



SSI Allocation Recommendations

Submitted to:
Chancellor John Carey
December 2013

Ohio Association of Community Colleges

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OACC COMMUNITY COLLEGE FUNDING CONSULTATION ROSTER

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BACKGROUND

In November 2012, the Higher Education Funding Commission (HEFC), established by Governor Kasich, recommended that Ohio's funding for higher education be increasingly focused on student success and completion. For community colleges, the report recommended the sector transition from a funding model based primarily on enrollment in classes to completion – of courses, degrees and certificates. The changes to the funding formula would take place over a two-year period, including the removal of the stop loss policy and the inclusion of extra weighting for success with students from at-risk populations. The community college sector and its college presidents endorsed the recommendations of the HEFC.

House Bill 59 (HB 59) is the legislation for Ohio's state budget for the 2014 and 2015 fiscal years. HB 59, introduced on February 12, 2013 and signed by Governor John Kasich adopted the recommendations of the HEFC. For fiscal year 2014 the State Share of Instruction (SSI) is distributed based on 50% course enrollment, 25% course completion and 25% success points, as originally defined in 2009. HB 59 also put forward two study charges for community college presidents in consultation with the Chancellor and Board of Regents to be incorporated into the FY 2015 State SSI formula:

- **Identifying At-Risk Students for Community Colleges:** “shall identify the socio-economic, demographic, academic, personal and other factors that identify a student as being at risk of academic failure...study the most appropriate weights for students who come from ‘at-risk’ populations.”
- **Success and Completion Measures:** “study shall research the most appropriate success points and completion measures that occur during the academic career of community college students...determine how the community college's fiscal year 2015...funding shall be distributed among its success points, completion measures and course completion funding, or other performance and access measures.”

Both studies are to be completed by December 31, 2013. The Ohio Association of Community Colleges (OACC) convened a Community College Funding Consultation with delegates appointed by the presidents to develop recommendations to the Chancellor in response to these HB 59 study charges.

This report outlines the recommended formula framework for FY 2015. The framework recommendations are based on the analysis of research, lessons from other states' funding formula, review of data provided by the Board of Regents and guided by best practice research for student success and the articulated priorities of the state. In addition to recommendations for the FY 2015 SSI allocation model, the consultation group identified several formula elements for potential inclusion in FY 2016 and beyond. These elements are aligned with the mission and role of community colleges and the students they serve, but the lack of acceptable data definitions and therefore data limit their inclusion in the FY 2015 formula.

Ohio SSI Community College Formula History 2009-2015

FY 2009-2013

Primarily enrollment-based
Inclusion of success points (5% to 10%)
Stop Loss (99%-96%)



FY 2014

50% enrollment + 25% course completion + 25% success points
97% stop loss



FY 2015

Elimination of enrollment component.
Combination of course completion (50%), success points (25%) &
completion metrics (25%).
At-risk or access category application. No stop loss.

OACC FUNDING CONSULTATION PROCESS

The OACC funding consultation process was deliberate and inclusive, with the majority of institutions represented, consultation and facilitation provided by HCM Strategists through the Lumina Foundation Strategy Labs, and included representatives from the Ohio Board of Regents, the Higher Education Funding Commission and the Ohio Office of Budget and Management.

The consultation group began work in March 2013. The initial meetings of the consultation group established a foundation for the more technical and detailed formula development that followed in August-October. These initial meetings established guiding principles for the work, provided understanding of the national performance funding landscape, research and state lessons learned, and reviewed data and policy analysis. The consultation group established a set of guidelines for development and implementation of the formula (see appendix A). Two key principles of the framework development were to maintain as much consistency as possible from the previous model (e.g., limited new metrics) and to phase-in the impact of the completion-based formula.

In August, after initial data reviews and policy discussions took place among the full consultation group, a working group was established to detail the formula framework and technical formula development. The working group was a subset of institution representatives of the full consultation group and represented a mix of chief academic officers and chief financial officers as well as larger, more urban community colleges, and smaller, more rural colleges. The working group met numerous times both in person, via webinar and conference calls. Recommendations of the working group were presented for feedback from the full consultation group at least once a month from August-November. In addition, the developing model was presented to the OACC Presidents for feedback during their monthly meetings in September, October, and November.

From March-December 2013 there were a total of 29 consultation-related meetings: 13 full consultation meetings (9 in person; 4 conducted by webinar) and 12 work group meetings (6 in person and 6 conducted by webinar) and 4 presentations to the OACC Presidents.

FISCAL YEAR 2015 SSI ALLOCATION RECOMMENDATIONS

The consultation group considered a number of models, and recommends the approach described below for FY 2015.

The framework consists of three components – course completion, student success points and completion milestones. The course completion and completion milestone metrics will also be weighted by access categories, intended to support the ongoing access mission of community colleges for certain populations that are underserved and whose increased success is essential to the attainment goals of the state. Additionally, the course completions and completion milestones will use a cost-based model (using statewide averages) to recognize that some courses and degree programs, such as Science, Technology, Engineering, and Mathematics, have higher associated costs.

Three-year data averages will be used to help ensure data stability and protect against major swings in campus allocations that might result from the use of a single data point.

FY 2015 CC Formula Summary



* Access Category Weights Applied

- **ADULT** (over age 25 at time of enrollment)
- **LOW-INCOME**, Pell Eligible (ever in college career)
- **MINORITY** (African American, Hispanic, Native American)

All data averaged over three years

Component #1: Course Completion *(50% of FY 2015 allocation)*

The course completion component of the formula remains mostly unchanged from the FY 2014 formula.

- **Cost-based model:** determined by the average statewide cost of all courses by CIP codes and subsidy model.
 - Based on FTE with number of successfully completed FTEs multiplied by appropriate model cost and totaled to determine each institution's course completion reimbursement amount.

Access category weights will also be applied to this component

Component #2: Student Success Points *(25% of FY 2015 allocation)*

The student success points largely reflect the success points previously used. Noted changes include: threshold changes to credit accumulation (from 15 to 12 and 30 to 24); elimination of the developmental education completion metric; addition of 36 credit hour success point. This component also does not include the associate's degrees, certificates and transfers, as they are included in the completion milestones component. This separation was intended to allow for a greater focus on completion (over-time, as phased-in) - a priority articulated by the Higher Education Funding Commission and reiterated by the Governor and legislature in adoption of the FY 2014-15 budget.

- **Developmental Education Math Success (same as current metric):** Number of students who successfully complete a developmental Math course in the prior year, who subsequently enroll in a college level Math course (at any Ohio public college or university) either in that year or in the current year; (1 point; increase from 2/3 of a point in FY 2014)
- **Developmental Education English Success (same as current metric):** Number of students who successfully complete a developmental English course in the prior year, who subsequently enroll in a college level English course (at any Ohio public college or university) either in that year or in the current year; (1 point; increase from 2/3 of a point in FY 2014)
- **12 Credit Hours (change from 15):** Number of students who achieve the threshold of earning their first 12 semester credit hours of college level course work at that institution. (1 point)
- **24 Credit Hours (change from 30):** Number of students who achieve the threshold of earning their first 24 credit hours of college course work at that institution. (1 point)
- **36 Credit Hours (new):** Number of students who achieve the threshold of earning their first 36 semester credit hours of college level course work at that institution. (1 point)

As is currently the case, the success points are not weighted for access categories.

Component #3: Completion Milestones (25% of FY 2015 allocation)

The completion milestones represent the points at which students achieve a particular endpoint at the two-year institutions. As noted above, these metrics are distinguished from the success points to reflect the intent of the funding commission and budget legislation which directs the development of a degree completion incentive within the formula. These metrics will be cost-based. The metrics included in this component include:

- **Associate Degree Completion (cost-based):** Students who earn an associate degree from an institution in a given year. Cost-based to reflect statewide average cost of all degrees within degree type.
 - *First-degree earned:* The cost-basis for the first degree earned by a student will be counted at 100% of the model cost for the degree category
 - *Subsequent degree earned:* Additional degrees earned by a student will be counted at 50% of the model cost for that degree category
- **Certificate Completion (new):** Long-term certificates (30+ credit hours) will be included in the formula for FY 2015. To mitigate concerns with prior reporting of certificates, the impact of certificates will be phased-in over three years, using a three-year average. The model cost for certificates is 50% of the cost calculated for associate's degrees within the same model.
 - *Phase-in:* Using FY 2014 data as the first-year of data along with the three-year average will phase-in the completions metric over time. (1/3 of certificate completions in FY 2015; 2/3 of certificate completions in FY 2016; 100% of certificate completions in FY 2017).
 - *First-certificate earned:* The cost basis for the first certificate earned by a student will be counted at 100% of the model cost calculated for that certificate category.
 - *Subsequent certificates earned:* Additional certificates earned by a student will be counted at 50% of the model cost for that category.

Note: The consultation recommends working to include short-term certificates and certificates of value within the completion milestones component beginning in FY 2016. Adequate and consistent data reporting and collection is not available for inclusion in FY 2015. This is discussed further in the report.

- **Transfer with 12 credits (change from 15).** Number of students completing at least 12 semester credit hours of college level course work at that institution and subsequently enrolling for the first time at a four year college or university in Ohio (currently only University System of Ohio). The cost-basis for transfers is calculated at 25% of the average cost for all degree programs. All transfers will receive the same cost-based calculation.
 - *Inclusion of transfer to private and out-of state¹ institutions of higher education:* The Board of Regents is working to collect data from the National

¹ The inclusion of transfer to out-of-state and private schools is not currently in the model as data need to be collected. Further discussion of other elements under development is provided below.

Student Clearinghouse to include transfers to private and out-of-state institutions. This process will likely not be completed in time for modeling or initial allocation estimates for FY 2015. The OACC will work with the Board of Regents to establish guidelines and procedures for institutions to self-report data for use in FY 2015 allocation projections. Final FY 2015 allocations will include actual data from the NSC.

Access category weights will also be applied to the completion metrics.

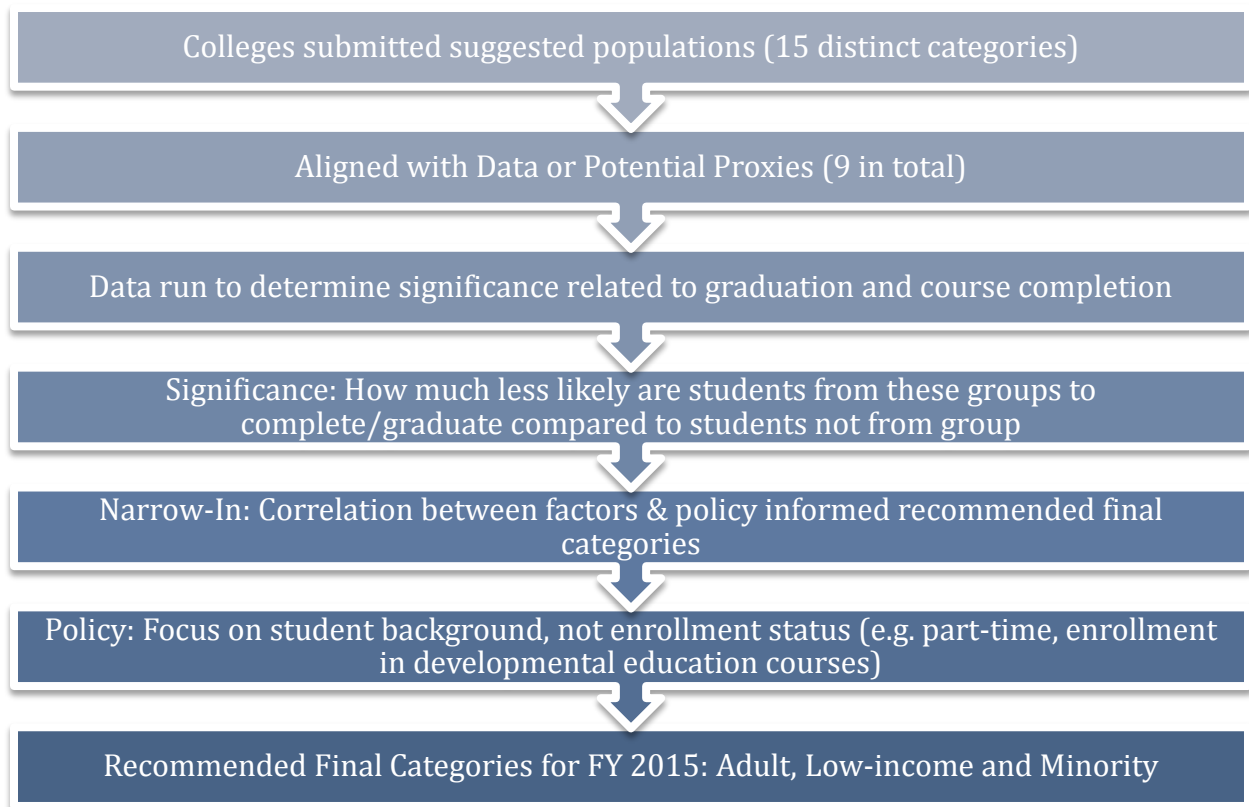
Access Categories

The access categories represent certain student populations that are under-served (traditionally-underrepresented and with low success rates) yet whose success is critical to the state meeting its postsecondary attainment needs. The categories support the access mission of community colleges for these students while still maintaining a focus on success.²An added weight will be applied for students within these access categories who successfully achieve the course completion and completion milestone metrics. This weight is a way to recognize added assistance provided and support institutions that are successful in maintaining access and achieving success for these students³. Identified access categories for FY 2015 are:

- **Adult:** age 25 and older at time of enrollment
- **Low-income:** Pell-eligible ever in college-career
- **Minority:** American Indian, Hispanic and African American

The recommended access categories were guided by the review of data provided by the Board of Regents. Analysis included evaluation of the data to ensure the categories defined adequately represent (either directly or as a proxy) students less likely to graduate than traditional students. The policy implications were also considered in deciding final categories to ensure they reinforced student success research and best practices. The graphic below summarizes the process of decision-making regarding the use of weights for access categories.

² The HEFC report noted “ In order to protect the access mission of Ohio’s community colleges, a new formula weight is recommended for the second year of the budget to reward schools that are successful in educating non-traditional and at- risk student populations.”



Note: The consultation recommends working to include academically underprepared students as an access category beginning in FY 2016. Adequate and consistent data collection is not available for inclusion in FY 2015. This is discussed further in the report.

Weights and Application of Access Categories

The working group reviewed several possible scenarios for applying access weights.

- **Flat weight:** One weight applied to all access categories, regardless of which and how many access categories a student falls into.
- **Maximum weight:** The maximum weight for a student falling into multiple categories is applied. For example, if a student is minority and adult, the minority weight would be applied for the student's success in course and completion milestone metrics as the empirically derived weight for minority students is more significant than that for adult students.
- **Cumulative weight:** A cumulative weight for students from multiple access categories based on the actual categories and associated weights a student falls into would be applied.
- **Number of categories:** Weights applied would be based on the number of categories, but would be the same for students with the same number of categories, regardless of which ones they fall into. For example, a student who falls into adult and low-income access categories would receive the same weight as a student from minority and low-income, as both are from two categories.

The reviews included analysis across the following principles:

- Phase-in of impact and distribution across institutions
- Simplicity of calculation
- Data guided, policy informed
- Total allocation attributed to access

After review across these various principles, the recommended application of access weights is a hybrid of the methods described above:

- **Course completions access weight:** A flat weight of 15% will be applied for students from one or more access category.
- **Completion Milestones:** The weights for students completing one of the completion milestones will vary based on the number of access categories a student falls into.
 - o *Students from one access category: 25% weight*
 - o *Students from two access categories: 66% weight*
 - o *Students from three access categories: 150% weight*

Distribution Method

A proportional distribution model for each component will be utilized, consistent with prior methods. Institutions will receive a proportional share of the total earned across each component.

Course Completion

(% of (total cost-based Completed FTE Earned + % of total completed FTE Access Add-on Earned) * 50% of FY 2015 Allocation)

+

Success Points

(% share success points earned * 25% FY 2015 Allocation)

+

Completion Milestones

(% of total cost-based completion milestones earned + % of total completion milestones access add-on earned) *25% of FY 2015 Allocation)

RECOMMENDATIONS AND CONSIDERATIONS FOR FUTURE YEARS

Throughout the formula there are a number of elements for further consideration and under development. These elements are considered priorities that align with the mission and role of community colleges, and support institutional student success strategies. However, there does not currently exist common data definitions, collection methods or reporting for these elements. The OACC recommends continued discussion of these elements to articulate plans for 1) developing common definitions, reporting and collection structures; and 2) phasing the elements into the formula (recognizing the need to examine their impact on funding).

Fiscal Year 2016-17 and Beyond

- **Short-term certificates & certificates of value:** Currently the model only includes certificates of 30+ credit hours. There is a need to continue to establish common definition and collection of short-term certificates (less than 1-year). Additionally, the Board of Regents certificates of value conversation will be considered for how those identified as “of value” will be reflected in the formula. ***For inclusion in 2016-17.***
- **Academic preparation access category:** Recognizing institutions for being successful with students who enter college underprepared is essential to the mission and role of community colleges. This access category will start with those exams that have common cut-scores established through the Ohio Remediation Free Standards. A process for collecting this information will be established. Additionally, a process for a crosswalk for other measures will be discussed. ***For inclusion in 2016-17.***
- **Use of projected data:** Ohio has typically used projected data to determine initial fiscal year allocations, settling up any differences between projected and actual data in the second half allocation. When allocations were based solely a minimum number of metrics it was easier for institutions to accurately project these figures. However, as additional metrics are added and measures such as access populations are included, projections become more difficult and could result in inaccurate modeling and estimates. Additionally, there does not appear to be consistent projection methodology used across campuses. The OACC Presidents have expressed a strong preference toward eliminating the use of projections. Continued discussion is necessary to finalize details for how the transition will be implemented. ***For use in 2016-17.***
- **Course equivalents:** The use of course equivalents should be transitioned into the formula over time as a common definition/threshold and method of collection is established. The inclusion of this metric will provide support for institutions to develop competency-based, accelerated models such as prior-learning assessment.
- **Dual enrollment:** Consideration as to whether more direct or “extra” recognition for the delivery and completion of dual enrollment courses should be included. The current model recognizes these courses as it does all credit-bearing courses directly within the course completion component and as part of the credit accumulation

(success points component) and the completion milestones (within calculated cost basis for certificates, degrees and transfer).

- **Program of study:** This measure will work to capture the student success research that indicates students earning certain number of credits within a degree program have higher success rates. Recognition has been given to the potential challenge of adequately defining this benchmark.

As noted, the OACC Presidents believe that short-term certificates and certificates of value, and the inclusion of an academic preparation access category, are of priority for establishing definitions and a common collection process so they can be appropriately included in the formula for FY 2016-17. Additionally, the OACC Presidents recommend a process for transitioning from projected to actual data be established for FY 2016-17 as new elements are introduced to the formula. This will provide for additional stability through another transition.

For Continued Discussion and Consideration

The consultation group discussed several other topics that should warrant continued discussion and attention as the new funding formula is implemented. Some of these issues may be appropriate for direct inclusion in a future funding formula, others will be supported indirectly through an outcomes-based formula that supports institutions to adopt best student success practices and continuously evaluate institutional practices.

These issues include:

- **Job placement & workforce training:** More direct recognition of the role community colleges play in preparing students for jobs and offering workforce training that addresses skills gaps, particularly in high-needs areas should be considered.
- **Subsequent success for transfer students:** Tracking and accounting for students' success upon transferring to a 4-year institution. This type of measure could support collaboration between sectors and transfer pathways. Consideration would need to be given for how this interacts with the University formula.
- **Transfer to 2-year institutions:** Several of our institutions do not offer degrees or full programs in areas of need and hence the preparation and transfer of students between community colleges serves as a mission particularly for some colleges. Further consideration and discussion should be given as to how the current formula accounts for this and if more direct recognition is warranted.
- **48 credit hour accumulation:** The formula currently recognizes student's progression through 36 credit hours and then again at completion of an associate's degree (60 credit hours).
- **Adjusted allocation among components overtime:** After institutions have had appropriate time to adjust to the new funding metrics and expectations, consideration could be given to how the allocation gets adjusted to increase recognition of student success and completion.

CONCLUSION: FORMULA IMPACT PHASE-IN AND NEXT STEPS

The recommendations put forward in this report are intended to reinforce the adoption of best practices for student success while recognizing the essential access mission community colleges serve toward achieving the educational attainment goals of Ohio and its citizens. The metrics and technical details of the formula will also provide an appropriate balance of stability and volatility in year-to-year allocations for institutions. However, initial data runs for the first year of the funding formula show some institutions will be significantly, negatively impacted. As institutions adjust to this new funding formula, the OACC supports the idea of “bridge funding” in this initial year to help mitigate the losses for the institutions affected. Therefore, the OACC supports a separate allocation outside of the new funding formula set at the equivalent of the transition funding provided to the universities and regional campus levels; a 96% stop loss (approximately \$2.8 million).

Additionally, as this formula continues to be implemented, and potential new metrics are included in FY 2016 and beyond the OACC and its institutions will continue to work with the Chancellor and Board of regents to ensure accurate and consistent data collection is maintained. Continuous documentation of formula’s impact on student retention and completion, as well as any unintended consequences will also be important. Realizing the full potential of this formula toward advancing student success will require ongoing evaluation, communications, institutional support and alignment with other state and OACC policies and practices.

The OACC looks forward to working with the Chancellor on the full implementation of the recommended SSI allocation model and continuing the work to incorporate the elements identified for potential inclusion in FY 2016 and beyond.

NOTE: FORMULA CALCULATIONS ARE NOT FINAL AND ARE SUBJECT TO CHANGE. DO NOT USE FOR BUDGETING OR PLANNING PURPOSES.

APPENDIX A

OACC Community College Funding Consultation – Guiding Principles

The OACC Community College Funding Consultation developed principles that guided its work. The consultation outlined that the final recommendation should:

- Hold true to the mission and priorities of community colleges including access, completion, quality, and workforce development.
- Recognize institutional differences in this process; we are a network of two-year colleges with a shared mission but unique priorities.
- Be simple to understand and communicate.
- Align with the USO & ODE priorities and initiatives.
- Be responsive to state and national initiatives.
- Allow for funding predictability.
- Be universally adopted by our sector.
- Incentivize institutions to adopt evidence-based practices to help them succeed.
- Avoid unintended consequences.
- Recommend a funding formula that promotes and supports “*access to success.*”
- Develop a model that is sustainable, consistent, and reliable.

APPENDIX B
FY 2015 Formula Summary

1. Course Completion Component (50%)	Comments	Apply Access Weights?
FTE students who complete course with passing grade (cost-based models)	No change	15% weight for students from one (or more) category
2. Success Points Component (25%), 1 point each	Comments	Apply Access Weights?
Students earning their first 12 college level semester hours	Change from 15 hours	No
Students earning their first 24 college level semester hours	Change from 30 hours	No
Students earning their first 36 college level semester hours	New	No
Students completing any developmental ENGLISH and attempting any college level ENGLISH	Previously 2/3 point	No
Students completing any developmental MATH and attempting any college level MATH	Previously 2/3 point	No
3. Completion Milestones (25%)	Comments	Apply Access Weights?
Associate Degree Completion: Cost-based model <i>First degree:</i> Statewide average cost of all courses taken within degree category <i>Subsequent degrees:</i> 50% of associated cost for any subsequent degree earned by student	Not previously cost-based	25% for students from one category 66% for students from two categories 150% for students from three categories
Certificate Completion (30+ credit hours): Cost-based model - Cost calculated at 50% of associate degree within same category <i>Subsequent certificates:</i> Institutions receive 50% of cost for any subsequent certificate earned by student	Not previously cost-based. Impact phased-in	
Transfer: to Ohio public, private or out-of state four-year institution with 12+ college level semester credit hours Cost calculated at 25% of statewide average cost for all degrees ("flat rate" for all transfers)	Not previously cost-based. Change from 15 hours.	

APPENDIX C
Proposed FY 2015 Formula Summary: Component Breakdown

Access Weights Course Completion: 15% for one (or more) category Completion Milestones: 25% for 1 category; 66% for 2 categories; 150% for 3 categories					
		Amount	% of Total	% Component	% of Component
Course Completions	Completed FTE	\$189,885,319	45.31%	90.62%	
	Completed FTE Access Add-on	\$19,665,395	4.69%	9.38%	
Success points		\$104,775,357	25.00%	100.00%	
Completion Milestones	Associate Degree	\$65,384,490	15.60%	62.40%	83.02%
	Associate Degree Access Add-On	\$21,609,782	5.16%	20.62%	
	Certificates	\$2,542,160	0.61%	2.43%	2.74%
	Certificates Access Add-on	\$320,518	0.08%	0.31%	
	Transfer	\$11,769,711	2.81%	11.23%	14.01%
	Transfer Access Add-on	\$3,148,696	0.75%	3.01%	
Total		\$419,101,428	100.0%		
Total To Access Add-On		\$44,744,391	10.68%		

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APPENDIX D

Proposed FY 2015 Formula Summary: Success Point Breakdown

Success Point	% of total points	Dollars	% of total dollars	% of total points	% of total dollars
12 Hrs	34%	\$35,238,465	8.4%	77%	19%
24 Hrs	24%	\$25,189,329	6.0%		
36 Hrs	19%	\$19,867,389	4.7%		
DEV English Success	10%	\$10,726,343	2.6%	23%	6%
DEV Math Success	13%	\$13,753,831	3.3%		

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