



## Connecting State Financing Policy to Institutional Innovation

June 5-7, 2019  
Benson Hotel, 309 SW Broadway  
Portland, Oregon

### Meeting Objectives

- Exchange best practices across states and learn from subject matter experts on current postsecondary financing strategies;
- Explore opportunities to create a comprehensive approach to state talent financing which integrates institutional input/feedback in implementation and review; and
- Examine strategies to invest in student outcomes, especially for adults, low income students and students of color.

### Wednesday, June 5

1:00 – 3:00 PM

**Registration**

2:00 – 2:30 PM

**Welcome**

*Martin Simon, Division Director, Economic Opportunity, NGA  
Solutions: The Center for Best Practices*

*Gretchen Syverud, Director of Strategy Integration, Lumina  
Foundation*

**Overview**

*Amanda Winters, Program Director, Postsecondary Education, NGA  
Solutions: The Center for Best Practices*

2:30 - 4:30 PM

**A Framework for Developing a Statewide Talent Finance Plan**

A statewide talent finance plan offers state leaders an analytical and collaborative process to assess how many more degrees the state needs and how much it will cost as well as offer a framework for how to pay for it through leveraged, new and reallocated funds. This workshop session will review a framework for states to align policies, data and assets to drive access and attainment efforts.

State focus: Oregon

*Facilitator: Andrew Rauch, HCM Strategists*

4:30 – 5:00 PM

**Wrap-up and framing for Thursday**

5:45 – 6:00 PM

**Travel to Dinner (Shuttles available to and from the restaurant)**

6:00 – 8:00 PM

**Dinner- Coopers Hall Winery and Taproom – 404 SE 6<sup>th</sup> Ave. Portland**

## Thursday, June 6

7:30 – 10:00 AM **Registration**

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7:30 – 8:30 AM **Breakfast**

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8:30 – 9:00 AM **Welcome and Overview of Day Two**

*Amanda Winters, Program Director, Postsecondary Education, NGA Solutions: The Center for Best Practices*

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9:00 - 10:15 AM **Focusing Squarely on Equity (Vision and Goals)**

**Host State Highlight**

*Patrick Crane, Director- Office of Community Colleges and Workforce Development, Oregon Higher Education Coordinating Commission*

*Jessica H. Howard, Ph.D., Campus President, Portland Community College, Southeast*

*David McDonald, Associate Vice President for Public Affairs and Strategic Initiatives at Western Oregon University*

An overview of the many ways in which Oregon uses an equity framework to support institutions and students including: their strategic framework, performance metrics, student success and completion model and the Oregon Opportunity grant.

**Equity Data Tools**

*J. Oliver Schak, Assistant Director for Higher Education Research and Data Analytics, The Education Trust*

The Education Trust will present on their data tools that can support states in having conversations around issues of equity and can provide key national comparisons across equity-focused metrics. Attendees will have an opportunity to engage with data resources and consider key questions for state data conversations.

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10:15 – 10:30 AM **Break**

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10:30 – 11:45 PM **Institutional Involvement in Equity-Focused Outcomes-Based Funding**

*Kate Shaw- Executive Director, Research for Action*

*Kate Callahan- Chief Research Officer, Research for Action*

This session will provide an opportunity for participants to learn about how institutions are engaged in outcomes-based funding processes, with specific state examples. Then, participants will have an opportunity to review the Research for Action (RFA) Equity Toolkit modules in small groups to take a deeper dive into identifying

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concerns, opportunities and supports regarding institutional involvement in equity focused OBF.

**Resource: Research for Action OBF toolkit.** Attendees will have an opportunity to interact with Toolkit modules and engage with the resource and experts.

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11:45 – 12:45 PM

**Lunch**

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12:45 – 1:45 PM

**Concurrent Challenge Sessions**

**Sustaining Outcomes Based Funding Through Implementation and Supporting Institutions**

**Andrew Rauch**- HCM Strategists

Identifying challenges and supporting sustainability of outcomes-based funding models through design principles, addressing unintended consequences, and supporting institutions.

**State Levers to Drive Change Across a Diverse System: Lessons from the California Community Colleges**

**Marty Alvarado**- Executive Vice Chancellor, California Community Colleges, Chancellor's Office

**Ajita Menon**- Senior Advisor to the Chancellor, California Community Colleges, Chancellors Office

**Laura Metune**, Vice Chancellor of Governmental Relations, California Community Colleges, Chancellor's Office

**Sheneui Weber**, Vice Chancellor of Workforce and Economic Development, California Community Colleges, Chancellor's Office

Recent state-level changes to funding and policy structures governing the California Community Colleges are aimed at driving better student outcomes. The creation of the Strong Workforce Program, the implementation of the guided pathways framework, and adoption of the new Student-Centered Funding Formula have required the Chancellor's Office to rethink how it provides oversight and support to the system to accomplish goals of closing achievement gaps and improving graduation rates. Panelists will highlight lessons learned while working to implement sustainable systemic reform.

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1:45 – 2:15 PM

**State Team Time**

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2:15 – 2:30 PM

**Break**

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2:30 – 3:45 PM

**Strategies to Connect Human Services to Attainment: The Integration of State and Federal Funding Streams to Support Student Success**

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*Michael Bonino-Britsch, Policy Analyst, NGA Solutions: The Center for Best Practices*

*David Croom, Assistant Director for Postsecondary, Ascend at the Aspen Institute*

### **Breakout State Strategy Discussions**

#### **Georgia- Two-Generational Approach**

Georgia's implementation of two-generation strategies increased coordination and collaboration between state agencies of both early childhood learning and higher education institutions. This session will focus on two-generation innovative strategies that led to successful alignment of programs and policies for young children and families.

*Jill O'Meara, Early Education Community Partnership Manager, Georgia Department of Early Care and Learning (DECAL)*

*Allison Setterlind, State Headstart Collaboration Director, Georgia Department of Early Care and Learning (DECAL)*

#### **Oregon- SNAP 50/50 Consortia**

Learn how Oregon's community colleges and the Oregon Department of Human Services are collaborating strategically to help SNAP recipients achieve escape velocity out of poverty through education and training.

*Daniel Haun, Deputy Director, Self-Sufficiency Programs, Oregon Department of Human Services*

*Kate Kinder, Director, Career Pathways and Skills Training, Portland Community College*

*Mark Mitsui, President, Portland Community College*

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3:45 – 5:00 PM

#### **Strategies to Serve Adult Students: Leveraging Adult Promise Grants**

An increasing focus has been placed on engaging/re-engaging adults in postsecondary education and training opportunities which will be key to meeting state workforce needs and attainment goals. This session will highlight three Lumina Adult Promise grantees, their strategies to serve adult students, and the ways in which philanthropic dollars can be leveraged to support state priorities.

*Gretchen Syverud, Director of Strategy Integration, Lumina Foundation*

*Rachelle Sharpe, Deputy Executive Director, Washington Student Achievement Council*

*Jodi Lewis, Director of Strategic Initiatives, Foundation for California Community Colleges*

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*Randall Brumfield, Chief Academic Officer, Idaho State Board of Education*

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5:00- 5:30 PM      **Wrap Up**

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*Dinner on your own (Group options)*

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## **Friday, June 7**

8:00 – 9:00 AM      **Breakfast**

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9:00 - 9:45 AM      **Collaboration and Communication with State Legislatures to Craft State Financing Policy (armchair discussion)**

*Ben Cannon, Executive Director, Oregon Higher Education Coordinating Commission*

*Ben Boggs, Program Principal- Higher Education, National Conference of State Legislatures (NCSL)*

**Discussant: The Role of Compacts**

*Cheryl Blanco, Vice President, Postsecondary Education, Southern Regional Education Board (SREB)*

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9:45– 10:45 AM      **Developing Technical Assistance Plans: Ed talks from Experts and Table-based Networking Discussions**

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10:45 – 11:00 AM      **Break**

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11:00 – 11:30 AM      **State Team Table Discussions/Planning**

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11:30 AM- 12:00 PM      **Report out and next steps**

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