

Information Item

Governmental Relations Committee

Status Report Update: AB 1123 Task Force

This agenda item responds to Assembly Bill 1123 (Cardoza), legislation which directs the Commission to convene an intersegmental working group to facilitate the development of statewide funding priorities for technology in higher education. The Commission is directed to forward the recommendations of the intersegmental working group to the Legislature and the Governor by August 1, 2002.

Staff will present a status report on the activities of the working group and the anticipated project schedule.

Presenter: Kathleen Chavira.



Status Report Update: AB 1123 Task Force

Background Assembly Bill 1123 (Chapter 467, Statutes of 2000) requires the California Postsecondary Education Commission to convene an intersegmental working group to facilitate the development of statewide funding priorities for technology in higher education. The Commission is directed to forward the recommendations of the intersegmental working group to the Legislature and the Governor by August 1, 2002.

The Commission has a long history of involvement and commentary on technology within higher education. The Commission's consistent message has included advocacy for the preparation and maintenance of a strategic plan for each public segment of higher education and recommendation of a process for determining shared goals, identifying priorities for cooperative activity, estimating costs, and seeking joint funding for cooperative projects.

The following summary, though not comprehensive, provides a brief overview of the some of the legislation and activities that have involved the Commission in the discussions surrounding higher education technology:

- In 1987, in a report entitled *Education Offered Via Telecommunications* (87-49), the Commission reiterated concern regarding the lack of progress toward developing a comprehensive statewide plan for the use of telecommunications in higher education, citing a lack of coordination among interested institutions and agencies. The Commission noted its own leadership role in the development of such a plan. The Commission also recommended development of a process to provide a long-term, relatively stable funding base for establishing the technology infrastructure needed to utilize distance learning on a statewide basis.
- In 1988 the Commission convened a Task Force on Educational Technology, a 19-member group of educators, corporate representatives, and State officials to develop a plan for more effective use of new technologies in California higher education, including their coordination, financing, quality control and incentives. That task force produced the report, *Technology and the Future of Education: Directions for Progress* (89-27), which described existing applications and listed short-term goals. This report also identified major barriers and made recommendations. These included the preparation and mainte-

nance of a strategic plan for each public segment of higher education and cooperative exploration of the technical, fiscal and operational aspects of connecting and expanding existing networks to create a statewide informational network which would link all campuses and school sites. Also proposed were funding formulas for State support of instructional technology to encourage the purchase of new and the replacement of obsolete equipment.

- Senate Bill 1202 (Hart; Chapter 1038, Statutes of 1989) directed the Commission to develop a State-policy statement on the use of distance learning technology in education. The bill specified that, in developing the statement, the Commission should "address issues of funding and management of intersegmental distance learning efforts, course credit transfer, qualifications and credentialing of instructors and onsite personnel, ensuring course quality, and other policy issues associated with distance education, as well as compile research on the effectiveness and cost-effectiveness of distance instruction at various levels of education."

In response, the Commission prepared a report entitled *State Policy on Technology for Distance Learning* (91-7), which reviewed the potential of distance learning technology to meet the State's education needs, summarized the conclusions of the literature assessing the effectiveness of distance learning, and identified barriers to the expanded use of this technology. The Commission then proposed a policy statement on distance learning technology to include seven principles.

- Based upon various legislative mandates as well as conclusions and recommendations contained in two major Commission reports completed in 1995: *The Challenge of the Century: Planning for Enrollment and Improved Outcomes in California Higher Education* (95-3) and *A Capacity for Growth: Enrollments, Resources, and Facilities for California Higher Education, 1993-94 to 2005-06* (95-9) the Commission undertook a two-year project in 1996 to develop recommendations for the use of technology in higher education. These reports projected a major increase in enrollment demand for California's higher education institutions and cited technology as one of the primary options for addressing California's challenges in postsecondary education.

The first report in the two-year project, *Moving Forward* (96-6), surveyed various national and State initiatives and reviewed recent activities of the California Legislature related to this topic. The report outlined the context in which educational technology initiatives were being put forward and discussed the potential "transformation" of higher education's operation with respect to technology, and examined some of the claims that technology may produce large future cost savings in higher education.

In 1997, the Commission presented a second report, *Coming of Information Age in California Higher Education (97-1)*, which provided an overview of the various initiatives at the three public systems of higher education, discussed technology and pedagogy, and outlined future challenges and problems. It also contained background information on the Internet and on general terms employed in technology discussions.

A listing of prior reports which the Commission has completed on the topic of technology is provided in Appendix A.

Work plan AB 1123 requires the intersegmental working group on statewide funding priorities for technology in higher education to be composed of representatives from a wide array of groups. These include public elementary and secondary education, the California State University, the California Community Colleges, the University of California, the independent accredited universities and colleges, private-sector providers of distance learning services, the Office of the Secretary of Education, and the private-industry sector. The complete text of the legislation is in Appendix B.

In response to the bill's requirements, the various entities outlined were invited to designate a representative to the working group. Appendix C contains a complete list of the participants in the AB 1123 Intersegmental Working Group.

The working group has had two meetings to date and will meet approximately six times over the next several months in anticipation of forwarding recommendations in spring 2002 to the Governor and Legislature in time to affect the 2003-2004 State Budget. Working group members have been asked to participate in discussion and to provide information and insight into the technology strategies, plans and goals of each of the public segments of higher education, as well as to share the perspective of private sector entities and related State departments who have affiliations with or interest in higher education technology.

Commission staff will support the work of the group, specific activities to include a review of available literature addressing various topics regarding technology in higher education, a review of related technology planning documents provided by working group members, and electronic survey activity to identify trends in distance learning within degree-granting institutions. Information systems staff are in the process of developing a website to house links to those documents central to the work of the group and a listserv is being established for communication between and among working group members. The working group has also expressed an interest in identifying individuals from both the private and public sectors who can address the working group to highlight issues of concern and identify and elaborate upon existing collaborative efforts.

Commission staff, in consultation with the working group, will produce a document which will at minimum: provide a summary of segment/system activities and funding priorities in technology; identify statewide, national and international trends, and provide recommendations for a coherent approach to the expenditure of State revenues on technology infrastructure and applications consistent with the institutional missions of the systems of higher education in California.

The work of the group will be guided by the following principles, specifically outlined in the enacting legislation, that there be:

1. development of a statewide infrastructure that provides compatible connectivity between all levels of education to reduce redundancy and increase efficiency.
2. adherence to nationally and internally accepted protocols and standards.
3. assurance that the standards for course and program quality applied to distance education are rigorous in meeting accreditation standards, Universal Design Standards, and standards currently applied to traditional classroom instruction at higher educational institutions in the areas of course content, student achievement levels, and coherence of the curriculum.
4. collaboration between the private sector and educational institutions in the availability and use of technology in low-performing schools and underserved areas.
5. collaboration across departments, institutions, states, and countries in the use of technology.
6. use of technology to contain costs, improve student outcomes, and enhance quality in instructional and non-instructional functions, such as student services, libraries, and administrative support.

Project schedule The first working group meeting took place on May 7, 2001. A second meeting is scheduled for July 17, 2001. The working group will meet through February of 2002, in anticipation of forwarding recommendations in spring 2002 to the Governor and Legislature in time to affect the 2003-2004 Budget.

The survey of distance learning programs at degree granting institutions within California was initiated June 1, 2001 and is expected to be completed by the end of summer 2001. Information and trends identified in the survey will be shared with the working group and will be integrated into the final report as well.

It is anticipated that the Commission will review the draft report and recommendations of the working group in February 2002, as an information item, and as an action item in April 2002.

Appendix A

California Postsecondary Education Commission Publications Subject: Technology

- 97-1 Coming of information Age in California Higher Education: A Survey of Technology Initiatives and Policy Issues (2/1997)
- 96-6 Moving Forward: A Preliminary Discussion of Technology and Transformation in California Higher Education (6/1996)
- 91-7 State Policy on Technology for Distance Learning: Recommendations to the Legislature and the Governor in Response to Senate Bill 1202 (Chapter 1038, Statutes of 1989) (4/1991)
- 89-27 Technology and the Future of Education: Directions for Progress. A Report of the California Postsecondary Education Commission's Policy Task Force on Educational Technology
- 87-49 Education Offered via Telecommunications: Trends, Issues, and State-Level Problems in Instructional Technology for Colleges and Universities (12/1987)
- 86-40 Plans of California's Two Public Universities for the Instructional Use of Computers: Materials Responding to Supplemental Language to the 1986-87 Budget (12/1986; See 85-39 for an earlier report on this topic.)
- 85-38 Instructional Equipment Funding in California Public Higher Education: A Report to the Legislature in Response to Supplemental Language in the 1985-86 Budget Act (12/1985)
- 85-39 Self-Instruction Computer Laboratories in California's Public Universities: A Report to the Legislature in Response to Supplemental Language in the 1985-86 Budget Act (12/1985)
- 83-35 Education for California's Changing Economy: Observations and Suggestions from Nineteen Leaders of California Government, Business, and Education (12/1983)
- 82-25 Director's Report, June-July 1982: Appropriations in the 1982-83 State Budget for the Public Segments of Postsecondary Education; High-Technology and Energy-Related Manpower in the West; Summary of Current Legislation (7/1982)
- 81-28 Linking Californians to Learning: Next Steps for Telecommunications in California Postsecondary Education (11/1981)
- 79-10 Using Instructional Media Beyond Campus (7/1979)
- 75-1 Undergraduate Instructional Equipment Grants (10/1975)

Appendix B

BILL NUMBER: AB 1123 CHAPTERED
BILL TEXT

CHAPTER 467
FILED WITH SECRETARY OF STATE SEPTEMBER 18, 2000
APPROVED BY GOVERNOR SEPTEMBER 15, 2000
PASSED THE ASSEMBLY AUGUST 24, 2000
PASSED THE SENATE AUGUST 22, 2000
AMENDED IN SENATE AUGUST 7, 2000
AMENDED IN SENATE JUNE 12, 2000
AMENDED IN ASSEMBLY JUNE 1, 1999

INTRODUCED BY Assembly Member Cardoza

FEBRUARY 25, 1999

An act to repeal and add Chapter 11.3 (commencing with Section 66940) of Part 40 of the Education Code, relating to distance learning.

LEGISLATIVE COUNSEL'S DIGEST

AB 1123, Cardoza. Distance learning: the California Distance Learning Policy.

Existing law requires the California Postsecondary Education Commission to develop a state policy on the use of distance learning technology, as defined, in education, to be considered and, if appropriate, adopted by the Legislature. Existing law requires the commission, in developing the policy, to address specified issues and to compile research on the effectiveness and cost effectiveness of distance education at various levels of education. Existing law requires that the policy be developed to recognize the several existing distance learning networks, to enhance their coordination and direction, and to provide statewide incentives to build partnerships that further distance learning, as specified. Existing law requires the commission, in developing the policy, (1) to propose a strategy to provide the 5 types of educational services of curriculum enhancement, expanded course offerings to rural and inner-city secondary schools, expanded course offerings at rural community colleges and off-campus centers, staff development courses for elementary and secondary teachers, and curriculum enhancement through the increased communication capability of schools, colleges, and universities and (2) to draw upon the experience and findings of the various campuses of the California State University that currently offer courses via distance education.

Existing law also requires the commission, in developing the policy, to identify existing sources of interactive distance learning instructional and staff development programming that can be utilized immediately by schools and colleges and to propose a strategy to utilize existing technologies to deliver instruction over distance,

and link together school and college classrooms in rural and inner-city areas in the state.

Existing law further requires the commission, in preparing the policy statement, to consult with an advisory committee having prescribed membership.

This bill would repeal these provisions, and instead require the commission to convene an intersegmental working group to determine state funding priorities consistent with the institutional missions of the segments of higher education. The bill would specify principles to be observed by the intersegmental working group in the development of priorities and the proposed expenditure of state revenue on technology infrastructure and applications.

This bill would require the intersegmental working group to be composed of representatives from public elementary and secondary education, the California State University, the California Community Colleges, the University of California, the independent accredited universities and colleges, private sector providers of distance learning services, the Office of the Secretary of Education, and the private sector.

The bill would require the commission to facilitate the development of statewide funding priorities for technology in higher education and to forward the recommendations of the intersegmental working group to the Legislature and the Governor on or before August 1, 2002.

Under existing law, these provisions would not be applicable to the University of California unless made applicable to the university by the Regents of the University of California by appropriate resolution.

THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

SECTION 1. The Legislature hereby finds and declares all of the following:

(a) The California Postsecondary Education Commission (CPEC) and other observers have estimated that a minimum of 714,000 additional students, in excess of the number of those enrolled in 1998, will need to be educated by California's colleges and universities by the year 2010.

(b) The nature of instruction and its delivery in postsecondary education, as well as new informational technologies and other related innovations, can provide promising education opportunities for individuals who are currently not being served, particularly for individuals without easy access to traditional campus-based postsecondary education or for whom traditional courses are a poor match with learning, education, or training needs. Learners, including students seeking basic or technical skills, initial postsecondary education experience, and those limited by time and place constraints, can benefit from nontraditional postsecondary education opportunities and appropriate support services.

(c) The need for high quality, nontraditional, technology-based education opportunities is great, as is the need for measures of educational progress and competency attainment that are valid and widely accepted; the advancement of these measures of progress and competency attainment will be more likely through the coordinated efforts of agencies and institutions working with state assistance, statewide coordination, and oversight.

SEC. 2. Chapter 11.3 (commencing with Section 66940) of Part 40 of

the Education Code is repealed.

SEC. 3. Chapter 11.3 (commencing with Section 66940) is added to Part 40 of the Education Code, to read:

CHAPTER 11.3. THE CALIFORNIA DISTANCE LEARNING POLICY

66940. There is hereby established the California Distance Learning Policy, which sets forth the guiding goal and principles for the utilization of technology in California postsecondary education.

66941. (a) The Legislature finds and declares that access to a high quality education is the primary goal for the use of educational technology in higher education. All students in California's public schools and colleges and all adults in the state shall have access to educational opportunities for which they are qualified, regardless of their income level, geographic location, or the size of the school they attend.

(b) Pursuant to its statutory planning and coordination functions and responsibilities identified in Section 66900, the California Postsecondary Education Commission shall convene an intersegmental working group to determine state funding priorities consistent with the institutional missions of the systems of higher education.

(c) The intersegmental working group shall observe all of the following principles to guide the development of priorities and the proposed expenditure of state revenues on technology infrastructure and applications:

(1) Development of a statewide infrastructure that provides compatible connectivity between all levels of education to reduce redundancy and increase efficiency.

(2) Adherence to nationally and internally accepted protocols and standards.

(3) Assurance that the standards for course and program quality applied to distance education are rigorous in meeting accreditation standards, Universal Design Standards, and standards currently applied to traditional classroom instruction at higher educational institutions in the areas of course content, student achievement levels, and coherence of the curriculum.

(4) Collaboration between the private sector and educational institutions in the availability and use of technology in low-performing schools and underserved areas.

(5) Collaboration across departments, institutions, states, and countries in the use of technology.

(6) Use of technology to contain costs, improve student outcomes, and enhance quality in instructional and noninstructional functions, such as student services, libraries, and administrative support.

(d) The intersegmental working group shall be composed of representatives from public, elementary and secondary education, the California State University, the California Community Colleges, the University of California, independent accredited universities and colleges, state approved schools and colleges, private sector providers of distance education, the Office of the Secretary of Education, and the private sector.

(e) The commission shall facilitate the development of statewide funding priorities for technology in higher education, and shall forward the recommendations of the working group to the Legislature and the Governor on or before August 1, 2002.

Appendix C

AB 1123 INTERSEGMENTAL WORKING GROUP

California State University

Dr. Gary Hammerstrom, Assistant Vice Chancellor, Academic Affairs
Mr. David Ernst, Assistant Vice Chancellor, Information Technology Services

University of California

William H. Campbell, Associate Vice President and Chief Information Officer

California Community Colleges

LeBaron Woodward, Dean, Instructional Resources and Technology

Association of Independent California Colleges and Universities

Beth Benedetti

California Department of Education

Nancy Sullivan, Manager, Education Technology Office
Ron Fox, Higher Education

Bureau for Private Postsecondary and Vocational Education

Steve Wittmann

California Trade & Commerce Agency

Bonnie Cornwall

Office of the Secretary for Education

Chris Shultz

Private Sector

Merissa Khachigian, California Government Affairs Manager, Agilent Technologies, Inc.
Michael Goldstein - Dow, Lohnes & Albertson, Washington D.C.
Robert Mendenhall, President & CEO, Western Governors University
