Free Community College Planning Proposal

Prepared for the Massachusetts Association of Community Colleges (MACC)
October 2, 2023

Introduction

Across the country, institutions, systems, and states have implemented hundreds of free college programs, which cover some combination of student's tuition, fees, and other indirect costs (e.g., housing, textbooks, food). These programs can be implemented in a variety of ways and must effectively integrate marketing and communications, program design, and future capacity planning to unlock success and ongoing viability. To achieve this, states and systems seeking to stand up new free college programs face a variety of strategic decisions. NCHEMS proposes to support the Massachusetts Association of Community Colleges (MACC) as it explores free college models for the state of Massachusetts by providing in-depth data analysis, financial analysis and models, evidence to support program design decisions, and implementation advice. NCHEMS will do this in virtual and in-person meetings, by providing accessible modeling tools for constituents and stakeholders to engage with, and by providing a final report and recommendations. The proposal that follows provides further details on how NCHEMS will approach this project, the methodologies we will employ, and a list of proposed deliverables along with a timeline and a budget.

Approach

Our approach to this project is informed by deep experience in state higher education funding and finance issues, as well as in strategic analysis and planning. It combines the expertise of an organization thoroughly steeped in higher education finance and financial aid issues and a technical assistance provider. This enables NCHEMS to provide support not only as an expert in higher education modeling and financial analysis, but also as a trusted advisor and thought partner.

For this project, NCHEMS proposes an approach that begins by bringing the working group named by MACC and other stakeholders together to discuss and agree on the fundamental goals and intended outcomes of the free college program. Our data and financial analysis work must be built on a shared understanding of the intended program goals, and of the roles of each of the stakeholders in achieving those goals. Without this foundation, enrollment and cost models will not provide the evidence required for effective program design and future planning. In this initial stage, we will also reinforce our knowledge of state free community college programs through a review of the existing research and exploring states' underlying financial models. This review will inform the meetings with the working group and the models that NCHEMS develops.

Building on this foundation, our approach will expand to include quantitative analysis and modeling. Using the agreed-upon outcomes of the program and the national policy review, NCHEMS will develop enrollment forecasts for each institution and cost models that produce results of the estimated fiscal effects of various potential program design parameters on the state,

the separate institutions, and students. Each of these models will interact, enabling users to estimate the impact of enrollment changes on the cost models, and vice versa.

In addition to the meetings with the working group and creating the models, NCHEMS will also leverage its national network of state postsecondary education leaders to foster peer-to-peer learning for the working group members. This learning will occur through a variety of modalities, including virtual meetings, document and website review, and in-person visits. To maximize the experience for the working group, NCHEMS will facilitate connection and learning with states that have mature free college programs in place that employ a variety of design features.

The meetings with the working group, review of existing research and other state models, peer-to-peer learning experiences, and the enrollment and cost models will culminate in a final report that provides an overview of findings as well as vetted, actionable recommendations for the design and implementation of a free community college program that serves the state's goals. This report will provide a thorough overview of the research and evidence gathered to inform the recommendations. In developing its recommendations, NCHEMS will partner closely with MACC and provide opportunities to review and provide feedback. In the review and feedback process, NCHEMS excels at pushing states and systems towards the most productive next steps to take to bring stakeholders closer to the outcomes that they seek. As a third party, NCHEMS is also well-positioned to present recommendations to stakeholder groups, including legislative testimony, guidance for the governor's office, and other high-stakes audiences.

Methodology

In the sections below, we discuss the methods that we will employ with the working group and in developing the interactive modeling tools.

Working Group

NCHEMS has deep experience in working with stakeholder groups to design policy and programs. In the context of this proposed project, we will aim to create a collaborative relationship with the working group members, to ensure they are able to articulate their goals and needs from a free college program, and to foster learning among them. To do this, we employ an action research methodology, which brings stakeholder groups together to identify problems, interpret data, and act on evidence. Throughout, the NCHEMS team provides key information, supports a robust feedback and accountability loop with the group, and facilitates their learning and decision-making.[1]

[1] We would like to highlight a distinction here between the action research methodology we are proposing and a participatory action research methodology (PAR.) Through PAR, all of the stakeholders participate in the research process by collecting and analyzing data and evidence together. NCHEMS intends to lead the

While we will support the working group, we do not see ourselves as the conveners of the working group and will defer to MACC on the specifics of our engagement with the group. At the same time, we can anticipate several needs from the working group, which could likely be met over two to three facilitated meetings with NCHEMS. We also would like to build in time for peer-to-peer learning with the working group.

Our early objectives for meetings with the working group include:

- Aligning with the working group on our role in the project and defining the parameters of our partnership.
- Given the long history of free college proposals from the legislature, and the role of the governor's office in creating Massachusetts Reconnect, NCHEMS will rely on MACC and the working group to understand the history, context, and politics of the free college movement in Massachusetts.
- Discussing and coming to consensus around the intended goals and objectives of a free college program for Massachusetts.
- Defining a starting point for which costs a free college model in Massachusetts would cover. While the model we provide will give flexibility to investigate a variety of scenarios, we believe that aligning early on with the group about a definition of "free" will be the building block for other program design conversations.

In addition, NCHEMS proposes to support peer-to-peer learning for the working group members. While the free college program that Massachusetts adopts will be contextualized to specific state needs, many states have adopted free college models from which the working group can learn. Specifically, we would organize virtual and in-person learning opportunities with states that employ one or more rationing strategies for their programs: first dollar, last dollar, or specific eligibility criteria, such as institution-based programs; programs for specific workforce-aligned fields; or programs that are limited by other student characteristics. The rationing strategy in place determines much of the program design, and thus is a key decision point for the Massachusetts working group. While we would plan to engage the group on this question, we would initially propose learning more from states like Washington, Oregon, Indiana, or Tennessee. Below, we provide some early rationale for these state selections:

data collection and analysis work, but will lean on MACC and the working group to direct those efforts. While we can conceive of these efforts within an action research frame, our intention is to conduct the data collection and analysis work in order to expand the capacity of the group to focus on the critical design features and policy parameters.

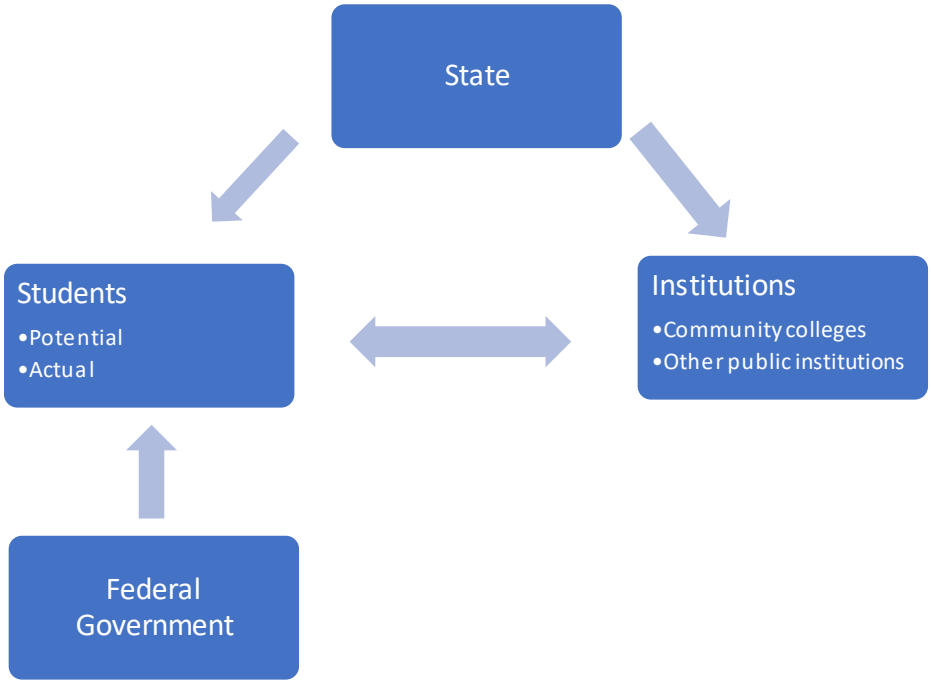
- Washington has a well-established program that promises free tuition to students with financial need beginning as early as middle school. This early promise model provides predictability for students and for the state, but is very narrowly tailored.
- Oregon uses a shared responsibility model for college affordability that serves to align all its investments in state financial aid. The Oregon Promise program effectively sets the student responsibility for payment at $0 for selected student populations. This program provides an example of a last-dollar program with rationing strategies in place.
- Indiana has designed two different state financial aid programs to stack in a way that key student populations can receive free college. With a combination of merit and need criteria, the state has taken steps not to make wholesale reforms to its aid programs, but to shift marketing and communications to more clearly articulate how the programs work for students and families.
- Tennessee operates two different free college programs in parallel: one for students coming from in-state high schools (Tennessee Promise) and a second for people coming back to college (Tennessee Reconnect.) Massachusetts began this journey with the Massachusetts Reconnect program, and therefore may learn from how THEC and the TN BOR have deployed two unique programs in parallel.

Conceptual Framework

In our state projects, NCHEMS finds that organizing the project stakeholders and the relationships between them within a conceptual framework is useful for guiding the work. Therefore, early in the project, NCHEMS will create a draft conceptual framework that describes the entities that must be considered in the analysis and the nature of the interactions among those entities. We propose to share this draft framework with MACC and the working group, discuss where it accurately captures the problem at hand and where it may be improved, and finalize the framework as an early deliverable.

We anticipate that the key entities in this model will include the state, students, and community colleges, as well as the role that the federal government plays to support students through the federal student aid programs. This is illustrated in the figure below and described in the sections that follow.

Figure 1: Early Draft of a Conceptual Framework for a Free Community College Program in Massachusetts



Our early understanding of the role of each of these entities includes:

1. The state of Massachusetts: Through executive and legislative actions, the state will play a significant role in designing and supporting a free college program for Massachusetts community colleges and students. The state also provides financial aid to students, as well as general appropriations to the institutions.

2. Students: This element includes both current students and projected numbers of students that could be expected under different assumptions in program design. We intend to measure students through rates of participation and retention by different student groups and by each institution's service area. Student tuition and fees generate revenue for the institutions, and the institutions also provide financial aid back to students.

3. Institutions: This element of the framework will include the community colleges and the public institutions that will most directly be affected by the implementation of a free community college program. It encompasses both the community colleges and other public institutions which may experience changes in enrollment due to the implementation of a free college program.

4. The federal government: As a major provider of student financial aid to community college students, federal aid programs such as Pell, campus-based programs (SEOG, work-study), and student loans are paid to students through the institution they attend.

The key relationships incorporated in the framework will include state funding to students in the form of existing student financial aid programs, state appropriations to community colleges for general operating support, enrollments of students in different institutions, tuition and fee revenues, institutional aid provided to students by community colleges, and financial aid provided to community college students by the federal government.

This conceptual framework along with a detailed explanation of its components will be shared with the working group, discussed, and revised according to the feedback received. The final framework will serve to guide the analyses done in the project and the design of the interactive models.

Interactive Modeling Tools

Together with the development of the conceptual framework, NCHEMS will develop several modeling tools that will help the working group and other stakeholders understand the impact of different design choices for the program. We anticipate that the following set of interrelated models will be constructed:

1. Enrollment Forecast

The enrollment forecast will be built on past data from the MACC institutions, together with a variety of yield rate scenarios based on evidence from the field and on the expertise of each of the institutional leaders in the Massachusetts community colleges.

2. State Cost Model

The state cost model will focus on anticipated costs to the state to stand up a free college program, to include impacts on existing financial aid programs, impacts on tuition and fee revenue, and potential new costs based on a variety of enrollment scenarios from the enrollment forecast.

3. Institution Cost Model

The institution cost model will estimate the costs of a free college program for the community colleges. This model will include faculty and staff compensation adjustments, facility needs, staff, technology, and other costs as determined with MACC and the institutions. There may also be costs that other public institutions in the state bear for the free community college program, expressed as a potential loss in enrollment and tuition and fee revenue. Where possible, NCHEMS will quantify these potential losses, but does not anticipate creating specific interactive models for public institutions outside of the community college sector.

4. Student Cost Model

Building on the definition of "free" from the foundational meetings with the working group, NCHEMS will provide a model showing the expected unmet cost of attendance through different program designs. The student cost of attendance contains a range of expenses that are billed directly by the institution and that the student will pay indirectly, such as textbooks and living expenses. The student cost model will allow us to consider which portions of the full cost of attendance that the program will cover, and see how those design choices impact the other models.

The student cost model will draw from the Shared Responsibility model that NCHEMS has used in Minnesota and Oregon. The Shared Responsibility model offers a standard for measuring the share of the full cost of attendance that students will be responsible for covering under different program design scenarios.

Given the general designs of each of the four models, we will develop a list of data items required to drive them. Some of the data items can be gathered from readily available public sources; for example, data about the age and education attainment levels of the population in different regions of the state are available from the U.S. Bureau of the Census. However, some of the required data will have to be collected from sources in Massachusetts. A partial list of these items includes:

- Student enrollments in each public institution, by geography of origin.
- Distribution of state student financial aid funds, to students in each institution, by category of student income.
- Allocation of state funds to each of the community colleges.
- Tuition and fee revenues (separately) for each of the community colleges.
- Faculty and staffing data for each of the colleges, by category.
- Facilities inventory data—such as the total amount of academic space available on each campus.

NCHEMS uses a variety of strategies to collect existing and calculate original data. In this context, we will work with MACC and the institutions to determine the best strategies for data collection. We may consider options such as: designing a data request for the institutions to complete, calculating variables using estimates from publicly available sources, using information from secondary sources such as legislative reports and institutional budgets, or other means as determined in collaboration with the group. Throughout the data collection process, NCHEMS brings a critical eye to the data sources that we use, and will advise the working group of the tradeoffs of various approaches. We aim to prioritize accuracy while balancing expediency and ease for the institutions and systems that submit data to our team.

Once the conceptual framework and general model designs are agreed to by the working group, NCHEMS will compile the necessary data, create the models, and begin to use the models to understand different program design scenarios as decided upon by the working group. NCHEMS will update and consult with the working group throughout this stage of the project.

The final step in the project will be the preparation of a final project report that will be crafted around the following general outline:

1. Introduction
2. Methodology
3. Primary Findings
    a. Range of projected enrollments for each of the colleges.
    b. Estimated impacts of the program on other public institutions.
    c. Cost consequences for the colleges—estimated costs to institutions of creating the additional capacity needed to accommodate projected enrollment increases.
    d. The costs of the program to the state under different assumptions of design criteria.
    e. Relative to students' total costs of attendance, the unmet financial needs of students under different formulations of the free community college program.
4. Recommendations of the working group
    a. Design of the free community college program
    b. Implementation steps/strategies.

Project Activities

To accomplish the purposes of the project, NCHEMS will conduct the following activities:

1. Meet with MACC to initiate the project and discuss NCHEMS' role vis-à-vis the working group. In addition, NCHEMS will seek information about data sources in Massachusetts, particularly data held at the Department of Higher Education and protocols for compiling data from this and other executive agencies in the state. Also in this conversation, NCHEMS will seek clarity about engagement with DHE and other entities whose cooperation will be key to the project.

2. Prepare materials for discussion with the working group. These materials will include:
    a. A draft of the conceptual framework.
    b. General descriptions of the elements to be included in each of the models
    c. An initial list of data required from sources in Massachusetts. This list will be shaped by the requirements of the various models.

3. Meet with the working group. The agenda for this meeting will be to:
    a. Discuss the purposes and intended outcomes of the project and the political and economic environment in which the project is being conducted.
    b. Present the conceptual framework and seek suggestions for any necessary modifications.
    c. Present the design features of the various models and seek input.
    d. Outline the data required and discuss the source of those data. We will emphasize a discussion of the data that must be collected directly from the community colleges.
    e. Compile the data that will be needed to drive the various models being proposed. These data will include those from the DHE, IPEDS, and potentially from individual institutions.

4. Develop initial versions of each of the models:
    a. Enrollment projections for each of the community colleges with estimates of impacts on other public institutions. We will base our enrollment projections off of historical data from Massachusetts, demographic trends in the state, and increased enrollment rates experienced in other states after implementing similar programs. We will model both the anticipated increase enrollment in the community colleges, and provide analysis of potential enrollment changes in other public higher education sectors.
    b. Cost models for each of the institutions to determine the additional costs associated with meeting the projected increased demand.
    c. State cost model indicating the cost to the state under various assumptions regarding eligibility for the program and the costs to be covered. We anticipate that these costs will come in the form of increased student financial aid and increased appropriations associated with increasing capacity.
    d. Student cost model that calculates the unmet financial need for students eligible for the free college program different program design choices.

5. Compile descriptive information on other statewide free college programs. This information will include:
    a. Program design: first dollar, last dollar, tuition only, tuition plus selected other expenses, cost of attendance, expected student contribution, treatment of contributions of other aid programs (Pell, state student aid, etc.)
    b. Eligibility: Recent high school grads, all community college students, income limited, etc. This section will also focus on any cost control or rationing strategies in place by each state, for example, application deadlines, residency requirements, or others.

c. Impact: enrollment changes after implementation of the program, for community colleges and for other public institutions where available.

6. Conduct a second meeting with the working group to:
    a. Report on progress in data collection and model development
    b. Present information about the design of programs in other states.
    c. Discuss parameters for the design of a free community college program for Massachusetts and develop preferred options to prioritize for NCHEMS to model.

7. Conduct virtual and in-person meetings between the working group and representatives of states with longer-standing free community college programs. The purpose of these meetings is to facilitate peer-to-peer learning and an opportunity to get feedback from those who have been actively involved in designing and implementing programs in other states. NCHEMS staff have been involved in program designs in several states with free college programs and would leverage these connections and lessons learned to support Massachusetts.

8. Populate the models with data and make initial runs, especially of enrollments and institutional costs.

9. Share the relevant models with each institution to get their input on the design and results. In these meetings, we anticipate receiving feedback that will necessitate revisions and changes to the models. We also use this time to gain trust in the validity of the models and explain data collection and analysis decisions.

10. Using feedback received during the one-on-one meetings, make any adjustments to the models and to the recommended parameters.

11. Conduct a third meeting of the working group to:
    a. Present revisions to the models based on their individual and collective feedback.
    b. Present a proposed state model based on discussions with the working group and suggestions received from participants in the peer-to-peer discussions.
    c. Establish the key design principles for the state model to be recommended by the working group.
    d. Discuss the outline for the final report of the working group.

12. Run the state model with the parameters recommended by the working group and conduct a virtual meeting of the working group to review the results of running the state model using the agreed upon design criteria. During this meeting, it will be possible to investigate the consequences of alternative variable values in real time. At the end of the

meeting, the intent will be to agree on parameters to be recommended in the final report of the working group.

13. Develop a draft of the final report for feedback from the working group. The report is expected to include:
    a. An introduction/background section that includes the charge to the working group and an overview of the services provided by NCHEMS.
    b. A description of the methodological approaches taken throughout the project.
    c. A description of and the results of the enrollment, institutional costs, and student cost models.
    d. A description of the recommended model, including the cost to the state and institutions.
    e. Recommendations of the working group regarding implementation of the free community college program. These recommendations may include suggestions for implementation at different funding levels or student eligibility criteria. Recommendations will also address the logistical considerations of implementation, as well as the potential benefits and challenges.

14. Conduct a final meeting of the working group to review the draft report and reach consensus on any necessary changes. This meeting could be held either in person or virtually depending on the preferences of the working group.

15. Make changes to the report and submit in final form.

16. Make presentations of the models, findings, and recommendations for various audiences as requested and arranged by MACC.

Deliverables

The MACC team and working group can expect to receive the following deliverables from the NCHEMS team:

Conceptual Framework

This will include the diagram that NCHEMS, MACC, and the working group co-create. This diagram will define the roles and interactions between the institutions, students, and the state in creating and implementing a free college program for the state of Massachusetts.

Peer-to-Peer Learning and Site Visits

NCHEMS will facilitate virtual and in-person learning opportunities for the working group to learn from other states that have implemented programs that are both similar and dissimilar from the

Massachusetts program. These visits will provide an opportunity to peer-to-peer learning that will inform the working group as it moves forward with policy recommendations and implementation.

Interactive Modeling Tools
MACC will receive four inter-related models that consider enrollment and costs to setting up a free college program in Massachusetts. Users will be able to manipulate the models for different enrollment and cost scenarios. We anticipate that the models will be delivered in Excel, so that users maintain maximum flexibility to manipulate them and can easily see the underlying calculations. If Excel does not provide the capabilities that we ultimately need, our team is also skilled in Tableau and in R programming.

Final Report and Presentations
MACC will receive a final report with vetted and actionable recommendations, as well as the opportunity to have NCHEMS staff present all or part of the project work to various stakeholder groups within the state, including the legislature.

Timeline

As outlined in the RFP, NCHEMS is prepared to complete this work within a 10-month timeframe, with a first draft of the final report available by 12/15/2023, and a final report by 4/30/24 followed by presentations and meetings with relevant stakeholders. Below, we provide a high-level timeline of our proposed activities:

October 2023

- Initial meeting with MACC to set project plans and priorities and align on approach.
- Create data collection plan.
- If possible, conduct first meeting with the working group.
- Research other state models and begin to organize possible peer-to-peer learning experiences.

November 2023

- Execute data collection.
- Develop initial versions of the four models.
- Second meeting with the working group, proposed to take place in-person if possible.

December 2023

- Validity and reliability checking for the collected data.
- Send draft models to MACC and to the institutions for feedback.
- Submit first draft of report by 12/15/2023. This report will include the information from other state contexts and findings from the draft models. Depending on the cadence of

meetings with the working group, it may also include a draft of the recommended free college program design for Massachusetts.

January 2024

- Continue to collaborate with the working group on a recommended program design if it does not already exist.
- Identify states that have pursued the proposed model- or a similar one- for on-site visits facilitated by NCHEMS.

February 2024

- NCHEMS team will conduct campus visits to discuss the draft models and draft report with campus leaders. NCHEMS has included an in-person visit to each of the 15 MACC institutions within our proposed project budget.

March 2024

- Make any revisions/changes to the model with the feedback from the campus visits.
- Continue to refine the final report with learning and feedback from the campus visits.

April 2024

- Deliver final copy of the models and report to MACC and the legislature.

May 2024-July 2024

- Remain available for any model or report revisions.
- Present the work to various constituencies and groups in Massachusetts.

Qualifications and References

NCHEMS' proposal to collaborate with MACC on this project builds on decades of experience in higher education finance planning, policy, and implementation. Below, we include references for previous or in-progress work that highlights our skills in enrollment projections, institutional cost models, free college program design, and our ability to work with stakeholder groups and lead them to consensus on difficult issues.

Utah System of Higher Education (USHE)
Contract Dates: October 2022 – present

USHE contracted with NCHEMS to analyze how well the state was providing community college services to all parts of the state through its unusual mix of institutions, which include eight relatively small technical, nondegree granting institutions and four dual-mission institutions that also provide baccalaureate and even graduate education. As part of this work, NCHEMS provided

a comprehensive report on enrollment trends across the system, which focused on the incoming high school graduate population, as well as other populations that USHE institutions ought to continue to target for enrollment.

Contact: Taylor Adams
Associate Commissioner of Student Affairs
taylor.adams@ushe.edu
435.554.2280

Missouri Department of Higher Education and Workforce Development (MO DHEWD)
Contract Dates: August 2022 – June 2023

This project focused on the development of a new resource allocation model for the state's public colleges and universities. In pursuing the development of this new funding model confronted the issues of establishing benchmarks for "frugal" levels of adequate institutional funding, dealing with the reality that the institutions had widely differing gaps between current levels of revenues and expenditures, and incorporating performance metrics in allocating state funding to the institutions.

Contact: Bennett Boggs
Commissioner
ben.boggs@dhewd.mo.gov
573-751-2361

Oregon Higher Education Coordinating Commission (HECC)
Contract Dates: September 2023 – January 2024

NCHEMS is currently supporting the Oregon Higher Education Coordinating Commission (HECC) in developing a formula to allocate $18 million in one-time funding to support financial sustainability efforts the state's regional colleges and universities.

Previously, NCHEMS has been under contract with HECC to implement a shared responsibility model for postsecondary affordability, which was used in designing the Oregon Promise program.

Contact: Ben Cannon
Executive Director, Oregon Higher Education Coordinating Commission
Ben.cannon@state.or.us
503-378-5690

Proposed Budget

Our cost proposal covers NCHEMS' efforts from 10/5/2023 to 7/31/24. The proposal also includes all travel costs for the NCHEMS team and meeting expenses for peer-to-peer learning experiences that occur in-person.

As a nonprofit firm, NCHEMS prides itself on providing high quality services to our state partners at our cost. As such, NCHEMS anticipates a project budget of $350,000 to complete the scope of activities described in this proposal. We recognize that the legislative appropriation for this study was much larger than our cost proposal, and we recognize that there is significant work that MACC will have to undertake to design and implement a free college program that are not accounted for in this particular RFP. We intend for our proposal to complement the other efforts that MACC will undertake within this single legislative appropriation.

Appendix: Resumes for Key Project Personnel

Brian T. Prescott

Professional experience

President, (Previously Vice President, Associate Vice President), National Center for Higher Education Management Systems (NCHEMS) (2016-present)

Strategy Director for Data Initiatives and Partnerships, Association for Institutional Research (AIR) (2015-2016)

Director of Policy Research (previously Senior Research Analyst and Research Associate), Western Interstate Commission for Higher Education (WICHE) (2004-2015)

Also served:

Graduate Assistant, University of Virginia
Residence Life Coordinator, Lehigh University

Consulting and Service Activities – Organizations

- Missouri Department of Higher Education and Workforce Development – Developed recommendations for reforming Missouri's approach to funding its public institutions (2023).
- Oregon Council of Presidents/Oregon Community College Association – Conducted a landscape review of higher education in the state and offered recommendations to better align educational investments, equity, and workforce and economic development (2022).
- Western Connecticut State University – Examined WCSU's strategic direction and organizational design and made recommendations to improve its long-term financial viability (2022).
- State Council of Higher Education for Virginia – Led a study of Virginia's model for funding public higher education institutions and institutional efficiencies (2022).
- State of Vermont – Led the effort to support a legislatively created task force to address long-term fiscal challenges in the Vermont State College System (2021)
- Carlos Albizu University – Developed strategic recommendations to address long-term institutional viability and health (2019, 2020)
- State of Utah Higher Education Strategic Planning Commission – Led development of statewide strategic plan for postsecondary education (2019)
- State of Florida – Conducted a review of the funding model in use by the State University System (2019)
- Oregon Higher Education Coordinating Commission – Assisted in the development of a statewide strategic capital plan (2019)

- University of Hawaii System – Analyzed public and institutional data to identify affordability gaps and to build a model to help inform tuition pricing strategy (2018)
- Iowa College Student Aid Commission – Provided recommendations concerning organizational strategic planning effort, including mission, activities, and funding (2018)
- West Virginia Higher Education Policy Commission – Provided recommendations for how to sustain public baccalaureate institutions and appropriately provide statewide postsecondary coordination and governance (2018)
- Pennsylvania State System of Higher Education – Conducted a strategic review of the system's governance and operations (2017)
- Southern Regional Education Board – Provided analytical support for a report on affordability in Georgia (2017)
- State of Oregon – Developed a model for distributing state-funded grant aid and estimated costs and impact (2007)

Publications (citations on request)

Numerous reports and articles concerning strategic issues in postsecondary education, especially related to financial aid, demographic changes, and the like.

Presentations:

Over 100 presentations offered. Sample of audiences:

- State Higher Education Executive Officers national meetings
- Association for Institutional Research
- National Association of College Admission Counseling
- National Conference of State Legislatures
- Education Commission of the States
- Statewide higher education agencies (e.g., University of Hawaii System, Colorado Commission on Higher Education, etc.)
- Testimony before various legislative committees and commissions

Education

Ph.D., The University of Virginia, Charlottesville, VA
M.A., The University of Iowa, Iowa City, IA
A.B., The College of William and Mary, Williamsburg, VA

Contact Information

NCHEMS, 3035 Center Green Drive, Suite 150, Boulder, CO 80301
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Sarah L. Pingel

Professional experience

Vice President, National Center for Higher Education Management Systems (NCHEMS) (2023-present)

- Support state and institutional leaders on strategic decision making in postsecondary funding and financial aid

Senior Researcher, Educational Transformation, Ithaka S+R (2022-2023)

- Led development of the organization's work on holistic credit mobility and state policy portfolio, among other responsibilities

Principal (formerly Researcher, Policy Analyst, and Senior Policy Analyst), Education Commission of the States (2014-2022)

- Led development of the organization's statewide free college policy resources and technical assistance, including:
  - Legislative tracking for statewide free college programs (including 7 legislative proposals in Massachusetts from 2016-2018)
  - Analysis of the impact on free college on statewide attainment
- Provided state financial aid technical assistance in numerous states, including California, Texas, Iowa, Maine, and others
- Drafted policy briefs and memos, provided legislative and committee testimony
- Completed quantitative and qualitative analysis to support policy decisions related to postsecondary funding, financial aid, and college affordability

Previously served as:

Senior Financial Aid Advisor, University of Denver
Administrative Coordinator for Financial Aid Systems & Loan Counselor, Regis University

Publications (citations on request)

Policy briefs and peer-reviewed articles related to college affordability, finance, financial aid, free college programs, workforce development, and student mobility.

Presentations:

Over 50 presentations offered. Sample of audiences:

- PromiseNet annual conference
- State promise program working group, hosted by Strada Education Network
- New England Board of Higher Education (NEBHE) Legislative Advisory Committee, multiple presentations related to college affordability
- State Higher Education Executive Officers national meetings
- National Governors Association national meetings
- Education Commission of the States

- National Association of State Student Grant and Aid Programs
- Statewide higher education agencies
- Testimony before various legislative committees and commissions

Education

Ed.D., University of Denver, Denver, CO
M.A., Bryn Mawr College, Philadelphia, PA
B.A., University of Colorado at Boulder, Boulder, CO

Contact Information

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Voice: 303.829.7315 Email: sarah.pingel@nchems.org

Dennis P. Jones

Professional experience

1969-Present

President Emeritus (previously President, Vice President for Planning and Evaluation, Associate Director, Assistant Program Director, Staff Analyst), National Center for Higher Education Management Systems (NCHEMS)

1961-1969

Assistant Director of the Planning Office (previously Assistant to the Business Manager, Executive Secretary to the Department of Physics), Rensselaer Polytechnic Institute

Selected Consulting and Service Activities

- State of Utah Higher Education Strategic Planning Commission – Led development of statewide strategic plan for postsecondary education
- Wyoming Educational Attainment Executive Council – Conducted data analysis, stakeholder outreach, and contributed content to a statewide postsecondary strategic plan development process
- State of Florida – Conducted a review of the funding model in use by the State University System
- Oregon Higher Education Coordinating Commission – Assisted in the development of a statewide strategic capital plan
- University of Illinois System – Provided background and justification for strategic visioning process
- West Virginia Higher Education Policy Commission – Provided recommendations for how to sustain public baccalaureate institutions and appropriately provide statewide postsecondary coordination and governance
- University of Alaska – Undertook Board development activities and consulted with University leadership on strategic planning and strategic budgeting.
- Connecticut State College and University System – consulted on the process of combining 12 community colleges into a single institution.
- California Community College Chancellor's Office – With Sally Johnstone, managed the process that led to the creation of Calbrlight, an on-line community college designed to meet the workforce preparation needs of workers whose jobs are threatened by automation.
- Western Nebraska Community College – Analyzed data and worked with the Board to identify strategies for right-sizing the instituion.
- U.S. Secretary of Education—Member of a Finance/Productivity Working Group that made recommendations regarding implementation of Spellings Commission Report,
- Society for College and University Planning—Received Founders Award (2004) for lifetime contributions to higher education planning
- National Center for Public Policy and Higher Education, Forum on State Policy Implementation—Member and Senior Consultant
- Western Governors University—Member of Design and Implementation Team, 1996

- California State University System—Member of the Steering Review and Oversight Committee for project on Benefits and Costs of Mediated Instruction and Distributed Learning, 1997

Publications (citations on request) **and Presentations**

Extensive publications and presentations covering the creation of information for use in strategic decision-making, budgeting and finance, and policymaking in higher education

Education

M.S. and B.S., Rensselaer Polytechnic Institute

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