or other measures of the value they offer. There are notable exceptions, like Tennessee, Indiana and Ohio, which fund colleges based on performance. To build on their examples, the President’s plan would also encourage states to provide accelerated learning opportunities, smooth the transition from high school to college and between two- and four-year colleges, and strengthen collaboration between high schools and colleges.
• Reward Colleges for Results with a Pell Bonus and Higher Accountability: To encourage colleges to enroll and graduate low- and moderate-income students, the President will propose legislation to give colleges a bonus based upon the number of Pell students they graduate. And the Administration will prevent the waste of Pell dollars by requiring colleges with high dropout rates to disburse student aid over the course of the semester as students face expenses, rather than in a lump sum at the beginning of the semester, so students who drop out do not receive Pell Grants for time they are not in school.

• Demand Student Responsibility for Academic Performance: To ensure students are making progress toward their degrees, the President will also propose legislation strengthening academic progress requirements of student aid programs, such as requiring students to complete a certain percentage of their classes before receiving continued funding. These changes would encourage students to complete their studies on time, thereby reducing their debt, and will be designed to ensure that disadvantaged students have every opportunity to succeed.

PROMOTE INNOVATION AND COMPETITION

A rising tide of innovation has the potential to shake up the higher education landscape. Promising approaches include three-year accelerated degrees, Massive Open Online Courses (MOOCs), and “flipped” or “hybrid” classrooms where students watch lectures at home and online and faculty challenge them to solve problems and deepen their knowledge in class. Some of these approaches are still being developed, and too few students are seeing their benefits. The federal government can act as a catalyst for innovation, spurring innovation in a way that drives down costs while preserving quality.

To promote innovation and competition in the higher education marketplace, the President’s plan will publish better information on how colleges are performing, help demonstrate that new approaches can improve learning and reduce costs, and offer colleges regulatory flexibility to innovate. And the President is challenging colleges and other higher education leaders to adopt one or more of these promising practices that we know offer breakthroughs on cost, quality, or both — or create something better themselves:

• Award Credits Based on Learning, not Seat Time. Western Governors University is a competency-based online university serving more than 20,000 students with relatively low costs — about $6,000 per year for most degrees with an average time to a bachelor’s degree of only 30 months. A number of other institutions have also established competency-based programs, including Southern New Hampshire University and the University of Wisconsin system.
• Use Technology to Redesign Courses. Redesigned courses that integrate online platforms (like MOOCs) or blend in-person and online experiences can accelerate the pace of student learning. The National Center for Academic Transformation has shown the effectiveness of the thoughtful use of technology across a wide range of academic disciplines, improving learning outcomes for students while reducing costs by nearly 40 percent on average. Carnegie Mellon University’s Open Learning Initiative has developed a hybrid statistics course used at six public universities, and its students performed as well as their peers in a traditional course in only 75 percent of the time. Arizona State University’s interactive algebra lessons helped students perform 10 percent better, despite meeting half as often, and at a lower cost. The University of Maryland redesigned an introductory psychology course, reducing costs by 70 percent while raising pass rates. New York’s Open SUNY initiative brings together every online program offered system-wide, helping students complete more quickly.

• Use Technology for Student Services. Online learning communities and e-advising tools encourage persistence and alert instructors when additional help is needed. Technology is enabling students from across campuses and across the world to collaborate through online study groups and in-person meet-ups. MOOC-provider Coursera has online forums in which the median response time for questions posed by students is 22 minutes. To help students choose the courses that will allow them to earn a degree as quickly as possible, Austin Peay State University has developed the “Degree Compass” system that draws on the past performance of students in thousands of classes to guide a student through a course, in a similar manner to the way Netflix or Pandora draw on users’ past experience to guide movie or music choices.

• Recognize Prior Learning and Promote Dual Enrollment. Colleges can also award credit for prior learning experiences, similar to current Administration efforts to recognize the skills of returning veterans. Dual-enrollment opportunities let high school students earn credits before arriving at college, which can save them money by accelerating their time to degree.

To help colleges innovate and improve quality and outcomes, the Administration will:

• Empower Students with Information: New college ratings will help students compare the value offered by different colleges. The Department of Education will enlist entrepreneurs and technology leaders with a “Datapalooza” to catalyze new private-sector tools, services, and apps to help students evaluate and select colleges. The effort will be complemented by earnings information by college that will be released for the first time on Administration’s College Scorecard this fall.
• **Seed Innovation and Measure What Works:** To demonstrate what works, President Obama has proposed a new $260 million First in the World fund to test and evaluate innovative approaches to higher education that yield dramatically better outcomes, and to develop new ways for colleges to demonstrate that they are helping their students learn. In addition, the Department of Labor is planning to grant an additional $500 million to community colleges and eligible four-year colleges and universities next year. A portion of these resources will be used to promote accelerated degree paths and credentials that would drive more high-quality and affordable options for adult workers and students. Through these efforts, the Administration will work with business and philanthropy to support industry partnerships to enrich student learning with valuable job exploration and experience.

• **Reduce Regulatory Barriers:** The Department will use its authority to issue regulatory waivers for “experimental sites” that promote high-quality, low-cost innovations in higher education, such as making it possible for students to get financial aid based on how much they learn, rather than the amount of time they spend in class. Pilot opportunities could include enabling colleges to offer Pell grants to high school students taking college courses, allowing federal financial aid to be used to pay test fees when students seek academic credit for prior learning, and combining traditional and competency-based courses into a single program of study. The Department will also support efforts to remove state regulatory barriers to distance education.

Finally, the President will challenge leaders in states, philanthropy, and the private sector to make their own commitments to improve college value while reducing costs. For example, states can redesign the transition to postsecondary education and commit to strategies to improve student learning and enhance student advising, such as hybrid learning pilots, adaptive learning platforms, and digital tutors. Philanthropists can create initiatives, pilots and prizes for colleges that advance competency-based education, accelerated degrees, and the integration of new technologies into on-campus teaching and learning. Investors and entrepreneurs can directly support and develop new technologies and innovations that accelerate student learning while evaluating the effectiveness of different approaches. And employers and industry groups can collaborate with postsecondary institutions and new providers to develop high-quality, low-cost degrees in growing sectors of the economy, offer work-based learning experiences to students, and hire graduates who demonstrate the knowledge and skills employers need.

### Ensure Student Debt Is Affordable

While bringing down costs for current and future college students, President Obama will also help students with existing debt to manage their obligations. Income-driven
repayment plans allow borrowers to take responsibility for their federal student loan debt with more flexible repayment terms, while helping professionals like teachers and nurses who take on critical jobs in our society that require significant education but may result in modest salaries. These plans allow students to fully repay their student debt on a sliding scale that adjusts monthly payments based on changing income and growing families. Nearly two-thirds of people that currently participate in the income-driven repayment plans make less than $60,000 a year. Currently, about 2 million of 37 million federal student loan borrowers are benefitting from income-driven plans.

- **Make All Borrowers Eligible for Pay As You Earn**: To make sure that students and families have an easy-to-understand insurance policy against unmanageable debt now and in the future, the President has proposed allowing all student borrowers to cap their federal student loan payments at 10 percent of their monthly income. Currently, students who first borrowed before 2008 or have not borrowed since 2011 are not eligible for the President’s Pay As You Earn plan. In addition, the Administration will work with Congress to ensure that the benefits are targeted to the neediest borrowers.

- **Launching an Enrollment Campaign for Pay As You Earn**: Beginning this fall, the Department of Education will contact borrowers who have fallen behind on their student loan payments, undergraduate borrowers with higher-than-average debts, and borrowers in deferment or forbearance because of financial hardship or unemployment to ensure they have the information they need to choose the right repayment option for them. Starting in 2014, the Department of Education and the Department of Treasury will work to help borrowers learn about and enroll in Pay As You Earn and Income-Based Repayment plans when they file their taxes. And to assist guidance counselors and other advisers who guide students through the process of selecting and financing their higher education, the Administration will launch a “one-stop shop” that will include important resources for choosing among various income-driven repayment options.
**Charge 2 – Study and make recommendations for the appropriate funding levels for the I&O and infrastructure formulas and the percent split between the “utilities” and “operations and maintenance” (O&M) components of the infrastructure formula. (TEC, Section 61.059 (b))**

An additional **$552 million or 13 percent more in all funds** or 17 percent more in general revenue would have been needed to fund the sector at 2010-2011 funding rates of $62.19 for the instruction and operations and $6.09 for the infrastructure formulas for the 2014-2015 biennium.

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<td>Instruction and Operations</td>
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<td>Formula Funding Total</td>
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<td><strong>552</strong></td>
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Charge 3 – Study and make recommendations on the treatment of competency-based courses in formula allocations.

Survey

Which of your public state higher education institutions offer Competency-Based Degree programs?

What are their classifications (Two-year, four-year, or medical)?

How are the programs funded?
   Do they receive state funding?
   If so, how does the funding work (Financial aid, direct reimbursement, allocation funding, or start-up funds only)?

Are the programs accredited by a different body than other degree programs?
   If so, by which accrediting body?

Wisconsin – Rebecca Karoff (608) 263-2728
The University of Wisconsin System will begin offering competency-based degree and certificate programs beginning this fall with its UW Flexible Option. This Option (UW Flex) is a portfolio of degrees, certificates, and courses drawn primarily from the system’s existing program array that will be offered through self-paced and competency-based formats and built on best-practice educational principles and learning science, including learning-outcomes assessment and instructional design principles. More information about the academic degree and certificate programs offered at http://flex.wisconsin.edu/.

The University of Wisconsin Milwaukee and Colleges (the UW System’s network of 13 freshman-sophomore campuses) will offer the first cohort of competency-based UW Flexible Option programs. Additional University of Wisconsin institutions will offer these programs in the second cohort. The model under development is multi-institutional and collaborative, involving a central role for the University of Wisconsin-Extension that provides extensive administrative and operational support to the participating institutions.

System Administration is providing start-up funding allocated to the participating degree-granting institutions for faculty curricular development, student services functions, and operational costs of mounting a competency-based program (infrastructure and personnel). The state of Wisconsin rescinded dedicated funding. However, the system funding includes previously allocated GPR. Additionally, the system is seeking Department of Education approval to award federal financial aid to program enrollees.

These programs’ accrediting bodies are the same as those that evaluate other UW system programs. Program accreditation was approved in July 2013. UW-Milwaukee and UW Colleges currently offer the converted programs, so accreditation for programs converted to competency-based was granted through the “Substantive Change” process from the Higher Learning Commission. UW-Milwaukee has been working with its nursing accrediting body to ensure a competency-based Bachelor of Science in Nursing offered at UW-Milwaukee starting this fall is in compliance as with the other Flex programs with professional accreditation.
Kentucky
State does not provide state funding for competency-based programs.

Georgia – Tracey Cook (404) 962-3233
Georgia does not have a competency-based degree program at this time, but we will probably be moving in this direction in the future. Students currently may receive credit for demonstrating competence for outcomes for a course at the 13 campus Adult Learning Consortiums by opting to provide a portfolio based assessment to demonstrate competencies in the course objectives and outcomes. Trained faculty assesses the portfolios and determines if the student meets outcomes; the portfolio serves as a de facto exit exam. Passing students receive credit and pay a Prior Learning Assessment Fee of $150 to $400 depending on the credit hours. These credit hours do not receive state funding.

Iowa – Diana Gonzalez (515) 242-6116
Iowa public four-year institutions do not offer competency-based degree programs. Students receive college credit at the public higher education institutions in Iowa (two and four-year) through agreements governing credit by examination (CLEP & APP) and awarding and transferring college credit for educational experience in the armed services.

Connecticut – Braden Hosch (860) 723-0235
In Connecticut, Charter Oak State College is the state’s public online college. It has a statutory mission in part to implement "new methods of awarding undergraduate degrees and college credits including but not limited to ... examinations and methods other than classroom instruction for determining qualifications" (Connecticut General Statutes 10a-143(a)) In practice, however the portfolio, exam, and competency assessments are always translated into credits.

Charter Oak State College is a public 4-year institution; all public institutions in CT are funded by block grants, without reference to enrollment, graduation, or other criteria. A total of $100,000 in state student financial aid is available for students attending Charter Oak. All programs are under the institution's regional accreditation from NEASC.

States indicating no competency-based programs
New Hampshire – Richard A. Gustafson (603) 271-0256
Florida – Tim Jones (850) 245-9397
Utah – Liz Hitch ehitch@ushe.edu
The state offers competency-based non-credit programs, but no competency-based degree programs in the Utah System of Higher Education. Western Governors University, headquartered in Utah, has such programs, which are not state funded.
Oklahoma – Dr. Blake Sonobe bsonobe@osrhe.edu
Illinois – Dr. Alan Phillips
The state’s public universities do not offer competency-based degree programs at this time. It is very likely that we start these programs.
Nebraska – Jamie Hullman (775) 784-3409
South Carolina – Renea Eshleman (803) 737-2281
States without responses

Alabama
Alaska
American Samoa
Arizona
Arkansas
California
Colorado
Delaware
District of Columbia
Georgia
Guam
Hawaii
Idaho
Illinois
Indiana
Kansas
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
New Jersey
New Mexico
New York
North Carolina
North Dakota
Northern Marianas Islands
Ohio
Oregon
Pennsylvania
Puerto Rico
Rhode Island
South Dakota
Tennessee
Texas
Vermont
Virginia
Virgin Islands
Washington
West Virginia
Wyoming
COMPETENCY-BASED EDUCATION: A SURVEY OF PROMINENT PROVIDERS

Prepared for the Texas Higher Education Coordinating Board by John W. Carroll, M.B.A., M.S.
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INTRODUCTION

Competency-based education (CBE) has evolved from a small group of innovative postsecondary providers to a growing group of regionally accredited baccalaureate granting institutions. Although CBE has been in use in medical, counseling, and professional service fields for decades, it is a relatively new method for baccalaureate education outside of those disciplines. The Department of Education recognizes how CBE differs from traditional postsecondary education and specifically authorizes the use of alternatives to the commonly accepted credit hour measurements for academic achievement. Direct assessment is the broad category under which CBE programs operate. The Code of Federal Regulations, Title 34, Section § 668.10 - Direct assessment programs, states the following:

(a)(1) A direct assessment program is an instructional program that, in lieu of credit hours or clock hours as a measure of student learning, utilizes direct assessment of student learning, or recognizes the direct assessment of student learning by others. The assessment must be consistent with the accreditation of the institution or program utilizing the results of the assessment.

(2) Direct assessment of student learning means a measure by the institution of what a student knows and can do in terms of the body of knowledge making up the educational program. These measures provide evidence that a student has command of a specific subject, content area, or skill or that the student demonstrates a specific quality such as creativity, analysis or synthesis associated with the subject matter of the program. Examples of direct measures include projects, papers, examinations, presentations, performances, and portfolios.¹

On March 19, 2013, the Department of Education issued a a Dear Colleague letter entitled “Applying for Title IV Eligibility for Direct Assessment (Competency-Based) Programs” which outlines the process by which competency-based programs can participate in Title IV federal student aid. Only those institutions that are offering the entire program as direct assessment competency-based are eligible. 34 CFR 668.10 includes the following requirements for such programs:

• Instructional programs may use direct assessment of student learning (or recognize the direct assessment of student learning by others) through projects, papers, examinations, presentations, performances, portfolios, and other similar assessments.

• Institutions wishing to award federal student aid must apply to the Department of Education for approval. The application must specify the equivalent credit or clock hours for the programs, including how equivalencies will be established. The Secretary of Education will use this information to determine whether or not the program meets minimum academic year requirements and base payment periods and award calculations on this information.

• Institutions must include in their application an explanation of how it determined the equivalent number of credit/clock hours for the program.

• Institutions must show that their accrediting agency(ies) have agreed with this assessment of equivalences.

• Institutions may use learning resources that are provided by entities other than the institution without regard to the limitations on written arrangements between an eligible institution and an ineligible institution/organization under 34 CFR 668.5(c).

• Federal student aid may only be awarded for learning that results from the instruction provided by the institution. No aid may be awarded for mastery obtained prior to the enrollment or on tests that are not associated with educational activities overseen by the institution.

• Several types of programs/coursework that might otherwise be eligible for federal student aid is ineligible if it involved direct assessment, including programs at foreign schools, preparatory coursework required for program entry, and coursework necessary for an elementary or secondary teaching credential.

• Remedial coursework measured through direct assessment is not eligible for Title IV federal student aid. Remedial coursework offered in clock/credit hours in conjunction with the direct assessment program is eligible for federal student aid, however.
• Any changes to the original direct assessment program that impacts the information provided in the initial application to the Department of Education must be approved by the Department through a reapplication.

• The institution’s application must also include related parameters of the program including minimum weeks of instructional time, payment period, how academic activities will take place each week, the definition of a full time student, how satisfactory academic progress will be measured, and how the financial system will be configured to process student aid.

In spring 2013, Southern New Hampshire University became the first institution approved to offer direct assessment federal student aid. As of August 2013, programs have also been approved for Title IV federal student aid at Capella University. Several other institutions were actively pursuing Department of Education approval including: Texas State Technical College-Harlingen, Northern Arizona University, and the Kentucky Community and Technical College System.

Postsecondary institutions have been assessing student performance using instruments like papers, projects and exams for a long while. Some of these assessments gauge knowledge acquisition, but not necessarily how well students might be able to apply that knowledge. This report provides a brief survey of selected colleges and universities who are successfully executing CBE programs that utilize direct assessment in one form or another. The report presents profiles of competency-based providers such as Southern New Hampshire University, Western Governors University, and Excelsior College. Special attention is given to Western Governors University, as they are most prominent and rapidly growing provider of CBE in Texas. Curiously, public postsecondary institutions have not implemented direct assessment—as defined by the Department of Education—or CBE in baccalaureate education to the extent done so by private non-profit colleges and universities. The study also provides a working definition of CBE. To begin, what is competency-based education?

DEFINITION

There are several competing definitions of competencies and competency-based education (CBE) within the business, medical education, and higher education literature, with little consensus among them. According to Axley “…there is no officially agreed upon theoretical or operational definition of
competency among nurses, educators, employers, regulating bodies, government, and patients." Axley's paper does not offer a definition or framework to resolve this problem, but others within the medical training field do. Frank, et al., conducted a rigorous analysis of the medical training literature in an effort to provide a working definition of CBE for the field. The authors retrieved 18,967 articles that were related to CBE in medical training. After specifying and employing a method with which to narrow their analysis, they fully reviewed 1,826 articles, of which 173 were determined to be directly relevant to creating a working definition of CBE.

Competency-based education (CBE) is an approach to preparing physicians for practice that is fundamentally oriented to graduate outcome abilities and organized around competencies derived from an analysis of societal and patient needs. It deemphasizes time-based training and promises greater accountability, flexibility, and learner-centredness.

While this definition captures elements of CBE as it applies to the medical profession, such as, an emphasis on the acquisition and demonstration of skills, it lacks portability to other disciplines.

Several authors have discussed CBE in medical education. As described above, the field has not achieved a common definition for CBE, yet there is general agreement that potential practitioners need to demonstrate their skills, abilities, and knowledge through periods of highly supervised professional internships. While this model works well with in the healthcare service profession, its application in other

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3 Jason R. Frank, Rani Mungroo, Yasmine Ahmad, Mimi Wang, Stefanie De Rossi and Tanya Horsley, "Toward a Definition of Competency-Based Education in Medicine: A Systematic Review of Published Definitions," Medical Teacher 32.8 (2010): 634.

4 Ibid.

5 Ibid. p. 636.

disciplines is less transparent than it is within other related healthcare disciplines. A more general CBE model is needed to allow disparate disciplines to design and implement effective CBE programs. An earlier definition of competencies was provided by Jones, et al., that appears to be broad enough to apply to many fields, while being sufficiently narrow to be meaningful in a variety of applications.\(^7\)

In 1998, the National Center for Education Statistics commissioned a report to study CBE. The study was conducted by a working group organized and run by the National Postsecondary Education Cooperative.\(^8\) The report “examines the use of competency-based initiatives across postsecondary education in the United States and presents principles that underlie successful implementation drawn from selected case studies”.\(^9\) The working group identified traits and characteristics, skills, abilities, and knowledge that led to competencies.

Jones, et al., differentiate competencies from outcomes or demonstrations. This analysis refines definitions provided by the medical literature, where demonstrations and competencies are comingled. Jones, et al., frames competencies as follows:

- Traits and Characteristics are the foundation for learning, the innate make-up of individuals on which further experiences can be built. Differences in traits and characteristics help explain why people pursue different learning experiences and acquire different levels and kinds of knowledge and skills.
- Skills, Abilities, and Knowledge are developed through learning experiences, broadly defined to include school, work, participation in community affairs, etc.
- Competencies are the result of integrative learning experiences in which skills, abilities, and knowledge interact to form bundles that have currency in relation to the task for which they are assembled.
- Demonstrations are the results of applying competencies. It is at this level that performance can be assessed.\(^10\)

Figure 1., shown below, illustrates the relationship among these elements. Traits and characteristics are innate to the student and they are the foundation upon which learning is fostered. The next level—skills, abilities, and knowledge—is where learning activities, such as assignments, readings, and experiential


\(^8\) Ibid.

\(^9\) Ibid. p. vii.

\(^10\) Ibid. p. 7.
learning, transform and enhance a student’s capabilities toward achieving and demonstrating competency. Jones et al. indicate “[s]kills, abilities, knowledge, and competencies are often used interchangeably by those within and outside of postsecondary education. For example, we speak of competent machinists and highly skilled machinists; competent mathematicians and knowledgeable mathematicians.” Their analysis, illustrated in Figure 1, seeks to separate skills, knowledge, and abilities from competencies. Their operational definition of competencies within CBE is where “competencies are the result of integrative learning experiences in which skills, abilities, and knowledge interact to form bundles that have currency in relation to the task for which they are assembled.” The interaction of those three elements being bundled, and coupled with salience to the task at hand, is the working definition of competencies in CBE use throughout the remainder of this report. This bundling technique is best demonstrated by the CBE effort at Southern New Hampshire University.

Figure 1. Hierarchical Relationship

11 Ibid. p. 8.
12 Ibid. p. 7.
Saving Higher Education: The integrated, competency-based three-year bachelor's degree program,\(^{13}\) is a thorough discussion of the development and implementation of their CBE program. The book presents SNHU's Competency Reinforcement Plan for Business Administration that illustrates how ten distinct program competencies are combined, or bundled, into separate modules in their three-year baccalaureate degree plan. The program competencies are "communication, research, information technology, analytical skills, teamwork, leadership, problem solving, global orientation, legal and ethical practices, and strategic management."\(^{14}\) The modules cover business topics such as quantitative analysis, marketing, communication, and management and take the place of traditional semester courses.\(^{15}\) SNHU clusters programs of study into modules rather than courses. This distinguishes their three-year CBE degree program from that of their traditional four-year program and its course work.\(^{16}\) The program is designed so that modules include several of the program competencies. Summative competency-integrating experiences occur during and at the completion of module sequences. The summative experiences may be the creation of elements in a portfolio or a short case study that assess student learning.

As a student progresses through the modules, they also participate in "integrating experiences"\(^{17}\) that combine some, or all, of the desired program competencies into one unifying activity. "It is the learning experiences associated with these modules that address topics and learning outcomes, which in turn support competency achievement."\(^{18}\) As Bradley, et al., point out, the final integrating experience, which occurs upon completion of the modules, is an example of what the Lumina Foundation for Education describes as "applied learning."\(^{19}\)

The Applied Learning outcomes make it clear that, beyond what graduates know, what

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14 Ibid. p. 49.

15 Ibid.

16 Ibid. p. 48.

17 Ibid. p. 49.

18 Ibid. p. 48.

they can do with what they know is the ultimate benchmark of learning. They emphasize a commitment to analytic inquiry, active learning, real-world problem solving, and innovation — all of which are vital in today's evolving workplace and in society. Applied Learning should be viewed as a core element of the student experience\(^20\) (emphasis in original).

These experiences can be week-long activities where students are placed into teams to work on a case or problem set.\(^21\) In SNHU's degree program “…student teams get a comprehensive case that is often drawn from real-world events from the previous year.”\(^22\) On the last day of the week, students present their work to the faculty. Teams present their result independently of each other. This reinforces the notion that the case studies are not competitions but demonstrations and assessments of the learning that occurred during the semester or academic year. Students also complete 360\(^\circ\) evaluations\(^23\) to communicate each team member's participation and contributions to their combined effort. The integrating experiences in the third and final year are more extensive and can last an entire academic year.

SNHU's final year in the three-year program contains a capstone experience tailored to each student's degree program and career goals.\(^24\) Examples of capstone applied learning or integrated experience activities at SNHU are yearlong projects at American Express, the New Hampshire Supreme Court Society, and the Community Health Center in Manchester, NH.\(^25\)

The transformative nature of such an experience should not be underestimated. When the yearlong integrating experience is done right, students have greatly matured by the end of the school year and are almost uniformly ready to enter the workforce in highly productive roles or to go on to graduate school ready to excel.\(^26\)

Each of these summative experiences allowed students to apply the material they learned in the modules in a manner that also demonstrates the competencies acquired on their journey through the modules.

\(^{20}\) Ibid. p. 8.

\(^{21}\) Bradley, Siedman and Painchaud, Saving Higher Education: The Integrated, Competency-Based Three-Year Bachelor’s Degree Program.

\(^{22}\) Ibid. p. 53.

\(^{23}\) Ibid.

\(^{24}\) Ibid.

\(^{25}\) Ibid. p. 57.

\(^{26}\) Ibid. p. 56.
Week long experiences at semesters end in years one and two, plus the yearlong experience in year three, allows students to build in-depth portfolios of their work. For example, the yearlong program of “Student as Leader & Manager, Humanities, and the Individual” lasts 31 weeks with integrating experiences occurring in weeks 16 and 31.27

SNHU embarked on their curriculum redesign with the goal of being painstakingly transparent at every step of the process. Faculty members and administrators from throughout the University were included in the design, development, and execution of their competency-based education initiative. The method the University used to overcome potential faculty objections was to involve faculty in the process. Faculty played an integral role in development of the competencies, creation of the modules containing the competencies, and the methods by which competencies would be assessed.28 Faculty were tasked with ensuring,

[1]there is a high degree of coordination between academic areas within a module in order to (1) achieve rapid cognitive mastery, (2) achieve a high level of mutually reinforcing, goal oriented activities, (3) provide foundational and building activities for the competencies, while reducing the number of multiple and unnecessary initiating activities, (4) eliminate unnecessary overlap and redundancy, (5) create an environment in which course-equivalent activities can be conducted, (6) establish academic threads within a module within a year, (7) ensure modules are guided by their themes, and (8) ensure modules are rooted in quality.29

Items four and five point to a high degree of interdisciplinary coordination. For example, a consumer behavior class could be taught by the Psychology Department or the Marketing Department in a School of Business. In the SNHU model, rather than offering two rather similar courses in separate departments, the course material would be incorporated into a single module. This allows for the possibility of faculty from either department being able to teach the material.

This high degree of integration was achieved by conducting many curriculum development sessions over a year’s time. SNHU chose to redesign their business program because it was the most popular and provided the best opportunity to realize cost savings for students.30 SNHU began the

27 Ibid. p. 46.
28 Ibid.
29 Ibid. p. 46.
30 Ibid.
program by communicating the need for change and creating a sense of urgency within the university community. Tuition costs had been increasing and the three-year competency-based program was offered as a way to combat those rising costs. The result of the program yielded a 25% reduction in tuition for the degree program.\(^3\) Next, they assembled a cross section of faculty leaders in business, the arts, and sciences to develop modules and competencies.

This assembly of community and faculty leaders created a coalition that would not only develop the program, but also carry the message to other interested stakeholders within the university and beyond.\(^3\) The team created a vision statement that provided guidance for their efforts and became the foundation of their communication strategy. The vision statement also was the foundation for “elevator speeches”, which are short statements about the program that quickly communicated the program’s purpose and desired results.\(^3\) This team also helped overcome potential institutional resistance to change by communicating that vision and underscoring the benefits to students, such as a reduction in tuition, that would occur as a result of their efforts. As part of this effort, SNHU conducted faculty workshops designed to offer details on the CBE initiative.

The faculty workshops achieved two objectives. First, they served as a communication platform to inform a diverse group of faculty about the team’s progress. The workshops provided details about the how competencies were being defined, how the assessments were being developed, and how the modules were being constructed. Second, the workshops gave faculty an opportunity to collaborate with the competency developers. The workshops operated as feedback loops, where ideas were discussed and refined with the rest of the university community. SNHU also implemented a faculty steering committee to supervise implementation. One of the early decisions was to retain a 15 weeks calendar. This provided continuity with existing programs and allowed students currently in four-year programs to transfer into the CBE degree program\(^3\).

The CBE structure maps to a traditional 15-week semester calendar with the first integrating experience scheduled where the end of a typical fall semester would finish. In a three-year degree program, a third 15 week semester is added to each academic year that effectively removes the need for a fourth year. This continuous format has several implications for students, faculty, and administrators.

A trimester schedule replaces summer session with a full semester. This creates an academic

\(^3\) Ibid. p. 92.
\(^3\) Ibid.
\(^3\) Ibid. p. 71.
\(^3\) Ibid.
calendar that operates nearly all year as opposed to a traditional academic calendar that contains several extended breaks. The benefit for SNHU’s students is a shorter time to degree completion. Less time in school implies reduced tuition costs and students begin reaping the benefits of their education more quickly. For those who need a degree for rapid or immediate career advancement, the three-year schedule is rather attractive. Removing extended semester breaks also implies faculty will need to refine and develop curriculum while teaching as opposed to waiting for traditional semester breaks. Administrators, particularly those in financial aid, will have increased operational tempo as compared to a more traditional busy time at the start of fall and spring semesters. While SNHU’s creation of CBE degree programs is innovative, in some ways, it still retains some characteristics of more traditional postsecondary education. This is not true of the other CBE providers.

WESTERN GOVERNORS UNIVERSITY

Western Governors University (WGU) began in 1995 as an idea during a meeting of the Western Governors Association. It was chartered in 1996, incorporated as a non-profit in 1997, and began accepting students in 1999. Since its inception, WGU has been an online university that uses “competencies rather than seat time as the measure of its outcomes.” WGU is organized around five broad themes: “Responsiveness to employment and societal needs; A focus on competency-based education; Expanding access; Cost-effectiveness; [and] Development of a technology infrastructure.” To accomplish this, “the governors enlisted the Western Interstate Commission on Higher Education (WICHE) and the National Center for Higher Education Management Systems (NCHEMS) to help design the newly envisioned university.” Having operations that span several regions with different regional accreditors, WGU participated in an innovative process for achieving accreditation.

In response to the unique needs of WGU, an Inter-Regional Accrediting Committee (IRAC) was formed from a group of representatives from four regional accreditors to review WGU’s accreditation application.

36 Ibid. para. 3.
37 Ibid. para. 5.
38 Ibid. para. 4.
39 Ibid.
The Inter-Regional Accrediting Committee was made up of members of the Commission on Colleges and Universities of the Northwest Association of Schools and of Colleges and Universities, the Higher Learning Commission of the North Central Association of Colleges and Schools, the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges, and the Accrediting Commission for Senior Colleges and Universities of the Western Association of Schools and Colleges.  

This committee jointly reviewed WGU's accreditation application. "WGU has the distinction of being the only university to receive regional accreditation simultaneously from four regional accrediting commissions." Despite strong opposition from the American Association of University Professors' Committee on the Accrediting of Colleges and Universities WGU achieved accreditation "Candidate" status in December 2000 after an initial vote slated for May of 2000 was delayed.

The path to accreditation has a few important milestones. "The accreditation process has three steps — eligibility, candidacy, and full accreditation." Having previously determined WGU's eligibility, their ascension to candidacy was delayed because panel members had questions about the mechanics of WGU's assessment model and the transferability of credits. The delay allowed WGU to submit additional information to the panel.

WGU's application to candidacy was approved and three years later, they achieved accredited status. Having earned simultaneous accreditation in four regions also meant competency-based education (CBE) and rolling matriculation—enrolling new students every month as opposed to on a traditional semester calendar—was available to other institutions within those regions. Breaking from a traditional semester course schedule also leads to operational changes as well. Due to WGU's

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45 Ibid.
47 Ibid.
headquarters being located in Salt Lake City, UT, WGU lists the Northwest Commission on College and Universities as its "home" regional accreditor.\(^{48}\) They also have programmatic accreditation for their Teachers College (NCATE), Nursing (CCNE), Health Informatics (CAHIM), and Information and Security Assurance (IACE).\(^{49}\) This new model, coupled with rolling admission, has a variety operational implications.

WGU's start calendars operate differently than that of traditional postsecondary institutions. "WGU operates year-round, enrolling new students on the first of every month in six-month semesters."\(^{50}\) This allows students the flexibility to enroll when they are ready rather than timing their matriculation to ridged semester starts. This calendar, and others like it, are organized around the convenience of the student rather than the convenience of the institution. The acceptance rate for WGU student in Texas is 35%.\(^{51}\) Average student age is 36 to 38.\(^{52}\) WGU Texas Chancellor Mark Milliron indicates,

> Our ideal student is what we call an independent striver. They're somebody who has a vision of where they're going and they know the credential they need to get there. We're not a good model for an 18-year-old who wants a residential experience. Seventy-four percent of our students are ethnic minorities, from rural areas or otherwise from underserved populations.\(^{53}\)

WGU has an alternative structure for course content delivery: Students work with "mentors" rather than faculty to use open source and proprietary electronic resources to assemble materials for their course of study.\(^{54}\) WGU recently partnered with CourseSmart to deliver some textbooks electronically.\(^{55}\) WGU recently announced an innovative agreement with McGraw-Hill where selected materials from their suite of online resources, which include textbooks and other online learning tools, are offered on a pay-for-

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\(^{49}\) Ibid.


\(^{51}\) R.K.M. Haurwitz, "Texas Branch of Western Governors University Making Mark in Cyberspace," The Austin American Statesman 22 April 2012.

\(^{52}\) Ibid.

\(^{53}\) Ibid.


performance basis. \(^{56}\) WGU is charged a deeply discounted fee plus a premium when students earn a B or higher.

In return for McGraw-Hill agreeing to take on some responsibility for student performance, WGU says it will share intelligence on how students are using the McGraw-Hill content — such as what course modules and e-texts portions students are looking at and how that correlates with student success. \(^{57}\)

WGU has a similar agreement with Pearson. All of these tools are incorporated, in one manner or another, into building curriculum.

WGU structures their curriculum around competency domains and learning assessments rather than traditional courses. \(^{58}\) At WGU “competence is a multidimensional construct requiring integrated methods to define it, a sequenced curriculum to help our students achieve it, and a battery of assessments to measure it.” \(^{59}\) Competency domains, which are similar in their intent to modules at SNHU, are developed in partnership with business and industry leaders.

A competency domain contains elements similar to the results of job task analysis, cognitive analysis, construct domain analysis, and more traditional curriculum development. Domains are simply containers that organize competences and their underlying objectives. Competencies are integrated performance statements that are operationally defined by a set of objectives. \(^{60}\)

Program Councils, comprised of subject matter experts from industry, are formed to define the real world objectives and outcomes that are captured in a domain. This information then goes to Program Assessment Managers who form teams of faculty members with expert knowledge in that particular field to refine the competencies. The result of that work is then sent back to the council for approval. \(^{61}\) This closely aligns WGU competencies with current needs in the employment market. According to Zane, “we

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\(^{57}\) Ibid.


\(^{59}\) Ibid, p.3

\(^{60}\) Ibid, p. 3.

\(^{61}\) Ibid.
use theory and constructs to frame our thinking, and we define domains based on what competent graduates should be able to do.”62 Students develop competencies at their own pace and under the supervision of a “mentor” rather than traditional faculty.63

WGU mentors are “academic advisors, coaches, and friendly supporters” that help students create a personalized degree plan.64 The personalized degree plan helps students map the learning tools they will need to complete their degrees.65 Those tools are included in the price of tuition. Examples of learning tools are electronic textbooks, online tutorials, simulations, and online classes.66 “When students need courses to prepare for their assessments they take them from WGU’s partnering institutions, the cost of which is included in their regular tuition.”67 The University has extensive partnerships with community colleges in each of the states in which they operate.68 WGU facilitates content delivery through via several of methods and from a variety of sources rather than creating one structure that is deployed to all students. Mentors create Academic Action Plans that map a student’s progress though the university.69

Academic plans can help ensure alignments between program-level competencies and module-level learning outcomes. The plans map module topics and learning experiences to their module-level learning outcomes and then to program-level competencies. When carefully coordinated, academic plans provide a powerful means of formative assessment.70

The first step students take toward degree completion is an orientation class entitled “Education Without Boundaries.”71 This orientation course provides students with the tools needed for success in the program. It helps students indentify what resources they will need and where they might take proctored

62 Ibid p. 4.

64 Western Governors University, Your Mentor, Available: http://www.wgu.edu, 16 May 2012.
66 Western Governors University, What You’ll Use to Learn.
69 Ibid.
71 Ibid p. 29.
assessments. “Although students have a great deal of communication with their mentor, the majority of the learning depends on the student’s active engagement in the material.” WGU’s self-paced learning model shifts the responsibility for content delivered by a faculty member giving lectures to the students independently engaging with a variety of learning materials. This model also has implications for assessing student learning.

Assessments are an essential element of WGU’s model. “As an online competency based university, Western Governors University (WGU) requires that students demonstrate competence in given content areas through a series of assessments.” According to Case, they use a variety of assessment methods that include, “objective assessment, performance assessments, portfolios, capstones, and observations.” Students are provided with learning objectives and mentors rather than syllabi and instructors. “Students cannot take the assessment until both student and mentor believe the student is ready. At that time, the assessment is officially scheduled and the student travels to a predetermined location where a proctor, who is an employee of WGU, supervises the test.” Recently, the university offered remote test taking using 360° view webcams to authenticate the test taker’s identity. Competency assessments take several forms. They can be,

- **Performance Assessments** contain multiple tasks such as scored assignments, projects, essays, and research papers. Performance Assessments contain detailed instructions and rubrics for completing each assigned task and are usually submitted via TaskStream, an online project-management and grading tool.

- **Objective Examinations** are designed to evaluate knowledge and skills in a subject area. Most objective exams include multiple-choice items, multiple- selection items, matching, short-answer, drag-and-drop, and point-and-click item types, as well as case studies and video-based items.

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72 Ibid.
74 Ibid.
75 Ibid.
76 Ibid.
• Essay Exams are used to measure students’ ability to integrate and apply concepts. Essays are scored by outside graders against competency-based rubrics established by the faculty.

• Observations are used to measure teacher certification candidates’ abilities to perform the skills acquired during their WGU studies. These classroom observations occur during the demonstration teaching experience and are conducted and evaluated by a trained local clinical supervisor.78

These assessments are evaluated by a testing service or by Graders. Graders are not the student mentors or faculty who guide their study.79 This represents another significant change in the traditional postsecondary delivery model. Graders have had no contact with the student prior to receiving the material to be graded.80 Graders use detailed rubrics with which to evaluate student performance. Proctored testing is another method by which students are assessed. Until the implementation of webcam proctored exams, the proctors might not be WGU employees.81 Some testing is performed by third party testing services like ETS. Although the study is self-paced, student still need to pass their assessments to progress in their Academic Action Plans.

Those passing student are allowed to proceed through their personalized plans but they do not get grades for their successfully completed work.

Students receive neither credits nor grades for the courses they take, nor for their WGU assessments, although all degrees are comparable in scope and depth to similar degrees at other institutions. The standard for passing assessments is performance equivalent to a grade of B or better in traditional systems, meaning that ‘the student has been fully engaged with the learning materials and activities necessary to master the competencies, has demonstrated the skills needed to utilize the competencies, and has produced work that indicates command of the competencies’ (quoted from the Western Governors University official transcript).82


80 Ibid.

81 Ibid.

82 Johnstone, "A Competency Alternative." 26. emphasis in original
WGU is a degree completion institution. WGU Texas has “a statewide articulation agreement with the Texas Association of Community Colleges that includes waiving of admission fees, a 5 percent tuition discount and the ability to apply for Finish to Go Further scholarships.”\(^{83}\) Tuition at WGU is $2,890 per six month period with an estimated total cost of $23,120 for four years. WGU is one of many postsecondary institutions using testing and prior learning assessment testing to award college credit. Excelsior College in Albany, NY makes extensive use of testing, so much so that entire degrees can be earned by exam.

**EXCELSIOR COLLEGE**

Excelsior College is a regionally accredited private nonprofit college offering credits by exam or via eight week or 15 week online courses. The college caters to non-traditional students seeking to complete a degree. For example, Marianne Durling, recently profiled in the Chronicle of Higher Education, used a combination of tests, military experience, and prior college credits to earn a degree from Excelsior.\(^{84}\)

With 18 credits to go for an associate degree in the liberal arts, Ms. Durling finished in one month. She kept going. Swapping study strategies on an online forum, she took about 20 tests—through Excelsior, the College Board, and the Defense Department—to complete the bulk of two bachelor’s degrees, in liberal studies and health sciences.\(^{85}\)

Excelsior College offers and accepts several types of standardized exams for credit. The University’s Excelsior College Examinations\(^{86}\) is a testing service developed by the University and accredited by The American Council on Education’s College Credit Recommendation Service.\(^{86}\) The University allows for extensive use of third-party exams, such as the CLEP and, in a partnership with Pearson, the UExcel\(^{87}\) test to fulfill college credit requirements. Another organization, New Charter University, briefly discussed in Appendix A, makes extensive use of exams as well. Excelsior College also accepts credits from Strigherline, which is a non-regionally accredited for-profit online college course provider.

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\(^{83}\) Haurwitz, "Texas Branch of Western Governors University Making Mark in Cyberspace."


\(^{85}\) Ibid.

Straigherline offers courses for a monthly fee of $99. Other postsecondary institutions accepting credit from Straigherline are UOPX, WGU, Capella University, and Albany State University. The University partners with testing services and other postsecondary education providers to deliver services traditionally offered within the university. Excelsior College partners with Johns Hopkins University for their library. Excelsior “...has outsourced its library and library technical services to the Johns Hopkins University, where a team of four employees is dedicated to maintaining Excelsior’s virtual library and assisting its students with questions both online and over the phone.” As a degree completion institution “...many Excelsior students have been out of school for years and may not be as tech-savvy as younger college students, the package [from Johns Hopkins] also includes online courses and programs designed to enhance information literacy.” Outsourcing their library and related technical support services allows the University to remain focused on their educational offerings rather than the administration of a library and support services. Excelsior College recently announced a $10,000 degree earned by exam. Students are able to use free open source courseware and materials to study for Excelsior’s exams. Passing students then receive three college credits for each exam. The degree to which Excelsior College uses exams is a relatively new phenomenon for regionally accredited colleges and universities. This method may have benefits for students by reducing their tuition costs and speeding their time to degree. The medium and longer-term effects of their program on student learning remains to be evaluated in the literature.

PROGRAM COMPARISON AND FINANCING

If we conceptualize online education as a continuum, we could place traditional colleges and universities that offer semester-based online courses at one end, and degree by exam programs, like the one at Excelsior College, at the other. Some postsecondary institutions at the traditional end of the continuum merely offer the same face-to-face classes in an online format without changing materials or assessment methods. Contrast that with Excelsior College, WGU, and SNHU who have completely redesigned their curriculum, assignments, and assessments. Although all three have implemented

89 Ibid.
competency-based-education (CBE), their execution of CBE is quite different.

Study at WGU is self-paced, utilizing an amalgam of learning materials and resources. Students are assessed when they, and their team of Mentors and faculty, deem they are adequately prepared. SNHU's program follows a 15-week semester schedule, where assessments and competency demonstrations occur on a time table similar to that of a traditional semester. However, their similarity to a traditional semester ends there. Other nontraditional providers, like University of Phoenix (UOPX), discussed in Appendix A, fall somewhere in the middle of the online continuum.

In addition to face-to-face degree programs, UOPX offers completely online degrees in accelerated formats that allow students to complete courses in 5 or 6 weeks. Courses are offered one at a time and mimic traditional course structures, albeit with a compressed calendar, with assignments and assessments due on specific days. UOPX is learner-centric, but not self-paced. Like Excelsior College, UOPX allows students to demonstrate abilities by passing CLEP exams however, unlike Excelsior College, UOPX limits the number of credits that may be earned via exams. New Charter University, which is a predominately exam based for-profit, is not regionally accredited.

Regional accreditation, or accreditation from one of the distance education accrediting agencies recognized by the Department of Education, is required for all postsecondary providers who wish to process Title IV funding for students. Pell Grants and Stafford Loans are examples of the most common forms of student financial aid. As discussed earlier, Title 36 Section § 668.10 in the Code of Federal Regulations specifically authorized direct assessment, which allows competency-based education programs to remain eligible for federal financial aid. All of the schools discussed within depend on tuition to fund their operations. Although SNHU has a modest endowment, their primary funding source is from tuition. None of the postsecondary institutions profiled here receive direct appropriations from the states in which they operate. Some states, such as New Hampshire, allow students to use state grant funds at private universities. Net tuition prices depend upon a variety of factors.

Given the variety of ways the institutions discussed here award college credit, calculating net tuition would be a cumbersome task. In an effort to simplify the comparison, cost per credit hour is estimated.

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92 University of Phoenix, Degree Programs.


This is an incomplete comparison. Given the variety of ways students can earn credit, and the wide ranging prices students pay for said credit, further research beyond the scope of this document will be needed to estimate accurately the true cost of attendance. At SNHU online, the cost per credit hour is $360.95 WGU’s tuition is for a time period, not a set number of credits or courses. Six months at WGU costs students $2,890.96 Assuming students would earn the equivalent of 15 credit hours during that time, per credit hour tuition is about $193.97 Excelsior College charges $39098 per credit hour and fees for Credit by Exam ranges from $95 to $375.99 Excelsior also has an extensive fee structure associated with matriculation and continuation in the program. Some of those fees are in excess of $1,000.100

CONCLUSIONS

The Department of Education authorized postsecondary institutions to develop and implement direct assessment as a measure of student learning in place of traditional credit hours or clock hours. These measures include “projects, papers, examinations, presentations, performances, and portfolios.”101 These alternative measures of student learning have been embraced by SNHU, WGU, and Excelsior College. WGU and Excelsior make extensive use of exams that translate into college credit. WGU also innovated the way they deliver course content and how students enroll.

Content is not predetermined but developed in partnership with Mentors who assist students with construction of a personalized degree plan. Students are not assessed according to a preset calendar. Assessments occur when they have mastered the material. WGU also offers rolling admission with cohorts starting every month. SNHU keeps to the widely-used 15 week semester calendar, but offers a full 15 week summer semester that allow students to eliminate a fourth year of study in their baccalaureate programs. They also transformed their curriculum into learning activities that build competencies. Those competencies are delivered within modules instead of within courses. Modules were developed with industry leaders and a multidisciplinary team of faculty to eliminate redundancy within a


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97 Western Governors University. How Wgu’s Tuition Compares.


99 Excelsior College, Credit by Exam.

100 Excelsior College, Costs and Financing.

101 Department of Education, Section 668.10 - Direct Assessment Programs.
particular program. As institutions consider piloting or implementing similar competency-based education programs, the following themes emerged from material reviewed here:

- Direct assessment of student learning is recognized by the Department of Education as an acceptable method to assess student learning. Direct assessment is being implemented in a variety of competency-based education degree programs around the country.

- Industry and faculty involvement in transforming the curriculum into the competency-based format is critical to a program's success. This is exemplified by SNHU's commitment to transparency and to conducting faculty workshops to communicate progress and to allow for greater faculty participation and feedback.

- SNHU's and WGU's competency-based programs took a year to develop. Great care was taken to ensure faculty and other stakeholders were involved in the process.

- Competency-based education varies greatly in its execution. SNHU and WGU created completely new methods to deliver and assess student competencies.

- As evidenced by WGU, competency-based education can change the way students interact with a university. These programs may require new positions within the university to serve students.

- Both SNHU and WGU were able to deliver significant cost savings to students as a result of their programs.

- Time to degree may be reduced by competency-based programs.

Competency-based education programs appear to lower tuition costs and speed time to degree completion. Due to the newness of these programs, there is a gap in the literature concerning the long-term implications of this form of postsecondary education. Longitudinal studies of the efficacy of these programs regarding student learning, degree value, and acceptance in the workplace need to be conducted. Although prior learning assessments like the CLEP exam have been evaluated, more research is needed regarding programs like Excelsior College's predominately exam-based offering. This method may shorten the time needed to earn a degree, but the effects on long-term knowledge retention have not been thoroughly explored. The net price of earning a degree from these providers is difficult to calculate. Further research should be conducted to more accurately calculate the net cost of attending each of these institutions.
Competency-based education is being used effectively by SNHU and WGU. Public postsecondary education has not embraced this method as widely, nor as fully, as their private non-profit and for-profit counterparts. Competency-based education programs have reduced tuition costs and reduced the time to degree for many students attending SNHU and WGU apparently without a reduction in student academic performance. Similar results may be possible in public institutions of higher learning. Works by Bradley et al., and Jones et al., offer the field competency-based education roadmaps for public colleges and universities to follow. Choosing to implement such programs will likely benefit the students they educate and the states they serve.
APPENDIX A

This appendix contains a brief overview of prominent providers of online baccalaureate education not offering competency-based education per se but are none-the-less innovators in postsecondary education. University of Phoenix, University of Maryland University College, and a new entrant into the market, New Charter University, are discussed briefly. Phoenix and Maryland also have a large student population of current and former members of U.S. armed forces.

University of Phoenix

Like WGU, University of Phoenix (UOPX) has continuous admissions and provides entering students an orientation class. Students who apply for admission with less than 24 credit hours are required to take a no-cost non-credit bearing orientation courses that allows them to experience the UOPX model prior to incurring any charges or fees. However, UOPX is an open enrollment institution whereas WGU has admission criteria beyond a high school diploma or a GED. UOPX is accredited by the Higher Learning Commission North Central Association. UOPX also earned programmatic accreditation in business (ACBSP), nursing (CCNE), and counseling (CACREP) (University of Phoenix "Accreditation"). The University offers associates, baccalaureate, masters, and doctoral degrees in a variety of subjects (University of Phoenix "Degree Programs"). Students take one 3-credit course at a time. Undergraduate classes are five weeks long. Masters courses last for six weeks and doctoral courses are nine weeks in length. UOPX uses a standard curriculum for online, local, and hybrid modalities. Although the curriculum is standardized, faculty have the academic freedom to change course assignments as they see fit, provided those changes meet the course objectives specified in the syllabus. All textbooks are delivered electronically via UOPX's proprietary online learning system. Students pay a flat resource fee for each course, which gives them access to all text books used at the University, access to the library, and access to other electronic resources such as the Center for Math Excellence and the Center for Writing Excellence.

102 University of Phoenix, Degree Programs.

University of Maryland University College

University of Maryland University College (UMUC) is a member of the Maryland University System and is accredited by the Middle States Association of College and Schools. The University explains their name and offerings as follows,

The “University of Maryland” portion signifies that we are part of the University System of Maryland. We're pretty sure that's clear, and we are proud to be part of one of the finest systems in the world. “University College” is an old British term which captures what we do: Take courses and programs from all academic departments and offer them outside of the university’s walls and normal class times.

UMUC primarily serves the United States Department of Defense community by offering online and face-to-face courses at U.S. military installations in Europe and Asia. These eight-week, credit bearing courses are structured similarly to those in traditional postsecondary institutions.

New Charter University

New Charter University is an open enrollment, online, for-profit postsecondary institution that purposively eschews regional accreditation and reliance on Title IV funding. Priced at $199 per month, New Charter University touts federal income tax credits as a means with which to finance one's college education. They employ a learn-at-your-own-pace model with access to tutors and faculty members as needed via Skype™, Google+™, Facebook™, text messaging, and by phone. New Charter University also offers students progress bars in the course work that illustrates their progress through their program.

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105 Ibid.


107 New Charter University, Financing Your Eduction.

108 New Charter University, Experience.
APPENDIX B: ANNOTATED BIBLIOGRAPHY OF SELECTED WORKS

The works selected for this bibliography, some of which were used in the body of the final report, were reviewed for their coverage of competency-based education in general, and for their insight into competency-based models for undergraduate education in particular. Sources from the newspapers, such as the Chronicle for Higher Education, and from university websites are excluded from this list.

The two most important works cited in this report were *Saving Higher Education: The Integrated, Competency-Based Three-Year Bachelor's Degree Program* and the report from the National Postsecondary Education Cooperative entitled "Defining and Assessing Learning: Competency-based Initiative." Both are discussed extensively in the body of the report. That discussion is not repeated here.

This book thoroughly covers Southern New Hampshire University's planning, implementation, and evaluation of their competency-based education program.

This report defines competency-based education and provides in-depth case studies of postsecondary institutions who have implemented such programs. Coupled with the Bradley, et al. book, these documents provide a roadmap for competency-based education programs from inception to implementation.

The remaining references are divided into three categories: Medical competency-based education, non-medical competency-based education, and recent press coverage of competency-based education.
Medically and Professional Related Competency-based Education

   The article attempts to define characteristics of competencies needed in medical to distinguish among competencies, outcomes, and goals.

   The author discusses the difficulties of ensuring quality training as South Africa transitions to democracy.

   Axley provides an analysis of competency-based education for nurses and attempts to offer a working definition of CBE.

   The authors provide an overview and analysis of seven multidisciplinary competencies that are needed in graduate education in the United States.

   This article discusses the European Union's tuning process resulting from the Bologna Accord and how it applies to medical education in Europe. The goals of the tuning project are to align education within the EU.

The authors provide case studies conducted in Scotland, the United States, Pakistan, and Singapore regarding the efficacy of outcomes-based education.


This study describes the effects of using Kotter's 8-steps to change method when transforming pharmaceutical education into competency-based programs.


Provides an exhaustive literature review in an attempt to define CBE for medical education.


Uses three animals as metaphors to characterize differing styles of outcomes-based medical education.


The authors compared the academic performance of doctor of pharmacy students in traditional and distance education programs. The distance students had statistically significantly better academic performance than the traditional students.


This is a survey of competency-based medical education and assessment.


The authors explore the policy effects of broadly implementing CBE in more areas of medical education.

Weinberger relates the position of the Alliance for Academic Internal Medicine Education Redesign Task Force II as it examines the advantages and challenges of a competency-based educational framework for medical residents.


The authors present a framework under which medical professional from various disciplines would be trained using similar board methods.

**Non-Medically Related Competency-Based Education**


This article provides a short discussion of changes in undergraduate education as faculty focus on student learning as opposed to focusing on current lecture based teaching methods.


Offers five key elements for medical education reform and provides practical advice for curriculum developers.


This is one of several articles written by the staff of WGU. The author has responsibility for the area discussed.

The article discusses the testing results from a self-directed learning experiment where students used software to direct their learning.

This article contain and overview of growth at Rio Salado college and how distance education has affected change within the institution and the student body.

This Canadian study done at a university in Quebec assess the effects of a competency-based programs used to train coaches. The study covered design, development, and implementation of CBE programs.

This European study investigates the effect on student performance given different types of evaluation and assessment techniques. The study found that good assessment techniques are characterized by teachers providing detailed explanations of the assessment prior to students taking the assessment.

This article studies the income affect of CBE in certain European labor markets.

This is a quantitative study investing the affects of supplement instruction on academic performance at a Hong Kong university. Supplement instruction was found to be statistically significantly related to academic performance.

Hoogveld et al. discusses methods by which faculty can be trained in CBE techniques that help them evaluate student work product as a measure of competency.


Compares and contrast competency-based social work programs at the University of Montana and the University of Georgia. Each used a different CBE model.


This is one of several articles written by the staff of WGU. The author has responsibility for the area discussed.


Discusses WGU as an alternative to traditional postsecondary education.


A review of WGU's CBE model.


This is an epistemological inquiry into the nature of competence.


This is a qualitative study of faculty experiences at four separate universities that each use different models of CBE.
This qualitative study revealed five areas of concern for WGU: (1) politics, (2) organizational models, (3) changing mission, (4) multiple missions, and (5) experiencing innovation.

This short article offers a discussion of how CBE may affect education reform in the Asia Pacific region.

This is one of several articles written by the staff of WGU. The authors have responsibility for the area discussed.


This article provides discussion of how the Bologna Accord is affecting teaching and learning in Germany.

This is one of several articles written by the staff of WGU. The author has responsibility for the area discussed.

The authors discuss the implications of allowing vocational qualifications to fulfill degree requirements.
This article discusses the results of a small Midwestern school experimenting with course design. It compares and contrasts how the Quality Matters and Community of Inquiry frameworks positively affect student outcomes.

The study explores the competency requirement for an instructional technologist.

This is one of several articles written by the staff of WGU. The author has responsibility for the area discussed.

Provides and in depth discussion of CBE models at Alverno College, Rutgers, and WGU. The article also offers and annotated bibliography of CBE.

This chapter discusses potential challenges with implementing CBE and the effects it has on assessment.

This is one of several articles written by the staff of WGU. The author has responsibility for the area discussed.
Recent Press Coverage of Competency-Based Education


APPENDIX C: OTHER MATERIAL

This appendix contains a list of material investigated in the course of writing this report that was not used in the final version.


Harden, Ronald M. "Outcome-Based Education - the Ostrich, the Peacock and the Beaver." Medical Teacher 29.7 (2007): 666-71. Print.


REFERENCES


Swing, Susan R. "Perspectives on Competency-Based Medical Education from the Learning Sciences." Medical Teacher 32.8 (2010): 663-68. Print.


COMPETENCY-BASED EDUCATION: A SURVEY OF PROMINENT PROVIDERS

Prepared for the Texas Higher Education Coordinating Board by John W. Carroll, M.B.A., B.S. through a grant made by the Houston Endowment to the Texas Higher Education Policy Institute.

The Texas Affordable Baccalaureate Project, a joint venture of the Texas Higher Education Coordinating Board, South Texas College, and Texas A&M University-Commerce funded by an Educause Wave IIIb Next Generation Learning Challenges Grant.
## Appendix B: Tentative Schedule of Future Meetings

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