

Extended Education at Evergreen: A Feasibility Study

June 2003

**Extended Education Committee
Don Bantz, Chair**

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Introduction

Evergreen's Financial Futures Group (FFG) was charged by President Les Purce with assisting the college to take greater control over its financial resources by identifying opportunities to (1) create new revenue and/or (2) reduce expenses through improved efficiencies, while remaining true to our mission and values. By early 2003, the FFG had received more than 100 ideas from the Evergreen community. The most often suggested idea was to offer some form of extended education (EE) at TESC. Accordingly, the FFG put EE on a "fast track" i.e., it was the one idea they felt should be investigated as soon as possible. The president accepted this recommendation on January 13, 2003 and directed Academics to 1) prepare a report to assess the feasibility of conducting an EE program at TESC to be written by June 30, 2003 and – if deemed feasible – to recommend a permanent organizational structure and 2) use Summer School as the vehicle to test pilot EE courses beginning in summer '03.

An interim EE planning team was immediately established consisting of Don Bantz, Amy Betz, Andrea Coker-Anderson, Carolyn Dobbs, Mary Jane Edmondson, Russ Fox, Tami Johnson, Beckie Kjer, Betty McGovern, Walter Niemiec, Kitty Parker, Char Simons and Caroline Tawes. The EE team framed its work around the following guiding principles:

1) The philosophy of the proposed Center for Community Partnerships

Community-based learning is experiential education in which students engage in activities that address human and community needs together with structured opportunities intentionally designed to promote student learning and development. Reflection and reciprocity are key concepts of community based learning.

The engaged campus, like the community-based learning student, recognizes that knowledge cannot be separated from the purposes to which it is directed. The engaged campus is not just located within a community, it is intimately connected to the public purposes and aspirations of community life itself. The engaged campus is unable to separate its unique responsibility for the development of knowledge from its role of knowledge in a democratic society to form the basis for social progress and human equality.

2) The core values established by the Core Values Group of the College Budget Council, posted at www.evergreen.edu/connections

The EE team is highly cognizant of the fact that if any EE activity is launched at TESC to provide additional revenue to support Academics, it must be undertaken in support of these core values.

Many of the ideas for EE activities originated from Evergreen faculty. They are actively pushing the EE team to respond to several faculty-sponsored initiatives such as:

- ❑ Professional Certification and Endorsement Programs for K-12 teachers
- ❑ MPA certificate program
- ❑ Conference-linked courses e.g., a national yoga conference this summer with 200 participants
- ❑ Summer high school programs in multimedia, sciences, the arts, etc.

The EE team established a six-month work plan, which culminates in this final feasibility report. The team concentrated its efforts 1) internally (record keeping, registration, financial feasibility of each class, advising, narrative evaluations, space scheduling, coordination with Conference Services, accounting services, Banner interface, and collecting ideas from faculty and staff regarding their vision and concerns for extended education at Evergreen), and 2) externally (interviewing private, public and nonprofit agencies to determine their needs, develop new community partnerships, conduct market research, and begin considering needs in the areas of promotional publications and Web site expertise for on-line marketing and registration). Additionally, the committee formulated a pilot structure to test an EE-like course as an expansion of Summer School to determine the actual issues and challenges EE offerings would present.

During the feasibility study period, the committee welcomed ideas and suggestions. We kept the provost, other key administrators and the faculty agenda committee informed of our findings. The following feasibility report is based on our “best thinking” at this time, and is subject to change. This report represents the committee’s best thinking given the short timeframe of six months for researching this initiative. AY 2003-04 will be used for further analysis that will flesh-out all underlying assumptions.

Executive Summary

Extended education (EE) refers to adult learning, most commonly for professional reasons. Classes that do not fit into either the full-time day or evening/weekend studies model of degree-seeking students, and are mainly for working adults are considered EE. This includes licensing and certification in a number of fields, and maintaining professional credentials. Extended education also means educating the workforce in a variety of settings, ranging from colleges and universities to employer-provided training. Personal enrichment courses, such as foreign languages, art, estate planning and outdoor leadership, are sometimes considered extended education as well. Therefore, extended education can grant academic credit, certificates, continuing education units or be non-credit classes.

Extended education can be found at nearly every college and university in the country. Evergreen is the only public institution in Washington State that does not offer a formal EE program. Historically, EE has been a market-driven, for-profit venture peddled by private organizations. Higher education institutions entered the field at a somewhat more measured pace. Since the early 1970s when workforce and educational needs began changing rapidly, EE programs at colleges and universities have burgeoned. During this period, public funding also began decreasing while lawmakers and college boards demanded more accountability and efficiency from institutions.

Evergreen's five foci – interdisciplinary study, personal engagement in learning, linking theory to practice, collaborative work and teaching across significant differences – create a strong foundation for EE at the college. Furthermore, Evergreen's mission statement is compatible with EE:

- ❑ Teaching is the central work of faculty, with students, faculty and staff actively engaged in learning.
- ❑ Academic offerings are collaborative and interdisciplinary, which produces a “real world” learning atmosphere congruent to that of the workplace.
- ❑ Students are responsible for their education, specifically how to apply it to their lives.
- ❑ Active participation in learning.
- ❑ Community-based learning.

National adult education studies as well as our own small-scale community needs assessment suggest that a mid-career highly professional workforce in public, private and nonprofit sectors demand educational and training opportunities. Locally, these needs are lacking in certain fields, most notably the environment, health, education, social services and law. Local organizations and agencies have consistently approached Evergreen over the years to provide such training, but because the college did not have a structure to offer for-credit and non-credit credit programs that were tied to employers' needs and timeframes rather than academic quarters, we were unable to provide such offerings.

At the same time, Evergreen has been providing extended education in a somewhat uncoordinated way. Based on practices at more than a half dozen institutions, EE appears to be any program outside of the full-time, day-time classes for traditional-aged college students. Evergreen is already meeting some of the needs of place-bound, working adults through Summer School, Evening/Weekend Studies, graduate programs and the public service centers, but is not meeting the professional non-degree training needs of working adults. This feasibility study suggests that a formal EE program could be established at Evergreen by coordinating current scattered offerings. Such coordination would increase operational efficiency and make it possible to institute a broader curriculum tailored to community needs.

To that end, Evergreen is testing three pilot EE programs. They are:

- *Six Days on Freedom: Teaching Yoga as Transformation and the Journey of Awakening An Advanced Training Retreat for Yoga Teachers and Dedicated Practitioners*, a national conference with an estimated 200 participants, to take place on campus in summer 2003. In conjunction with the conference is a for-credit academic class in which students read texts, write papers, seminar and write self-evaluations, or the option of earning continuing education units. CEUs are less academically rigorous than traditional college credits, but are necessary in several fields for professional development. They are typically based on attendance and participation during an activity, but call for little or no outside work or narrative evaluation. The CEU offering is a coordinated effort between Conference Services and EE.
- K-12 professional teacher certification. A recent Washington State law requires all public school K-12 teachers on the job for less than five years to earn a professional certification in addition to any degree(s) they have. Evergreen's Master in Teaching program, in conjunction with Registration and Records, is conducting a small pilot program, a four-credit professional certification summer seminar class through summer school.
- Public administration certification. Evergreen's Master of Public Administration is developing a specialized certification program that is more technically oriented than an undergraduate degree but less academically rigorous than a master's degree. The program is scheduled to begin in fall 2004.

In examining the feasibility of establishing an EE program at Evergreen, two priorities became apparent: that it be economically viable, specifically self-supporting within five years, and that offerings be consistent with the mission of the college. Both priorities appear to be possible. To remain consistent with the college's mission, each offering would be reviewed by the head of EE to ensure quality and compatibility with Evergreen's educational style. However, another year of planning is needed to come to a final conclusion about whether to launch EE.

As a result of this feasibility study, the EE committee makes the following recommendations:

1. Extended Education and Summer School be combined. The official name of the program would be Extended Education and Summer School at Evergreen.
2. Goals for EE include to become financially self-supporting by 2009 (to be refined in AY03-04) and to offer classes compatible with Evergreen's mission and education style.
3. EE's draft mission statement will be "Using the strengths of the college, we will help lifelong learners develop their potential and contribute to positive social change through enhancement of personal and professional skills. We will meet the changing needs of the professions, business and industry, and non-traditional student populations with programs that are flexible, responsive and innovative."
4. EE needs another planning year in order to determine the initial market, build curriculum, hire faculty, market, develop policies and procedures, and integrate the EE business plan into college business systems.
5. EE must develop a specific workplan for '03-'04 with measurable goals to develop internal and external processes, an administrative structure and offerings.
6. Should prospects for EE look solid at the end of the '03-'04 planning year, growth would be well planned and steady beginning in 2004-2005.
7. EE curriculum will be built thoughtfully around community needs, as well as by identifying and developing classes in subjects, formats and teaching styles that Evergreen is particularly strong at – our niches. EE will also collaborate with Conference Services, an existing revenue-generating operation on campus, to plan activities that are mutually beneficial to both areas, such as identifying potential on-site, intensive fee programs that would use Conference Services, Food Services and Housing.
8. EE will be housed in the Academic Dean's area during the '03-'04 planning year. Discussions will continue regarding where to house EE after that.
9. The EE curriculum will include a mix of credit, non-credit, certificate and continuing education units.
10. For EE to be successful, the college will have to see it as a priority and fully support it.
11. Two coordinating committees, one internal and one external, will assist in the development, implementation and assessment of EE.

12. Evergreen faculty, both full-time and adjuncts, will be given priority in teaching EE classes. Questions remain about current compensation policies for Evergreen faculty members (all categories) particularly the issue of capping teaching loads/compensation and will be thoroughly examined. The goal is to take advantage of the faculty resources we have currently. If faculty do not have the time, interest or expertise to teach an offering, then applications will be accepted from the larger community.
13. EE classes could be offered on the Olympia campus, as well as the Tacoma campus and Grays Harbor. Classes may be offered off-site as well, depending on a cost-benefit analysis.
14. Current \$20/class audits would be moved to EE, renamed and the cost increased to competitive market prices.

Part I: Context

A. Situation Analysis

1. National and Local Adult Education Overview, Statistical Analysis and Forecast

Higher education is no longer an activity one does during the traditional age span of 18-22. It has become a lifelong endeavor for more and more Americans.

Adult Students Today, Carol Aslanian

The adult student market – whether degree-seeking as in Evening and Weekend Studies, or non-degree seeking as would make up the bulk of Evergreen’s proposed EE unit – share certain demographic characteristics as well as expectations:

The relationship these students want with their college is like the one they already have with their banks, supermarkets and other organizations they patronize, notes Arthur Levine, president of Teachers College at Columbia University in *Adult Students Today*. They want education to be nearby and to operate during convenient hours – preferably around the clock. They want easy, accessible parking, short lines, and polite and efficient personnel and services. They prefer to tend to their own entertainment, health care and spiritual needs and do not want to pay a college for these services. All they want of higher education is simple procedures, good service, quality courses and low costs – with course quality ranked as the highest priority, and price, procedures and services ranking lower. Nontraditional students frequently are quite critical about these areas. They are bringing to higher education exactly the same consumer expectations they have for every other commercial enterprise with which they deal.

A national study conducted by The College Board in 2000 found that when choosing an institution of higher education, adult students tend to base their decision first and foremost on offering of desired course or degree, followed by quality of programs, quality of faculty, location, schedule of courses and general reputation of the college or university.

Of 1,000 institutions surveyed by The College Board, the majority of undergraduate degree-seeking adult students were female and the median age was 40, up from 33 in 1988. Their median income was \$47,300. The most popular subject areas were business, education, health, engineering and computer science. Adult students in non-credit classes tended to be more affluent than the degree-seekers, with a median family income of \$60,000. The non-degree seekers also tended to be predominately female (70 percent), 92 percent Caucasian. Sixty-three percent already have a bachelor’s degree. Both degree- and non-degree seeking adult students enroll in classes primarily for job-related or career

reasons. The vast majority – 87 percent – said their preferred method of study was in the classroom, as opposed to distance or other means. Findings for adult students with or working on graduate degrees was similar to that of undergraduate and non-degree seeking adult students.

The numbers of adults enrolled in noncredit classes almost doubled in a decade, going from 58 million in 1991 to 90 million in 2000. They are enrolled in workshops, institutes and seminars, frequently at a college or university but not always. The median noncredit adult student is 47 years old, female and white. She is married with a family income of \$60,000. She is employed full time in a professional position and has a bachelor’s degree. She resides in a suburban community or small city with an average population of 43,000. Other noteworthy patterns:

- ❑ 58 percent are between ages 40 and 60
- ❑ 38 percent have family incomes of more than \$70,000
- ❑ 71 percent are employed full time
- ❑ 46 percent are in a professional position
- ❑ 22 percent have a master’s degree
- ❑ 32 percent live in areas with a population of 10,000 to 50,000

Median incomes in Thurston County bode well for the development of EE, which tends to draw wealthier participants than the adult degree programs. Median household income in Thurston County has been higher than the national average since at least 1989, and the gap is widening.

Median Household Income

	Thurston	Washington	United States
2001	\$47,998	\$48,835	\$42,228
2000	\$48,388	\$48,023	\$42,022
1999	\$46,975	\$45,776	\$40,696
1997	\$43,778	\$45,053	\$37,005
1995	\$37,976	\$39,954	\$34,076
1993	\$37,766	\$36,716	\$31,241
1991	\$35,133	\$34,423	\$30,126
1989	\$30,976	\$31,183	\$28,906

Source: <http://www.ofm.wa.gov/pop/poptrends/index.htm> and U.S. Census Bureau.

Thurston County tends to have a well-educated population, better than the national average. This fact also bodes well for the establishment of EE, which tends to draw participants with bachelor’s degrees and higher.

Percentage of Population Aged 25 and Older Who Have Attained Educational Achievement Beyond High School

	Thurston	Washington	United States
2000	66%	62%	50%
1990	59%	56%	NA

Source: U.S. Census, Statistical Abstract of the United States.

Persons 25 years and over who have attained some college, but no degree, an associate's degree, a bachelor's degree or an advanced degree.

The most popular fields of study for non-degree seekers were computers/software (23 percent), health (15 percent), business (15 percent) and education (12 percent), according to The College Board survey. The main educational providers for these adult learners are two- and four-year colleges (17 percent each), professional associations (15 percent) and employers (11 percent). The most important factors in enrolling in a particular class were quality of the program, quality of instructor, schedule of course and general reputation of the institution.

The most popular length for classes was less than one week (47 percent). There was no clear consensus on the most popular length for a class session. Fifteen percent noted seven to nine hours, followed 14 percent noting 20-29 hours, and 13 percent at 15-19 hours.

For courses lasting one week or less, weekday mornings and weekday afternoons were the two most popular class times, at 31 percent and 29 percent respectively. Seventeen percent met early weekday mornings, finishing by 9 a.m., while 16 percent met weekday evenings. Three percent met Saturdays and 3 percent met weekends. For courses more than one week in length, half met weekday evenings. The second most popular time (tie) was weekday mornings and weekday afternoons. Seven percent met early weekday mornings finishing by 9 a.m., 4 percent met Saturdays and one percent met weekends.

Various surveys and reports from the mid- to late 1990s for Evergreen's Evening and Weekend Studies parallel The College Board's national findings. They indicate that Evening and Weekend Studies students share some of the same demographics as potential EE students. Following are the demographics of Evergreen Evening and Weekend Studies students, as of 1998:

- ❑ **Age:** Almost 80 percent were age 30 and older; the median age was 35
- ❑ **Gender:** 2/3 were female
- ❑ **Students of color:** 11 percent
- ❑ **Residence:** Sixty percent were from Thurston County
- ❑ **Starting quarter:** Roughly one-third spring, one-third fall and 20 percent summer.
- ❑ **Most important characteristics of a college (potential marketing messages):** High quality instruction, affordable education, availability of classes.
- ❑ **TESC strengths compared with other colleges (potential marketing messages):** Close to home, high quality instruction, close contact with faculty
- ❑ **Reasons to enroll in a particular program:** Interest in subject (90 percent), convenient schedule (46 percent), reputation of faculty or class (40 percent), work-related (27 percent).
- ❑ **Planning:** One-quarter interested in participating in EWS planning discussions

- **Guiding principle of EWS:** Access to higher education for adult, place-bound learners. This is done through special student status, and publicized through advising and outreach, community forums and the *Times*.

The forecast for both degree-seeking and non-degree seeking adult education looks rosy. Numerous state government reports, including those from the governor's office and the Higher Education Coordinating Board, support the need for continuing education and retraining of the workforce. According to Aslanian:

If we believe that the turbulent decades of the 1980s and the 1990s were periods of rapid social, technological and economic changes that propelled millions of Americans back to school to gain competencies needed to cope with such changes, we may have to redefine our concept of "turbulence" in the 21st century. We can expect societal changes to progress at an even more accelerated rate from here on...It means that lifelong education will continue to be the largest and most rapidly growing sector of American higher education.

Aslanian's research and examination of the supply and demand for adult learners nationwide at hundreds of colleges led her to the following observations that are relevant to the feasibility of establishing EE at Evergreen:

- Currently, three out of four jobs require some postsecondary education, and the fastest growing jobs are those that require higher levels of education and training, such as those in management, professional and technical fields.
- Although a substantial proportion of adults will continue to seek degrees, more and more will enroll in certificate programs, particularly in technology, and in individual courses, both credit and non-credit, in order to gain skills in specific areas on a short-term, intensive basis. Mandatory continuing education for professionals by regulatory agencies will also add to the demand.
- Former students are future students. Colleges have a built-in audience for extended education. More degrees, courses, certificates, workshops and conferences will provide the skills and knowledge adults need to make life transitions. The providers they return to will be those who are always there, always open, always welcoming. Americans will not finish their education, but will return, over and over, throughout their lifetimes.

In terms of the local potential for EE, Thurston County has a well-educated, middle class workforce – which is the demographic that tends to populate extended education nationally. According to a community needs assessment undertaken in spring 2003 by Evergreen's Master of Public Administration Program for United Way of Thurston County:

Thurston County is blessed by a multitude of strengths. We have a reasonably strong economy centered on state government and a well educated, talented workforce supported by three strong educational institutions, The Evergreen State College, St. Martin's College and South Puget Sound Community College. The natural environment is stunning and the community has a small town feel, with a low crime rate and sense of tradition. We have a nonprofit and social service sector that is highly cooperative and provides high quality services to local residents. Citizens participate in civic affairs and volunteer for important community tasks.

Ingredients of a successful EE program include offering a wide variety of credit and non-credit classes and not relying on any one sector for participants. The proportion of Thurston County residents aged 65 and over is now 11.4 percent of the population. Thanks to the aging of the baby boom generation, that proportion is expected to double by 2025. While this segment of the population may not need job-related EE, many will likely be interested in personal enrichment EE offerings and have the income to pay for it.

According to the United Way community needs survey, several issues that were not highly rated by the respondents to the surveys or participants in focus groups are relatively hidden except to those directly affected, but are critical to the quality of life in our community. These invisible issues that may be emerging parts of an EE curriculum include:

- ❑ Care for children and adults with disabilities
- ❑ Family violence

There are also emerging issues that are likely to be of importance to county residents in the years ahead, including:

- ❑ Increasing ethnic and racial diversity in the county
- ❑ Land use and the environment
- ❑ Downstream effects of budget cuts on prevention programs
- ❑ Demographic issues and the aging population
- ❑ Physical and mental health care

As community groups and agencies digest the United Way community needs survey and decide on courses of action, the issues of concern listed above may be areas for EE curriculum development.

Population growth and an increasingly diverse population may also bring opportunities for EE. According to the 2000 U.S. census, between 1990 and 2000 only 12 percent of the nation's counties grew faster than Thurston County. The county remains nearly 86 percent white, with 2.4 percent African American, 4.4 percent Asian and 1.5 percent American Indian or Alaska Native. Hispanic residents (who may be of any race) totaled 4.5 percent. It is surprising to note that census data show that only about 38 percent of

the nation's counties had more diversity. The county is likely to begin reflecting statewide trends, with increasing proportions of African American, Asian and Hispanic residents, who as of the 2000 census were 3.2, 5.5 and 7.5 percent respectively of the state's population.

This increase in diversity will provide a challenge to the county's political and social status quo, which could mean opportunities for EE. People with new perspectives will seek to make their voices heard. Key sectors of the community, including business, law enforcement, teachers, school district leadership and boards of community organizations will need to become more diverse and rethink the way they are organized and offer their services. Interviews with local ethnic minorities for the United Way community needs assessment reinforced this point:

Many agencies and businesses say they want diversity. The way it's usually done is like this: they invite people of color in, but they are not willing to change...it's like your house is my house, but you have to follow my rules. If you truly want to achieve diversity, it's time to look at new processes.

We get on boards, but a lot of the time I think they just want a Token – someone who just agrees and does not really bring up minority issues. They don't want to give up any of the power...but yet they are trying to impact systems where minorities are overrepresented without having minorities input.

General community needs based on the United Way survey included improving the collaboration of nonprofits with the faith community and schools that are not currently strong parts of the nonprofit network yet are increasingly relied on to provide social assistance. Several people also suggested that the nonprofit community (as well as state and local government) needed to “tell our stories better”— to more fully communicate why social services are needed and to be clear about the effects of funding reductions.

External economic, technological, political and social forces influence the degree and type of EE that the college could offer. K-12 education reform requires all teachers who have taught less than five years to earn a professional certificate in addition to a degree. Both public, private and nonprofit employers are increasingly stressing efficiency and efficiency goals to employees.

One indicator of the popularity of EE is among the transfer credits of matriculated students. According to *Continuing Education: A Program for The Evergreen State College*, Jane Wood's Master of Public Administration 1999 thesis, the Credentials Evaluation Office in Admissions typically receives 40-50 formal requests a year to evaluate continuing education units (CEUs) from other institutions. Participation in training and professional development areas are then converted to Evergreen academic credit based upon an established seat-time formula. At no cost, the college grants

academic credit for EE done elsewhere and over which the college has no way of ascertaining the quality.

Local and state government is the largest employer in Thurston County. However, the private and nonprofit sectors are also key employers. A successful EE program needs to cater to a carefully researched mix of sectors.

Because of Evergreen's location in the state capital, we believe the public sector will be EE's main niche. Regardless of state agency, this audience has certain common training needs, such as civil service reform and collective bargaining in the short-term. More specific long-term needs can be broken down into the fields of environmental regulation, K-12 education, health care, social services, law and miscellaneous community needs and desires.

One means of tracking need is through local and state government personnel and training offices. Information gained from their annual training plans could help define agency educational and professional development needs and help shape EE curriculum. Furthermore, the state Department of Licensing has information on ongoing training and credentialing needs for a variety of professions and fields.

B. History of Extended Education at Evergreen

The terms adult education, extended education and continuing education historically have had different connotations. Adult education has meant pre-postsecondary adult learning; extended education was more agricultural- or at least vocation-based; and continuing education was for adults in postsecondary study, according to Wood's master's thesis. For purposes of this report, extended education (EE) and continuing education (CE) will be used interchangeably.

Extended education in its broadest definition – which is classes that fall outside the realm of traditional academic year daytime offerings – has long been a part of Evergreen through Summer School, Evening and Weekend Studies and the public service centers. All of these could provide useful models on how to develop a successful EE program that is well planned and expands at a reasonable rate. A more formal EE program has also long been discussed at Evergreen. Various administrators, including past presidents, provosts, academic deans and other key college personnel, have pondered and supported the notion of EE at Evergreen through various planning documents and public speeches. Interest tended to peak during bleak financial times, then recede into the background when budget constraints loosened. Faculty and staff, on the other hand, have had divergent opinions on EE for reasons of workload, possible divergence from Evergreen values and other issues.

Because EE is to be self-supporting, Summer School serves as a particularly useful model. It has been partially self-supporting since 1982, and after several years of financial uncertainty, it became very successful with student FTEs, increasing by 39 percent from 566 in 1981 – the last year of state support – to 778 in 1993. Reserve funds have been a critical feature of the program and have been used to offset drops in enrollment.

A formal although modest EE program was established at Evergreen in the early 1980s by then-dean Betsy Diffendal. Driven by a desire to strengthen connections between Evergreen and the community, she created partnerships with SPSCC and had a pool of Evergreen adjuncts to work with. At that time, EE consisted of:

- Joint classes with SPSCC, e.g. basic math and other offerings that Evergreen didn't have. SPSCC students came to Evergreen for classes that were under-enrolled, and vice versa. Five classes were offered each quarter, and they were very popular. Key partners at SPSCC were the EE director and dean of instruction.
- Intensive MPA weekend workshops for state workers. In partnership with the state Department of Personnel, these classes always filled to capacity.
- Agreements with UW Jackson School of International Studies and UW School of Engineering
- Modest Elderhostel program. It was operated jointly with Conference Services, and Elderhostel participants were housed on campus. There was little profit

margin and the group was high maintenance. The program produced good public relations for the college, and was marketed nationally in Elderhostel catalog.

Diffendal also participated in the Inter-Institutional Council on EE, which was comprised of public and private colleges around the state.

The demise of Evergreen's EE program was due to lack of continuity among deans. No one was committed to continuing the program after Diffendal returned to teaching status. Record-keeping was also an issue. EE students would later request academic credit, and some students wanted to take EE classes/workshops as part of individual contracts, which created difficulties setting fees. There was also some tension between state workers in professional development workshops who didn't want traditional college-age students attending.

The 1980s version of EE at Evergreen was marketed through the state Department of Personnel, Evergreen brochures, Olympian ads and KAOS. State government and local businesses were particularly targeted.

Several Evergreen DTF reports and self-studies since the 1980s have consistently recommended that the college establish EE as a means to generate revenue and to offset shrinking state funds and the drop in out-of-state students, which decreased from 27 percent in 1994 to 21 percent in 2002.

The 1995 Growth Group Report called for new curricular initiatives to meet growth expectations, particularly pathways in technology, entrepreneurial business and human services. The 1994 Long-Range Planning DTF's Establishing a Sound Fiscal Base subcommittee report recommended working with the surrounding community to create opportunities for residents to get involved with the college, such as through summer activities on campus. The report also recommended expanding what the college does well, such as environmental education and community service outreach programs, both on- and off-campus.

The report also traces the long history of state budget cuts at Evergreen. From 1984-1994, state funding per FTE decreased 9.5 percent in constant dollars, while the state support of other institutions of higher learning either increased or were cut by a much smaller percentage than Evergreen's. At the same time, Evergreen's enrollment increased by 46 percent or 1,000 students while staff decreased by 23.

During this same period, Conference Services and EF Language School emerged as bright spots in an otherwise dim budgetary picture. Conference Services distributes \$500,000 annually to other units on campus. At the same time, a growing number of conferences are repeat customers.

The 1994 Long-Range Planning report listed the following top three financial priorities for the college in terms of establishing new revenue:

- ❑ Closely examine the growth potential for Summer School, summer conferences and EF. Each program generates revenue which benefits the college. The college should maximize potential revenue and space utilization while recognizing that growth creates tension between Academics and other programs.
- ❑ Develop summer programs to the full potential in terms of purpose, ideal size and mix of offerings. More continuity and planning in academic administration is needed.
- ❑ Establishment of a vigorous continuing education program should be explored to expand college services, deepen our relationship to the community and provide an avenue for early retirement faculty to work part-time.

The 1997 Long Range Strategic Plan Update also called for establishment of EE:

Evergreen will enhance revenue through non-state resources, in a manner consistent with college mission and goals, improve and expand external understanding of the college and its offerings, examine the growth potential of summer session, summer conferences, the English Language School and continuing education to maximize potential revenue.

The 1998 reaccreditation report by the Northwest Association of Schools and Colleges also recommended that Evergreen widen its revenue base: “Without additional contributions and support from auxiliary services, the college may be eroding funding for core academic programs. There appears to be a lack of understanding of the role that auxiliary services play in campus financing.”

The recommendations of this EE feasibility study include implementing the three key recommendations outlined in the 1994 Long-Range Planning report.

Another important research document on EE at Evergreen is Wood’s master’s thesis. Due to her work as Part-Time Studies program coordinator, Wood brought insight to the roles of both EE and Part-Time Studies, and her thesis can serve as a planning document for implementing EE. Core findings and recommendations include that EE at Evergreen:

- ❑ Be self-supporting
- ❑ Use adjunct faculty
- ❑ Support the mission, goals and objectives of the college
- ❑ Supplement Evergreen’s Evening and Weekend Studies program
- ❑ Integrate liberal and professional education
- ❑ Is learner-centered yet market-driven, flexible and pragmatic
- ❑ Is highly responsive to community needs in order to ensure success

Wood asserts that extended education is a way to overcome educational barriers typically experienced by adult and minority students, namely cost, distance from home and campus culture. In other words, EE could serve as a gateway to adults who get their feet wet at Evergreen through extended education, then move on to degree programs at the college. Furthermore, EE could help meet the demands on the college for growth and budget restraints.

According to Governor Gary Locke's 2020 Commission on Higher Education, 150,000 new students will enter state colleges between 2000 and 2010. Many of these students will be older than traditional college age, already have credentials, but in need of additional job-related training. The report urges institutions of higher learning to form new partnerships, establish branch or satellite campuses, and provide distance learning, alternative schedules and extended education.

In her last convocation speech, former Evergreen President Jane Jervis observed that while colleges and universities will become more selective in their admissions process because of growth-driven demands, they will increasingly turn away those most in need of a college education – the economically and socially disenfranchised. EE could be a saving grace to that population, depending on the price of offerings.

Extended education is nothing new. It has historically been tied to economic development, and both the public and private sectors have played major roles as deliverers of EE. A 1986 classification by the U.S. Department of Education (the most recent available) lists nine categories of EE providers: two-year/junior/technical colleges, vocational/trade/business schools, elementary or high schools, other schools, private community organizations, government agencies, labor organizations and professional associations, tutors, private instructors or others.

It can be argued that EE began with the establishment of state and land grant universities, which assumed a public service obligation through extension services to education widely. EE further burgeoned in 1944 with the introduction of the federal G.I. bill which subsidized higher education and vocational training for more than two million veterans. In the 1950s, the private sector dominated the training and development field, as workplace retraining began to become necessary due to technology and international competition. In the 1960s, the federal government introduced retraining programs as a result of economic recession, the civil rights movement and racial unrest. Programs included job retraining and adult basic education. In the 1980s, a large part of training and retraining dollars were given to private corporations by the federal government. Colleges and universities also greatly expanded services to working adults in the areas of credentialing and extended education.

Approximately \$300 billion per year is spent on for-profit higher education. For-profit institutions, such as the University of Phoenix and ITT Technical Institutes, constitute the fastest growing segment of extended education, expanding at a rate of 10 percent a year. Part of their popularity has to do with the fact that they tend to take the lead over traditional colleges and universities in developing new formats and technologies in a variety of settings.

Despite the rapid growth of EE's for-profit sector, it still constitutes only about 2 percent of the higher education market nationally. Therefore, traditional colleges and universities still constitute the largest share of the adult education market, and are generally perceived as having firm credibility with the public because they are nonprofit, relatively free of

conflict of interest and have the capability to deliver ongoing programs. In short, colleges and universities are perceived as delivering higher quality instruction than the for-profit sector.

All indicators suggest that the EE market specifically, and adult education in general, will continue to expand. One reason is that future job growth is expected to occur almost entirely within the service sector, which requires a higher level of average skill than the manufacturing sector. Another reason for the predicted growth of EE is based on demographics. A third reason is that the size of the traditional college-age population is expected to continue its steady decline while older, non-traditional students will continue returning to college. While the adult population increased by only 33 percent between 1969 and 1984, participation rates in adult education grew 79 percent. College students over the age of 25 increased more than 20 percent between 1988 and 1996. The over-25 age group now accounts for about 44 percent of total college students, according to the National Center for Education Statistics.

Furthermore, about 76 million employed adults, or 40 percent of the workforce, participated in one or more adult education activities, according to a 1995 National Household Education survey by the U.S. Department of Education. This represents a 32 percent increase from the previous year, however this data includes remedial education, such as GED preparation. Of those who did participate in adult education, one-fourth replied they had an interest in taking a career or job related course. Relevant to EE, adults who already had a bachelor's degree or higher generally participate in adult education at a much higher rate of 51 to 55 percent.

Major trends in adult education that could affect EE at Evergreen include:

- ❑ An increase in work-related learning activities
- ❑ A sharp decline in courses toward a degree
- ❑ Increased enrollment by women and older adults
- ❑ A nearly 50 percent increase in the annual proportion of the adult population engaged in continuing their education

The growth of adult education and EE brings to the fore the debate over the purpose of education in general. Some educators, such as John Dewey, argued that education does and should have other functions in addition to workplace preparation. Others argue that the preparation of a highly trained workforce is the most important function of schooling. EE is the bridge between a liberal and technical education. One notable curriculum trend in adult higher education that bodes well for EE at Evergreen is integrating liberal studies with professional education. Should Evergreen decide to offer EE, it is in a unique position to combine educational theories and, as one of the five foci describes, bridge theory and practice. This style could make Evergreen's delivery of EE unique in its marketplace.

EE will also be increasingly needed to meet employer demands and a changing workplace. Specifically:

- ❑ Since 1984, the percentage of workers who use a computer in their jobs has risen from 25 to 46 percent.
- ❑ The American workforce will be significantly more educated and diverse.
- ❑ Corporate restructuring, notably downsizing and lack of job security, will continue.
- ❑ Human resource departments will increasingly turn to colleges and universities for quality instruction.
- ❑ More focus on performance improvement.

The latter was confirmed by conversations this spring with state agencies, such as Labor and Industries and Licensing, which reported that they increasingly want training in which the curriculum is directly tied to employees' jobs and performance improvement.

The overall rate of participation in extended education by college graduates is more than three times the rate of those who did not have a high school diploma and nearly twice the rate of high school graduates without any postsecondary schooling, according to a 1995 U.S. Department of Education survey. Almost half took one adult education course in the year prior to the survey. Furthermore, close to 65 percent of all adult education courses were taken for job/career enhancement, while the second largest group took EE classes for personal or social reasons. The majority of these courses – 30 percent – were provided by colleges and universities.

The most common source of financial support for adult education courses was the business community – 37 percent – or participants themselves at 35 percent. State and local governments financed about 13 percent. About 60 percent of adult education courses had some type of employer involvement, such as time off for the participant (44 percent), paid by the employer (34 percent), on-site training at the workplace (28 percent) and required for employment (25 percent). The major reason non-participants in adult education gave for not taking classes was that they didn't know about them. Other major barriers were time and cost.

Another study, this one conducted nationally by Washington State University in 1995, also found widespread support for extended education. More than three-fourths of those surveyed believe that EE is important to be successful at work; four in five adults received some type of job-related training in the previous three years; and three in four adults said they would take a non-credit course.

Another indicator of the popularity of extended education is by the number of professional associations and publications dedicated to the field. The trend is for continuing education to form interest groups and publications within specialty fields.

An important development, and one which is adaptable to the Evergreen style of delivery, is the comparative approach to continuing education. Stemming from the 1980 book *Continuing Learning in the Professions* author Cyril Houle discovered that some dominant conceptions guide all of the 17 professions he surveyed, namely a fresh

exchange of ideas, practices and solutions to common problems. According to Wood, “By way of analogy, we can say that continuing education is in the same state of organization as traditional education was at the beginning of the 20th century.”

C. Site Visits: Lessons Learned

During site visits to Western Washington and Portland State universities, as well as attendance at the University of Continuing Education conference in Chicago, the following sage advice was gleaned on the philosophy, planning, daily operations and assessment of EE programs. Some of these recommendations have already been implemented by the EE Committee during the course of this 2003 feasibility study.

Western Washington University

- ❑ Try small pilot programs first before launching a broader EE program.
- ❑ Leadership of Evergreen's EE program should include a faculty member. This will enhance credibility of EE within the overall Evergreen faculty. It's also necessary, in terms of protocol, to have a faculty member on the EE team who can negotiate with EE faculty on types of offerings and how they will be delivered.
- ❑ EE students should have access to college resources, e.g. library cards, computer lab, etc.
- ❑ Include student rights and responsibilities and student services in EE catalog.
- ❑ Insist on EE input in Banner.
- ❑ Get Registrar, Admissions, Financial Aid and Academic Advising on board early.
- ❑ Ease staff concerns regarding increased workload by stressing that EE is a community service and is consistent with the college's mission. Ask staff to help develop EE procedures. Answer up-front the "what's in it for me (staff)?" question.
- ❑ Establish an EE committee of stable members similar to Evergreen's Evening and Weekend Studies Coordinating Committee.
- ❑ Put EE link on college home page.
- ❑ Make EE upper division only.
- ❑ Create partnerships. WWU-EESP does with community colleges, Olympic National Park Institute, North Cascade Institute, Peninsula Education Partnership, Pacific Science Center, NSIS Consortium and the military.
- ❑ Figure out what Evergreen does well and create a niche market. WWU-EESP's is teacher preparation and rehabilitation counseling, in which they use as many resources on campus as possible. For example, one of the most popular courses is Math 102, which is a prerequisite for teacher education and has more than 100 students doing this correspondence course.
- ❑ For off-site programs, secure facilities before even contemplating what courses may be offered and to whom. Be prepared to pay for everything, e.g. furniture, phones, technology, etc.
- ❑ When doing business by phone or e-mail, EE students need to identify themselves as off-campus students so staff recognize that their access to campus is not as frequent as that of full-time day students.
- ❑ When working with smaller communities, be entwined with community leaders, planners and officials.
- ❑ Use as many existing resources as possible. For example, WWU has access to a native Mongolian speaker, and offers the only Mongolian correspondence course in the U.S. (and they do have students).

- ❑ Carefully consider which classes to take off state budget. EE students are not eligible for state-supported financial aid. Also, there could be acrimony among students who pay more to attend same class as EE students.

Portland State University

- ❑ There needs to be a spirit of institutional commitment, with the policy underpinnings and authority to carry them out.
- ❑ Establish a clear mission. Frame EE as reflecting Evergreen’s mission, but with more applied values and age diversity.
- ❑ Establish clear decision-making lines within EE, and who has authority over it.
- ❑ Get agreements and policies from college up front. Propose agreements on legitimacy and authority structure so that change in personnel does not change the sustainability of the program.
- ❑ Establish a clear charge-back system. The School of Extended Studies pays PSU \$6 per credit hour for both credit and non-credit offerings. Eastern Michigan at the half year keeps a certain amount of EE revenue as a reserve, while a percentage of the net goes to the president, the provost and the school/college, figured on a ratio according to what the school/college has offered in terms of EE programs.
- ❑ Understand your markets. Clarify and understand credit vs. non-credit markets.
- ❑ Customer service is key, especially to the business and professional community. Either improve the institution’s overall service, or have dedicated extended education staff. Set up the system so it is a pleasant experience for the customer.
- ❑ Potential market: K-12 schools who don’t meet federal standards as part of the No Child Left Behind program (70-80 percent of schools not making it)
- ❑ Capitalize on existing successes, e.g. Evening and Weekend Studies, Summer School, Conference Services.
- ❑ Ideally, EE support needs to include a good accountant, a program expert in the Registrar’s office who has an interest in and knowledge of EE programs as well as a holistic sense of the college’s offerings, is people-oriented and remembers names and programs well. Get a good person to work with the overall college Registrar, business office and student accounts. This person needs to have credibility within the college, but can be an entry-level clerk if she/he has the right qualities.
- ❑ Sell idea to college staff by showing how centralized EE system will take work off their hands.
- ❑ Banner works fairly well, but check out systems options.
- ❑ Have fee payment options – in-house, online and electronic credit card processing
- ❑ Create a system so that students who drop an EE class in time but whose request is not processed in time do not get charged a late fee.
- ❑ Send students confirmation cards after they register.
- ❑ Answer the following questions:
 - ❑ How successful financially were Evergreen’s early attempts at EE under Betsy Diffendal?
 - ❑ What does “making money” mean (the more money made, the more education can occur)? Include administrative costs.

- ❑ If EE is profitable, what portion will EE keep for reinvestment and emergencies?
How much reserve should be kept?
- ❑ Can EE be seeded with state funds?
- ❑ What are the true costs of EE?
- ❑ Will the college expect money back from EE for using space and services (charge backs)? Will these be counted as giving back to the college or will EE be expected to generate money on top of that, and if so, how much?
- ❑ EE is often given the last priority for space scheduling. Try to partner with other classes and programs to alleviate that.
- ❑ Diversify offerings. Don't put all eggs in K-12 basket, as professional funding and requirements may shift with state budgets. Also, state agencies may be difficult to tap into as they have their own training environments.
- ❑ Get involved with the state training council, a group of trainers for state agencies.
- ❑ Develop relationships with academic units on campus. Lead EE person needs to be a faculty member in order to increase credibility on issues such as developing systems for approving courses and hiring non-credit faculty. Useful if lead is an adjunct or faculty member of an academic department (or, in Evergreen's case, PUC). In any case, director and/or staff should be integrated into PUCs and other campus meetings.

- ❑ Public administration, business and K-12 have the greatest profit potential. Develop relationships with major partners, not small businesses.
- ❑ Create rituals associated with completion of certificates, endorsements, etc., such as a graduation reception that includes the student's employer and family.
- ❑ Try to anticipate economic fluctuations. Constantly scan the environment. What was popular a few years ago, e.g. multi-media classes, may be money-losers now.
- ❑ Create a holding tank for registration and payments, as Banner can't register students more than a couple weeks before a quarter starts.
- ❑ Regarding program proposals, the right staff is key to a successful EE program. Include people whose strengths are fostering town-gown connections. This can lead to new curriculum. Director and staff should have master's degree at a minimum.
- ❑ EE profits must partially go back to academic units, not just the college as a whole and/or administration, otherwise it will be difficult to get faculty support for EE. Unless an academic department sees EE money coming back to it, support for EE will be hard to maintain.
- ❑ Marketing: Drive people to the Web for information; stay away from college-wide marketing committees.
- ❑ A good Webmaster is critical. Fast turnaround of changes is needed. Get dedicated time for EE.
- ❑ Create print and Web publications that infer reliability and a professional presence.
- ❑ Constantly remind the broader college of EE's presence and successes.
- ❑ Continually keep the students in mind, and how curriculum and administrative decisions will affect them.
- ❑ For the EE market, the term "student" can be viewed pejoratively. Instead, use "clients," "customers" or "participants."
- ❑ For professional development courses, research what companies and state agencies normally pay per day in training, e.g. \$200, then charge accordingly. Don't be put off

by national chains, such as Skill Path or Fred Pryor. PSU charges \$4,000 for a project management certificate course. Set fees high, then produce quality programs. Faculty are paid industry rates of \$100-\$275 an hour. Demand more for higher salaries, such as faculty signing a non-competitive agreement and use of proprietary information in developing curriculum that can't be disclosed elsewhere.

- For professional development classes, the worst thing is to offer classes taught by faculty who teach theory but don't know how to teach application and/or aren't current on industry trends so they teach outdated curriculum. Community-based instructors may not have teacher training, so it is important to establish the following during the hiring process:
 1. How experiential is their teaching
 2. How effective a speaker they are
 3. Do they have the ability to develop curriculum
- To pursue professional development offerings, attend the Corporate Managers Executive Directors (CMED) annual conference (www.proed.com). Also study Boston University and Southern Methodist University for effective professional development programs.

University of Continuing Education Conference, Chicago

- Use the program development steps received at the conference as the process and basis for Evergreen Extended Education program creation.
- Create a course proposal form using the steps and blueprint document from Penn State to be used by internal community members to create proposals for programs. Also, use these same standards to create an external proposal form for community organizations.
- Development of EE:
 1. Mission statement
 2. Strategic plan and goals for programming (needs to be academic centered)
 3. Policies regarding faculty involvement, cross-divisional workload, etc.
 4. Marketing plan
- EE administrative leadership must be based on longevity/permanency, academic credibility and highly business oriented.
- Develop a strong marketing strategy.
- Create branding that is consistent with other Evergreen publications
- Look at all marketing tools, e.g. Summer Times, Evening and Weekend Studies Times, Recreation Guide, etc.) and re-think our branding to the community
- Establish partnerships with local organizations, high schools and businesses to offer classes at their facilities.
- Establish a committee of stakeholders from across all divisions and a couple of community representatives. This committee is responsible for giving the EE unit direction in building relationships and programs.

- ❑ Create an internal marketing tool, such as a flyer, that describes the work and processes involved in getting a program started. It should also include program development facts with costs associated.
- ❑ Do a cost analysis before EE takes on any programs. Create a standard administration fee, faculty salary scale, etc. Show the costs as well as where the revenue goes, and incentives for faculty.
- ❑ Establish a single point of contact for registration, advice and fees, to be done all by one unit.
- ❑ Create a niche program for Evergreen by offering independent learning contracts and/or internships to non-matriculated students.
- ❑ Create a president's advisory group made up of community leaders (CEOs, executive directors, etc.) who meet regularly with the college to discuss the needs of the community with the college.

D. Strengths in Establishing EE at Evergreen

In this section, and in the following Section E, Challenges in Establishing EE at Evergreen, we want to acknowledge each strength and concern the EE committee heard from faculty and staff. Some points we heard only once, others were voiced multiple times. In any case, the degree of each strength and weakness is unknown at this point.

1. Existing Buy-in/Collaboration/Support

Support for this venture of starting extended education at Evergreen has come from many areas of the college. As soon as extended education became a topic of discussion, the offices that would be most affected by additional curriculum were included in decisions that would shape recommendations regarding the development of extended education. These offices include Registration and Records, Student Accounts, Conference Services and Academic Advising, and representatives from these areas became members of the EE committee. In addition, more than 50 faculty/staff in key areas were interviewed by EE committee members to ascertain the level of support for EE and to collect questions and concerns about the venture. Although concerns were voiced (see Faculty/Staff Opposition section), the overwhelming response was positive to the possibility of establishing EE at Evergreen. Some areas, particularly the service centers, the First-Year and Evening and Weekend Studies deans, faculty who have traditionally included community service in their curriculum and others expressed that they have been waiting a long time for the college to do EE.

Other areas of the college were also asked to provide input on how they would be affected by adding this new curriculum. Overall, every office is willing to support extended education development as long as it is clear that each area will be considered in regards to the costs, workload and revenue generated in the development of new programming.

Each office would collaborate differently with the extended education office depending on the type of offering, e.g. credit, non-credit, continuing education unit, etc. Therefore, decisions regarding cost sharing between areas will be unique to each offering.

2. Support from Public, Private and Nonprofit Sectors of the Community

During a brief brainstorm session, committee members developed a contact list of more than 50 public, private and nonprofit employers, mostly in Thurston County, at which members had personal connections and which the organization likely had professional development/training needs. Of the 50, a limited community needs assessment was conducted by individual meetings with 18 community organizations and public agencies.

The goals of the needs assessment were to ascertain opportunities and constraints for continuing education at Evergreen. Specifically, organizations were asked:

- ❑ Do you have unmet training needs?
- ❑ How interested are you in working with Evergreen, and how do you envision that relationship working?
- ❑ What curriculum ideas do you have?
- ❑ Who else do you recommend the college contact to discuss long- and short-term training needs?
- ❑ Next steps: Evergreen will keep your organization informed of continuing education project if it develops. If you have further ideas or suggestions, contact EE committee members.

As with the internal Evergreen community, responses were overwhelmingly positive. The only concerns voiced were that Evergreen would create competition and drive some nonprofits out of business whose financial base is offering professional development courses and training. There is also a concern that if Evergreen EE does not maintain open communication with the state Department of Personnel, the college may be competing with DOP and their market of public employees.

Everyone we met with wished to be kept updated on if, how and when EE would develop at Evergreen, and how they could submit course proposals. Some offered to teach, while others volunteered, unsolicited, to be on a community advisory committee.

3. Established Models Within Evergreen

Examinations of existing EE programs at other colleges and universities indicate that Evergreen already does EE – we just don't call it that. Typically, summer school, evening and weekend classes, conferences, leisure education and professional development workshops and seminars fall under the EE umbrella. Should Evergreen adopt EE, we already have several elements of an EE program in place. These can be used as a model to establish and build EE, as well as to provide EE curriculum, faculty and staff. Specifically, these include:

❑ Summer School

John Cushing's 1997 *Self-Study of TESC Summer School* is particularly instructive in terms of potential parallels with developing an EE program, and the role that Summer School was intended to serve with EE.

Summer School began at Evergreen in 1971 when the college opened, and has been "self-supporting" since 1981 when the state legislature changed the funding structure at all state institutions' summer schools. The change in funding structure meant that Summer School had to pay its own way, at least with regard to direct expenses, such as faculty salaries.

Since its inception, one train of thought within Evergreen was for Summer School to be a quarter equal to other parts of the academic year. This was due at least partly to early emphasis in the curriculum on field work in natural history and environmental studies. It was also a response to the common observation that colleges and universities underutilize facilities during the summer.

From the beginning, Summer School curriculum differed from that of the full-time day programs. Summer classes typically had a single focus and lacked the thematic integration of interdisciplinary studies. Rather than team-taught programs, most courses were taught by a single instructor. Individual contracts were also popular. Furthermore, enrollment was small, roughly 25 percent of fall quarter 1996.

Over the years, Summer School has come to serve many purposes within the college. Results from a 1995 student survey suggest that summer classes tend to fill gaps in the academic year curriculum; allow students to master specific skills that may be needed for graduation or entry into graduate school or the workplace; and allow students to complete their degrees more quickly.

Enhancing faculty salaries has become another purpose of Summer School. Between 1995 and 1997, summer salaries increased by 10 percent. The increase was done to help make up both for the negative financial impacts of Evergreen's egalitarian salary scale which pays based on years of experience regardless of academic discipline, and for the legislature's inability to provide faculty raises.

One fundamental component of Summer School that can be used as a model for EE has been the creation of a substantial reserve fund. This is used to purchase faculty and staff computers and for other faculty support, which amounted to more than \$200,000 in 1997. Summer School also is covering an increasing portion of summer instructional support costs (library, computer center, media services, etc.), in order to save scarce state funding for other purposes. The total direct costs, excluding faculty salaries and benefits in 1997 was about \$75,000.

The reserve fund, according to Cushing's 1997 *Self-Study*, was to hedge against a bad year and "in anticipation of start-up costs for endeavors such as continuing education." As of fall 1996, the cash balance in the Summer School account was approximately \$500,000, minus contributions to S&A and the building fund. Since 1997, profit has been relatively consistent at \$425,000 per summer. Approximately \$425,000 of the academic division operating base is funded through summer school. Therefore, the summer school reserve has remained relatively constant at ~\$700,000.

Cushing recommends maintaining two summers' worth of direct costs as a basic operational reserve. He further notes that the current method of computing faculty salaries and determining curriculum makes it fairly certain that Summer School will not go into debt on faculty salaries. The formula allows a small contingency of about \$25,000 to be held for the few classes run at below the break-even enrollment in order to meet student needs, and errors in estimating the overall size and distribution of

Summer School classes. Combining two years of operating expenses, a course contingency fund and a fund for each annual cycle of academic division computer upgrades suggest that Summer School maintain a net revenue balance of about \$450,000 at the end of each Summer School cycle.

Demographically according to 1997 figures, 93 percent of summer students were undergraduates and 7 percent graduates. Eighty-two percent were Washington State residents, 18 percent were non-residents. The most common area of study was culture, text and language, with 29 percent, expressive arts, 22 percent, social sciences, 21 percent, environmental studies 14 percent and scientific inquiry 13 percent. The average credit load was just over nine quarter hours.

Although Summer School serves mainly established Evergreen students rather than a separate group of clients, results of the 1995 student survey suggest that Summer School had tapped into a new market: almost two-thirds of summer students surveyed had not previously attended Evergreen's Summer School, even if they had attended the college during other quarters. One fifth used Summer School to take their first-ever class at Evergreen.

Evening and Weekend Studies students tend to view Summer School as just another part of the academic year. A little more than one-third of the 1995 classes were offered in the evenings, suggesting that some faculty are choosing to offer summer classes for Evening/Weekend students.

Gross revenues for Summer School in 1995 were \$1.05 million, and net revenues were \$367,000, not including fees distributed to S & A and building funds which totalled a combined \$156,000.

Summer School trends from 1982-1997 show steady growth during the first decade; a significant decline in summer enrollment in 1992; and fairly stable enrollment until 1996, when enrollment – and net revenues – began to rise steeply. The 1992 decline was most likely due to a change in tuition structure which made it much less attractive for resident students to attend full-time and more attractive for non-resident students to attend.

The growth of Summer School by more than 22 percent between 1995 and 1997 can probably be explained by an increased and more focused amount of summer session marketing and an expansion in the number of courses being offered by almost 50 percent. Specifically, preliminary announcements of summer classes were sent out before winter break, when students and their families begin making decisions about summer. Marketing efforts also highlighted the tuition break for non-resident students in Summer School, and individual contracts, which accounted for 37 percent of total summer credits in 1997, continued to be offered.

□ **Evening/Weekend Studies**

The 1998 Part-Time Studies Self-Study is a very useful planning document for EE, particularly because it details the origins of Evening and Weekend Studies, its development, structures and coordination with the rest of the college. Particularly informative:

- ◆ The program evolved slowly from the early 1970s, with a major growth spurt in the mid-1990s. It only changed from a minor to a major desk assignment for the dean in 1996. This helped to create an identity for EWS.
- ◆ Access to higher education for adult, place-bound learners is the guiding principle. This is done through special student status, and publicized through advising and outreach, community forums and the *Times*.
- ◆ Set goals for target enrollment (EWS's goal was 250 FTE after 4-6 years of operation, which was nearly met after the first year).
- ◆ Student-centered, flexible and innovative curriculum. Not planned as far in advance as full-time curriculum for this reason. Curriculum developed through call for proposals to Evergreen and wider communities, analysis of student enrollment patterns and periodic community needs surveys. Curriculum compliments full-time curriculum, doesn't compete against it. Pathways based on community needs survey: business and management; computers and society; human services and psychology; literature/history/writing. Curriculum selected by the EWS dean, outreach coordinator, EWS coordinator, PUC coordinators, curriculum dean. Later, group included six continuing adjuncts. Students most interested in social sciences and environmental studies.
- ◆ Quality of faculty ensured by giving faculty privileges rare at other institutions, e.g. full voting rights at faculty meetings, access to paid professional development institutes and travel, not limited to teaching lower division courses, biennial evaluation by dean, EWS faculty retreats, and a select number on long-term contract. EWS teaching also open to full-time faculty.
- ◆ Half of the students are returning adult learners
- ◆ More than half work full-time
- ◆ No barriers to students moving from EWS to full-time and vice versa; open to community members for credit or as auditors
- ◆ Evergreen *Times* used to help create EWS identity and for recruitment. In addition to blanket mailing, copies also distributed to state agencies, businesses, community colleges and at offices and high-visibility spots around Evergreen. Also devoted substantial space to highlighting college events, such as performances, sports, gallery exhibitions. For two years in the '80s, the *Times* and Leisure Ed catalogs were combined into one publication. The *Times* influenced just over half of EWS a great deal or somewhat to enroll; the percentage jumps to 60 percent when students over age 25 are considered.

- ◆ Enrollment growth in EWS due to increased recruitment and blanket *Times* mailing.
- ◆ Special outreach to women and state workers (63 and 27 percent of EWS students, respectively)
- ◆ Strong student advising component
- ◆ Vancouver branch, worked on the Clark College Campus, closed due to competition from WSU.
- ◆ Proliferation of four-credit courses, many of which support full-time curriculum and appeal to students who don't want to study a subject in-depth or because they want introductory level, single-discipline classes.
- ◆ EWS coordinating committee serves to keep various parts of the college informed on EWS issues, specifically recruitment and advising, marketing and publications, career counseling, student retention and financial aid.
- ◆ Learning styles where working adult students rate significantly higher than traditional college age: Putting together ideas to see relationships; finding information relevant to a career; broadening their acquaintance with and enjoyment of literature
- ◆ Significant student gains: learning analytical and problem solving skills; gaining broad, general knowledge; putting ideas together, understanding and enjoying art, music and drama; learning independently; becoming aware of consequences of new science and technology; learning about other parts of the world and other peoples; quantitative thinking.
- ◆ Challenges for EWS: providing liberal arts curriculum that meets student needs and given limited college resources; reconsidering what liberal arts means in today's world on a regular basis; providing enriching, life-long learning in adherence with college's mission; placing value on prior experience of learning that adult students bring; using plain language and not academic jargon in our publications and advising; preserving and expanding EWS legitimacy within the college; coordinating with staff to make bookstore, food services, etc. accessible; contacting state agencies and other organizations to put Evergreen link on the part of their Web sites that refer to educational opportunities; create more opportunities for dialogue between EWS faculty and full-time.
- ◆ Need for systematic survey/report on EWS student learning.

□ **Public Service Centers**

The Evergreen Center for Educational Improvement, the Labor Center, the Longhouse, the Washington Center for Undergraduate Education and the Northwest Indian Applied Research Institute already provide various professional development and EE seminars, workshops and other events. Their multi-year experience with curriculum and staff/faculty development, administration, delivery and assessment would make the public service centers key collaborators with EE.

4. **Conferences Services**

Conference Services grosses an annual \$1.3 million, including Food Services, Housing and EF Language School. Revenues have been consistent during the past

five years. Although the conference market is a lucrative one, as Western Washington University discovered, it must be diversified in order to shield from economic downturns.

Seventy percent of conferences at Evergreen are repeat customers, and the percentage of repeats is consistent. At the same time, Conferences Services is attracting new year-round business from both the private and state agencies sectors.

Conference Services and EE are natural partners, as conferences sometimes request an educational component, such as continuing education units, in conjunction with their events. Until summer 2003, Evergreen did not offer such opportunities. However, one EE pilot program is the *Six Days on Freedom: Teaching Yoga as Transformation and the Journey of Awakening An Advanced Training Retreat for Yoga Teachers and Dedicated Practitioners*, a national conference of 200 attendees, some of whom will be receiving either academic credit through Sarah Williams class that is running in conjunction with the conference or continuing education units for participation in the conference. This pilot program should be a valuable indicator as to the potential for future Conference Services/EE collaboration.

5. Leisure Education

Evergreen's Campus Recreation Center has been operating leisure education classes for several years. It operates as one-stop shopping where participants register and pay fees for classes through the CRC, and offers a variety of classes in response to community needs.

6. Facilities

The availability of suitable classrooms will make or break an EE program, according to Western Washington University's Summer School and Extended Studies Program. Fortunately, Evergreen is in a good position in this regard. On campus, Seminar II is set to open in winter 2004. This building, located at the bus circle and the closest to C lot parking, was designed partially with serving the broader community in mind. It will house Evening and Weekend Studies as well as the Center for Community Partnerships, which has offered to share administrative space with EE. Coordination with both areas is essential, particularly Evening and Weekend Studies.

In conjunction with the opening of Seminar II and a remodel of the Library, consideration is underway to make Seminar I dedicated space for Conference Services, which has been operating under limited facilities. In addition, EE space would be available at the Tacoma campus during non-class times of 2-5 p.m. weekdays, all day Friday and summers.

Based on our conversations with potential community partners, off-site classes could take place in existing facilities, including government and nonprofit agencies, the Olympia and Lacey community centers and other venues. A potential conference center downtown could provide additional off-site facilities for EE.

7. Pool of Potential Faculty/Staff

Evergreen employs 700 staff and faculty, including 156 full-time faculty and about 70 adjuncts. Both categories of faculty should be given priority in teaching EE classes. If faculty do not have the time, interest or expertise to teach an offering, then applications would be accepted from the larger community.

EE can be an incentive for faculty to make additional income. Teaching EE courses can also expand faculty members' pedagogical toolkits, exposing them to a greater demographic range than full-time day programs, and perhaps even Evening/Weekend Studies programs. However, there may be circumstances when Evergreen faculty cannot teach certain EE offerings.

The EE committee, in partnership with Evening and Weekend Studies, is already keeping a file of proposals submitted by both Evergreen faculty and community members interested in teaching EE courses.

EE may necessitate a change of Faculty Handbook policy, which limits the amount full-time faculty can teach. If full-time Evergreen faculty would wish to teach in EE they would not be able to do so under current policy. A change to the policy would create more flexibility for faculty and for EE, but a change in the restrictions would not lift them altogether so as not to detract from teaching non-EE Evergreen students.

EE would offer incentives in recruiting and training faculty. Specifically, it would provide additional opportunities for summer work for all faculty, and perhaps increase opportunities for Evening/Weekend faculty. Lifting the restriction on more than full-time work in the Faculty Handbook would allow more flexibility in hiring existing faculty. However, changing policy will take time, and require developing a new policy, support of faculty, plus a quorum and majority vote at a faculty meeting.

For EE instructors that come from outside the ranks of Evergreen faculty, we could draw on a wealth of community expertise, including alumni, more than half of whom live in Western Washington. Of that number, about one-quarter live in the Olympia area. Hiring alumni, when appropriate, would strengthen alumni ties with the college. EE would, however, need to establish careful hiring practices to ensure quality of instruction, and perhaps offer training to EE instructors.

8. Proposals for Potential Curriculum

The quality of programs offered through EE needs to be a priority for the college. EE's success is dependent upon meeting the demands of the local and professional communities, while at the same time offering the same quality of programming that is offered through our full-time, evening and weekend studies, and graduate programs.

EE will not just offer any program that is proposed. There are certain academic standards and core values that all programs at Evergreen adhere to and similar standards would be applied to new EE curriculum development. The quality of an

Evergreen education, whether it is for a degree, a certificate, professional development or personal enrichment, will remain at the same high standard that it is currently.

In addition, EE is being developed to eventually generate revenue for the college. With this goal in mind, business processes and policies created for EE must be of high quality and efficiency. For instance, serving local community members and professionals takes a special type of customer service that differs from services for the degree-seeking college student. For example, ease of registration, payment and obtaining texts and other materials in one-stop or as-few-as-possible-stop shopping is critical. It is key that EE focus on convenience, flexibility and meeting the specific needs of the local markets Evergreen is trying to reach. Using this as an example, EE's business procedures and policies must be clear both internally and externally.

The issue of quality regarding academic standards, efficient business practices and clear communication both within the college and externally will constantly need to be addressed and assessed by the EE office.

E. Challenges in Establishing EE at Evergreen

1. Market Competition

The EE market is highly competitive, with community college, four-year colleges and universities, public, private and nonprofit sector employers, and for-profit institutions offering EE classes in various fields. While Thurston County is a relatively open market in some areas, it will not remain so for much longer as institutions are moving swiftly to establish programs and carve out their niches. This makes it imperative that, if Evergreen decides to proceed with EE, it do so quickly. Sources of competition include:

- ❑ South Puget Sound Community College, particularly its management certification program
- ❑ University of Washington-Tacoma, which is rapidly developing an EE program
- ❑ Washington State Department of Personnel, which offers training in a variety of subjects to the public sector
- ❑ Nonprofit-specific training courses offered by the Community Foundation of South Puget Sound and the Tacoma-based Nonprofit Center of South Sound
- ❑ Seattle University Not-for-Profit Leadership master's degree
- ❑ Washington State University distance education offerings
- ❑ Heritage Institute and Antioch's continuing K-12 classes
- ❑ Established private consultants and trainers
- ❑ For-profit institutions that have largely on-line offerings, such as City and Phoenix universities
- ❑ K-12 teacher certification programs at other colleges and universities around Puget Sound in response to new legal requirements
- ❑ Evergreen's own Leisure Education program, as it plans to expand its offerings to foreign languages and other personal enrichment classes that may overlap with the curriculum vision for EE. Evening and Weekend Studies classes may vie for some of the same student population as EE. Both EE and Leisure Education share some of the same audience – the local community – and it is important that communication among the offices is clear. Not only is communication important for internal diffusion of conflict, but it is also important in regards to what message we send to the community. No matter which office is developing a course, from the community's perspective The Evergreen State College is offering the course. It will be important to continue conversations with the Leisure Education program and to develop an open communication process between both offices.
- ❑ Professional development e-learning offered by Evergreen's Human Resource Department, although these classes are limited to Evergreen staff.

Mitigation: Regular and thorough market research. The limited needs assessment conducted by the EE committee suggests that it would be possible for Evergreen to develop a niche market that would attract EE participants whose needs are not being met by existing offerings and/or teaching styles at other institutions.

2. Weak Economy

The current budget situation in the state of Washington is the worst in two decades. We are highly dependent on a shrinking state government whose county workforce is also likely to decline in the 2003-2005 biennium. Decreases in state employment of 2,000 to 2,500 positions have been forecast, several hundred of which would occur in Thurston County. Whether the job cuts in state government will be attained through attrition or outsourcing remains to be seen. In any case, the public sector economic situation reinforces the advice given to the EE committee by EE veteran administrators at Western Washington and Portland State universities, which is to identify your niche market but diversify it. Don't rely on any one sector to carry EE financially, as EE is bound to the vagaries of the economy.

Furthermore, the amount of training dollars varies from agency to agency in the public sector, and the effects of budget cuts are unclear on training programs. As a result, any emphasis that EE puts on attracting state workers needs to be approached with sound research to track where the training dollars are and which agencies are likely to have them in the future.

The closure of the Miller Brewery in Tumwater means a loss of 400 positions at the brewery plus an estimated 600 more likely to be lost from businesses that support it. This will be a blow to an economy that already has a minimal manufacturing sector, but could provide a potential EE market should Evergreen wish to explore opportunities in retraining unemployed workers.

The current economic picture suggests both potential and cautions for establishing EE at Evergreen. Forty-two percent of all employment in Thurston County is in the government sector, followed by services (23 percent) and wholesale and retail trade (22 percent). The Thurston Regional Planning Council predicts the population will increase by more than 160,000 in the next 20 years. Sectors expected to experience the more significant growth are services (140 percent), construction and retail trade (100 percent) and government (75 percent).

Despite the regional and national recession, the county economy has held up well, with an unemployment rate lower than the state average and wages close to state norms.

Unemployment Rate

	Thurston County	Washington	United States
March 2003	5.6%	7.4%	5.8%
Dec. 2002	5.5%	7.0%	5.9%
2001	5.7%	6.4%	4.8%
1999	4.6%	4.7%	4.2%
1994	6.2%	6.4%	6.1%
1991	5.9%	6.4%	6.8%

Source: Washington State Department of Employment Security, Labor Market, and Economic Analysis. Bureau of Labor Statistics. Dec. 2002 data for Thurston County reflects Olympia PMSA. Total civilian annual unemployment as a percent of total employment.

Yet even before the current recession, the county struggled to generate jobs outside of the state sector that pay over the state median wage. The presence of state government in the capital tends to overshadow our other economic achievements, including the county's emergence as a retail and health services center. State jobs pay more than every other category except transport and public utilities, which as noted have declined as a proportion of the workforce. However, a 2002 state Department of Personnel analysis of salaries in comparable market segments found that state salaries generally lag the rest of the job market by 16 percent.

Mitigation: Diversify targeted audiences. Administrators of Western Washington University's Extended Education program stressed the importance of targeting various sectors, such as public, private, nonprofit, seniors, youth, repeat conferences, etc. in order to safeguard EE revenue against swings in the larger economy. For Evergreen, this may mean not to focus solely on developing the state worker market, for example.

3. The St. Martin's College Experience

Cautionary voices at Evergreen and in the broader community have stated repeatedly that EE is not automatically a money-maker and that, in fact, EE has been a drain on resources at other colleges and universities. One example close to home is that of St. Martin's College in Lacey.

St. Martin's operated a small EE program from 1986 to 1997. It was not much of a money-maker. One staff person ran the program, including recruitment. Offerings included business, retirement and computer software (Word, Excel). Most profitable were the K-12 music programs, particularly week-long band camps. It was hoped that band camps would be a recruitment tool to the college, but the outcome was not clear. Also, faculty complained about noise from band camps, even though EE classes took place in the engineering building and other classes were in Old Main.

In terms of credit, some EE offerings were for clock hours, others were for personal enrichment. Marketing/publicity was done through brochures distributed to K-12 schools, inserts in *The Olympian*, mailings of summer EE classes within the summer school schedule, and the reader board on Pacific Avenue. Registration was done by the EE Director. Fees went through Bursar. No transcripts were generated. The EE office maintained records of clock hours. Faculty were generally not from St. Martin's.

St. Martin's lost its teacher market to Educational Service District 113, which expanded its offerings of computer courses and other clock hour classes. However, St. Martin's is currently exploring re-starting its EE program, perhaps focusing on the nonprofit sector.

Should Evergreen pursue EE, it should build on the college's mission and on what it does best, e.g. environmental studies, peace and justice issues, basketball camps, Elderhostel. It should also make sure that EE staff and administrators have support from the rest of the Evergreen community, including faculty.

Mitigation: Staff EE adequately and build support for the program college-wide.

4. Requires Additional Staff

Despite increases in enrollment and faculty during the past decade, staffing levels at the college have remained flat. In order to operate a successful EE program, new staff positions will need to be created. This could cause friction with other areas of the college, which would remain overworked and under-staffed. With EE, the workload, which is already at a high capacity, will increase for some offices. EE staffing and organization will be refined in AY 2003-04.

Mitigation: Once up and running, EE would add much-needed support staff in a few key areas of the college that are already overburdened.

5. Faculty/Staff Opposition

Information has been presented to faculty and staff regarding EE through campus-wide e-mails, regular updates to the provost, presentations to the Agenda Committee, the deans, Evening and Weekend Studies curriculum planning committee and individual fact-finding meetings. A formal update, however, has not yet been made at a faculty meeting, which we anticipate will happen in fall 2003. As such, it is difficult to gauge the amount of faculty/staff opposition to EE. However, concerns that have been voiced include:

- Putting profit ahead of the college's mission, and offering classes inconsistent with the mission and teaching/learning style of the college
Mitigation: EE mission statement reflecting adherence to the college's mission. Also EE dean and advisory boards will provide mechanism for quality control of instruction. Also essential, is a systematic method of informing Evergreen faculty and staff of EE's development and the community needs EE is meeting. This could be done through an Evergreen-wide EE newsletter and regular participation in curriculum planning units, marketing committee and other key bodies.
- Additional workload for staff, particularly in Registration and Records, Academic Computing, Business Office, Student Advising and Admissions.
Mitigation: Development of EE will have clear guidelines set in place to compensate other areas for the added workload. Also, centralized EE office would offset some of the workload.
- Lack of quality control in hiring and curriculum.
Mitigation: EE dean would control both, similar to Evening and Weekend Studies and Summer School, which have high quality levels of instruction. Additional input would be provided by internal and external advisory boards.
- Programs already doing EE-type offerings, such as the Labor Center, would lose money because they would have to work through a centralized EE system.
Mitigation: A revenue-sharing plan would be developed during the EE planning year.
- Cost-sharing for EE tasks, such as marketing, by areas of the college that are already strapped for funds.

- **Mitigation:** EE's revenue-sharing plan would also include administrative areas of the college.
- More bureaucracy.
Mitigation: Additional staff positions would be created as a result of EE. However, staff levels have remained flat over the last several years even as the number of students increased, and additional staff would be dedicated to EE.
- Legislators seeing a profitable EE program as justification to further reduce state revenue to the college.
Mitigation: The state Legislature has already reduced funding to Evergreen, and the trend shows no indication of reversal, thus necessitating development of new revenue sources, such as EE.
- Undermining Evening/Weekend Studies and Leisure Education.
Mitigation: Coordination and communication with EWS and Leisure Ed will be key to strengthening all three areas of the college and ensuring that programs do not compete with one another and that a clear marketing message is disseminated to the community.
- Creating a fifth tier of faculty that's paid even less than Evening/Weekend Studies faculty.
Mitigation: Yes, EE will create a new category of faculty. However, EE faculty will also have fewer responsibilities than full-time and EWS faculty e.g. will not write evaluations (for non-credit offerings), will not assign work outside of class for the most part, and will teach on shorter-term contracts than EWS faculty.
- Credit laundering, e.g. giving Evergreen EE credits to unknown or disreputable organizations.
Mitigation: Quality control will be provided by the EE dean and advisory boards.
- Lack of continuity among deans if it is decided to make head of EE a dean.
Mitigation: The EE committee discussed several scenarios in order to provide continuity to EE.
- EE students later trying to change status to academic credit.
Mitigation: EE written registration materials would include a proviso that students must sign stating EE credit (e.g. non-credit and continuing education units) cannot be changed to academic credit.
- Difficulties with setting fee structure for students who want to take EE as part of individual contracts.
Mitigation: Part of EE policies to be developed during planning year. Students who want to take EE as part of an individual contract could pay regular tuition, plus EE tuition, plus a registration fee in order to cover EE costs.

- Potential for tension between state workers in mixed professional development workshops who don't want traditional college-age students attending.
Mitigation: Establish strict prerequisites for EE classes intended for professional audiences.
- Will be difficult to incorporate five foci into EE courses.
Mitigation: Each proposal would be evaluated by the EE dean for consistency with Evergreen values.
- Off-campus classes may be more practical, but problem of homogeneous groups.
Mitigation: In order to serve the needs of the community, there may be times when off-site classes would be more homogeneous than those on-campus. However, innovation would still be possible, such as mixing groups from various state agencies.
- Limited time and resources throughout internal Evergreen offices may restrict or limit the EE office to move forward quickly with programs and its flexibility to offer specific programs.
Mitigation: EE would continue to build on the clear communication channels established during this feasibility study with affected areas on campus. That, coupled with a centralized EE office would facilitate the type of speed and flexibility needed to work with community organizations to meet their needs.
- Evergreen lacks an institutional process for new program development. Currently, individuals within TESC are supported to pursue their own partnerships and programming ideas. Centralizing these efforts for greater efficiency and unified marketing may be a tough sell to a faculty used to a great degree of autonomy, however, there would be staff in place to support their ventures. The EE process needs to be centralized and the college needs to address this issue prior to opening the doors for EE proposals in order to give the EE office credibility.
Mitigation: Faculty would maintain the same degree of autonomy they currently enjoy in terms of establishing community partnerships. However, a centralized EE operation would provide support to faculty and make those community partnerships easier and more efficient to establish, maintain and grow.
- Under current policy, using internal full-time faculty as instructors is limited due to policy in the Faculty Handbook. This policy may need to be changed in order to give full-time faculty opportunities to teach in EE other than in the summer.
Mitigation: Changing the limits on how much full-time faculty could teach would need to be addressed during EE's planning year. Extensive communication with faculty on how best to do this would be key.
- Banner's lack of flexibility.
Mitigation: The Registrar, as part of the EE team, has already begun working on modifications to Banner that would allow for EE. Changes and updates in Banner will be needed upfront, however in the long-run Banner should be flexible.

- Unclear guidelines in curriculum development may cause competition between Leisure Ed, Evening/Weekend Studies, graduate programs, public service centers and EE offerings.

Mitigation: During the EE planning year, great emphasis will be given to developing policy and establishing clear functions, purposes and operations of EE in conjunction with EWS, Leisure Ed, graduate programs and public service centers.

6. **Initial Financial Outlay**

The average business does not make a profit the first year, or even the first couple years. EE, which would attempt to operate on a business model within a state institution, will also need time to develop.

Mitigation: The proposed budget for EE (see: Part II, section C: Internal Business Model and Cost Analysis) illustrates the estimated amount of investment the college will need to provide in the first year, as well as the potential revenues generated in the second, third, fourth and fifth years.

7. **Uncertainty of Long-Term Commitment from College to Establish EE**

While the college is systematically exploring new revenue streams through the Financial Futures Group and other venues, no time commitment has been forthcoming from the administration regarding how many years the college is willing to invest in EE in order for it to become profitable.

Mitigation: Written commitment from the college on the amount of time they are willing to give EE to make it self-supporting.

8. **The possibility of creating a fifth category of faculty.**

Currently, there are four main categories of faculty at Evergreen: full-time, half-time continuing, half-time annual, and adjuncts who teach four-credit courses. Any non-Evergreen faculty or community members hired to teach EE might create a fifth category of faculty with even fewer wages, benefits and job security than existing categories.

Mitigation: It is still to be determined who will teach EE offerings. Questions remain about current compensation policies for Evergreen faculty members (all categories) particularly the issue of capping teaching loads and compensation. This area of EE instruction still needs to be researched and developed in AY 03-04. On a positive note, EE would offer opportunities for existing faculty to supplement their incomes, develop new teaching materials and work with a new demographic group of students. It would also offer qualified community members, including alumni, the opportunity to teach at Evergreen. Furthermore, there are many contractual arrangements other than those the faculty are accustomed to that could be beneficial for both the college and EE instructors.

9. Current workload

The Academic Deans' area is already overworked and short-staffed. Taking on any new initiatives will be problematic without stabilizing and strengthening the Deans' area first.

Mitigation: Stabilize hiring and strengthen support in the Deans' area.

F. Opportunities for EE at Evergreen

1. Institutional Research Findings

Evergreen's Institutional Research office conducted an analysis of three small potential EE markets – special students, auditors and employees attending Evening and Weekend Studies through state tuition waivers. These audiences may be a bridge between EWS and EE, as they share certain demographic characteristics, e.g. working adults. Following are Institutional Research's findings, recommendations and questions:

- Look at existing EWS offerings and determine which could also be offered as EE (and vice versa, especially two- and four-credit classes), particularly under-enrolled classes. The college could designate a certain number of EE slots for some EWS classes.
- EE selling point to faculty who would have both EE and regular students in class: EE students are less work, as they don't require assignments or narrative evaluations.
- Have EE faculty training on how to write objectives and covenants.
- Look at special students (250/quarter) and Evergreen staff (30/quarter) for possible correlation to EE markets.
- Open faculty institutes to non-Evergreen faculty and/or offer some type of credit to faculty.
- Explore grants that are available to develop EE classes.
- Fuzzy line between EE students that would need to be reported to the federal government and those who would not (EE students working toward academic credit or certification would, e.g. K-12 teachers. Non-certificated state worker trainings would not).
- EE would affect Institutional Research's workload, but it's a worthwhile endeavor.
- Potential markets: slightly underqualified state workers who are doing the state in-training program in which they have to take classes. Currently that population is registered as special students; federal workers are eligible for training or an academic course once a year.
- Offerings: grantwriting (perhaps a special EE section). Foreign languages are also popular with special students. The rest are scattered among science, math, computing, statistics, salmon and wetlands ecology, business, labor, Grays Harbor, writing and human resource management. Classes in math, science and MES electives tend to be under-enrolled. Perhaps specials take those classes because that's what is available to them as they register last.

2. Little Competition in Certain Fields

The EE market is highly competitive, with community colleges, four-year colleges and universities, public, private and nonprofit sector employers, and for-profit institutions vying for EE participants in various fields. Thurston County is a relatively open market in some areas, but will not remain so for much longer as institutions are moving swiftly to establish programs and carve out their niches. Nonetheless, EE offerings at other institutions differ from those that Evergreen is considering, and any future EE curriculum

development would need to be highly aware of programs offered at competing institutions.

For example, the professional certification field for teachers is relatively open in Thurston County. This certification is required of all K-12 public school teachers who have taught less than five years. Programs exist at colleges and universities in Pierce and King counties, such as Pacific Lutheran University, but are less geographically convenient and do not offer the Evergreen style of education. The Heritage Institute and Antioch University offer only a limited number of continuing K-12 classes in Thurston County. Other strong K-12 needs not offered in Thurston County are endorsements in special education and English as a Foreign Language.

South Puget Sound Community College, in partnership with City University, offers a management certification program. A public administration certificate is one of Evergreen's pilot EE programs, to begin in fall 2004, but could appeal to a different constituency and could be marketed differently than SPSCC's. Furthermore, an opportunity to partner with SPSCC on its management certification could be explored, as their relationship with City University may not be solidified.

The University of Washington-Tacoma is rapidly developing an EE program, but again its geographical target area and niche markets would be different from Evergreen's.

The Washington State Department of Personnel offers training in a variety of subjects to the public sector, but the quality varies as evidenced by the large number of state agencies who hire trainers outside of DOP. The agency's classes are also typically of limited scope, whereas EE at Evergreen would have the flexibility and expertise to develop more advanced curriculum.

Nonprofit-specific training courses are offered by the Community Foundation of South Puget Sound and the Tacoma-based Nonprofit Center of South Sound. The latter offers very few classes in Thurston County. Both organizations almost exclusively offer classes limited to half-day sessions for a maximum of 15 participants. Evergreen could offer more in-depth, advanced curriculum and for a larger audience.

Seattle University offers a master's degree in Not-for-Profit Leadership, and St. Martin's College may be exploring developing a nonprofit-centered EE curriculum. Washington State University offers distance education, which the national literature describes as the least preferred means of EE delivery by participants. Finally, there is a good supply of private consultants and trainers locally in certain fields. Evergreen could in some cases hire them as EE instructors and in other cases be aware of what they are teaching successfully through other venues and develop compatible curricula.

3. Develop Niche Markets

EE curriculum should be built thoughtfully around community needs, as well as by identifying and developing classes in subjects that Evergreen is particularly strong at – our niches. Partnerships would be developed both on- and off-campus with, for example,

Conference Services, state agencies, K-12 schools, nonprofit organizations, businesses and service centers. Additional partnerships could be formed with targeted demographic groups, such as elders or youth.

Best practices from EE programs at other institutions strongly suggest that Evergreen identify what we already do well and expand it to EE offerings. While EE will be flexible and responsive to community needs, for organizational and marketing purposes, a theme-based curriculum may be the most appropriate. Based on interviews with various public and nonprofit community organizations, needs appear to fall in the following categories:

- ❑ Environment (e.g. land use planning, GIS, growth management)
- ❑ Education (e.g. , professional certification, special education endorsement)
- ❑ Law (e.g. interviewing witnesses, case management, Internet-based legal research)
- ❑ Social Services (e.g. Spanish for social workers, non-profit management)
- ❑ Health (e.g. risk communication, confidentiality and data management)
- ❑ Miscellaneous (e.g. civil service reform, collective bargaining, foreign languages for personal enrichment, grantwriting)

Many additional professions to those listed or implied above are also mandated to have continuing education, such as accountants, architects, dentists, engineers, lawyers, nurses, physicians, pharmacists, social workers and teachers. A more complete list can be obtained from the state Department of Licensing, and should be pursued for systematic curriculum planning.

4. Community Demand and Potential Partnerships

The EE committee conducted a limited needs assessment by interviewing a sampling of local public and nonprofit sector organizations. They were conducted in the spirit of preliminary conversations and showed that there is general support for Evergreen offering various types of extended education classes. The interview questions are listed on page 29. Interviewees seemed to understand that if Evergreen goes ahead with EE, we would be back to do a more detailed identification of needs that we could meet. Several mentioned focus groups as the way to do this work.

Themes from the community interviews were that Evergreen could do EE and professional development/training differently than other institutions and offerings. This was sometimes tied to the fact we have academic expertise and the ability to keep up with a field. The perception was also that our approach to learning is through learning communities and valuing interdisciplinary connections, collaborative work, diversity issues, and bridging theory and practice. In a number of cases it was suggested that we not compete with other opportunities already underway, but instead identify ways to build depth or more particular content tied to an agency's mission and activities, and to develop our own unique niches. All interviewees were interested in on-going communication with Evergreen as the college develops ideas and direction more fully.

Organizations to interview were selected based on areas in which the college has expertise, training needs of the labor market and professional/personal connections. The goals of the needs assessment were to ascertain opportunities and constraints for continuing education at Evergreen.

Many organizations on the list were contacted, and most, if not all, are worth follow-up to determine specific training needs. Some organizations have immediate training needs and are interested in submitting curriculum proposals. Many have both long- and short-term needs. All state agencies are required to have annual training plans of how they intend to educate their workforce. Some organizations are not satisfied with the quality of existing offerings, while others have difficulty finding instruction in their fields. Still other organizations do not have the capacity to provide all the needed classes.

5. Opportunities for Faculty

As discussed on page 34, Evergreen currently has a large number of full- and part-time faculty, as well as staff, who may want to expand their teaching experience and income by teaching in EE.

As word spread of this feasibility study, including an initial e-mail distributed to all faculty and staff by Don Bantz, faculty submitted a number of unsolicited proposals. They included:

- ❑ Grantwriting (separate classes for public sector and nonprofits)
- ❑ Accounting (separate classes for small businesses and nonprofits)
- ❑ Business planning
- ❑ Establishing a small business/nonprofit
- ❑ Lobbying
- ❑ Shadowing internship
- ❑ Foreign language (Spanish for business; conversational Spanish, Arabic, French, etc.)
- ❑ Media classes

6. Filling Under-Enrolled Classes

Under-enrolled two- and four-credit classes could be filled with a mix of matriculating, special and EE students. This option has been recommended by Evergreen's Institutional Research Office, the dean of Evening/Weekend Studies and some faculty. Adding EE students to under-enrolled classes would be similar to the existing mix of matriculating, specials and auditors and would not create additional work for faculty as EE students would not be doing work that required faculty evaluation. The mix of populations would support Evergreen's mission and foci of interdisciplinary study, personal engagement in learning, linking theory to practice, collaborative work and teaching/learning across significant differences. Also significant is that filling under-enrolled classes would be more cost-efficient.

7. Improve Town-Gown Relations

Strengthening relationships between Evergreen and the community requires a multi-faceted approach, on human (faculty and staff), curricular and service levels. EE would provide a bold, strong vehicle for the community to become better acquainted with the college by exploring its offerings, interacting with faculty and using the facilities. One of the most powerful marketing tools is word-of-mouth, and news of positive EE experiences would spread both formally, through for example media attention, and informally through, for example, water cooler conversations at the workplace. Either way, EE would help dispel inaccurate stereotypes about the college while giving the community greater access to and knowledge of Evergreen's educational style, faculty and staff.

Part II: Proposal

A. Quality

The quality of the programs offered through EE will be a priority for the college. EE's success is dependent upon meeting the demands of the local and professional communities, while at the same time offering the same quality of programming that is offered through our full-time, Evening and Weekend Studies, and graduate programs.

EE would not just offer any program that is proposed. There are certain academic standards and core values that all programs at Evergreen adhere to and similar standards will be applied to new EE program and course development. The quality of an Evergreen education, whether it is for a degree, a certificate, professional development or personal enrichment, will remain at the same high standard that it is currently.

In addition, EE could be developed to eventually serve as a revenue generating office for the college. With this goal in mind, the business processes and policies created for EE must be of high quality and efficiency. For instance, serving local community members and professionals takes a special type of customer service that differs from services for the degree-seeking college student. Ease of registration, payment and obtaining texts and other materials in one-stop or as-few-as-possible-stop shopping is critical. It is key that EE focuses on convenience, flexibility and meeting the specific needs of the local markets Evergreen is trying to reach. As such, clear internal and external business procedures and policies will need to be developed and constantly assessed by the EE office.

B. Modes of Program Offerings

After several months of research, the committee recommends that EE start with four modes of program offerings.

Certificate Programs

A growing number of certificate programs are being offered statewide in specific areas of professional development. Such certificates are often useful for job advancement, particularly in the public sector. Programs vary in number of credits, number of courses and length of time. Evergreen is exploring offering a professional certification program via the MIT graduate office that serves teachers. Evergreen's MPA program is also looking at offering certificates within their graduate offerings. All of these options, if planned and implemented appropriately, can be a great opportunity for the college not only in increased revenue, but also in serving local professional communities. EE will be looking into all opportunities that revolve around certificate creation.

Credit

Some professions requiring individuals to take credit-bearing professional development courses. In these cases, EE would offer professional training courses and participants would receive credit for taking them.

Continuing Education Units (CEU)

A continuing education unit is a standard of measurement regarding contact hours of participation in organized continuing education experiences that are taught through qualified instruction. There are many professions that require individuals to continue their education and require them to provide verification that they participated in a certain course, conference or workshop. The CEU was created to measure the number of hours individuals participated in professional development. The international standard of measurement for continuing education units is one CEU for every ten contact hours.

Because one of EE's main services would be to provide the community with professional development courses, EE would be the office that manages CEUs for the college. The EE office would follow international guidelines established by the International Association for Continuing Education and Training in record-keeping and continuing education course development. By offering CEUs, the college will be able to serve a broader professional development market. The college will also be able to create partnerships between Academics and Conference Services. By working together, these two areas could bring in professional conferences and be able to offer continuing education units to attendees. A pilot project, *Six Days on Freedom: Teaching Yoga as Transformation and the Journey of Awakening An Advanced Training Retreat for Yoga Teachers and Dedicated Practitioners*, is planned for this summer in which Evergreen will offer an option of academic credit or CEUs. After this experience and more market research, it can be determined what the next steps are regarding CEU offerings.

Non-Credit

Non-credit EE courses should be those in demand by local community organizations as well as those that meet the professional development needs of local organizations, businesses and state agencies. There are many courses that are offered through the Evening/Weekend Studies curriculum that are of interest to local community members, but due to high enrollment by Evergreen degree-seeking students and the high cost of tuition, actual enrollment by non-degree seeking community members is limited. If we can define the types of courses the community wants to participate in and if we already have or are able to get the resources to provide the courses, Evergreen will be serving the needs of the local community in ways it has not been able to do.

C. Internal Business Model and Cost Analysis

In the last six months the EE committee has taken all of the information learned from other institutions and from discussions with our local contacts in Thurston and Pierce Counties and has put together a projected budget for an EE program here at Evergreen.

Timeline:	2003-2004	Developmental Year
	2004-2005	Start-Up Year
	2005-2006	2 nd Year
	2006-2007	3 rd Year
	2007-2008	4 th Year
	2008-2009	5 th Year and Review

Internal Business Model

Administration: all positions are 12 months, salaries & benefits combined

MODEL	03-04	04-05	05-06	06-07	07-08	08-09
Staff Salaries and Benefits: .5 fte Dean 1.0 fte Exempt Staff .5 fte Secretary for year 2, 1.0 fte for years 3-5	\$60,840	\$111,180	\$145,739	\$161,576	\$169,655	\$178,137
Registration and Student Accounts Compensation (\$30 per student)	-----	\$7,050	\$18,750	\$36,900	\$47,400	\$51,450
Instructor Salaries		\$60,680	\$118,558	\$213,330	\$220,626	\$213,376
G&S, Travel, Rental Food, Printing	\$4,000	\$15,000	\$15,750	\$16,538	\$17,364	\$18,233
TOTAL OPERATING COSTS	\$64,840	\$193,910	\$298,797	\$428,343	\$455,045	\$461,196

2003-2004

This year will consist of planning internal processes and creating a 5-year Extended Education Program Plan, beginning with creating programming that will start summer 2004. The work will involve creating partnerships within the campus community as well as the external community, researching opportunities, and planning a few programs to be offered 2004-2005.

2004-2005

Based upon the assumptions below, we can expect to offer the following number of programs for 2004-2005:

1. We will offer four program types - Certificate, Credit, Non-Credit, CE Units.
2. Revenue per event based on expected average 5-25 clients per event as noted. Inflation not factored over 5-year period.
3. Participation Cost for clients depends on type of offering.
 - a. Certification - assume 4-credit classes, regular TESC graduate tuition.
 - b. Credit - assumes 4-credit hour offerings at TESC UG and G rate as noted.
 - c. All clients pay non-refundable registration fee @ \$30 each. Inflation not factored over 5-year period.
 - d. Lab/specialty fees need to be assessed based on unique event basis.
 - e. Technology fee of \$25 per class to cover computer labs if needed.

Type of Program	# of events	total # students	Revenue
Certificate	3	15	\$11,040
Credit	8	70	\$57,820
Non-Credit	6	150	\$45,000
CEU's	2	50	\$7,500
Registration Fee	17	235	\$7,050
			<hr/> <hr/>
Estimated Total			\$128,410
Estimated Costs (Includes Administration, Instructor and Registration Costs)			\$193,910
			<hr/> <hr/>
Estimated Revenue/Loss			(\$65,500)

2005-2006

Type of Program	# of events	total # students	Revenue
Certificate	9	60	\$66,240
Credit	10	125	\$103,640
Non-Credit	19	440	\$117,625
CEU's	3	75	\$11,250
Registration Fee	38	625	\$18,750
			<hr/> <hr/>
Estimated Total			\$317,505
Estimated Costs (Includes Administration, Instructor and Registration Costs)			\$298,797
			<hr/> <hr/>
Estimated Revenue/Loss			\$18,708

2006-2007

Type of Program	# of events	total # students	Revenue
Certificate	9	60	\$66,240
Credit	13	140	\$117,200
Non-Credit	46	1030	\$279,375
CEU's	3	75	\$11,250
Registration Fee	68	1230	\$36,900
			<hr/>
Estimated Total			\$510,965
Estimated Costs (Includes Administration, Instructor and Registration Costs)			(\$428,343)
Estimated Revenue/Loss			\$82,622

2007-2008

Type of Program	# of events	total # students	Revenue
Certificate	13	100	\$88,240
Credit	13	140	\$117,200
Non-Credit	62	1340	\$334,875
CEU's	3	75	\$11,250
Registration Fee	88	1580	\$47,400
			<hr/>
Estimated Total			\$598,965
Estimated Costs (Includes Administration, Instructor and Registration Costs)			(\$455,045)
Estimated Revenue/Loss			\$143,920

2008-2009

Type of Program	# of events	total # students	Revenue
Certificate	13	115	\$88,240
Credit	13	140	\$175,280
Non-Credit	62	1340	\$334,875
CEU's	3	75	\$11,250
Registration Fee	88	1715	\$51,450
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Estimated Total			\$661,095
Estimated Costs (Includes Administration, Instructor and Registration Costs)			(\$461,196)
Estimated Revenue/Loss			\$199,899

These projections of revenues and costs are illustrations of possible outcomes. They represent reasonable expectations, but they are not predictions. They suggest that there is revenue potential in Extended Education. It is important to note that the projections include only direct costs. Net revenue, therefore, represents amounts that could be applied, in part, to indirect costs - space, utilities, business office support - and are not pure profit to the college.

These projections are conservative, and there is potential for greater returns than shown in this analysis. There is also some chance that EE might fall short of realizing even these modest levels. If this were to happen, all of these steps are reversible; the program could be terminated on relatively short notice.

D. Marketing

The success of EE hinges greatly on development of a sound marketing plan. The marketing plan needs to include 1) target audiences – our identified niches and other community organizations and agencies, 2) professional training and development and personal enrichment needs, 3) key marketing messages, including customer service (single point of contact model) and others, 4) mediums of delivery, including print and Web and 5) coordination with other areas of the college, including College Relations, Publications, Advising, Registration, Administration and Conferences Services.

Before a marketing plan can be developed, several components of research need to happen. Some of these have already been conducted by the EE committee, the Evening and Weekend Studies marketing committee and by Jane Wood in her master's thesis, *Continuing Education: A Program for The Evergreen State College*. Namely:

- ❑ Community needs assessment
- ❑ Survey of local training managers
- ❑ Evaluation of employers, employees, current and prospective students
- ❑ Study of college documents

Of 25,000 state employees, about one-third participated in some form of professional development in the past year. Furthermore, eight out of 11 state agencies surveyed by Wood in 1999 had annual training plans. The state now requires all agencies to have such plans, which help guide and determine continuing education needs and offerings.

In terms of curriculum needs, a comparison between Wood's 1999 survey and the 2003 community needs study undertaken by the current EE committee demonstrates the rapidly-changing nature of the workplace and training needs. It also illustrates the necessity of keeping abreast of changes underway, as well as those planned for both the short- and long-term. Four years ago, top training needs requested by state agencies were computer software application, information technology, management, communication skills, leadership and project management. In 2003, computer and IT training has been replaced with needs for classes on civil service reform, management, leadership, communication skills and project management in terms of priority, as well as agency- or profession-specific training, such as growth management, case management, grantwriting, etc.

An examination of the well-planned, steady evolution of Evening and Weekend Studies may be instructive in terms of developing EE. Between 1989 and 1997, the number of part-time students (defined as those taking fewer than 12 credits) almost doubled, from 383 to 624. The growth in students taking half-time interdisciplinary programs between 1993 and 1999 made even greater gains, increasing from 91 in 1993 to 681 in 1999. Part of the growth was due to an increase in program offerings, but part is also due to new recruitment efforts, specifically expansion and blanket mailing of the class listings and

schedule as well as outreach efforts, such as community forums, information sessions, updated mailing lists and personal contacts.

Several positive marketing developments happened during the course of this feasibility study:

- The hiring of a new director of College Relations. This marks the first time the college has hired a marketing expert for this position.
- The evolution of the Evening and Weekend Studies marketing committee to include representatives from EE and Summer School. This marketing committee is compiling a report of EWS market research, plans and implementation and to what degree those efforts match Evergreen's (and EWS') mission statements and visions. A draft of the report will be circulated among all three programs for feedback. The group also plans to explore ways beginning in fall 2003 that EWS, EE and Summer School can share marketing resources as all three programs share certain student demographics that differ from the full-time, academic year day program. This marketing group envisions itself focusing on product marketing of the three programs, while perhaps a newly-constituted college-wide group would focus on brand marketing.

E. Recommendations

1. Extended Education and Summer School be combined. The official name of the program will be Extended Education and Summer School at Evergreen.

Rationale: Folding EE into Summer School would be more efficient than establishing a separate EE operation. Both EE and Summer School have similar programming and administrative structure in terms of curriculum development, hiring of faculty, marketing, etc. In 2002, Summer School produced about \$2 million in gross revenue with less than one combined staff FTE. In order to grow, assess faculty and curriculum, Summer School needs more staff. In order to establish EE, staff and start-up funds will be needed for an indeterminate amount of time. In order to make Summer School more profitable and to establish EE, it makes sense to follow the standard EE model that other institutions use and combine the two, both in staffing and revenues.

2. Goals for EE include to become financially self-supporting by 2009 and to offer classes compatible with Evergreen's mission and education style.

Rationale: With the college and Academics facing a one percent budget cut in the '03-'05 biennium, finding new revenue sources is critical. At the same time, it is just as important to stay true to the mission of the college and the education style that has made us a national success. Therefore, we recommend that any EE offering be compatible with Evergreen's mission and not forsake that mission for the sake of potential profits.

3. The mission statement for EE will be "Using the strengths of the college, we will help lifelong learners develop their potential and contribute to positive social change through enhancement of personal and professional skills. We will meet the changing needs of the professions, business and industry, and non-traditional student populations with programs that are flexible, responsive and innovative."

Rationale: From researching the mission statements of several extended education programs, it is apparent that they seek to combine the mission of their overall institution while serving the needs of the community. During the proposed planning year, the unit may want to develop a broader mission statement and vision statement that incorporates Summer School.

4. EE needs another planning year (AY 03-04) in order to determine the initial market, build the curriculum, hire faculty, market, develop policies and procedures, and integrate the EE business plan into college business systems.

Rationale: In less than six months since its establishment, the EE committee has quickly researched the feasibility of EE at Evergreen. We have met with more than 50 TESC stakeholders and with more than a dozen major local employers and others whose employee training needs seemed an appropriate fit with Evergreen's mission. Further research was done through attendance at the National University of Continuing Education

conference, and site visits to successful and well-established EE programs at Western Washington and Portland State universities.

Although our research was of tremendous value in learning what the establishment of an EE program entails, it is clear that much planning and feasibility work remains to be done before the committee can conclusively recommend that Evergreen establish an EE program. While external indicators, namely community interest and need, appear positive, work needs to be done to solidify initial contacts and develop contractual relationships where feasible, explore other key potential partnerships, develop a process for submission of curriculum proposals and determine fees. Internal indicators also appear that EE would be successful, but more development is needed, particularly working closely with Registration and Records to establish new Banner codes, working with Student Accounts and the Finance Office on billing and payment procedures and educating the faculty about the merits of EE at Evergreen and gaining their support.

At least as many questions as answers were produced during the course of the EE feasibility study and were beyond the scope of the study. An additional planning year would help EE develop clear policies and procedures based on best practices at other institutions as well as internal negotiations and conversations with key areas of the college in order to increase EE's viability. Specific policy areas would include cost/revenue sharing, financial aid for EE participants, the level of services EE participants would have access to and recommendation of fees to present to the Board of Trustees.

At the end of this planning year, we anticipate that the college would implement EE. If, however, during the course of the planning year it becomes apparent that EE would not be financially feasible, the project would be discontinued.

5. The EE goals for 2003-2004 are as follows:

- Create fundamental processes internally and externally including:
 - a. Internal communication (educating the college community)
 - b. Internal program development (process for program creation) using the program development steps received at UCEA conference and creating a proposal template for the internal community
 - c. External communication plan for business/agencies wanting to make proposals for partnerships
- Develop a strategic plan for the next five years.
- Create an internal timeline for possible programs allowing time for development
- Set revenue/budget goals for the programs being offered
- Conduct more systematic market research, including the development and testing of markets
- Develop partnerships/relationships within the community, e.g. state agencies, associations, organizations, businesses, etc.
- Create a committee of EE stakeholders, including representatives from internal offices and community members. This committee would give direction to the EE office in building relationships within the community.
- Develop a marketing plan.

- Develop internal paperwork tracking system/process for record keeping and confirmation letter administration.
- Programming goals for 2004-05 and 2005-06 would be developed

6. Initial thinking on administrative staffing for EE and Summer School is as follows:

- 2003-2004
 - a. Summer School dean would oversee EE, and incorporate EE into the desk assignment. The dean reports to the provost in order to ensure academic focus and quality of EE.
 - b. EE staff (1 new temporary FTE). This person would help plan and implement first-year goals outlined above. Reports to Summer School/EE dean.
 - c. Summer School staff (1 existing FTE). This person would assist with the administration of summer school. Reports to Summer School/EE dean.

- 2004-2005 and beyond (further discussion needed based on workload and needs)
 - a. The Summer School/EE dean. Responsibilities would include budgets, recruitment (community partnerships, faculty), community liaison, hiring of instructors, planning, curriculum development and internal networking.
 - b. EE staff position (1 FTE).
 - c. Summer School/EE administrative assistant (.5 FTE).
 - d. Clerical support (.5 FTE in '04-'05 and then full-time thereafter)
 - e. Registrar (.5 FTE). Processes EE registration and records.
 - f. Business Office support (.5 FTE). Accepts EE payments and processes them.
 - g. Web/Graphics/Marketing support (.5 FTE)

Rationale: The 2003-2004 planning year for EE will need minimal staffing (as little as 1 FTE) as we proceed with feasibility work.

The Summer School/EE dean would increase the amount of time he or she devotes to EE. Because continuity is critical for the development, implementation and assessment of EE, this dean's position would be a four-year term, with an option for renewal. Also, based on the experience of other institutions, it is important for the head of EE to be a faculty member in order to gain support from the rest of the faculty and because the EE dean negotiates contracts with EE faculty and helps plan, approve and evaluate curriculum.

Two staff members will divide responsibilities, according to need and individual skills. Tasks will include supervision and implementation of all EE business functions, market research, marketing, intake proposals from potential EE faculty and community partners, assist in curriculum delivery and supervise clerical support.

Because EE will impact the workload of other areas of the college, most notably Registration and Records, the Business Office and communications/marketing, and because we are cognizant of overloading staff and burnout, we are recommending additional EE support in those areas.

- 7. EE curriculum will be built thoughtfully around community needs, as well as by identifying and developing classes in subjects, formats and teaching styles that Evergreen is particularly strong at – our niches. EE will also collaborate with Conference Services, an existing revenue-generating operation on campus, to plan activities that are mutually beneficial to both areas, such as identifying potential on-site, intensive fee programs that would use Conference Services, Food Services and Housing.**

Rationale: Best practices from EE programs at other institutions strongly suggest Evergreen identify what we already do well and expand it to EE offerings. While EE will be flexible and responsive to community needs, the committee recommends considering developing a theme-based curriculum. From interviews with various public and nonprofit community organizations, needs appear to fall in the following categories:

- ❑ Environment (e.g. land use planning, GIS, growth management)
- ❑ Education (e.g. , professional certification, special education endorsement)
- ❑ Law (e.g. interviewing witnesses, case management, Internet-based legal research)
- ❑ Social Services (e.g. Spanish for social workers)
- ❑ Health (e.g. risk communication, confidentiality and data management)
- ❑ Miscellaneous (e.g. civil service reform, collective bargaining, public policy, foreign languages for personal enrichment, grantwriting)
- ❑ Independent contracts

In addition to the areas listed above, many professions are mandated to have continuing education, such as accountants, architects, dentists, engineers, lawyers, nurses, physicians, pharmacists, social workers and teachers. A more complete list is available from the state Department of Licensing.

- 8. EE will collaborate with other areas of the college to create internal structures to support EE, and will create during the planning year a revenue sharing plan between EE and affected areas of the college.**

The committee recommends that the single point of contact (SPC) model be the long-term goal of the EE office for the purpose of flexibility, customer service, marketing and efficient processing. The SPC philosophy is that EE would serve as one-stop shopping for any offering that is developed and managed by the EE office. This means that the EE office would register, advise and manage fees for all EE courses and programs. Of course, the EE office would work closely with other offices on campus to make courses and programs run seamlessly.

Specifically, the EE staff will work with Registration and Administrative Computing to define responsibilities and process for all programs including:

- ❑ Training and program development in Banner regarding program set-up and code creation
- ❑ Training and program development in Banner regarding non-credit registration and development of non-credit record keeping.
- ❑ Development of record keeping standards and processes regarding non-credit courses

The EE office will also:

- ❑ Facilitate policy creation regarding standard registration deadlines, cost analysis, etc.
- ❑ Follow up with community connections that the EE Committee made during the feasibility study
- ❑ Create market research tools
- ❑ Create assessment tools for all offerings and processes
- ❑ Create a revenue sharing plan

9. EE will be housed in the Dean's area during the '03-'04 planning year. Discussions will continue during that time regarding where EE will subsequently be housed.

Rationale: Because its constituency will be largely unfamiliar with college procedures and the physical location of campus offices and classrooms, EE needs to have a space that easily visible and accessible to the broader community. When it opens in 2004, Seminar II will be the closest building to the C parking lot and just off the bus circle. In addition, the unfunded Center for Community Partnerships (CCP) does have office space in Seminar II. Because both EE and the CCP have similar goals of working closely with the broader community and its needs, it may make sense to co-house these offices. However, because EE is first and foremost a profit-making venture and because the CCP does not have that goal, it is unclear how much synergy would develop between these two offices. However, it is a relationship worth exploring to determine what mutual benefits there may be.

10. In order to evaluate the success of the EE program adequately, the college should support and invest in the program for a minimum of five years.

Rationale: Summer School has become a \$2 million operation that includes 1,600 FTE students, 140 faculty and 180 classes. This has been achieved with little planning and marketing, due to time constraints of less than one combined FTE operating the entire program. Our initial projections for EE are based upon our early research of interest in the community and knowing what Evergreen can offer right now with the resources we already have available. Since EE is such a different type of curriculum than Evergreen has ever offered before and since participant fees will not be bound to tuition levels but

may exceed them, our projected EE revenues after five years of operation are truly an estimation at best. The committee highly recommends giving the EE program a few years to develop and grow prior to evaluating its success.

11. The EE curriculum will include a mix of credit, non-credit, certificate and continuing education units.

Rationale: Community groups and individual members have a wide range of EE needs. The core constituency is non-degree seeking adults working in a variety of public, private and nonprofit settings. In order to keep their jobs and/or advance in their professions, some need to earn a certificate in their field, while others need to accumulate a certain number of continuing education units (one unit per 10 hours of seat time is the national standard recommended by the International Association of Continuing Education and Training). Some will need no type of credit at all. Because EE exists to serve community needs, a variety of credit and non-credit offerings needs to be included in the curriculum.

One area of concern is potential overlap with Evergreen's Leisure Education program which offers non-credit classes to the community. EE and Leisure Ed. would need to consult with each other to clearly define missions and offerings so as to not compete with one another and confuse the broader community. A clear definition of EE and Leisure Ed. offerings would need to be developed during the 2003-2004 planning year.

Because EE needs to fit with the mission and education style of the college, we are not recommending distance learning or correspondence courses to be a part of the curriculum.

12. For EE to be successful, the college will have to make it a priority among several competing needs.

Rationale: Because of budget cuts, all areas of the college are under severe pressure to take on new revenue-generating projects. These new projects need to be prioritized in order of greatest potential gain for the college. The Financial Futures group has recommended that EE is one of the top potential new revenue streams for the college. As such, the EE committee recommends the development of EE be put above less financially certain projects.

13. Two coordinating committees, one internal and one external, will assist in the development, implementation and assessment of EE.

Rationale: Communication within the campus community, as well as with existing and potential community partners, is key to EE's success. Best practices from other institutions recommend an internal advisory board comprised of those areas of the college most directly affected by EE, including Registration and Records, Business Office, Conference Services, Academic Advising, Admissions, College Relations, Evening and Weekend Studies and faculty. We envision the committee would operate similarly to the

Evening and Weekend Studies coordinating committee which meets regularly to provide guidance and input.

The EE external advisory committee would also meet regularly with the EE dean, EE staff and selected others from the internal advisory committee. Its mission would include developing and strengthening partnerships between the community and the college, and serve as an outreach effort and bridge between town and gown. During the course of this feasibility study, two community members have already volunteered to serve on such a committee.

14. Evergreen faculty, both full-time and adjuncts, will be given priority in teaching EE classes. If faculty do not have the time, interest or expertise to teach an offering, then applications will be accepted from the larger community.

Rationale: Evergreen employs 700 staff and faculty, including 156 full-time faculty who are limited by the Faculty Handbook in the number of hours they can teach. In addition, the college employs about 70 adjuncts to teach in Evening and Weekend Studies. Faculty need to be given some incentives in order to support EE. Teaching EE courses can also expand faculty members' pedagogical toolkits. However, there may be circumstances when Evergreen faculty cannot teach certain EE offerings.

The EE committee, in partnership with Evening and Weekend Studies, is already keeping a file of proposals submitted by both Evergreen faculty and community members interested in teaching EE courses. For full-time faculty interested in EE, a policy change may be necessary.

15. EE classes would be offered on the Olympia campus, as well as the Tacoma campus and Grays Harbor. Classes may be offered off-site as well, depending on a cost-benefit analysis.

Rationale: Best practices from other institutions indicate that offerings will be shaped somewhat by the availability of facilities, and that convenience for the community needs to be a priority. Therefore, we recommend that EE classes take place in a variety of settings, including the new Seminar II building and dedicated conference space on the Olympia campus, the Tacoma campus when available, Grays Harbor College, and in the workplace or other community meeting space.

16. Current \$20/class audits be moved to EE, renamed and the cost increased to competitive market prices.

Rationale: For years, the college has been subsidizing community members and students to audit classes for a mere \$20. Institutional Research at Evergreen shows that auditors tend to take a wide range of classes, but are particularly concentrated in foreign languages, math and graduate electives. Anecdotal evidence from Evening/Weekend Studies faculty indicates a steady, if not increasing, interest in auditing by alumni and community members – and with no marketing on the part of the college or faculty. By

doing away with the current audit system, selected two- and four-credit Evening/Weekend courses could be marketed by a new name, placed under EE, and auditors would be charged an increased fee. The Banner system has an audit function with three sub-categories, which could be used to register credit and noncredit (EE) students in the same class.

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