SC EDUCATION OVERSIGHT COMMITTEE

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AGENDA

EIA and Improvement Mechanisms Subcommittee

Monday, September 21, 2015
1:00 p.m.
Room 403, Blatt Building

I.	Welcome and Introductions	
II.	Approval of Minutes of May 18, 2015	
III.	Information: Report on Educational Credits for Exceptional Needs Children	Melanie Barton
IV.	Information: Discussion of 2016-17 Budget	Bunnie Ward
V.	Adjournment	

Subcommittee Members:
Dr. Bob Couch, Chair
Margaret Anne Gaffney
Rep. Dwight Loftis
Deb Marks
Rep. Joe Neal
David Whittemore

David Whittemore
CHAIR
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VICE CHAIR
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Joseph H. Neal
Neil C. Robinson, Jr.
Molly Spearman
Patti J. Tate

Melanie D. Barton
EXECUTIVE DIRECTOR

Minutes
EIA and Improvement Mechanisms Subcommittee
May 18, 2015
10:00 A.M., Room 433 Blatt Building

Subcommittee Members Present: Dr. Bob Couch (Chair); Rep. Raye Felder; Ms. Margaret Anne Gaffney; Rep. Dwight Loftis; Ms. Deb Marks; and Mr. David Whittemore

EOC Staff Present: Kevin Andrews; Melanie Barton; Rainey Knight; Bunnie Ward; and Dana Yow

Welcome and Introductions
Mr. Whittemore opened the meeting by introducing the new chair of the Subcommittee, Dr. Bob Couch, who facilitated the meeting.

Approval of the Minutes of November 16, 2014
There being no changes, the minutes were approved as distributed.

FY2015-16 Budget
Ms. Barton provided an overview of the Fiscal Year 2015-16 budget as approved by the House of Representatives and the Senate. Ms. Barton reported that the House can further amend the bill now. She noted that both bodies funded the base student cost of the Education Finance Act (EFA) at $2,220 per weighted pupil unit. There will be an expansion of the full-day 4K program to students living in four school districts that now have a poverty index of at least 70 percent. Funds to provide these additional services will come from unexpended funds in the program. She also noted that under the Senate version, the EOC will receive $2.0 million in unexpended 4K funds for community development block grants that will expand high-quality 4K programs in the state. Rep. Loftis inquired about the evaluation that will accompany the community development block grant program. Ms. Barton explained how Dr. Knight is already working with the five districts that received grants this year. If the funding is maintained in the final version of the budget, Dr. Knight and Ms. Ward will work together to establish criteria to evaluate the programs and will engage the EOC in setting the criteria. Finally, Ms. Barton noted that the Senate included a proviso that addresses early literacy assessments for four-year-olds in publicly funded programs and for children entering kindergarten. The proviso designates a specific early literacy assessment for five-year-olds that may also be used as a progress monitoring system for the Read to Succeed legislation.

Annual Report on the South Carolina Teacher Loan Program, 2013-14
Dr. Couch called upon Bunnie Ward to highlight the findings of the annual report on the South Carolina Teacher Loan Program. Ms. Ward described how both the nation and South Carolina are experiencing a decline in interest in teaching. Regarding the teacher loan program, there continues to be a decline in the number of applications and in the number of loans awarded. Ms. Barton recommended that the EOC look at the teacher program in a broader context because we are facing an overall shortage in the teacher pipeline, beyond those critical needs and critical geographic area schools. Rep. Loftis commented that teachers are leaving the profession for reasons other than pay, including the extra administrative duties being placed on teachers. When looking at solutions to the Abbeville equity lawsuit, the state has to look at more than just increasing the average teacher salary in order to recruit and retain teachers to rural districts in South Carolina. Ms. Marks commented that students may be disenfranchised from entering teacher profession due to dismay or concern about the current state of

teaching. Ms. Barton responded that the EOC, the Center for Educator Recruitment, Retention and Advancement (CERRA) and others have discussed developing and distributing a survey to college students about their interest in teaching and any incentives that would cause them to enter the profession. Mr. Whittemore also noted that he believes teachers who have more administrative duties and responsibilities like clubs often lack time for a planning period as well.

Mr. Whittemore moved to approve the report with Rep. Loftis seconding the motion. The draft report was approved.

Results of the 2014 Parent Survey

Dr. Andrews reported on the results of the 2014 Parent Survey. Dr. Andrews noted that there was an 11.2 percent decline in the number of parents who responded to the survey, a decline of approximately 7,000 responses from the prior year. Dr. Andrews noted that for some districts the administration of the 2014 Parent Survey occurred over the spring break time period which could be one reason for the lower response rate.

Despite the decline in the number of surveys returned, the results were comparable to prior year's results accordingly: (1) elementary school parents are overrepresented and high school students are underrepresented in the sample; (2) the percentage of parents who agreed or strongly agreed that they were satisfied with the learning environment (87 percent) and social and physical environment (84 percent) of their child's school were consistent with prior year's results; (3) as the rating of a school decreases, the overall satisfaction decreases; and (4) parents continue to cite work as their larges impediment to involvement. The only difference was in home and school relations, where 72 percent of parents had favorable perceptions, a decline of 12 percent from the previous year. Dr. Andrews attributed the decline to an increase in the number of parents who chose not to respond to the question about home and school relations. Dr. Andrews noted that this could be an aberration and recommended waiting to see if a trend is occurring. Dr. Andrews also discussed the components of the Gallup Student Poll, a national, free, online survey that measures students' hope, engagement, and well-being.

Ms. Marks asked if there were schools in the state, other than the schools in Spartanburg 7, who participated in the Gallup Student Poll last year. Dr. Knight reported that this year's recipients of the community block grant funds will participate in the Gallup Student Poll. In addition, Ms. Barton has written all superintendents encouraging them to consider participating in the fall of 2015. Rep. Loftis supported the reporting of Gallup Poll data on report cards. He was concerned about the lack of hope among polled students

Rep. Loftis motioned to approve the report with Mr. Whittemore seconding the motion. The draft report was approved unanimously.

District Efficiency Study

Bunnie Ward reported on the progress of the District Efficiency Reviews which are occurring in four school districts. The final report will be provided to the full EOC at its June meeting. Ms. Barton noted there were implications for Abbeville school districts. There were two primary areas of concern: adequate liability of technology risk and sufficient money set aside for reserve funds.

There being no other business, the subcommittee adjourned.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: EIA and Improvement Mechanisms

Date: September 21, 2015

ACTION:
Implementation of the Educational Credit for Exceptional Needs Children Program

PURPOSE/AUTHORITY
SECTION 9 of Act 92 of 2015 authorized supplemental appropriations for Fiscal Year 2015-16 and provided for other related matters including the Educational Credit for Exceptional Needs Children (ECENC) Program. The Education Oversight Committee (EOC) is responsible for approving eligible schools to participate in the program.

CRITICAL FACTS
For Fiscal Year 2015-16 the EOC is required to accomplish the following:

1. Initiate an application process whereby independent schools apply to patriciate in the program by August 1;

2. Publish by September 1 on its website the list of independent schools meeting the eligibility requirements schools and the schools' contact information;

3. Publish by September 1 on its website a list of and contact information for all qualifying nonprofit scholarship funding organizations as determined by the Department of Revenue. In addition, the audit for each nonprofit scholarship funding organization must be published with the list; and

4. Work with the nine-member advisory committee to make recommendations on the program's implementation. Appendix B contains the names of the individuals serving on the advisory committee in Fiscal Year 2014-15 and in Fiscal Year 2015-16.

TIMELINE/REVIEW PROCESS
The approval process was initiated on June 26, 2015 and concluded on September 1, 2015.

ECONOMIC IMPACT FOR EOC

Cost: No fiscal impact beyond current appropriations

Fund/Source:

ACTION REQUEST

☐ **For approval** ☒ **For information**

ACTION TAKEN

☐ **Approved** ☐ **Amended**

☐ **Not Approved** ☐ **Action deferred (explain)**

2015

DRAFT

Educational Credit for Exceptional Needs Children Program: EOC Responsibilities and Results, FY 2015-16

SC EDUCATION
OVERSIGHT COMMITTEE

PO Box 11867 | 227 Blatt Building | Columbia SC 29211 | WWW.SCEOC.ORG

DRAFT
Educational Credit for Exceptional Needs Children Program: Education Oversight Committee's Responsibilities and Results Fiscal Year 2015-16

Statutory Authority

Act 92 of 2015 authorized supplemental appropriations for Fiscal Year 2015-16 and provided for other related matters including the Educational Credit for Exceptional Needs Children (ECENC) Program. The ECENC Program was first established in a proviso in Fiscal Year 2013-14. Pursuant to SECTION 9 of Act 92, tax credits totaling $12 million may be claimed by making contributions to nonprofit scholarship funding organizations or refundable tax credits against income taxes for individuals paying for the tuition for their exceptional needs child to attend an eligible independent school. The cumulative maximum total for credits authorized for individuals who pay tuition for their exceptional needs children may not exceed $4 million. Appendix A is SECTION 9 of Act 92.

Act 92 expressly charges the Department of Revenue with oversight of the nonprofit scholarship funding organizations and the Education Oversight Committee (EOC) with determining if an independent school meets the eligibility requirements for which it may receive contributions from a nonprofit scholarship funding organization for which the tax credit allowed by this proviso is allowed. Specifically, for Fiscal Year 2015-16 the law requires:

1. Schools apply to the EOC to participate in the program by August 1;

2. The EOC publish by September 1 on its website the list of independent schools meeting the eligibility requirements and the schools' contact information;

3. The EOC publish by September 1 on its website a list of and contact information for all qualifying nonprofit scholarship funding organizations as determined by the Department of Revenue. In addition, the audit for each nonprofit scholarship funding organization must be published with the list; and

4. The EOC must work with the nine-member advisory committee to make recommendations on the program's implementation. Appendix B contains the names of the individuals serving on the advisory committee in Fiscal Year 2014-15 and in Fiscal Year 2015-16.

The following is a report that documents the steps taken and results of the EOC's administration of the Educational Credit for Exceptional Needs Children (ECENC) Program for Fiscal Year 2015-16.

Application Process for Independent Schools

On June 26, 2015, the EOC staff communicated in writing and via email to all schools that had participated in the ECENC program in Fiscal Year 2014-15 the following information:

- A letter from the Executive Director of the EOC explaining the application process for Fiscal Year 2015-16;
- A copy of SECTION 9 of Act 92 of 2015; and
- An Annual Standards Assurance Form detailing the criteria to participate in the program. A copy of the Assurance Form is Appendix C

According to Act 92 of 2015, an independent school's application must contain the following:

> (a) the number and total amount of grants received from each nonprofit scholarship funding organization in the preceding fiscal year;
> (b) student test scores, by category, on national achievement or state standardized tests, or both, for all grades tested and administered by the school receiving or entitled to receive scholarship grants pursuant to this proviso in the previous fiscal year;
> (c) a copy of a compilation, review, or compliance audit of the organization's financial statements, conducted by a certified public accounting firm; and
> (d) a certification by the independent school that it meets the definition of an eligible school as that term is defined in subsection (A)(1) and that the report is true, accurate, and complete under penalty of perjury in accordance with Section 16-9-10.

This year there were changes in the application and approval process. First, in the prior year schools that failed to provide assessment data were eliminated from the approved list. This year, the application process required that the data be submitted at the time of application.

Second, in the prior fiscal year, Proviso 1.80 of the 2014-15 General Appropriation Act, which governed the program, required "every independent school accepting grants for

eligible students shall cause to be conducted a compliance audit by an outside entity or auditing firm examining its compliance with the provisions of this proviso, and shall furnish the same within thirty days of its completion and acceptance to the Secretary of State and Department of Revenue which must be made available by them on their website for public review." The review or audit did not have to be conducted by a certified public accounting firm. Act 92 of 2015 requires that a compilation, review or compliance audit conducted by a certified public accounting firm had to be submitted as part of the application process. While some independent schools have annual financial audits conducted, many smaller independent schools do not. The EOC received a significant number of inquiries from schools asking for clarification on this part of the application. To assist schools in understanding the "minimum" requirements of the compilation review, the Executive Director of the EOC provided a letter of clarification on July 6, 2015. (See Attachment D) Certified public accounting firms were able to provide reviews pursuant to the clarifying letter.

And, unlike the prior year, when school applications were received and verified throughout the fiscal year, Act 92 required that schools apply for the program by August 1, and the EOC approve schools by September 1. Due to the fact that most independent schools have reduced staff or hours of operation in the summer, the application and approval processes were condensed into a very tight timeframe both for the schools and EOC staff. Below is a timeline of the application and approval processes for 2015-16.

Date	Action
June 26, 2015	EOC staff notified independent schools of application process and Act 92 requirements
August 21, 2015	EOC staff determined that **102** schools had submitted the standards assurance form and copy of a compilation, review, or compliance audit. Of these schools **76 schools** or **three-fourths** had completed the process.
August 24, 2015	EOC staff notified by email the remaining schools that had not completed the process that the deadline for completing the process was close of business on August 31, 2015
September 1, 2015	**101** schools approved for participation in ECENC program in 2015-16. One school withdrew its application because the school did not want to provide assessment data.

The following are some issues and concerns that occurred during the application and approval process:

- Conflicting information on the application and approval process impeded the timeliness of some schools completing the application and other schools of finalizing their application. For example, at least one school documented receiving conflicting information about its application and approval from a nonprofit scholarship funding organization.

- One school reported having received grants in the prior school year from a nonprofit scholarship funding organization; however, the school was not an eligible school in 2014-15. The school had been eligible in 2013-14, but had not reapplied in 2014-15. The information was provided to the Department of Revenue.

- The EOC staff encountered problems with data security. Several schools submitted information that included individual student test data while others provided the names of individual students who received scholarship grants in the prior fiscal year. Upon receiving the personally identifiable information, the information was either shredded or the names redacted.

- The EOC staff had to reject the initial assessment information provided by several schools because the data were not specific. The staff worked with schools to ensure that assessment data was incorporated into the academic profiles for each school that contained grade level and subject level results. The EOC staff worked with schools to only report grade level data for grades having 10 or more students in order to guarantee student privacy. The assessment data were included in the academic profiles that appear on the EOC's website.

Approved, Eligible Schools

On September 1, 2015 the EOC posted on its website the name, address, telephone number and website address for **101** schools that met the criteria for participation in the Educational Credit for Exceptional Needs Children (ECENC) Program in 2015-16. Appendix E is the list of all schools that completed the application process and were approved. A breakdown of the schools by Support Level appears below in Table 1. The advisory committee defined these support levels in the prior fiscal year as follows:

> SUPPORT LEVEL I: Traditional school/classroom environment with no specific special education services provided but strives to make needed accommodations for exceptional needs students who struggle in academic

areas.

SUPPORT LEVEL II: Traditional school/classroom environment with a specially designed program or learning resource center to provide needed accommodations based on the needs of exceptional needs students.

SUPPORT LEVEL III: A school specifically existing to meet the needs of only exceptional needs students with documented disabilities.

Table 1
ECENC Schools Approved for 2015-16

Support Level	Number of Schools	% of Schools
I	**49**	**48.5%**
II	**42**	**41.6%**
III	**10**	**9.9%**
TOTAL	**101**	

Between September 1 and September 4, 2015, the EOC office received requests from three independent schools asking to be allowed to complete the application process. The requests were denied. One school had expressed interest in participating in the program in July but at the time was not a "member in good standing of the Southern Association of Colleges and Schools, the South Carolina Association of Christian Schools, or the South Carolina Independent Schools Association." The school did not notify the EOC when the school became a member of one of these associations. Another school had participated in 2014-15 but had not provided assessment data as required and therefore was removed from the group of eligible schools. The school did not contact the EOC office for application material until August 31, 2015. The third school failed to respond to the application process.

Approved Nonprofit Scholarship Funding Organizations

On August 10, 2015 the EOC posted on its website the name, contact information and audit for the following four nonprofit scholarship funding organizations that had been determined as qualifying by the Department of Revenue. The Department of Revenue directly communicated with the EOC staff the following list of approved nonprofit scholarship funding organizations:

- Advance Carolina SFO
- Donors Enriching Students' Knowledge
- Palmetto Kids FIRST Scholarship Program, Inc.
- St. Thomas Aquinas Scholarship Funding Organization

New Information

Act 92 requires schools applying for participation in the ECENC program in 2015-16 to report "the number and total amount of grants received from each nonprofit scholarship funding organization in the preceding fiscal year." The 101 schools that were approved to participate in the program in 2015-16 reported receiving $8,455,830 for 1,055 students in the prior year. The EOC staff cannot independently verify the information, and as noted in Appendix F, there were some discrepancies noted.

Table 2 summarizes the number and total amount of grants received by schools in each support level from each nonprofit scholarship funding organizations. Table 3 summarizes the information by School Support Level.

Table 2
Grants Received in FY2014-15 by Support Level Schools and by Nonprofit Scholarship Funding Organizations for Schools Approved to Participate in FY 2015-16

School Support Level	Advance Carolina		Donors Enriching Students' Knowledge		Palmetto Kids FIRST		St. Thomas Aquinas	
	# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount
I	13	$38,450.00	1	$3,500.00	158	$1,243,698.55	45	$251,807.00
II	24	$44,000.00	2	$15,544.00	279	$2,365,292.63	151	$954,483.85
III	18	$87,000.00	19	$154,712.00	345	$3,297,341.88	0	$0.00
TOTAL	55	$169,450.00	22	$173,756.00	782	$6,906,333.06	196	$1,206,290.85

Table 3
Number and Amount of Grants by Support Level Schools

Support Level Schools	Number of Grants	Total Amount Grants
I	217	$1,537,455.55
II	456	$3,379,320.48
III	382	$3,539,053.88
TOTAL	1055	$8,455,829.91

Appendix A
Act 92 (R.130, H.4230) of 2015

SECTION 9. (A) As used in this proviso:

(1) "Eligible school" means an independent school including those religious in nature, other than a public school, at which the compulsory attendance requirements of Section 59-65-10 may be met, that:

(a) offers a general education to primary or secondary school students;

(b) does not discriminate on the basis of race, color, or national origin;

(c) is located in this State;

(d) has an educational curriculum that includes courses set forth in the state's diploma requirements and where the students attending are administered national achievement or state standardized tests, or both, at progressive grade levels to determine student progress;

(e) has school facilities that are subject to applicable federal, state, and local laws; and

(f) is a member in good standing of the Southern Association of Colleges and Schools, the South Carolina Association of Christian Schools, or the South Carolina Independent Schools Association.

(2) "Exceptional needs child" means a child:

(a)(i) who has been evaluated in accordance with this state's evaluation criteria, as set forth in S.C. Code Ann. Regs. 43-243.1, and determined eligible as a child with a disability who needs special education and related services, in accordance with the requirements of Section 300.8 of the Individuals with Disabilities Education Act; or

(ii) who has been diagnosed within the last three years by a licensed speech-language pathologist, psychiatrist, or medical, mental health, psychoeducational, or other comparable licensed health care provider as having a neurodevelopmental disorder, a substantial sensory or physical impairment such as deaf, blind, or orthopedic disability, or some other disability or acute or chronic condition that significantly impedes the student's ability to learn and succeed in school without specialized instructional and associated supports and services tailored to the child's unique needs; and

(b) the child's parents or legal guardian believes that the services provided by the school district of legal residence do not sufficiently meet the needs of the child.

(3) "Independent school" means a school, other than a public school, at which the compulsory attendance requirements of Section 59-65-10 may be met and that does not discriminate based on the grounds of race, color, religion, or national origin.

(4) "Nonprofit scholarship funding organization" means a charitable organization that:

(a) is exempt from federal tax pursuant to Section 501(a) of the Internal Revenue Code by being listed as an exempt organization in Section 501(c)(3) of the code;

(b) allocates, after its first year of operation, at least ninety-seven percent of its annual contributions and gross revenue received during a particular year to provide grants for tuition to children enrolled in an eligible school meeting the criteria of this proviso, and incurs administrative expenses annually, after its first year of operation, of not more than three percent nor more than $200,000 in the aggregate, whichever is less, of its annual contributions and revenue for a particular year to cover operational costs;

(c) allocates all of its funds used for grants on an annual basis to children who are exceptional needs students;

(d) does not provide grants solely for the benefit of one school, and if the department determines that the nonprofit scholarship funding organization is providing grants to one particular school, the tax credit allowed by this proviso may be disallowed;

(e) does not have as a volunteer, contractor, consultant, fundraiser or member of its governing board any parent, legal guardian, or member of their immediate family who has a child or ward who is currently receiving or has received a scholarship grant authorized by this proviso from the organization within one year of the date the parent, legal guardian, or member of their immediate family became a board member;

(f) does not have as a member of its governing board or an employee, volunteer, contractor, consultant, or fundraiser who has been convicted of a felony;

(g) does not release personally identifiable information pertaining to students or donors or use information collected about donors, students or schools for financial gain; and

(h) must not place conditions on schools enrolling students receiving scholarships to limit the ability of the schools to enroll students accepting grants from other nonprofit scholarship funding organizations.

(5) "Parent" means the natural or adoptive parent or legal guardian of a child.

(6) "Person" means an individual, partnership, corporation, or other similar entity.

(7) "Qualifying student" means a student who is an exceptional needs child, a South Carolina resident, and who is eligible to be enrolled in a South Carolina secondary or elementary public school at the kindergarten or later year level for the applicable school year.

(8) "Resident public school district" means the public school district in which a student resides.

(9) "Transportation" means transportation to and from school only.

(10) "Tuition" means the total amount of money charged for the cost of a qualifying student to attend an independent school including, but not limited to, fees for attending the school, textbook fees, and school-related transportation.

(11) "Department" means the Department of Revenue.

(B)(1)A person is entitled to a tax credit against income taxes imposed pursuant to Chapter 6, Title 12, or bank taxes imposed pursuant to Chapter 11, Title 12 for the amount of cash and the monetary value of any publicly traded securities the person contributes to a nonprofit scholarship funding organization up to the limits of this proviso if:

(a) the contribution is used to provide grants for tuition to exceptional needs children enrolled in eligible schools who qualify for these grants under the provisions of this proviso; and

(b) the person does not designate a specific child or school as the beneficiary of the contribution.

(2) An individual is entitled to a refundable tax credit against income taxes imposed pursuant to Chapter 6, Title 12, or bank taxes imposed pursuant to Chapter 11, Title 12 for the amount of cash and the monetary value of any publicly traded securities, not exceeding ten thousand dollars per child, the individual contributes as tuition for exceptional needs children within their custody or care and enrolled in eligible schools who qualify for these grants under the provisions of this proviso. The cumulative maximum total for credits authorized by this subitem may not exceed four million dollars. However, if a child within the care and custody of an individual receives a tuition scholarship from a nonprofit scholarship funding organization, then the individual only may claim a credit equal to the difference of ten thousand dollars or the cost of tuition, whichever is lower, and the amount of the scholarship.

(C) Grants may be awarded by a scholarship funding organization in an amount not exceeding ten thousand dollars or the total cost of tuition, whichever is less, for qualifying students with exceptional needs to attend an independent school. Before awarding any grant, a scholarship funding organization must receive written documentation from the parent documenting that the qualifying student is an exceptional needs child. Upon approving the application, the scholarship funding organization must issue a check to the eligible school in the name of the qualifying student. In the event that the qualifying student leaves or withdraws from the school for any reason before the end of the semester or school year and does not reenroll within thirty days, then the eligible school must return a prorated amount of the grant to the scholarship funding organization based on the number of days the qualifying student was enrolled in the school during the semester or school year within sixty days of the qualifying student's departure.

(D)(1)(a) The tax credits authorized by subsection (B) may not exceed cumulatively a total of twelve million dollars for contributions made on behalf of exceptional needs students. If the department determines that the total of such credits claimed by all taxpayers exceeds either limit amount, it shall allow credits only up to those amounts on a first come, first served basis.

(b) The department shall establish an application process to determine the amount of credit available to be claimed. The receipt of the application by the department shall determine priority for the credit. Subject to the provisions of item (5), contributions must be made on or before June 30, 2016, in order to claim the credit. The credit must be claimed on the return for the tax year that the contribution is made.

(2) A taxpayer may not claim more than sixty percent of their total tax liability for the year in contribution toward the tax credit authorized by subsection (B)(1). This credit is not refundable.

(3) If a taxpayer deducts the amount of the contribution on the taxpayer's federal return and claims the credit allowed by this proviso, then the taxpayer must add back the amount of the deduction for purposes of South Carolina income taxes.

(4) The department shall prescribe the form and manner of proof required to obtain the credit authorized by subsection (B). Also, the department shall develop a method of informing taxpayers if the credit limit is met at any time during Fiscal Year 2015-2016.

(5) A person only may claim a credit pursuant to subsection (B) for contributions made between July 1, 2015, and June 30, 2016.

(E) A corporation or entity entitled to a credit under subsection (B) may not convey, assign, or transfer the credit authorized by this proviso to another entity unless all of the assets of the entity are conveyed, assigned, or transferred in the same transaction.

(F) Except as otherwise provided, neither the Department of Education, the Department of Revenue, nor any other state agency may regulate the educational program of an independent school that accepts students receiving scholarship grants pursuant to this proviso.

(G)(1)By August 1, 2015, each independent school must apply to the Education Oversight Committee to be considered an eligible institution for which it may receive contributions from a nonprofit scholarship funding organization for which the tax credit allowed by this proviso is allowed. The Education Oversight Committee, as established in Chapter 6, Title 59, is responsible for determining if an eligible school meets the criteria established by subsection (A)(1), and shall publish an approved list of such schools meeting the criteria. If an independent school does not apply to be an eligible school, the independent school may not be published as an approved school, and contributions to that school shall not be allowed for purposes of the credit allowed by this proviso. The Education Oversight Committee must publish the approved list of schools on its website by September first of each year, and the list must include their names, addresses, telephone numbers, and, if available, website addresses. Also, the score reports and audits received by the Education Oversight Committee pursuant to items (2)(b) and (c) must be published with the list. The Education Oversight Committee shall summarize or redact the score reports if necessary to prevent the disclosure of personally identifiable information. For this purpose, it also shall promulgate regulations further enumerating the specifics of this criteria. In performing this function, the Education Oversight Committee shall establish an advisory committee made up of not more than nine members, including parents, and representatives of independent

schools and independent school associations. The advisory committee shall provide recommendations to the Education Oversight Committee on the content of these regulations and any other matters requested by the Education Oversight Committee.

(2) An independent school's application for consideration as an eligible institution must contain:

(a) the number and total amount of grants received from each nonprofit scholarship funding organization in the preceding fiscal year;

(b) student test scores, by category, on national achievement or state standardized tests, or both, for all grades tested and administered by the school receiving or entitled to receive scholarship grants pursuant to this proviso in the previous fiscal year;

(c) a copy of a compilation, review, or compliance audit of the organization's financial statements, conducted by a certified public accounting firm; and

(d) a certification by the independent school that it meets the definition of an eligible school as that term is defined in subsection (A)(1) and that the report is true, accurate, and complete under penalty of perjury in accordance with Section 16-9-10.

(3) Any independent school not determined to be an eligible school pursuant to the provisions of this proviso may seek review by filing a request for a contested case hearing with the Administrative Law Court in accordance with the court's rules of procedure.

(4) The Education Oversight Committee, after consultation with its nine-member advisory committee, may exempt an independent school having students with exceptional needs who receive scholarship grants pursuant to this proviso from the curriculum requirements of subsection (A)(1)(d).

(H)(1) By August first of each year, each nonprofit scholarship funding organization must apply to the department to be considered an eligible organization for which its contributors are allowed the tax credit allowed by this proviso. If a nonprofit scholarship funding organization does not apply, the organization may not be published as an approved organization, and contributions to that organization shall not be allowed for purposes of the credit allowed by this proviso. A nonprofit scholarship funding organization's application must contain:

(a) the number and total amount of grants issued to eligible schools in the preceding fiscal year;

(b) for each grant issued to an eligible school in the preceding fiscal year, the identity of the school and the amount of the grant;

(c) an itemization and detailed explanation of any fees or other revenues obtained from or on behalf of any eligible schools;

(d) a copy of the organization's Form 990 or other comparable federal submission that indicates the provisions of the Internal Revenue Code under which the organization has been granted exempt status for purposes of federal taxation;

(e) a copy of a compilation, review, or audit of the organization's financial statements, conducted by a certified public accounting firm;

(f) the criteria and eligibility requirements for scholarship awards; and

(g) a certification by the organization that it meets the definition of a nonprofit scholarship funding organization as that term is defined in subsection (A)(4) and that the report is true, accurate, and complete under penalty of perjury in accordance with Section 16-9-10.

(2) By receiving the application materials and approving the organization as an eligible organization pursuant to item (1), the department is not determining that the organization meets all of the requirements of a qualified nonprofit scholarship funding organization and the organization remains subject to examination as provided for pursuant to subsection (I).

(3) The department has authority to disclose the names of qualifying nonprofit scholarship funding organizations to the Education Oversight Committee. The department also may disclose to the Education Oversight Committee the names of organizations that applied but were not qualified by the department and those organizations whose eligibility has been revoked in accordance with subsection (I)(2), as well as the reason the application of the organization was not accepted or the reason its qualification was revoked.

(4) By September first of each year, the Education Oversight Committee must publish on its website a list of all qualifying nonprofit scholarship funding organizations, provided by the department, to include their names, addresses, telephone numbers, and, if available, website addresses. Also, the results of the audit required by item (1)(e) must be published with the list.

(I)(1) The department has authority to oversee, audit, and examine the nonprofit scholarship funding organizations, including determining whether the nonprofit scholarship funding organization is being operated in a manner consistent with the requirements for an IRC Section 501(c)(3) organization or is in compliance with any other provision of this proviso.

(2)(a) If at any time during the year, the department has evidence, through audit or otherwise, that a nonprofit scholarship funding organization is not being operated in a manner consistent with the requirements for operating an IRC Section 501(c)(3) organization or is not in compliance with any other provision of this proviso, the department immediately may revoke the organization's participation in the program and must notify the organization and the Education Oversight Committee in writing of the revocation.

(b) Notice of revocation may be provided to the organization by personal delivery to the organization, by first class mail to the last known address of the organization, or by other means reasonably designed to provide notice to the organization.

(c) Any donations made following the date the notice of revocation is received by the organization or in the case of delivery by mail ten days after the notice of revocation was mailed, will not qualify for the credit and the donated funds must be returned to the donor by the organization. This proviso shall not limit the department's authority to deny any tax credit or other benefit provided by this proviso if the circumstances warrant.

(d)(i) Within thirty days after the day on which the organization is notified of the revocation, the organization may request a contested hearing before the Administrative Law Court. Within thirty days after a request for a contested case hearing is received by the Administrative Law Court, an administrative law judge shall hold the contested case hearing and determine whether the revocation was reasonable under the circumstances. The department has the burden of proof of showing that the revocation was reasonable under the circumstances. The revocation is "reasonable" if the department has some credible evidence to believe that the organization is not being operated in a manner consistent with the requirements for operating an IRC Section 501(c)(3) organization or is not in compliance with any other provision of this proviso. The decision made by the administrative law judge is final and conclusive and may not be reviewed by any court. If the organization does not request a contested case hearing within thirty days of the immediate revocation, the revocation shall become permanent.

(ii) If the administrative law judge determines that the revocation was reasonable, the administrative law judge shall remand the case to the department to issue a department determination for permanent revocation within the time period determined by the judge. The organization may appeal this department determination in accordance with Section 12-60-460. At the contested case hearing on the department determination, the parties can raise new issues and arguments in addition to those issues and arguments previously presented at the revocation hearing.

(iii) If the administrative law judge determines that immediate revocation is not reasonable, the revocation shall be lifted and the organization may resume accepting donations and award scholarships hereunder. The department may still issue a department determination in accordance with Section 12-60-450(E)(2).

(iv) If at any time during the process, the department believes the organization is in compliance, the department, in its sole discretion, may reinstate the organization and notify the Education Oversight Committee.

(v) Following the permanent revocation of a nonprofit scholarship funding organization, the Education Oversight Committee has the authority to oversee the transfer of donated funds of the revoked organization to other nonprofit scholarship funding organizations.

(J) A nonprofit scholarship funding organization may transfer funds to another nonprofit scholarship funding organization, especially in the event that the organization

cannot distribute the funds in a timely manner or if the organization ceases to exist. None of the funds that are transferred by one nonprofit scholarship funding organization to another may be considered by the former organization when calculating its administrative expenses.

Appendix B
Advisory Committee
Fiscal Year 2014-15 Membership

Parents: (2)

Ms. Dorothy Cobb
152 Fawnbrook Drive
Greer, SC 29650

Mr. Jose Mulero
1707 Green Hill Road
Lugoff, SC 29078

Representatives of Associations (2)

Mr. Edward Earwood
Executive Director
South Carolina Association of Christian Schools
615 St. Andrews Road
Columbia, SC 29210

Mr. Larry K. Watt
Executive Director
South Carolina Independent School Association
134 SCISA Drive
Orangeburg, SC 29118

Representatives of Schools (5)

Mr. Dan Blanch
Head of School
Camperdown Academy
501 Howell Road
Greenville, SC 29615

Ms. Kathy Cook
Head of Schol
Trident Academy
1455 Wakendaw Road
Mt. Pleasant, SC 29464

Mrs. Jacqualine Kasprowski
Associate Director of Secondary Education
Diocese of Charleston
And Principal Cardinal Newman School
4701 Forest Drive
Columbia, SC 29206

Ms. Joanna Swofford
Westminster Catawba Christian School
2650 India Hook Road
Rock Hill, SC 29732

Dr. Susan S. Thomas
Head of School
Glenforest School
1041 Harbor Drive
West Columbia, SC 29619

Appendix B (continued)
Advisory Committee
Fiscal Year 2015-16 Membership

Parents: (2)

Ms. Stephanie Schaffer
205 Alender Way
Simpsonville, SC 29681

Mr. Jose Mulero
1707 Green Hill Road
Lugoff, SC 29078

Representatives of Associations (2)

Mr. Edward Earwood
Executive Director
South Carolina Association of Christian Schools
615 St. Andrews Road
Columbia, SC 29210

Mr. Larry K. Watt
Executive Director
South Carolina Independent School Association
134 SCISA Drive
Orangeburg, SC 29118

Representatives of Schools (5)

Mr. Dan Blanch
Head of School
Camperdown Academy
501 Howell Road
Greenville, SC 29615

Ms. Betsy Fanning
Interim Head of School
Trident Academy
1455 Wakendaw Road
Mt. Pleasant, SC 29464

Mrs. Jacqualine Kasprowski
Associate Director of Secondary Education
Diocese of Charleston
And Principal Cardinal Newman School
4701 Forest Drive
Columbia, SC 29206

Ms. Joanna Swofford
Westminster Catawba Christian School
2650 India Hook Road
Rock Hill, SC 29732

Dr. Susan S. Thomas
Head of School
Glenforest School
1041 Harbor Drive
West Columbia, SC 29619

Appendix C

South Carolina Education Oversight Committee

Annual Standards Assurance Form

H.4230 *(R.130)* Conference Report

2015-2016

Please complete the information requested below concerning your independent school. This information will be listed on the South Carolina Education Oversight Committee's website, www.eoc.sc.gov.

Independent School Name:	
Independent School Contact Person:	
Independent School Address:	
City, State, Zip Code:	
Independent School Telephone Number:	( ) –
Independent School Fax Number:	( ) –
Independent School E-mail Address:	
Independent School Website Address:	

Please review the standards below based on H.4230 *(R.130)*. An "Eligible school" is defined in the Proviso as "an independent school including those religious in nature, other than a public school, at which the compulsory attendance requirement of section 59-65-10 may be met." Please indicate whether your school has met each standard to ensure the following academic requirements are being met. The S.C. Education Oversight Committee reserves the right to request documentation to show the school is in compliance with H.4230 *(R.130)*.

STANDARDS	YES	NO
1. Offers a general education to primary or secondary school students.	☐	☐
2. Does not discriminate on the basis of race, color, or national origin.	☐	☐
3. Is located in this state.	☐	☐
4. Has school facilities that are subject to applicable federal, state, and local laws.	☐	☐
5. Is a member in good standing of the Southern Association of Colleges and Schools, the South Carolina Association of Christian Schools or the South Carolina Independent Schools Association.	☐	☐
6. Has an educational curriculum that includes courses set forth in the state's diploma requirements and where the students attending are administered national achievement or state standardized tests, or both, at progressive grade levels to determine school.	☐	☐
ADDITIONAL REQUIREMENTS: 1. The school must report on student achievement data by updating or completing an academic profile to be emailed to the school upon receipt of the Annual Standards Assurance Form.* 2. The school must submit a compilation, review, or compliance audit of the school's financial statement conducted by a certified public accounting firm. The audit will be published online. 3. Did this school receive any grants last fiscal year (July 1, 2014 until June 30, 2015) from any nonprofit scholarship funding organization under the Educational Credit for Exceptional Needs Children Program? If Yes, then attach information that documents the number and total amount of grants received from each nonprofit scholarship funding organization. * Upon completing this Assurance Form, your school will be asked to update its academic profile to include student assessment information from school year 2014-15 with the "Update School Profile Survey". New schools applying for participation in the program need to complete the survey that will be used to create an academic profile that includes student test data from 2014-15. The law requires that schools completing an application must submit student test scores on national achievement or state standardized tests, or both for all grades tested and administered.	☐ ☐ ☐	☐ ☐ ☐

I assure that annually our school will report assessment data as requested and that the report is true, accurate, and complete under penalty of perjury in accordance with Section 16-9-10.

Signature:_____ **Date:**_____

Print Name of Signature Above: _____ **Title:** _____

Return this form to Melanie Barton.

- Phone: 803.734.6148
- E-mail: mbarton@eoc.sc.gov
- Mail: 1205 Brown Building, Suite 501
  Columbia, S.C. 29201

Appendix D

SC EDUCATION
OVERSIGHT COMMITTEE

PO Box 11867 | 227 Blatt Building
Columbia SC 29211 | WWW.SCEOC.ORG

July 6, 2015

Whom It May Concern:

SECTION 9 of H.4230 as ratified on June 23, 2015 requires that an independent school's application must include "a copy of a compilation, review, or compliance audit of the organization's financial statements, conducted by a certified public accounting firm."

The term compliance audit refers to a determination of whether the school in the prior fiscal year complied with the requirements of the Educational Credit for Exceptional Needs Children Program. The certified public accounting firm confirms in writing that:

- the independent school can document and verify that all grants received under the Educational Credit for Exceptional Needs Children Program in 2014-15 were for eligible children enrolled in the school;
- the independent school can document the total amount of each grant per child from every scholarship funding organization (SFO);
- the independent school can document that no grant exceeded $10,000 during school year 2014-15;
- the independent school returned a prorated amount of the grant to the SFO if any student withdrew during the school year; and
- the total amount of each grant was used for tuition which is defined as "the total amount of money charged for the cost of a qualifying student to attend an independent school including, but not limited to, fees for attending the school and school-related transportation."

Sincerely,

Melanie D. Barton

David Whittemore
CHAIR
Daniel B. Merck
VICE CHAIR
Anne H. Bull
Bob Couch
Mike Fair
Raye Felder
Margaret Anne Gaffney
Barbara B. Hairfield
Nikki Haley
R. Wesley Hayes, Jr.
Dwight A. Loftis
Deb. Marks
John W. Matthews, Jr.
Joseph H. Neal
Neil C. Robinson, Jr.
Molly Spearman
Patti J. Tate

Melanie D. Barton
EXECUTIVE DIRECTOR

Appendix E
Schools Approved for 2015-16

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
Addlestone Hebrew Academy	1639 Wallenberg Boulevard Charleston, SC 29407	843.571.1105	http://addlestone.org/
Anderson Christian School	3902 Liberty Highway Anderson, SC 29621	864.224.7309	http://www.andersonchristian.com/
Ashley Hall	172 Rutledge Avenue Charleston, SC 29403	843.722.4088	http://www.ashleyhall.org/index.php
Beaufort Christian School	378 Parris Island Gateway Beaufort, SC 29906	843.525.0635	http://beaufortchristianschool.org/
Ben Lippen School	7401 Monticello Road Columbia, SC 29203	803.786.7200	http://www.benlippen.com/
Bishop England High School	363 Seven Farms Drive Charleston, SC 29492	843.849.9599	http://www.behs.com/
Blessed Hope Christian Academy	410 Blessed Hope Road PO Box 609 York, SC, 29745-0297	803.684.9819	www.bhcayork.com
Blessed Sacrament School	7 Saint Teresa Drive Charleston, SC 29407-7243	843.766.2128	http://www.scbss.org/home
Bob Jones Academy	1700 Wade Hampton Boulevard Greenville, SC 29614	864.770.1395	www.bobjonesacademy.net
Calvary Christian School	101 Calvary Street Greer, SC 29650	864.877.5555	http://www.calvarychristiangreer.org/
Camden Military Academy	520 Highway 1 North Camden, SC 29020	800.948.6291	http://camdenmilitary.com
Camperdown Academy	501 Howell Road Greenville, SC 29615	864.244.8899	http://camperdown.org
Capers Preparatory Christian Academy	1941 Bees Ferry Road Charleston, SC 29414	843.225.2892	http://www.capersprepatorychristianacademy.com/
Cardinal Newman High School	4701 Forest Drive Columbia, SC 29206	803.782.2814	http://cnhs.org/
Carolina Christian Academy	1850 Kershaw Camden Highway Lancaster, SC 29720	803.285.5565	http://carolinachristian.org/
Chabad Jewish Academy	2803 North Oak Street Myrtle Beach, SC 29577	843.448.0035	http://www.chabadjewishacademy.org/

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
Charleston Collegiate School	2024 Academy Drive John's Island, SC 29455	843.559.5506	http://www.charlestoncollegiate.org/index.html
Charleston Day School	15 Archdale Street Charleston, SC 29401	843.377.0315	http://www.charlestondayschool.org
Cherokee Creek Boys School, Inc.	Westminster, SC 29693	864.647.1885	http://cherokeecreek.net/
Christ Church Episcopal School	245 Cavalier Drive Greenville, SC 29607	864.331.4225	http://www.cces.org
Christ Our King-Stella Maris Catholic School	1183 Russell Drive Mount Pleasant, SC 29464-4057	843.884.4721	http://www.coksm.org/
Clarendon Hall School	P.O. Box 609 1140 South Duke Street Summerton, SC 29148	803.485.3550	http://clarendonhall.net/
Colleton Preparatory Academy	P.O. Box 1426 165 Academy Road Walterboro, SC 29488	843.538.8959	http://www.colletonprep.org/index.html
Covenant Classical Christian School	3120 Covenant Road Columbia, SC 29204	803.787.0225	http://www.covenantcs.org/
Cross Schools	495 Buckwalter Parkway Bluffton, SC 29910	843.706.2000	http://www.crossschools.org/
Cutler Jewish Day School	5827 A North Trenholm Road Columbia, SC 29206	803.782.1831	www.cjdssc.com
Divine Redeemer Catholic School	1104 Fort Drive Hanahan, SC 29406	843 553 1521	http://www.catholic-doc.org
Einstein Academy	847 Cleveland Street Greenville, SC 29601	864.269.8999	http://einsteinacademysc.org/
Five Oaks Academy	1101 Jonesville Road Simpsonville, SC 29681	864.228.1881	www.fiveoaksacademy.com
Glenforest School	1041 Harbor Drive West Columbia, SC 29169	803.796.7622	www.Glenforest.org
Greenwood Christian School	2026 Woodlawn Road Greenwood, SC 29649	864.229.2427	http://www.greenwoodchristianschool.org/
Hammond School	854 Galway Lane Columbia, SC 29209	803.776.0295	http://www.hammondschool.org/Home
Hampton Park Christian School	875 State Park Road 875 State Park Road	864.233.0556	http://www.hpcsonline.org/hpcs

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
Harvest Community School	PO Box 21 (10 South Dukes Street) Summerton, SC 29148	803.574.1004	http://www.harvestcommunityschool.org/
Hawthorne Christian Academy	PO Box 801 790 Hawthorne Road Chester, SC 29706	803.377.8235	www.hawthornechristian.com
Hidden Treasure Christian School	500 West Lee Road Taylors, SC 29687	864.235.6848	www.hiddentreasure.org
Hilton Head Christian Academy	55 Gardner Drive Hilton Head Island, SC 29926	843.681.2878	http://www.hhca.org/
Hilton Head Preparatory School	8 Fox Grape Road Hilton Head Island, SC 29928	843.671.2286	http://www.hhprep.org/page.cfm?p=1
Holy Trinity Catholic School	1760 Living Stones Lane Longs, SC 29568-7486	843.390.4108	http://www.htcatholicschoolmyrtlebeach.com
HOPE Academy	PMB 358, Suite 2100 2131 Woodruff Road Greenville, SC 29607	864.676.0028	http://www.projecthopesc.org/hope-academy/
Hope Christian Academy	545 Alexander Circle Columbia, SC 29206	803.790.4028	http://hcatoday.com/
John Paul II Catholic School	4211 N. Okatie Highway Ridgeland, SC 29936	843.645.3838	www.johnpaul2school.org
Laurence Manning Academy	P.O. Box 278 1154 Academy Drive Manning, SC 29102	803.435.2114	http://www.laurencemanning.com/
Lowcountry Preparatory School	300 Blue Stem Drive Pawleys Island, SC 29585	843-237-4147	www.lowcountryprep.org
Mason Preparatory School	56 Halsey Boulevard Charleston, SC 29401	843.723.0664	http://www.masonprep.org/page.aspx?pid=278
Mead Hall Episcopal School	129 Pendleton Street Aiken, SC 29801	803.644.1122	http://www.meadhallschool.org/
Miracle Academy Preparatory School	1019 Bethel Road Russellville, SC 29476	843.567.4644	http://miracleacademy.org/Home_Page.html
Mitchell Road Christian Academy	207 Mitchell Road Greenville, SC 29615	864.268.2210	http://www.mitchellroadchristian.org
Montessori School of Anderson	280 Sam McGee Road Anderson, SC 29621	864.226.5344	http://msasc.org/

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
Nativity Catholic School	1125 Pittsford Circle Charleston, SC 29412	843.795.3975	http://www.nativity-school.com/
New Covenant School	303 Simpson Road Anderson, SC 29621	864.224.5675	http://newcovschool.net/
Newberry Academy	2055 Smith Road Newberry, SC 29108	803.276.2760	http://www.newberryacademy.com/
Northside Christian Academy	4347 Sunset Boulevard Lexington, SC 29072	803.520.5656	http://northsidechristianacademy.org/
Northside Christian School	7800 Northside Drive N. Charleston, SC 29420	843.797.2690	http://www.northsideministries.com/?d=school
Orangeburg Preparatory Schools, Inc.	2651 North Road, NW Orangeburg, SC 29118	803.534.7970	http://orangeburgprep.com/index.html
Our Lady of Peace Catholic School	856 Old Edgefield Road N Augusta, SC 29841	803.279.8396	http://www.olpschool.us/
Our Lady of the Rosary Catholic School	2 James Drive Greenville, SC 29605-2209	864.277.5350	http://www.olrgreeville.net
Pee Dee Academy	P.O. Box 449 2903 E. Highway 76 E Mullins, SC 29574	843.423.1771	http://peedeeacademy.org/index.html
Porter-Gaud School	300 Albemarle Road Charleston, SC 29407	843.556.3620	http://www.portergaud.edu/
Prince of Peace Catholic School	1209 Brushy Creek Road Taylors, SC 29687	864.331.2145	http://popcatholicschool.publishpath.com/default.aspx
Ridge Christian Academy	2168 Ridge Church Road Summerville, SC 29483	843.873.9856	http://ridgechristian.info/
Sandhills School	1500 Hallbrook Drive Columbia, SC 29209	803.695.1400	http://www.sandhillsschool.org
Shannon Forest Christian School	829 Garlington Road Greenville, SC 29615	864.678.5107	http://www.shannonforest.com/
Southside Christian School	2211 Woodruff Road Simpsonville, SC 29681	864.234.7575	http://www.southsidechristian.org
Spartanburg Day School	1701 Skylyn Drive Spartanburg, SC 29307	864.582.7539	https://www.spartanburgdayschool.org/
St. Andrew Catholic School	3601 N Kings Highway Myrtle Beach, SC 29577-2933	843.448.6062	http://standrewschoolmb.com/
St. Anne Catholic School	1698 Bird Street Rock Hill, SC 29730-3800	803.324.4814	http://www.stanneschool.com

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
St. Anne Catholic School	11 South Magnolia Street Sumter, SC 29150	803.775.3632	http://www.stannesumtersc.org/
St. Anthony Catholic School	2536 W. Hoffmeyer Road Florence, SC 29501	843.662.1910	http://www.saintanthony.com/school/
St. Anthony of Padua Catholic School	311 Gower Street Greenville, SC 29611	864.271.0167	www.stanthonygreenvillesc.org
St. Francis by the Sea Catholic School	45 Beach City Road Hilton Head Island, SC 29926	843.681.6501	http://www.sfcshhi.com/
St. Francis Xavier High School	15 School Street Sumter, SC 29150	803.773.0210	http://www.sfxhs.com
St. Gregory the Great Catholic School	323 Fording Island Road Bluffton, SC 29909-6134	843.815.9988	http://sggcs.org/
St. John Catholic School	3921 St. John Ave N. Charleston, SC 29405	843.744.3901	http://saintjohncatholicsc.org/schoolsite/index.php
St. John Neumann Catholic School	721 Polo Road Columbia, SC 29223	803.788.1367	http://www.sjncatholic.com
St. John's Christian Academy	204 W. Main Street Moncks Corner, SC 29461	843.761.8539	http://www.sjcacavaliers.com/
St. Joseph Catholic School	1200 Cornelia Road Anderson, SC 29621-3349	864.760.1619	http://www.stjosephofanderson.com
St. Joseph Catholic School	3700 Devine Street Columbia, SC 29205-1908	803.254.6736	http://www.stjosdevine.com
St. Joseph's Catholic School	100 St Joseph's Drive Greenville, SC 29607	864.234.9009	http://www.sjcatholicschool.org/index.php
St. Mary Help of Christians Catholic School	118 York Street, SE Aiken, SC 29801	803.649.2071	http://www.stmaryhoc.net
St. Michael Catholic School	542 Cypress Avenue Murrells Inlet, SC 29576-8739	843.651.6795	http://www.saintmichaelsc.com
St. Peter's Catholic School	70 Lady's Island Drive Beaufort, SC 29907	843.522.2163	http://school.stpeters-church.org/
St. Peter's Catholic School	1035 Hampton Street Columbia, SC 29201	803.252.8285	http://www.stpeters-catholic-school.org/
Summerville Catholic School	226 Black Oak Blvd Summerville, SC 29485-5800	843.873.9310	http://www.summervillecatholic.org/home
Sumter Christian School	420 S. Pike West Sumter, SC 29150	803.773.1902	http://www.sumterchristian.org/

SCHOOL	ADDRESS	TELEPHONE	WEBSITE ADDRESS
Sundrops Montessori School	955 Houston Northcutt Boulevard Mt. Pleasant, SC 29464	843.849.3652	www.sundropsmontessori.com
Tabernacle Christian School	3931 White Horse Road Greenville, SC 29611	864.269.2760.221	www.tbc.sc/school
Temple Christian Academy	2905 Standridge Road Anderson, SC 29625	864.226.1259	http://templechristianedu.com/home.html
The Barclay School	4702 Colonial Drive Columbia, SC 29203	803.629.6318	http://www.thebarclayschool.org
The Carolina Academy	351 N. Country Club Road Lake City, SC 29560	843.374.5485	http://thecarolinaacademy.org/Bobcats.aspx
The Chandler School	2900 Augusta Street Greenville, SC 29605	864.991.8443	www.thechandlerschool.org
The Charleston Catholic School	888-A King St Charleston, SC 29403-4181	843.577.4495	http://www.charlestoncatholic.com/
The King's Academy	1015 S Ebenezer Road Florence, SC 29501	843.661.7464	http://www.tkaflorence.com/
The Oaks Christian School	505 Gahagan Road Summerville, SC 29485	843.875.7667	https://oakschristianschool.org/
Thomas Hart Academy	852 Flinns Road Hartsville, SC 29550	843.332.4991	http://thomashart.org/
Thomas Sumter Academy	5625 Camden Highway Rembert, SC 29128	803.499.3378	www.thomassumter.org
Trident Academy	1455 Wakendaw Road Mt. Pleasant, SC 29464	843.884.7046	http://www.tridentacademy.com/
Walnut Grove Christian School	1036 Maxwell Mill Road Fort Mill, SC 29708	803.835.2000	http://www.walnutgrovechristianschool.com/
Westgate Christian School	1990 Old Reidville Road Spartanburg, SC 29301	864.576.4953	http://www.westgatechristianschool.com/
Westminster Catawba Christian School	2650 India Hook Road Rock Hill, SC 29732	803.366.4119	http://wccs.org
Westside Christian Academy	554 Pinewood Road Sumter, SC 29154	803-775-4406	http://wcasumter.org/

Appendix F

Number and Total Amount of Grants Received by Schools Participating in ECENC Program in 2014-15 from each Nonprofit Scholarship Funding Organization:

	School Name	Support Level	Advance Carolina		Donors Enriching Students' Knowledge		Palmetto Kids FIRST		St. Thomas Aquinas		TOTAL	
			# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount
1	Addlestone Hebrew Academy	II					13	$110,315.25			13	$110,315.25
2	Anderson Christian School	II					49	$416,500.00			49	$416,500.00
3	Ashley Hall	I									0	$0.00
4	Beaufort Christian School	I									0	$0.00
5	Ben Lippen School	II					16	$135,200.00			16	$135,200.00
6	Bishop England High School	II							13	$108,850.00	13	$108,850.00
7	Blessed Hope Christian Academy	I	1	$1,500.00							1	$1,500.00
8	Blessed Sacrament School	II							3	$15,276.60	3	$15,276.60
9	Bob Jones Academy	II	20	$33,000.00							20	$33,000.00
10	Calvary Christian School	I									0	$0.00
11	Camden Military Academy	I					21	$210,000.00			21	$210,000.00
12	Camperdown Academy	III					113	$1,132,814.71			113	$1,132,814.71
13	Capers Preparatory Christian Academy	I					8	$41,000.00			8	$41,000.00
14	Cardinal Newman High School	II							30	$258,853.60	30	$258,853.60
15	Carolina Christian Academy	I									0	$0.00
16	Chabad Jewish Academy	II					6	$60,000.00			6	$60,000.00
17	Charleston Collegiate School	II					1	$10,000.00			1	$10,000.00
18	Charleston Day School	I					1	$10,000.00			1	$10,000.00
19	Cherokee Creek Boys School, Inc.	II									0	$0.00
20	Christ Church Episcopal School	II					19	$161,150.00			19	$161,150.00
21	Christ Our King-Stella Maris Catholic School	II							7	$35,837.50	7	$35,837.50
22	Clarendon Hall School	I									0	$0.00

	School Name	Support Level	Advance Carolina		Donors Enriching Students' Knowledge		Palmetto Kids FIRST		St. Thomas Aquinas		TOTAL	
			# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount
23	Colleton Preparatory Academy	II									0	$0.00
24	Covenant Classical Christian School	II									0	$0.00
25	Cross Schools	I					13	$86,350.00			13	$86,350.00
26	Cutler Jewish Day School	I									0	$0.00
27	Divine Redeemer Catholic School	I									0	$0.00
28	Einstein Academy	III					38	$249,750.00			38	$249,750.00
29	Five Oaks Academy	I					1	$9,615.00			1	$9,615.00
30	Glenforest School	III			13	$108,199.00					13	$108,199.00
31	Greenwood Christian School	II									0	$0.00
32	Hammond School	II									0	$0.00
33	Hampton Park Christian School	I									0	$0.00
34	Harvest Community School	I									0	$0.00
35	Hawthorne Christian Academy	I	2	$3,000.00							2	$3,000.00
36	Hidden Treasure Christian School	III	10	$50,000.00	5	$41,513.00					15	$91,513.00
37	Hilton Head Christian Academy	II					21	$196,985.50			21	$196,985.50
38	Hilton Head Preparatory School	II					16	$115,715.50			16	$115,715.50
39	Holy Trinity Catholic School	I							2	$7,136.00	2	$7,136.00
40	HOPE Academy	III					47	$463,547.92			47	$463,547.92
41	Hope Christian Academy	III	8	$37,000.00							8	$37,000.00
42	John Paul II Catholic School	II							9	$54,748.00	9	$54,748.00
43	Laurence Manning Academy	II					5	$18,600.00			5	$18,600.00
44	Lowcountry Preparatory School	I									0	$0.00
45	Mason Preparatory School	I					10	$96,435.00			10	$96,435.00
46	Mead Hall Episcopal School	II									0	$0.00
47	Miracle Academy Preparatory School	I					40	$356,550.00			40	$356,550.00
48	Mitchell Road Christian Academy	II					8	$64,590.00			8	$64,590.00

	School Name	Support Level	Advance Carolina		Donors Enriching Students' Knowledge		Palmetto Kids FIRST		St. Thomas Aquinas		TOTAL	
			# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount
49	Montessori School of Anderson	I					9	$87,773.50			9	$87,773.50
50	Nativity Catholic School	I									0	$0.00
51	New Covenant School	I									0	$0.00
52	Newberry Academy	II									0	$0.00
53	Northside Christian Academy	I									0	$0.00
54	Northside Christian School	I	1	$2,000.00							1	$2,000.00
55	Orangeburg Preparatory Schools, Inc.	I					13	$72,227.14			13	$72,227.14
56	Our Lady of Peace Catholic School	I							5	$26,100.00	5	$26,100.00
57	Our Lady of the Rosary Catholic School	II							17	$140,730.25	17	$140,730.25
58	Pee Dee Academy	I					6	$25,608.00			6	$25,608.00
59	Porter-Gaud School	II									0	$0.00
60	Prince of Peace Catholic School	I									0	$0.00
61	Ridge Christian Academy	I					26	$202,240.00			26	$202,240.00
62	Sandhills School	III					69	$690,000.00			69	$690,000.00
63	Shannon Forest Christian School	II					17	$165,780.00			17	$165,780.00
64	Southside Christian School	II			2	$15,544.00	21	$195,299.99			23	$210,843.99
65	Spartanburg Day School	II					16	$155,064.00			16	$155,064.00
66	St. Andrew Catholic School	I							1	$5,908.50	1	$5,908.50
67	St. Anne Catholic School	II							21	$69,418.90	21	$69,418.90
68	St. Anne Catholic School	I							1	$4,010.00	1	$4,010.00
69	St. Anthony Catholic School	I									0	$0.00
70	St. Anthony of Padua Catholic School	I							2	$4,590.00	2	$4,590.00
71	St. Francis by the Sea Catholic School	I							3	$14,008.50	3	$14,008.50
72	St. Francis Xavier High School	I									0	$0.00
73	St. Gregory the Great Catholic School	I									0	$0.00
74	St. John Catholic School	II							26	$123,134.00	26	$123,134.00

	School Name	Support Level	Advance Carolina		Donors Enriching Students' Knowledge		Palmetto Kids FIRST		St. Thomas Aquinas		TOTAL	
			# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount	# Grants	Amount
75	St. John Neumann Catholic School	I							21	$131,471.00	21	$131,471.00
76	St. John's Christian Academy	I					10	$45,899.91			10	$45,899.91
77	St. Joseph Catholic School	I							1	$4,000.00	1	$4,000.00
78	St. Joseph Catholic School	II							10	$58,299.00	10	$58,299.00
79	St. Joseph's Catholic School	II							5	$47,009.00	5	$47,009.00
80	St. Mary Help of Christians Catholic School	I							3	$23,240.00	3	$23,240.00
81	St. Michael Catholic School	II							5	$23,625.00	5	$23,625.00
82	St. Peter's Catholic School	I							4	$19,357.00	4	$19,357.00
83	St. Peter's Catholic School	I							2	$11,986.00	2	$11,986.00
84	Summerville Catholic School	II							5	$18,702.00	5	$18,702.00
85	Sumter Christian School	II	3	$9,000.00							3	$9,000.00
86	Sundrops Montessori School	II									0	$0.00
87	Tabernacle Christian School	II	1	$2,000.00							1	$2,000.00
88	Temple Christian Academy	I									0	$0.00
89	The Barclay School	III					17	$170,000.00			17	$170,000.00
90	The Carolina Academy	II									0	$0.00
91	The Chandler School	III					27	$266,429.25			27	$266,429.25
92	The Charleston Catholic School	I									0	$0.00
93	The King's Academy	II					33	$279,999.50			33	$279,999.50
94	The Oaks Christian School	II					12	$51,800.00			12	$51,800.00
95	Thomas Hart Academy	I									0	$0.00
96	Thomas Sumter Academy	II					6	$40,409.39			6	$40,409.39
97	Trident Academy	III			1	$5,000.00	34	$324,800.00			35	$329,800.00
98	Walnut Grove Christian School*	I	3	$24,450.00	1	$3,500.00					4	$27,950.00
99	Westgate Christian School	I									0	$0.00
100	Westminster Catawba Christian School	II					20	$187,883.50			20	$187,883.50

	School Name	Support Level	Advance Carolina			Donors Enriching Students' Knowledge			Palmetto Kids FIRST			St. Thomas Aquinas			TOTAL	
			# Grants	Amount		# Grants	Amount		# Grants	Amount		# Grants	Amount		# Grants	Amount
101	Westside Christian Academy	I	6	$7,500.00											6	$7,500.00
	TOTAL		55	$169,450.00		22	$173,756.00		782	$6,906,333.06		196	$1,206,290.85		1055	$8,455,829.91

Source: Information above was provided by each school applying for participation in the program in 2015-16.

*DESK reported that no scholarship was awarded to this school.

The Education Oversight Committee does not discriminate on the basis of race, color, national origin, religion, sex, or handicap in its practices relating to employment or establishment and administration of its programs and initiatives. Inquiries regarding employment, programs and initiatives of the Committee should be directed to the Executive Director 803.734.6148.

CHAD WALLDORF, Chairman
HOWELL CLYBORNE, JR.
EMERSON F. GOWER, JR.

SOUTH CAROLINA
REVENUE AND FISCAL AFFAIRS OFFICE

FRANK A. RAINWATER
Executive Director

September 8, 2015

The Honorable Molly Spearman
State Superintendent of Education
South Carolina Department of Education
1429 Senate Street
Columbia, SC 29201

Dear Superintendent Spearman,

This letter is in response to the statutory provisions regarding annual estimates of the EFA base student cost and inflation factor, Southeastern average teacher salary, weighted pupil units, and EIA revenue for Fiscal Year 2016-17. We are pleased to provide you with the following estimates and will be happy to answer any questions you may have.

EFA Base Student Cost and Inflation Factor

Our estimate of the base student cost for FY 2016-17 is $2,933. This represents a 2.5 percent increase over the revised base student cost of $2,862 for FY 2015-16 and a 4.7 percent increase from the $2,801 estimate provided for the FY 2015-16 budget process. Our estimates are summarized as follows:

	FY 2012-13 (estimate)	FY 2013-14 (estimate)	FY 2014-15 (estimate)	FY 2015-16 (estimate)	FY 2016-17 (estimate)
Budgeted Base Student Cost	$2,790	$2,771	$2,742	$2,801	$2,933
Original Budgeted Inflation Factor	0.0%	(0.7%)	(1.0%)	2.2%	4.7%
Base Student Cost Current Estimates (as of 9/08/15)	$2,690	$2,732	$2,797	$2,862	$2,933
Current Inflation Factor (as of 9/08/15)	1.1%	1.6%	2.4%	2.3%	2.5%

Since our previous estimates were provided for the FY 2015-16 budget process, we received revised data for public school employee wages that indicates a higher growth rate than previously estimated for FY 2013-14. This revision resulted in a higher base year and higher wage projections for future years. In reviewing this data, we also noted that wage growth for the first two quarters of FY 2014-15 was higher than previously estimated, and we consequently estimated higher growth in upcoming years over last year's figures.

Southeastern Average Teacher Salary Projections

Our estimate of the Southeastern average teacher salary for FY 2016-17 is $51,495. This represents a 2.5 percent increase over the revised FY 2015-16 estimate and a 3.4 percent increase from the budget estimate of $49,796 for FY 2015-16.

	FY 2012-13 (estimate)	FY 2013-14 (estimate)	FY 2014-15 (estimate)	FY 2015-16 (estimate)	FY 2016-17 (estimate)
FY 16 Estimates (as of 8/29/14)	$47,964	$48,237	$48,933	$49,796	n/a
Prior Percent Change	0.2%	0.6%	1.4%	1.8%	n/a
FY 17 Estimates (as of 9/08/15)	$47,964	$48,289	$49,223	$50,239	$51,495
Current Percent Change	0.2%	0.7%	1.9%	2.1%	2.5%

Since the previous estimates were provided for the FY 2015-16 budget process, final data for FY 2013-14 shows average teacher salaries were higher than estimated, and the growth rate for FY 2014-15 was also higher than estimated. As a result, our base for projecting future years was higher, and our growth rate was also increased.

Weighted Pupil Estimates

We estimate the weighted pupil units (WPU) for FY 2016-17 to be 982,299. This represents a 0.8 percent increase over the revised FY 2015-16 budget estimate and a 1.7 percent increase over the FY 2015-16 estimate of 966,029.

	FY 2012-13 (estimate)	FY 2013-14 (estimate)	FY 2014-15 (estimate)	FY 2015-16 (estimate)	FY 2016-17 (estimate)
Budgeted Estimate	870,286	876,359	886,926	966,029	982,299
Percent Change in Budgeted Estimates	0.5%	0.7%	1.2%	8.9%	1.7%
Current Estimate (as of 9/08/15)	873,022 (actual)	880,477 (actual)	965,385 (actual)	974,155	982,299
Current Percent Change	0.9%	0.9%	9.6%	0.9%	0.8%

Proviso 1.3 was amended in FY 2014-15 and changed pupil classification weightings as outlined in § 59-20-40. The changes include add-on weights for students in gifted and talented programs, academic assistance, limited English proficiency, and pupils in poverty. The add-on pupil classification weightings in proviso remain the same for FY 2015-16, and the estimates are based on the these weights for FY 2016-17. As in prior years, we also examined birth rates, enrollment in public and private schools, and home schooling trends and included these factors in our projections.

EIA Revenue

	FY 2012-13 (actual)	FY 2013-14 (actual)	FY 2014-15 (actual)	FY 2015-16 (estimate)	FY 2016-17 (preliminary)
Current Estimate	$611,823,605	$643,252,466	$681,408,940	$705,703,750	$732,366,250

This revised FY 2015-16 estimate and this preliminary estimate for FY 2016-17 were calculated by using the final FY 2014-15 revenue as a base and applying the long term growth rates adopted by the BEA in November 2014. The BEA will provide the first official estimates for FY 2016-17 in November 2015.

Please find attached additional tables and charts that support our estimates. Please be advised that these estimates are subject to change as additional information is received.

If I may be of further assistance, please do not hesitate to contact me.

Sincerely,

Frank A. Rainwater
Executive Director

FAR/lpw
Enclosures: 5

cc: The Honorable Nikki R. Haley, Governor
The Honorable Hugh K. Leatherman, Chairman, Senate Finance Committee
The Honorable W. Brian White, Chairman, House Ways and Means Committee
Mr. Josh Baker, Governor's Office
Ms. Melanie Barton, Education Oversight Committee
Mr. Grant Gibson, Senate Finance Committee
Ms. Brenda Hart, Executive Budget Office
Ms. Emily Heatwole, Department of Education
Ms. Mellanie Jinnette, Department of Education
Ms. Kenzie Riddle, House Ways and Means Committee
Mr. Mike Shealy, Senate Finance Committee
Ms. Beverly Smith, House Ways and Means Committee

EFA FACTOR COMPUTATION

Fiscal Year		Average South-East Wage (1)	Non-Wage Index (2)	Index South-East Wage (3)	Composite Index Wages and Non-Wages (4)	Revised Estimate of Base Student Cost to Match Inflation (5)		Revised Estimate of Inflation Factor (6)	Estimate of Base Student Cost Provided for Budget (7)	Budgeted Inflation Factor (8)		Base Student Cost Approp. (9)	Base Student Cost After Mid-Yr. Cuts by B&CB (10)	Final Base Student Cost, Including S.D.E. Cuts (11)	
89-90	a/	20,026	100.0	100.0	100.0	1,467			1,467			1,467		1,467	
90-91		21,023	101.0	105.0	104.5	1,533		4.5%	1,539	4.9%		1,539		1,539	
91-92		21,226	101.1	106.0	105.4	1,546		0.9%	1,604	4.2%	*	1,562	1,505	1,505	
92-93		21,737	100.7	108.5	107.6	1,578		2.0%	1,610	3.1%	*	1,585	1,532	1,532	
93-94		22,315	104.0	111.4	110.5	1,621		2.7%	1,651	2.9%	*	1,581		1,581	
94-95		23,125	107.4	115.5	114.5	1,679		3.6%	1,652	2.4%	*	1,619		1,619	
95-96		23,726	106.1	118.5	117.0	1,716		2.2%	1,718	4.0%		1,684		1,684	
96-97		24,441	110.8	122.0	120.7	1,771		3.2%	1,778	3.5%		1,760		1,760	
97-98		25,067	112.8	125.2	123.7	1,814		2.5%	1,839	3.2%	*	1,839		1,839	
98-99		26,312	114.7	131.4	129.4	1,897		4.6%	1,879	2.2%		1,879		1,879	
99-00		27,161	118.0	135.6	133.5	1,959		3.2%	1,937	3.1%		1,937		1,937	
00-01		28,529	121.5	142.5	139.9	2,053		4.8%	2,012	3.9%		2,012	1,992	2,002	d/
01-02		29,242	125.6	146.0	143.6	2,106		2.6%	2,073	3.0%		2,073	1,940	1,881	c/
02-03		30,574	127.9	152.7	149.7	2,196		4.3%	2,133	2.9%		2,033	1,859	1,770	d/
03-04		30,766	130.7	153.6	150.9	2,213		0.8%	2,201	3.2%		1,777		1,754	
04-05		31,906	133.5	159.3	156.2	2,292		3.5%	2,234	1.5%		1,852		1,852	
05-06		33,019	137.5	164.9	161.6	2,371		3.4%	2,290	2.5%		2,290		2,290	
06-07		34,627	142.8	172.9	169.3	2,484		4.8%	2,367	3.4%		2,367		2,367	
07-08		36,176	146.5	180.6	176.5	2,590		4.3%	2,476	4.6%		2,476		2,476	
08-09		36,855	151.9	184.0	180.2	2,643		2.1%	2,578	4.1%		2,578	2,190	2,184	
09-10		36,813	154.0	183.8	180.3	2,644		0.0%	2,687	4.2%		2,034		1,756	
10-11		37,075	155.6	185.1	181.6	2,664		0.7%	2,720	1.2%		1,630		1,615	
11-12		36,923	158.7	184.4	181.3	2,660		(0.2%)	2,790	2.6%		1,880		1,880	f/
12-13		37,277	163.3	186.1	183.4	2,690	r	1.2%	2,790	0.0%		2,012		2,012	
13-14		37,842	166.1	189.0	186.2	2,732	r	1.5%	2,771	(0.7%)		2,101		2,100	
14-15	b/	38,788	168.7	193.7	190.7	2,797	r	2.4%	2,742	(1.0%)		2,120		2,101	
15-16	e/	39,758	169.9	198.5	195.1	2,862	r	2.3%	2,801	2.2%		2,220			
16-17	e/	40,752	173.6	203.5	199.9	2,933		2.5%	2,933	4.7%					

r - Revised since previous estimate.

* - Inflation factor calculated from revised/funded base.

Footnotes and Column Notes:

a/ Base from which increases are computed in accordance with revised methodology.

b/ July 2015 survey, latest data is the Average Southeast Wage through 2013 and subject to revision.

c/ Reflects mid-year cuts of 5.3% plus S.C. Dept. of Ed.'s additional E.F.A. reduction for allocation to school districts of 3.96% for a net reduction of 9.26%.

d/ Reflects a 1% B&CB cut and a .5% Dept. of Ed. restoration in FY 00-01 and a 8.57% mid-year cut in FY 02-03.

e/ Estimate based on July 2015 survey, teacher salary growth and latest Consumer Price Index.

f/ Base Student Cost Appropriated reflects additional non-recurring revenue above the $1,788 figure in Proviso 1.3

Source: Budget & Control Board, Office of Research & Statistics

(1) Computed from survey of Employment Security Commission offices in southeastern states based on wage data reported for workman's compensation program. Includes teachers and nonteachers in public schools in the Southeast.

(2) For FY 89-90 through FY 96-97, based on implicit deflator for purchases by state and local governments nationwide as projected by Evans Econometrics. Since FY 97-98, based on actual and projected growth in the Consumer Price Index.

(3) Index of column 1 based on FY 89-90.

(4) Column 2 and Column 3 weighted by 12% for Column (2) and 88% for Column (3).

(5) Column 4 times FY 89-90 base amount of $1,467. Revised after surveys to include actual data.

(6) Revised inflation factor based on actual data received from surveys.

(7) Original estimate of Base Student Cost.

(8) Original estimate of inflation factor.

(9) Base Student Cost appropriated each fiscal year. FY 09-10 does not include Federal Funds.

(10) Actual Base Student Cost funded to districts after budget cuts by the Budget & Control Board.

(11) Actual Base Student Cost funded to districts after B&CB cuts plus cuts by the State Department of Education.

Source: SC Revenue and Fiscal Affairs Office

Revised: 9/08/15

SOUTHEASTERN AVERAGE TEACHER SALARY

ALL FIGURES IN THESE COLUMNS ARE SUBJECT TO REVISION AFTER UPDATE

	FY 10 (1)	FY 11 (2)	FY 12 (3)	FY 13 (3)	FY 14 (4)	FY 15 (5)	FY 16 (6)	FY 17 (6)
Alabama	47,246	48,282	48,002	47,949	48,720 r	49,503 r	50,493 r	51,756
Arkansas	46,601	46,663	46,946	47,316	48,060 r	48,816 r	49,792 r	51,037
Florida	46,696	45,723	46,479	46,583	47,780 r	49,008 r	49,988 r	51,238
Georgia	53,155	52,830	53,002	52,956	52,972	53,424 r	54,492 r	55,855
Kentucky	49,332	49,614	50,428	50,938	51,100	51,635 r	52,668 r	53,984
Louisiana	48,903	49,006	48,966	48,369	49,067 r	49,775 r	50,771 r	52,040
Mississippi	42,308	41,976	41,976	41,814	41,849	43,308 r	44,308 r	45,416
N. Carolina	46,850	46,791	45,933	45,737	44,990 r	47,783 r	48,266 r	49,473
Tennessee	45,597	45,891	47,082	47,563	47,732 r	47,902 r	49,818 r	51,063
Virginia	51,894	51,524	52,096	52,923	53,818 r	54,516 r	55,334 r	56,717
W. Virginia	44,506	44,262	45,400	45,453	45,086	45,783 r	46,699 r	47,866
SE Avg. from Survey	47,553	47,506	47,846	47,964	48,289	49,223	50,239	51,495
Projected Avg. for Budget	48,172	48,725	49,007	49,319	48,858	48,892	49,796	51,495
South Carolina Actual	47,508	47,050	47,428	48,375	48,430			

Notes:

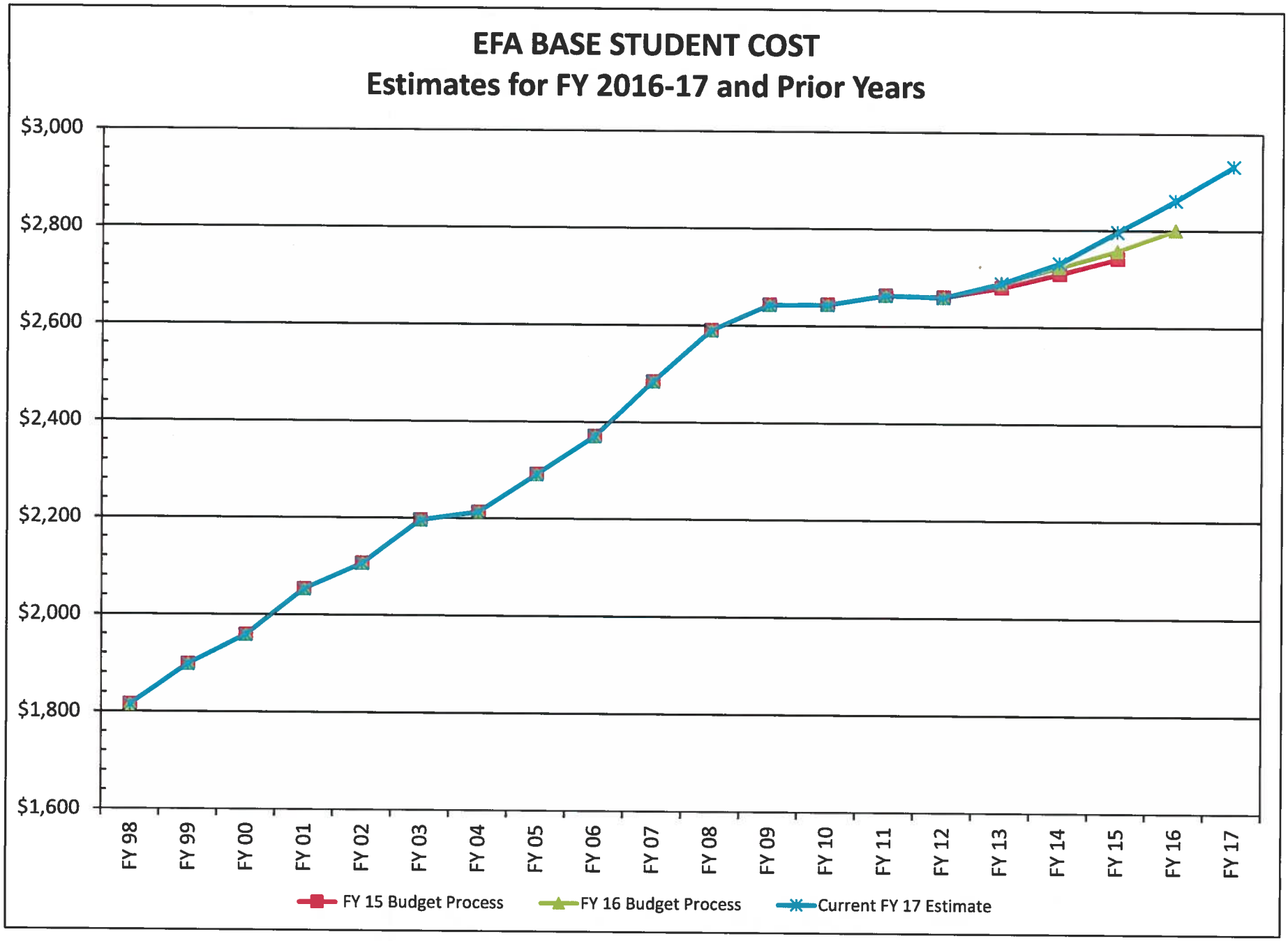
Column footnotes apply to all rows except "Projected Average for Budget"

r - Revised since previous estimate.

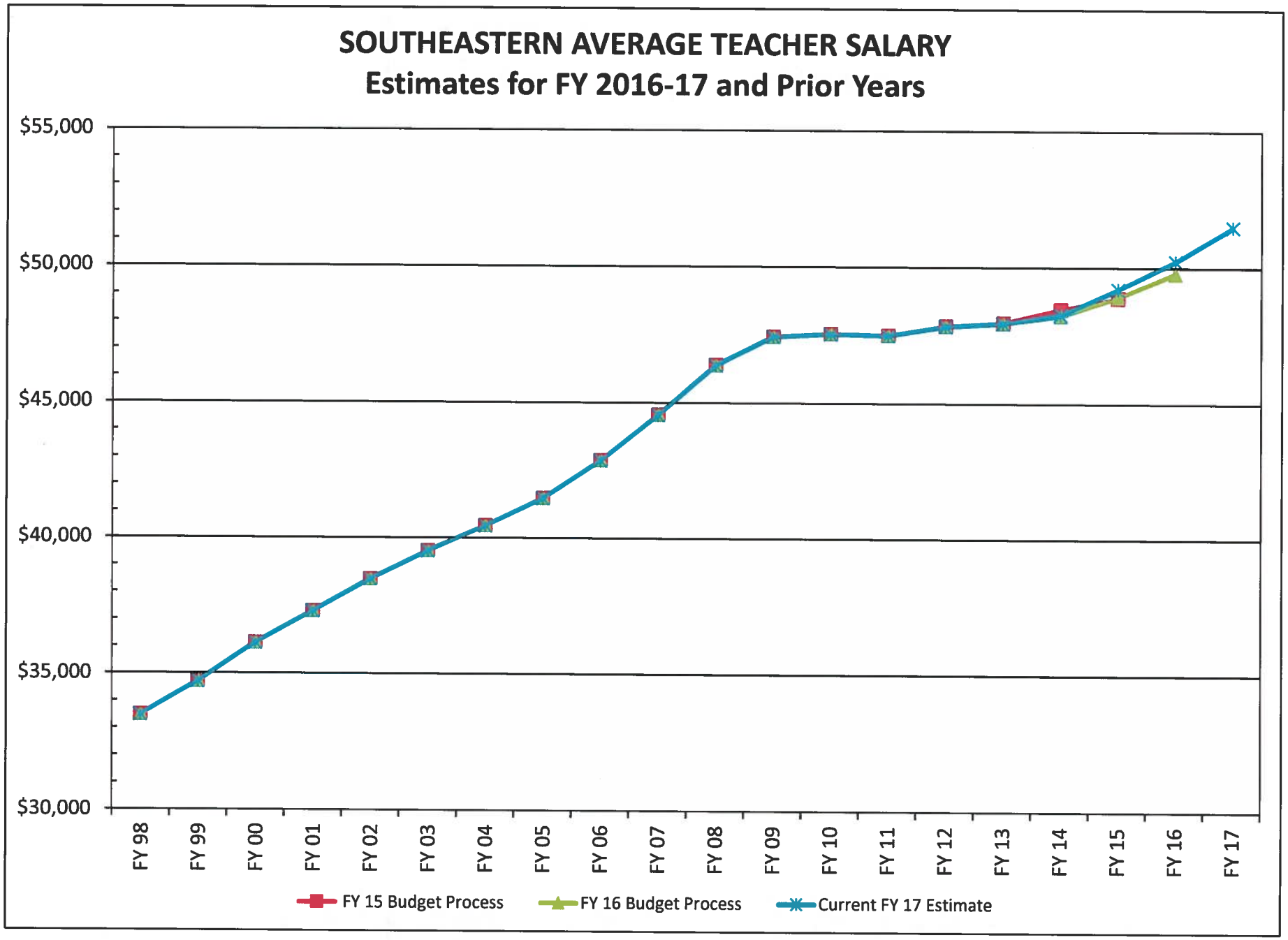
n/a - No figure listed in the Appropriation Bill

(1) Actual numbers reported by states in fall 2011 survey, updated in August 2012.
(2) Actual numbers reported by states in fall 2012 survey, updated in August 2013.
(3) Actual numbers reported by states in fall 2013 survey, updated in August 2014.
(4) Actual numbers reported by states in fall 2014 survey, updated in August 2015.
(5) Based upon information provided by the state in August 2015 survey.
(6) Estimates from information provided by the states and recent revenue trends.

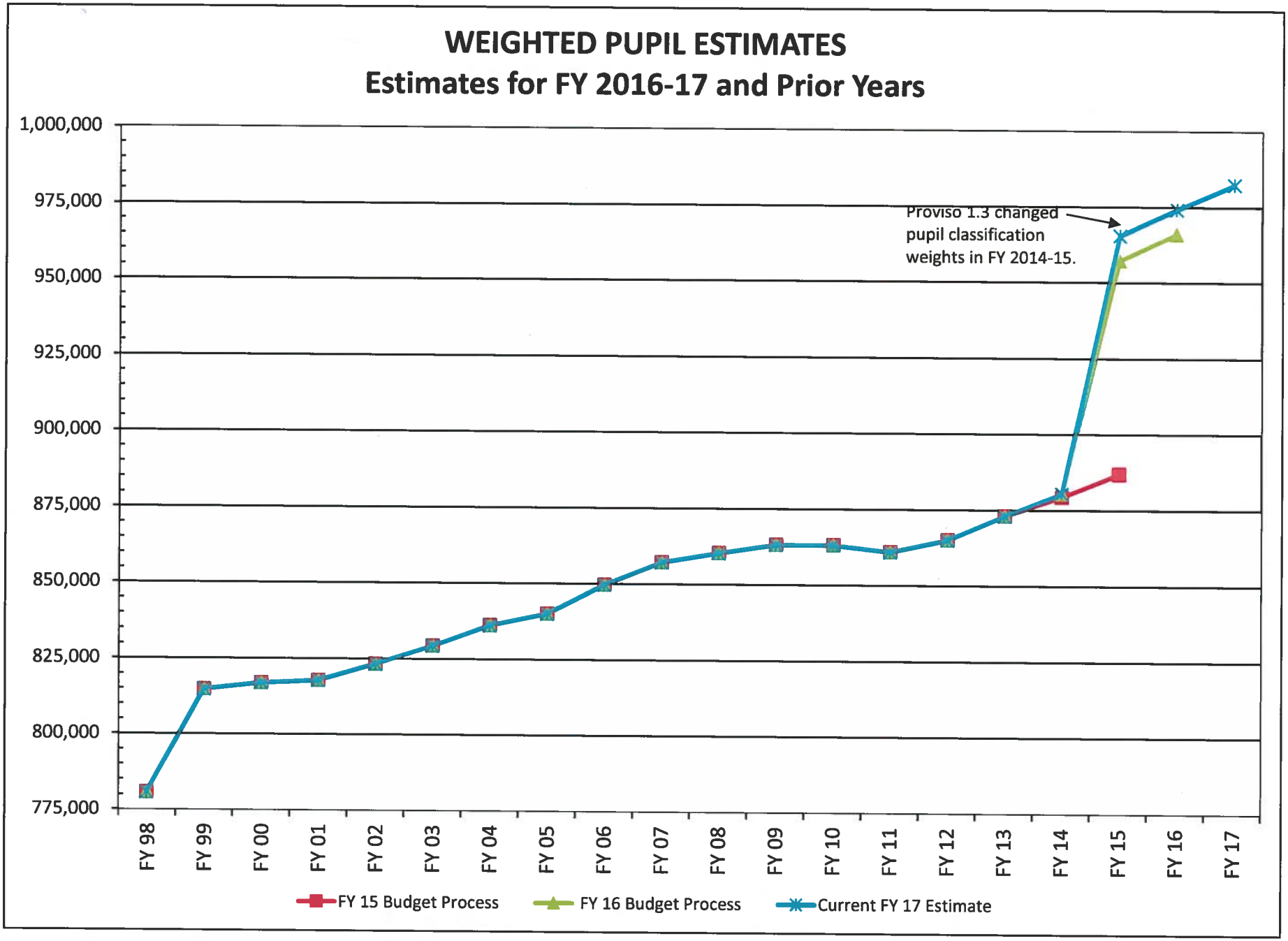
Source: S.C. Revenue and Fiscal Affairs Office
Revised 9/08/15



S.C. Revenue and Fiscal Affairs Office 9/08/15



S.C. Revenue and Fiscal Affairs Office 9/08/15



S.C. Revenue and Fiscal Affairs Office 9/08/15

Education Improvement Act Funding History

	2013-14		2014-15	2015-16	Request for 2016-17	Explanation
A. STANDARDS, TEACHING, LEARNING, ACCOUNTABILITY						
1. Student Learning						
Personal Service Classified Positions	58,629		58,629	58,629		
Other Operating Expenses	136,739		136,739	136,739		
High Achieving Students	26,628,246					
Aid to Districts	37,736,600		37,386,600	37,386,600		
School Health & Fitness Act -- Nurses	6,000,000		6,000,000	6,000,000		
Tech Prep	3,021,348		3,021,348	3,021,348		
Modernize Vocational Equipment *	6,359,609		6,682,406	7,260,261		
Arts Curricula	1,187,571		1,487,571	1,487,571		
Adult Education	13,573,736		13,573,736	15,073,736		
Students at Risk of School Failure	136,163,204		79,551,723	79,551,723		
High Schools That Work	2,146,499		2,146,499	2,146,499		
Summer Reading Camps				1,500,000		
Reading Coaches *				4,961,278		
EEDA *	7,315,832		6,013,832	6,013,832		
Subtotal	**240,328,013**		**156,059,083**	**164,598,216**		
2. Student Testing						
Personal Service Classified Positions	488,518		488,518	488,518		
Other operating Expenses	332,948		332,948	332,948		
Assessment / Testing *	24,761,400		27,261,400	27,261,400		
Subtotal	**25,582,866**		**28,082,866**	**28,082,866**		
3. Curriculum & Standards						
Personal Service Classified Positions	126,232		126,232	126,232		
Other Personal Service	4,736		4,736	4,736		
Other Operating Expenses	41,987		41,987	41,987		
Reading	6,542,052		6,542,052	6,542,052		
Instructional Materials	20,922,839		20,922,839	20,922,839		
Instructional Materials Non-Recurring	***8,000,000*** *		*0*	*0*		
Subtotal	**35,637,846**		**27,637,846**	**27,637,846**		
4. Assistance, Intervention, & Reward						
Personal Service Classified Positions	1,236,436		1,236,436	1,236,436		

Education Improvement Act Funding History

	2013-14		2014-15	2015-16	Request for 2016-17	Explanation
Other Operating Expenses	1,174,752		1,174,752	1,174,752		
EAA Technical Assistance	6,000,000		8,800,000	8,800,000		
PowerSchool/Data Collection	7,500,000		7,500,000	7,500,000		
Subtotal	**15,911,188**		**18,711,188**	**18,711,188**		
B. Early Childhood						
Personal Service Classified Positions	376,246		376,246	376,246		
Other Operating Expenses	556,592		556,592	556,592		
Alloc EIA - 4 YR Early Child	15,513,846		15,513,846	15,513,846		
SCDE-CDEPP	20,240,998		34,324,437	34,324,437		
Subtotal	**36,687,682**		**50,771,121**	**50,771,121**		
C. TEACHER QUALITY						
1. Certification						
Personal Service Classified Positions	1,068,102		1,068,102	1,068,102		
Other Personal Service	1,579		1,579	1,579		
Other Operating Expenses	638,999		638,999	638,999		
Subtotal	**1,708,680**		**1,708,680**	**1,708,680**		
2. Retention & Reward						
Special Items						
Teacher of the Year Award	155,000		155,000	155,000		
Teacher Quality Commission	372,724		372,724	372,724		
Teacher Salary Supplement	125,756,960		127,640,691	127,640,691		
Teacher Salary Supplement - Fringe	15,766,752		15,766,752	18,266,752		
National Board Certification	54,000,000		55,500,000	54,000,000		
Rural Teacher Recruiting Initiative				1,500,000		
Teacher Supplies	13,596,000		13,596,000	13,596,000		
Subtotal	**209,647,436**		**213,031,167**	**215,531,167**		
3. Professional Development						
Special Items						
Professional Development	5,515,911		5,515,911	9,515,911		
ADEPT	873,909		873,909	873,909		
Subtotal	**6,389,820**		**6,389,820**	**10,389,820**		
E. LEADERSHIP						

Education Improvement Act Funding History

	2013-14		2014-15	2015-16	Request for 2016-17	Explanation
1. Schools						
2. State						
Personal Service Classified Positions	82,049		82,049	82,049		
Other Personal Service	83,121		83,121	83,121		
Other Operating Expenses	150,032		279,032	279,032		
Technology	10,171,826		10,171,826	12,271,826		
Employer Contributions	1,064,221		1,064,221	1,064,221		
Subtotal	**11,551,249**		**11,680,249**	**13,780,249**		
F. PARTNERSHIPS						
1. Business and Community						
2. Other Agencies & Entities						
State Agency Teacher Pay (F30)	716,323		73,861	73,861		
Education Oversight Committee (A85)	1,293,242		1,643,242	1,793,242		
Center for Educational Partnerships (H27)	715,933		715,933	715,933		
SC Council on Economic Education	300,000		300,000	300,000		
Science PLUS	503,406		503,406	563,406		
Gov. School Arts & Humanities (H63)	828,185		959,994	959,994		
Wil Lou Gray Opportunity School (H71)	605,294		605,294	605,294		
School for Deaf & Blind (H75)	7,176,110		7,439,286	7,439,286		
Disabilities & Special Needs (J16)	613,653		613,653	613,653		
John De La Howe School (L12)	417,734		417,734	417,734		
Clemson Ag Ed Teachers	758,627		889,758	889,758		
Centers of Excellence-CHE (H03)	887,526		1,137,526	1,137,526		
Teacher Recruitment Program-CHE (H03)	4,243,527		4,243,527	4,243,527		
SC Program for the Recruitment and Retention of Minority Teachers, SC State University (Base: $339,482)						
Center for Ed, Recruitment, Ret, and Adv	531,680		531,680	531,680		
Teacher Loan Program-State Treasurer (E16)	5,089,881		5,089,881	5,089,881		
Gov. School Science & Math (H63)	416,784		533,130	533,130		
Science South	500,000		500,000			
STEM Centers SC	1,750,000		1,750,000	1,750,000		
Teach For America SC	3,000,000		3,000,000	3,000,000		
ETV - K-12 Public Education	2,829,281		2,829,281	2,829,281		
ETV - Infrastructure	2,000,000		2,000,000	2,000,000		
SC Youth Challenge Academy	1,000,000		1,000,000	1,000,000		

Education Improvement Act Funding History

	2013-14		2014-15	2015-16	Request for 2016-17	Explanation
School Readiness Plan (A85) **Non-Recurring**	***590,000***	*				
Literacy & Distance Learning			415,000	415,000		
Regional Education Centers			1,302,000	1,302,000		
Reach Out and Read (A85) **				*1,000,000*		
Arts Curricula (H910)				1,000,000		
Subtotal	**36,767,186**		**38,494,186**	**40,204,186**		
G. TRANSPORTATION/BUSES						
Other Operating	16,347,285		12,575,684	12,575,684		
Subtotal	**16,347,285**		**12,575,684**	**12,575,684**		
H. Charter School District			**56,253,692**	68,131,619		
Charter Schools Chartered by Institutions of Higher Education				1,440,000		
Subtotal				**69,571,619**		
I. First Steps to School Readiness						
Personal Services			2,182,993	2,182,993		
Other Operating			1,872,789	1,872,789		
County Partnerships			11,262,214	12,693,265		
CDEPP			9,767,864	9,767,864		
BabyNet Autism Therapy			437,476	1,699,848		
Fringe Benefits			677,349	918,849		
BabyNet						
Subtotal			**26,200,685**	**29,135,608**		
EIA TOTAL	**$636,559,251**		**$647,596,267**	**$682,698,250**		
Non-Recurring Appropriations *	***$8,590,000***		***$0***	***$0***		
Proviso 1A.59.						
EOC Partnerships for Innovation				$900,000		
Allendale County School District				$150,000		
Modernize Vocational Equipment				$1,501,307		

Education Improvement Act Funding History

	2013-14		2014-15	2015-16	Request for 2016-17	Explanation
Assessment				$7,300,000		
Digital Music Materials				$625,000		
Subtotal:				**$10,476,307**		
Act 92						
Modernize Vocational Equipment				$6,538,722		
Reading Coaches				$4,961,278		
EEDA				$2,400,000		
Transition Payments				$7,600,000		
Subtotal:				**$21,500,000**		
** **Reach Out and Read (Non-Recurring General Funds) $500,000**						

Statewide Higher Education Policy for Delivery and Transferability of "Dual Enrollment" Coursework Offered in High Schools

Preface

The term "Dual Enrollment" as used in this document refers *exclusively* to sections of courses offered through an institution of higher education in a cooperative arrangement with a local school district (i.e., Local Education Agency or LEA*). The purpose of these courses is to allow high school students who have mastered or nearly mastered the relevant high school curriculum and who are capable of college-level work that is, by definition, more advanced than the regular high school curriculum to earn simultaneously both high school credit toward graduation from high school and academic course credit toward either an associate or baccalaureate degree* in an institution of higher education. In such an arrangement, when the student successfully completes the course, the institution of higher education formally posts the earned credit to a student's transcript for the collegiate experience, and the high school posts the earned credit to a student's transcript for the secondary experience.

Dual enrollment courses have been a feature in South Carolina high schools for at least a decade. The purpose of these courses is to provide an avenue through which highly talented high school youth can earn college credit while simultaneously meeting high school graduation requirements by taking courses in the high school setting that are offered by an institution of higher education. In this model both the high school and the college provider earn funding through the state, while the student pays tuition to the college.

Promoters of dual enrollment maintain that it helps students earn credit for a small number of courses prior to entry into college and assists the student to graduate earlier than (s)he might otherwise have done. At the same time, it assists the state to bring more productive workers into the economy at a faster rate. On the other hand, the mechanism for selecting faculty to teach dual enrollment course sections, the state's full payment to both a LEA and an institution of higher education for offering the same course, and a perceived need for more definitive data on the value-added dimension for students who have completed these courses have been raised as concerns about this practice.

I. Purposes of Dual Enrollment

A. Dual enrollment courses should be made available only to those who have mastered or nearly mastered the complete high school curriculum and who are

capable of college-level coursework which, by definition, is more advanced than the regular high school curriculum provides.

B. Policy guidelines contained herein apply to general education courses offered through South Carolina's two- and four-year public institutions of higher education and technical education courses offered by the technical colleges and, in a very few instances, by four-year public institutions. **These Guidelines do not cover "Advanced Placement" courses or International Baccalaureate courses, which are alternative methods (and which require adequate performance on either national or international standardized examinations) for high school students to earn both high school and college credit.**

II. Student Eligibility

A. Public institutions of higher education offering dual enrollment course sections must require that students wishing to enroll in such course sections meet one of the following criteria:

a.1. For course sections in four-year institutions and two-year regional campuses of the University of South Carolina, a student must have at least a 3.0 grade point average (on a 4.0 scale) and the recommendation of the high school principal or his/her designee;

a.2. For course sections in technical colleges, a student must meet the same requirements for individual courses as other college students and must have the recommendation of the high school principal, his/her designee or the designee of the governing school association.

B. Dual enrollment should be limited to junior and senior students in a high school. Documented exceptions may be made for freshman or sophomore students at the request of the high school principal, his or her designee, or the designee of the governing school association. Such documentation demonstrating exceptional ability to undertake college-level coursework shall be retained in the student's college file.

C. An individual college or university may establish additional criteria for admission into courses.

III. Structure and Administration of Dual Enrollment Offerings

A. Dual enrollment course sections must be comparable in academic content and expected outcomes, syllabus, textbook(s), teaching methodologies, and assessment strategies to the particular course offerings delivered elsewhere by the providing higher education institution..

B. Courses must be approved for dual enrollment status by the institution's chief academic officer, or his/her designee.

C. The chief academic officer of the providing college/university, or his/her designee, will be responsible for selecting and evaluating all dual-enrollment faculty, using Southern Association of Colleges and Schools college-level criteria as minimal requirements for teaching these sections.

D. The chief academic officer, or his/her designee, must ensure standards of student evaluation and faculty evaluation in the dual enrollment course sections comparable to those required of other sections of the same courses.

E. All students enrolled in a college course offered for dual enrollment must be enrolled in the class for college credit, i.e., students in a single class cannot have the option to receive either high school or college credit.

F. Students enrolled in dual enrollment courses must be guaranteed convenient geographic and electronic access to student and academic support comparable to what is accorded on-campus students, including access to library resources. Students in dual enrollment courses also must have reasonable access to the course instructor outside regular classroom hours either in person, via phone, or electronically.

G. Institutions shall cooperate with each other in providing dual enrollment courses in a particular geographic area.

IV. Faculty Eligibility and Support

A. The appropriate higher education institution's full-time teaching faculty and the chief academic officer, or his/her designee, of the offering higher education institution shall assure that any faculty member teaching in dual enrollment offerings meets all relevant SACS criteria.

B. Orientation and evaluation of instructors teaching dual enrollment course sections rests with the appropriate academic department of the respective institution of higher education. The chief academic officer, or his/her designee, shall assure consistency and comparability of both orientation and evaluation across the institution.

C. Dual enrollment instructors must participate in the expected, relevant professional development and evaluation activities of the offering institution of higher education.

D. For purposes of assuring comparability of dual enrollment offerings with other institutional offerings, academic departments must provide instructors of dual enrollment course sections with support services, including a designated on-campus faculty liaison.

E. Whether the course is offered by traditional means or by distance learning technology, the providing higher education institution must provide evaluation and supervision of dual enrollment faculty members in the high schools. Traditionally-delivered dual enrollment coursework should only be offered within reasonable commuting distance of the offering institution to facilitate on-site evaluation and supervision.

F. The higher education institution must demonstrate clear control of each dual enrollment course, to include control of the faculty either through a direct employment contract or through a statement signed by the faculty agreeing to comply with all college course requirements.

V. Assessing Student Learning

A. The same methods of assessment should characterize dual enrollment courses in relationship to on-campus and other offerings of the same level and subject matter to assure quality and comparability.

B. The college faculty in the relevant department must approve both formative and summative assessment strategies and tools.

The chief academic officer of the institution of higher education offering the course is responsible for the review of student performance prior to the continuation of the course and the instructor in subsequent semesters.

VI. Limitations on Credit Earned and Transferability of Credit

A. Dual enrollment offerings are meant to enrich the academic experience of high school students who have mastered or substantially mastered the secondary school content of the curriculum in certain subject areas. The number of college-level courses completed in these dual enrollment offerings will vary according to the student's ability and work ethic.

B. Credit earned by satisfactory completion of dual enrollment courses will transfer to other public institutions in South Carolina provided that

b.1. for general education coursework, dual enrollment courses have been selected from the List of Transferable Courses in the Statewide Transfer and Articulation Policy.

b.2. for technical education courses the student enrolls in a technical college after high school which allows for such a course to be counted toward an associate degree, diploma, or certificate.

C. Course credit transfer to public institutions in South Carolina for dual enrollment courses not covered by either b.1 or b.2 above must be articulated directly by the student with the receiving higher education institution. Such articulation should take place prior to enrolling in the course in high school.

D. Prior to course registration, an institution offering a dual enrollment course shall advise students in writing that it is the student's responsibility to contact and receive written assurance from any nonpublic institution in South Carolina or any public or private institution outside South Carolina of that institution's willingness to accept a dual enrollment course toward degree requirements.

VII. Demonstration of Policy Compliance and Reporting

A. Each institution shall develop an annual report on dual enrollment offerings that demonstrates compliance with these policy and procedure guidelines for each dual enrollment course offered to high school students.

B. This annual report shall be submitted to the Division of Academic Affairs and Licensing of the Commission on Higher Education by September of each year for the prior academic year. Each technical college shall send its annual report to the State Technical College System office which shall assemble a summary report for the technical college system and transmit it and the 16 institutional reports to the CHE.

C. The Commission on Higher Education, in consultation with its Advisory Committee on Academic Programs, shall annually provide the standardized format for the institutional reports.

D. The Commission shall issue annually a report on dual enrollment offerings of the prior year by public institutions of higher education in South Carolina.

Implementation Date: Fall 2004

Dual Enrollment
Education Commission of the States www.ecs.org
700 Broadway, Suite 810 • Denver, CO 80203-3442

Increasing Student Access and Success in Dual Enrollment Programs: 13 Model State-Level Policy Components

By Jennifer Dounay Zinth

February 2014

Dual enrollment or concurrent enrollment programs allow eligible high school students to take postsecondary courses for college and, usually, high school credit. Programs are nearly ubiquitous — in 2014, courses for dual or concurrent enrollment credit are offered in every state and the District of Columbia. Statewide policies govern these programs in 47 states and D.C., and local policies or agreements oversee programs in **Alaska**, **New Hampshire** and **New York**.

While programs have various names in different states, the term "dual enrollment" will be used throughout this report. Findings are based on an ECS analysis of state dual enrollment policies and a review of relevant academic research.

What's happening in your state? Visit ECS' 50-state database on dual enrollment policy

Among some of the findings:

- The number of U.S. public high schools offering dual enrollment programs is growing, with 82 percent providing such opportunities in 2011-12, the most recent national data available.
- Academic research and state experience highlight the benefits of dual enrollment programs for improving college completion rates, particularly for minority and/or low-income students.
- However, with the possible exception of **Massachusetts**, minority and/or low-income students tend to be underrepresented in statewide dual enrollment programs. Recent analyses in **Illinois**, **Ohio** and **Washington** show white and/or more affluent students are overrepresented in these programs.

ECS identified 13 model state-level policy components that may increase student participation and success in dual enrollment programs. These components fall under four broad categories: access, finance, ensuring course quality and transferability of credit. Examples of state laws containing these components are incorporated throughout this report.

In this report

Model Components of State-Level Policies on Dual Enrollment

Access

Components to increase the likelihood underserved students will participate

1. **All eligible students are able to participate**. To ensure program access, state law must be unequivocal on this point. … p. 4
2. **Student eligibility requirements are based on the demonstration of ability to access college-level content**, not bureaucratic procedures or non-cognitive factors. … p. 5
3. **Caps on the maximum number of courses students may complete are not overly restrictive**. Cost should not be a driving factor for states to establish caps. … p. 5
4. **Students earn both secondary and postsecondary credit for successful completion of approved postsecondary courses**. While it may sound obvious, such policies are not universal. … p. 6
5. **All students and parents are annually provided with program information**. Less-advantaged parents are typically less likely to be aware of dual enrollment opportunities. … p. 7
6. **Counseling is made available to students and parents before and during program participation**. State policies should promote the availability of counseling. … p. 8

Finance

Components to lessen financial barriers for students and financial disincentives for districts and colleges

7. **Responsibility for tuition payments does not fall to parents.** Requiring parents to pay tuition up front and receive reimbursement later may preclude participation by some students. … p. 9
8. **Districts and postsecondary institutions are fully funded or reimbursed for participating students**. At least one state is tying full funding to course quality. … p. 10

Ensuring Course Quality

Components to maintain consistent academic rigor across all course delivery options

9. **Courses meet the same level of rigor as the course taught to traditional students at the partner postsecondary institution.** Nearly 40 states have embedded instructor and/or course quality in state law. … p. 10
10. **Instructors meet the same expectations as instructors of similar traditional postsecondary courses, and receive appropriate support and evaluation.** This is particularly important when dual enrollment courses are taught by high school instructors. … p. 11
11. **Districts and institutions publicly report on student participation and outcomes.** Only 30 of the 47 states with state-level dual enrollment programs require such reporting. … p. 12
12. **Programs undergo evaluation based on available data.** Nearly 30 states require dual enrollment programs to undergo internal or external evaluation. … p. 14

Transferability of Credit

Component to ensure dual enrollment credit is treated equitably

13. **Postsecondary institutions accept dual enrollment credit as transfer credit, provided measures of quality are ensured.** More than 20 states require dual enrollment credits to be treated for transfer credit in the same manner as credits earned at the receiving institution. … p. 15

Who participates in dual enrollment programs?

National data show increasing numbers of U.S. public high schools are offering dual enrollment opportunities – from just under seven out of 10 (69.3 percent) in the 2007-08 school year to 82 percent in 2010-11.[1] However, these data can mask low statewide participation or wide variability in participation rates among certain high schools within a state.

For example, a December 2013 Ohio report notes that only 5 percent of the state's roughly 560,000 public high school students participate in dual enrollment opportunities.[2] The percentage of Florida's 2007 high school graduates who had dually enrolled ranged by district from 5 percent to 52 percent, with the state average across districts at 14 percent.[3] A 2013 Illinois study of the Class of 2003 identified lower participation rates in Chicago and other northeastern high schools than in other areas of the state.[4]

Massachusetts data show low-income and minority students are well-represented in the state's modest dual enrollment program, but data from other states suggest this is not universally the case.[5] For instance:

- In fall and spring of the 2013 fiscal year, 78 percent of **Ohio**'s dually enrolled students were white; black and Hispanic students made up 7 percent and 2.6 percent of dually enrolled students, respectively.[6]
- A 2012 **Washington state** analysis found, "All racial/ethnic categories are underrepresented in the Running Start (dual enrollment) program except for Asian and White." Hispanic students, 18.9 percent of the Washington student population, made up 6.8 percent of Running Start participants. While low-income students comprise 43.7 percent of the student population, these students comprised just 25.4 percent of Running Start participants.[7]
- The 2013 **Illinois** analysis found, "high schools in the lowest dual-credit participation quartile have the highest proportion of racial/ethnic minorities and lowest proportion of White students, on average, and high schools in the highest quartile have the lowest proportion of racial/ethnic minorities and highest proportion of White students, on average." The researchers also noted a similar inverse relationship between a high school's dual credit participation quartile and the proportion of low-income students.[8]

What are the benefits of dual enrollment?

A preponderance of academic research and state data underscore the benefits of dual enrollment programs, particularly for students traditionally underrepresented in higher education in the United States.

Data suggest that dually enrolled students share the following characteristics:

- More likely to meet college-readiness benchmarks[9]
- More likely to enter college, and enter shortly after high school graduation[10]
- Lower likelihood of placement into remedial English or math[11]
- Higher first-year grade point average (GPA)[12]
- Higher second-year retention rates[13]
- Higher four- and six-year college completion rates[14]
- Shorter average time to bachelor's degree completion for those completing in six years or less.[15]

Model policy components

Research and state experience suggest that 13 policy components related to access, finance, ensuring course quality and transferability of credit may increase the likelihood that a more diverse group of students successfully participates in high-quality dual enrollment courses and receives credit that will be transferable to other public postsecondary institutions in the same state. Each essential policy element falling under these umbrellas of access, finance, ensuring course quality and transferability of credit will be identified individually below.

The set of policies describes in this report should be viewed as a complete whole rather than a menu from which states may choose. All four policy areas are interrelated.

Nonetheless, there is no single cookie-cutter policy incorporating all 13 elements that all states should adopt … diverse examples exist that accomplish the goals set forth in each policy element.

However, the set of policies described in this report should be viewed as a complete whole rather than a menu from which states may choose. All four policy areas are interrelated. For example, access and participation are compromised if funding strategies create disincentives for students or districts. Moreover, the transfer and articulation of college credits earned in high school can be constrained if academic quality is not vigorously maintained.

Nonetheless, there is no single cookie-cutter policy incorporating all 13 elements that all states should adopt. As will be presented in this report, diverse examples exist that accomplish the goals set forth in each policy element.

Access

As the research suggests, students participating in dual enrollment programs tend to be nonminority and more affluent than nonparticipating students. To increase the likelihood that underserved students will participate, state policies should incorporate the following policy components:

Component 1: All eligible students are able to participate

Many state policies are unclear as to whether a district must offer dual enrollment opportunities. **Ohio** provides, "Each city, local, exempted village, and joint vocational school district and each chartered nonpublic high school shall provide students enrolled in grades nine through twelve with the opportunity to participate in a dual enrollment program. For this purpose, each school district and chartered nonpublic high school shall offer at least one dual enrollment program".[16]

And regardless of whether a district or postsecondary institution is required to offer a dual enrollment program, many state policies are ambiguous as to whether a district must allow an otherwise eligible student to participate, and whether a postsecondary institution, space permitting, must accept an otherwise eligible high school student. To ensure program access, state policies must be unequivocal on this point. **Oklahoma** statute prohibits districts from denying program participation to a student who

meets dual enrollment requirements, and prohibits public postsecondary institutions from denying enrollment in any course to an otherwise qualified high school or home-schooled student.[17]

Broadening program access also means that state policies should ideally allow *both* two- and four-year public postsecondary institutions to participate in dual enrollment programs. While dual enrollment students (particularly where parents and students pay tuition and fees) will oftentimes elect to enroll in courses at community colleges, where costs are typically lower, state policies should not prohibit public four-year institutions from participating. To further expand opportunities for students, a number of states have extended program eligibility to accredited private institutions, and a few explicitly allow tribal colleges to offer dual enrollment courses.

Component 2: Student eligibility requirements are based on demonstration of ability to access college-level content (i.e., college placement exams)

Eligibility for dual enrollment should hinge on demonstrated academic abilities, not bureaucratic procedures or information that is not directly related to a student's academic abilities or plan of study. Moreover, districts should not depend on difficult-to-measure student attributes determined by school, district or postsecondary staff, such as "ability to benefit," "maturity" or "motivation."

States should also be wary of predicating student eligibility *entirely* on local board or institutional policies, as local variations in expectations may create barriers in one community that do not exist in another one. Access is improved when policies are easy to understand, minimize bureaucratic procedures and are consistently implemented.

Eligibility requirements should be based on quantifiable, reliable and valid indicators of a student's ability to succeed in a postsecondary course. Also, eligibility criteria should mirror those criteria otherwise expected for students who are not in high school. Why would the prerequisite requirements for College Algebra differ for high school students and adult students? Similarly, eligibility requirements should be the same regardless of whether a student is accessing the course at the postsecondary campus or at his/her high school. Eligibility criteria should not have their basis in non-cognitive factors such as a student's age or academic standing.

Ohio legislation enacted in 2013 makes clear that local programs should not establish unnecessary barriers to program participation. The amendment mandates that state board rules for the Postsecondary Enrollment Options program include a requirement that student program participation be based solely on a college's established placement standards for credit-bearing courses.[18]

Component 3: Caps on the maximum number of courses students may complete are not overly restrictive

Some states worried about potential costs or other concerns such as transportation have set caps on the number of dual enrollment courses students may complete. However, states with caps on the lowest end of the spectrum (for example, two credits per semester and only for grades 11-12) may wish to reconsider these caps. Cost should not be a driving factor for states to establish caps. As discussed in further detail later in this report, in funding dual enrollment courses, states are not paying twice for the

same course, provided the course is recognized for transfer credit at the institution in which the student eventually matriculates.

Eleven states explicitly allow high school students to enroll in college programs as part- or full-time students: California, Florida, Georgia, Idaho, Indiana, Massachusetts, Minnesota, Ohio, Oregon, Rhode Island and Wisconsin.

In addition, the growing availability of online postsecondary classes potentially makes dual enrollment courses available to a wider audience of students without incurring the corresponding costs of a traditional course in a bricks-and-mortar classroom. A 2010 report by the **California** Legislative Analyst's Office (LAO) notes that while the instructional costs are similar for traditional and distance-learning courses (because student-faculty ratios do not change by delivery method) and some one-time and ongoing costs are incurred for technology, online courses can result in "potentially significant cost savings" as a result of reduced facilities requirements (i.e., classrooms and parking lots) and increased collaboration in course development within and across campuses.

According to the LAO report, "Research at the University of Texas found that lower infrastructure-related costs resulted in average per-unit savings of $90 a year for the delivery of online instruction relative to campus-based instruction — or roughly $2,500 per FTE student in general operating, bond and other funding sources. A 2009 report to the Board of Trustees by CSU East Bay suggests a comparable level of savings from distance education."[19]

An *Inside Higher Ed* article about the LAO report notes that Christopher Edley, co-chair of the University of California Commission on the Future, "has been evangelizing about online education as a way to reach more students while cutting costs for a system that is running a $5 billion deficit."[20]

Component 4: Students earn both secondary and postsecondary credit for successful completion of approved postsecondary courses

While it may sound obvious that dual enrollment students should receive both high school and postsecondary credit for successful completion of dual enrollment courses, 2013 ECS data suggest such policies are not universal.

Only 24 states specify that both secondary and postsecondary credit must be awarded. In 13 states, the type of credit awarded depends on which of two or more state programs a student is participating in or other mitigating factors. Policies requiring students to "apply" for credit they are not automatically awarded give an unfair advantage to students aided by adults to shepherd them through the application system and create unnecessary bureaucracy for schools, districts and institutions. In 10 states, policy is either silent on the type of credit that must be awarded or requires the level of credit awarded to be specified in local agreements between K-12 and higher education partners.

Awarding both types of credit incentivizes student participation and has the potential to reduce time-to-degree. And many would argue that it simply makes sense. Some policies awarding only secondary credit (or requiring students to apply to receive postsecondary credit) may reflect concern that dual

enrollment courses do not truly reflect postsecondary content. Subsequent sections of this report, "Ensuring Course Quality" and "Transferability of Credit," identify policy approaches to ensure that dual enrollment students are truly held to postsecondary expectations.

Component 5: All students and parents are provided with program information

Students with the best-connected (oftentimes most affluent and educated) parents are most likely to know about dual enrollment options and the potential benefits. Less-advantaged parents, on the other hand, are typically less likely to be aware of dual enrollment opportunities or their potential benefits. Although providing program information to all students and their parents is a relatively low-cost approach, with the potential to increase program participation among eligible traditionally-underserved youth, ECS has identified only 18 states with such a requirement in state policy.

All high schools should provide program information (including eligibility criteria and costs information) to all students and their families the term before students are eligible to participate, and each academic year thereafter. Such information should describe student eligibility requirements, participating institutions and types of courses available; who pays tuition and other fees (and reimbursement procedures where applicable); processes for awarding of secondary and/or postsecondary credit; and support services available to students, among others. **New Mexico** requires information about dual credit programs to be provided during student advisement, academic support and formulation of each student's annual next step plan (first developed in grade 8, identifying the courses a student will take each year in grades 9-12 to achieve the student's stated postsecondary or workforce goal).[21]

Does dual enrollment mean states pay twice for one course?

There is a common perception that dual enrollment courses require a state to "pay twice" for a student to take a single course. However, if the dual enrollment opportunity is strong, rather than paying twice, states are paying earlier.

To illustrate: Joe is a high school student taking Calculus 101 at his local community college. If he were not a dual enrollment student, the state would already be paying for him to take a math course in high school. It also would be paying in a year or two for Joe to take Calculus 101 after he entered college.

Now the state is making those payments for the high school course and the college course at the same time. And in fact, the state may be reducing its cost on remedial education costs. That's if Joe takes rigorous academic courses his senior year of high school that help him perform well enough on college placement exams that he avoids placement into remedial courses in college.

One caveat: The state is consolidating two payments into one *only* if that Calculus 101 course Joe took at his community college is transferable to the postsecondary institution where he later enrolls. Transferability is discussed in greater depth at the end of this report.

Some states go the extra mile, hoping to entice dropouts to return to high school to participate in the dual enrollment program. **Oregon** makes it a priority for districts to provide information about the state's dual enrollment program (the Expanded Options Program) to dropouts, and requires districts to establish a process to identify dropouts and send program information to the last known address of the student's family.[22]

Component 6: Counseling is made available to students and parents before and during program participation

It is likely that a single information sheet or brochure is not going to answer every question parents and students have before signing on the dotted line to participate in a dual enrollment program. State policies should promote the availability of counseling. Currently, 19 states specify that current or prospective dual enrollment students be provided with counseling about program participation.

Idaho, **Michigan**, **Minnesota** and **Ohio** all have similar comprehensive student/parent advising policies.

Generally, in these four states, required information includes:

- Who may enroll
- What institutions and sources are available under the program
- The process for granting academic credits
- Financial arrangements for tuition, books and materials
- Eligibility criteria for transportation
- Availability of support services
- Scheduling and registration arrangements
- Consequences of failing or not completing a course in which the student enrolls
- The effect of enrolling in the program on the student's ability to complete the required high school graduation requirements
- The academic and social responsibilities that must be assumed by the student and parents

Laws in these four states direct counselors to encourage students and their parents to use available counseling services at the postsecondary institutions prior to the semester of enrollment to ensure that anticipated plans are appropriate. After receiving such counseling but prior to enrolling, the student and parents must sign a form indicating that they have received all of the aforementioned information and that they understand the responsibilities associated with enrolling in this program. Statutes in Idaho, Michigan and Minnesota also require the department of education or superintendent of public instruction to provide technical assistance upon request to a district (or postsecondary institution, in Michigan) in developing appropriate forms and counseling guidelines.[23]

States such as **Iowa**, **Missouri**, **New Mexico** and **Texas** even make clear that dually enrolled students can access the same or comparable support services afforded traditional college students, including academic advising/counseling.[24]

States can also encourage or require advisement to prevent students from taking courses that may duplicate courses they've already completed toward the general academic core or a major — thus also saving the state money. **Utah** directs the state board of regents and the state board of education to coordinate advising to students participating in the state's dual enrollment program. This advising must

include information on general education requirements at higher education institutions and how the student can choose dual enrollment courses to avoid duplication or excess credit hours.[25]

Finance

Mechanisms for funding dual enrollment programs vary significantly. Not surprisingly, financial policies can create barriers for middle- and low-income student participation and/or disincentives for district or institutional participation. Research and state experience show the following components can help lessen those potential obstacles:

Component 7: Responsibility for tuition payments does not fall to parents

According to ECS data, nine states require students or their parents to cover tuition costs. In 18 states and the District of Columbia, local agreements between a district and postsecondary institution determine the entity/entities responsible for tuition. In 10 more states, the entity responsible for paying tuition depends on which of two or more state programs a student is enrolled in.

Programs that require parents to pay tuition up front and receive reimbursement later may preclude participation among low-income students, and may reduce participation even among youth from middle-income families. Alternatives to these models include transferring tuition responsibility to:

- The district (current practice in **Colorado**, **Florida**, **Iowa**, **Wyoming**).[26]
- State-level entity. For example, in **Georgia**, dual credit/dual enrollment tuition is covered by either the Georgia Department of Education or the Georgia Student Finance Commission, depending on the participating program. Students and parents are responsible for some of the costs, which may vary depending on the type of dual enrollment program.[27] In **New Mexico**, the higher education institution is reimbursed for the waived tuition and general fees by a legislative allocation the following year, based on the number of completed credit hours reported to the higher education department.[28]

Some states provide scholarships or tuition waivers to partially or fully cover tuition and other course costs, either for all students up to a certain credit cap or for low-income students.

Washington state institutions must make fee waivers available for low-income students. Institutions must make every effort to communicate to students and their families the benefits of the waivers and provide assistance on how to apply. …

Institutions also must, to the greatest extent possible, use all means of communications, including websites, online catalogues, admission and registration forms, mass e-mail messaging, social media and outside marketing to ensure that information about waivers is visible, compelling and reaches the maximum number of eligible students and families.

Component 8: Districts and postsecondary institutions are fully funded or reimbursed for participating students

States should reconsider policies that fund districts for dually enrolled students as less than a 1.0 FTE if the student is enrolled in high school courses at least a certain number of hours a day or a certain percentage of the day. If the dual enrollment course is offered at the high school and taught by a high school teacher, the high school should be reimbursed for the costs associated with providing that course in the same manner that it would be reimbursed for the costs of providing a traditional high school course. The postsecondary institution should receive some reimbursement for any costs (administrative, etc.) associated with student data collection, approving the teacher qualifications and any course materials.

Minnesota, for example, stipulates that if a dual enrollment course is offered at a high school and taught by a high school teacher, the postsecondary institution must not require a payment from the district that exceeds the cost to the postsecondary institution that is directly attributable to providing that course.[29]

Interestingly, states have begun to specify that districts and institutions will be fully funded for dual enrollment students only if students are enrolled in programs that meet measures of quality. **Minnesota** makes districts eligible for aid for the costs of providing postsecondary courses at the high school only if the courses offered are accredited by the National Alliance of Concurrent Enrollment Partnerships, in the process of being accredited, are shown by clear evidence to be of comparable standard to accredited courses, or are technical courses within a recognized career and technical education program of study approved by the commissioner of education and the chancellor of the Minnesota State Colleges and Universities.[30]

Ensuring course quality

Maintaining consistent academic rigor across all course delivery options is of paramount importance. The most accessible, financially-viable dual enrollment programs will ultimately fail if academic integrity is compromised. Inclusion of the following components in state-level policies raises the chances that a dual enrollment course will ensure that enrolled students meet postsecondary expectations by providing the same level of rigor as a traditional postsecondary course. The ECS 50-state dual enrollment database shows 37 states have embedded instructor/course quality components into state policy, a 28 percent increase from the 29 states with policies in place in 2008.

Component 9: Courses have the same content and rigor regardless of where and to whom they are taught

Arkansas, for instance, specifies that an "endorsed concurrent enrollment course" is a course that is approved through the institution's normal process and listed in the institution's catalog. The course content and instruction must meet the same standards and adopt the same learning outcomes as those developed for a course taught on the institution's campus, including the administration of any departmental exams applicable to the course and the use of the same book and syllabus as used at the college level.[31] **North Dakota** eliminates the guesswork, stating that "To ensure that college course standards are adhered to, the [North Dakota University System] college/university course syllabus will be

provided to the instructor and be used as the criteria and model for all such dual-credit college courses taught in the high school."[32]

Arizona has established other parameters for community college courses taught at high schools during the school day. In addition to requiring courses offered at high schools to use the same syllabi, textbooks, course outlines and grading standards as the course if taught at the community college, policy also requires the chief executive officer of each community college to establish an advisory committee of full-time faculty to assist in dual enrollment course selection and implementation at high schools. The committee must meet at least three times each school year and review and report at least annually to the chief executive officer of the community college whether the course goals and standards are understood, the course guidelines are followed and the same standards of expectation and assessment are applied to these courses as though they were being offered at the community college.[33]

Some states are ensuring course rigor by integrating the National Alliance of Concurrent Enrollment Partnerships (NACEP) standards into state policy. These standards address curriculum and student assessment, as well as faculty, student selection and rights, and program evaluation.

For example, **Indiana** requires a state institution or campus that offers dual enrollment college courses to be either accredited by the National Alliance of Concurrent Enrollment Partnerships or approved by the commission for higher education.[34] **Minnesota** encourages postsecondary institutions to apply for NACEP accreditation and, as mentioned above, districts are eligible for state aid for providing postsecondary courses only if the courses are accredited by NACEP or are in the process of being accredited, are shown by clear evidence to be of comparable standard to accredited courses, or are technical courses within a recognized CTE program of study approved by the commissioner of education and the chancellor of the Minnesota State Colleges and Universities.[35]

Component 10: Instructors meet the same expectations as instructors of similar traditional postsecondary courses, and receive appropriate support and evaluation

This is particularly important when dual enrollment courses are taught by high school instructors. Teachers of dual enrollment courses must meet the college's hiring standards and demonstrate readiness. Some states require that any high school teacher designated to teach a dual enrollment course be appointed an adjunct faculty member by the participating postsecondary institution, or that the teacher meet the requirements of a faculty or adjunct faculty member at the participating postsecondary institution.

Arkansas stipulates that the instructor of an endorsed dual enrollment course have no less than a master's degree with at least 18 hours of completed coursework in the subject area of the course, as well as the relevant credentials and experience necessary to teach from the syllabus approved by the institution of higher education granting the course credit. The instructor's credentials must be approved by the academic unit or chief academic officer of the institution of higher education offering the endorsed dual enrollment course.[36]

Some states also specify that institutions not only appoint appropriate staff to teach dual enrollment courses, but that institutions support course instructors with appropriate orientation and staff development. The **Missouri** Department of Higher Education's Dual Credit Policy seeks to provide a one-to-one connection for dual credit instructors, requiring that they be designated an "on-campus faculty

member to serve as a liaison." New dual credit instructors must participate in orientation activities provided by the college and/or academic department. Continuing dual credit instructors must participate in the same professional development and evaluation activities as adjunct faculty on the college campus.[37] **Nebraska**'s Dual Enrollment Standards, which serve as guidelines but do not have the force of law, propose that "High school and postsecondary faculty maintain contact throughout the program. In some instances, this contact is facilitated by technology."[38]

It is also important that dual enrollment teachers be supervised and evaluated in the same manner as regular postsecondary instructors. In just one example, Missouri's Dual Credit Policy requires that the postsecondary institution "provide on-site supervision and evaluation of the dual credit faculty," and that dual-credit instructors be evaluated "according to the college's evaluation policies for other part-time/adjunct faculty." The campus academic department is responsible for making the recommendation for continuation of the instructor's role. The policy adds, "This process is best served when the instructional site is within a reasonable commuting distance from the institution of higher education."[39]

The NACEP "faculty" standards can provide further guidance for state-level policy.

Component 11: Districts and institutions publicly report on student participation and outcomes

States should look not just at "inputs" (course expectations and instructor qualifications) to determine program quality but also at outputs, such as student participation and outcomes data.

Perhaps surprisingly, while dual enrollment programs are active in every state and 47 states have state-level policies governing such programs, just 30 states and the District of Columbia require any entity — either a high school, postsecondary institution, school district, a statewide postsecondary system or postsecondary governing board, department of education or department of higher education, or longitudinal data system center — to report on dual enrollment participation. These reporting requirements vary widely across states, both on the type of data to be reported and the entities to which data are reported.

Program data can answer critical questions: Are diverse students accessing and succeeding in dual enrollment courses? Are dually enrolled students ultimately graduating from high school, enrolling in postsecondary institutions in the state and completing postsecondary credentials or degrees in a timely manner? States should require districts, postsecondary institutions or systems, or state K-12 or higher education agencies, as appropriate, to report annual and trend participation and outcome data on dual enrollment students and programs. Ideally, such data would include:

Student characteristics

Beyond the number of students dual enrolled at each postsecondary institution, states should consider collecting and reporting comprehensive information about the characteristics and performance of enrolled students. In particular, state should collect and report the following kinds of information:

- Gender
- High school GPA
- Composite ACT or SAT (if available)

- District, high school, including student's high school and/or district accountability rating, and the percentage of students participating in dual enrollment programs in comparison to their representation in the district/high school student body
- Low-income status
- Race/ethnicity
- Special education status
- ELL status
- Institution and institution type (for example, are certain institutions serving disproportionate numbers of minority or nonminority students?)

Course/high school completion

- Number of dual enrollment credits attempted vs. credits earned
- The number or percentage of courses completed by the average or median student each year as well as the highest number of courses completed by all students by year. Are there very many high school juniors and seniors who are completing 50 percent or more of their coursework through college courses — and who are these students (by geography, other subgroup data described above)?
- Subject areas of courses completed, by postsecondary institution
- High school graduation rates among dual enrollment participants, disaggregated by student and institutional indicators

Postsecondary enrollment and postsecondary readiness

- Subsequent enrollment in various types of postsecondary institutions (two- vs. four-year, selective versus less-selective) by dual enrollment students, disaggregated by student data
- Postsecondary remediation rates of dual enrollment students (disaggregated by various student and postsecondary institution indicators). What percentage of students who took dual enrollment English find themselves in a remedial writing course? Are students who took dual enrollment English still taking remedial English (or any other remedial course) at the same rates as college freshmen who did not take a dual enrollment course?

Transferability of credit

- The percentage of students' dual enrollment credits recognized at the postsecondary institution in which they matriculate as freshmen
- The number of courses taken through dual enrollment that students ultimately retake because the matriculating institution did not recognize the dual enrollment course (this figure may differ from that in the bullet above, given student decisions not to retake the course for which they were denied transfer credit)
- The total cost for the state and school district for students having to retake courses for which dual enrollment credit was previously awarded (cost of course plus tuition)

Persistence and success

- Second-year retention data for former dual enrollment students (disaggregated by various student and institution indicators, both for the dual enrollment institution and the matriculating institution)
- Six-year postsecondary completion rate of former dual enrollment students (disaggregated by the same student and institution indicators)

- College GPA of dual enrollment students (including and not including courses they took while still high school students). To what degree do these GPAs differ from students who did not complete dual enrollment courses?
- Degrees that former dual enrollment students complete

Reporting requirements could also take a state's geography or unique program characteristics into account: For example, are there large rural areas in the state with limited physical access to postsecondary campuses? Are dual enrollment programs geared in part toward serving special populations, such as former dropouts?

States must also consider the appropriate audiences to receive such reported information, such as policymakers, district officials or school/district accountability report cards, as well as appropriate avenues for audiences to access information, including publicly available online. And if so, are data published on district and institution websites or only on agency websites?

Component 12: Programs undergo evaluation based on available data

The number of states with policies requiring dual enrollment programs to undergo internal or external evaluation doubled from 2008 to 2013, from 13 to 26 states. As with state policies on the reporting of dual enrollment data, evaluation policies vary widely — some policies simply require programs to establish an evaluation process or be evaluated based on local criteria, while others go farther.

Twenty-six states require dual enrollment programs to be evaluated. Twenty-four states and the District of Columbia do not have state-level policies requiring dual enrollment programs to undergo evaluation.

North Carolina, for example, requires the North Carolina Community College System and the department of public instruction to jointly develop and implement a program accountability plan to evaluate short-term and long-term outcomes for Career and College Promise. Outcomes to be measured must include:

- The impact of dual enrollment on high school completion
- The academic achievement and performance of dually enrolled high school students
- The number of students who successfully complete college certificates while dually enrolled
- The impact of dual enrollment and certificate completion on enrollment in college
- The persistence and completion rates of students who continue into college programs after high school graduation
- The academic achievement and performance of students who continue into college programs after high school graduation.[40]

Colorado statute creates a dual enrollment advisory board tasked with making recommendations to the general assembly, the state board and the commission concerning the improvement or updating of state policies relating to dual enrollment programs, including policy recommendations that would allow every local education provider in the state to have adequate resources to enter into at least one cooperative

agreement. The board must annually submit a report to the state board and the commission on higher education that includes guidelines for the administration of the ASCENT program and board recommendations for state policy changes.[41]

Transferability of credit

Component 13: Postsecondary institutions should accept and apply credit earned through dual enrollment as standard transfer credit

An increasing number of states – (22 states in 2014, up from 15 states in 2008) – require dual enrollment credits to be treated for transfer credit in the same manner as credits earned at the receiving institution, or include dual enrollment courses in a statewide guaranteed transfer list recognized by all public two-and four-year institutions. In adopting these transfer policies, some states have taken steps to assuage postsecondary institutions' fears that dual enrollment courses for transfer credit do not reflect quality postsecondary coursework.

In Florida, any course that has a statewide-numbering system number must be accepted by Florida public institutions as if the course were taken at their institution. …

The department of education must develop a statement on transfer guarantees to inform students and their parents, prior to enrollment in a dual enrollment course, of the potential for that course to be "counted" as an elective or a general education course in a postsecondary degree program.

In one example, **Minnesota** requires the Board of Trustees of the Minnesota State Colleges and Universities and the Board of Regents of the University of Minnesota (and requests private and nonprofit and proprietary postsecondary institutions in the state) to award postsecondary credit for any course offered through a program certified by the National Alliance of Concurrent Enrollment Partnerships.[42]

Florida not only provides for the transferability of courses, it makes sure to get the word out. Statute directs the department of education to develop a statement on transfer guarantees to inform students and their parents, prior to enrollment in a dual enrollment course, of the potential for the dual enrollment course to articulate as an elective or a general education course into a postsecondary education certificate or degree program. The statement must be provided to each district school superintendent, for inclusion in the information provided to all secondary students and their parents as required above. The statement may also include additional information, including dual enrollment options, guarantees, privileges and responsibilities.[43]

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The conclusions presented in this report are those of ECS, which receives the majority of its funding from the member states it serves. State policymakers seeking additional information on this topic should contact author Jennifer Dounay Zinth at jdounay@ecs.org. As part of the services ECS provides to states, staff members are available for consultation and to serve as third-party experts in legislative hearings.

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State approaches to funding dual enrollment

Jennifer Zinth

Research shows that students who dually enroll are more likely to finish high school and succeed in postsecondary education than their peers with a similar grade point average (GPA), test scores, demographics, etc.[1] Yet in many states, students and parents are largely – if not entirely – responsible for covering dual enrollment course costs, placing these courses out of reach of students in greatest need.

This Education Commission of the States policy analysis explores approaches states are taking to minimize – or completely eliminate – tuition and other costs for dually enrolled students. For each state highlighted, this report describes the state's mechanism for funding dual enrollment, the potential benefits and drawbacks of each approach, student access and program outcomes, and considerations on the politics or culture underlying these funding approaches.

> To ensure that all eligible students have equal access to dual enrollment courses, states may consider funding models that place dual enrollment tuition costs with the state or district instead of the student.

KEY TAKEAWAYS

While states are increasingly committed to expanding dual enrollment access, it has not consistently included eliminating financial barriers to participation, either overall or among low-income students.

Models to effectively support dual enrollment costs require states to establish consistent, predictable and adequate funding streams.

Many states removing the tuition burden from dually enrolled students see larger proportions of minority and low-income students participating in dual enrollment programs.

Why dual enrollment funding matters

Research increasingly bears out the benefits of participating in dual enrollment. Compared with their peers with similar high school academic performance and demographics, students who have participated in dual enrollment coursework share the following characteristics:

- More likely to meet college readiness benchmarks.[2]
- More likely to enter college, and enter shortly after high school graduation.[3]
- Less likely to place into remedial English or math.[4]
- Higher first-year GPA.[5]
- Higher second-year retention rates.[6]
- Higher four- and six-year college completion rates.[7]
- Shorter average time to bachelor's degree completion for those completing in six years or less.[8]

Beyond these quantitative outcomes, dually enrolled students cite additional benefits, including seeing themselves as college material by experiencing and succeeding in college-level coursework and having the opportunity to "try on" different career/technical education (CTE) pathways or majors before deciding upon a postsecondary institution, degree or certificate program. States increasingly are taking a second look at dual enrollment policies originally enacted to serve academically oriented high-achievers and reframing these programs to broaden access to middle-achieving students in both academic and CTE courses. Some states have even adopted a statement of purpose in statute or regulation, to make clear that the purpose of dual enrollment programs is to increase postsecondary participation and success among traditionally underserved students.

Yet this commitment to expanding dual enrollment access has not consistently included eliminating financial barriers to participation, either overall or among low-income students. A 2015 Education Commission of the States analysis of dual enrollment policies found that in:

- Nine states, the student or parent is responsible for covering tuition costs.
- Eleven states, differing entities are responsible for covering dual enrollment tuition costs, depending on the program a student enrolls in. In nine of these states, the parent/student is responsible for some or all tuition costs under at least one dual enrollment program.
- Fourteen states and the District of Columbia, determinations of who is responsible for paying dual enrollment tuition are made locally – by the student's high school or district and the partnering postsecondary institution.[9]

In practice, when dual enrollment tuition decisions are determined locally, access to dual enrollment courses can vary considerably district by district. Students in some districts pay little to no tuition if the district, postsecondary partner, foundation, or business representative (or some combination thereof) steps up to cover costs, while students in the next district over must cover all tuition costs to access similar coursework.

To ensure that all eligible students – regardless of family income or geography – have equal access to dual enrollment courses, states may consider funding models that place dual enrollment tuition costs with the state or district. This report explores several of these funding models by looking at approaches taken in Florida, Iowa, Minnesota, North Carolina and Utah.

When the district funds

In four states – Colorado, Florida, Iowa and Wyoming – the district is responsible for covering dual enrollment tuition costs. This analysis focuses on Florida and Iowa.

Snapshot of Florida and Iowa's dual enrollment funding mechanisms

Florida

Under Florida statute, school districts pay public postsecondary institutions the standard tuition rate per credit hour from funds provided in the Florida Education Finance Program (that is, districts' general operating funds) when the dual enrollment course takes place on the postsecondary campus during the fall or spring term. If the course is taught at the high school by postsecondary faculty, the district reimburses the costs associated with the institution's proportion of salary and benefits to provide the instruction. If a high school instructor teaches the course, the district is not responsible for payment to the postsecondary institution. A district may not deny a student access to dual enrollment unless the student does not meet statutorily defined eligibility requirements.[10]

Prior to legislative action in 2013, the tuition cost was absorbed by postsecondary institutions. Each agreement between a postsecondary institution and district to offer dual enrollment courses was required to include "a delineation of institutional responsibilities for assuming the cost of dual enrollment courses and programs." The tuition responsibility was transferred to districts in 2013 after postsecondary institutions supported legislation to create an alternative funding mechanism to cover dual enrollment costs.

Iowa

Iowa's Senior Year Plus is an umbrella program encompassing concurrent enrollment, the Postsecondary Enrollment Options program (PSEO), Advanced Placement (AP), career academies, regional academies and, most recently, Project Lead the Way. Under concurrent enrollment, the state's largest dual enrollment program by far, a district contracts with a community college to offer a course at the high school or community college, or online. PSEO allows students, primarily 11th- and 12th-graders, to take courses at an eligible two- or four-year postsecondary institution.

Although districts are responsible for tuition costs under both concurrent enrollment and PSEO, there are substantive differences by program in the amount paid and financial assistance provided to districts by the state. Under concurrent enrollment, a district is responsible for paying the community college per the terms stipulated in the agreement with the college — this may be the full tuition charged a traditional community college student or a discounted amount. This program is relatively unique because concurrent enrollment students generate an additional weight in the school funding formula. Specifically, the funding formula for a concurrent enrollment student is the district's state allocation times the percent of time the student is enrolled in the course compared to the entire school year times the weighting factor of either 0.46 or 0.7, depending on whether the student is enrolled in a general arts and sciences course or CTE course.

Under PSEO, districts reimburse the postsecondary institution for the cost of the course, up to $250 per student, from their general funds. This $250, a rate set in the 1980s, must cover all institutional costs, including tuition, fees, textbooks and any other course materials that do not become the student's property at the end of the course.

What are the benefits of these funding approaches?

In Florida, postsecondary institutions benefit from no longer being required to absorb program costs associated with providing dual enrollment courses. Recognizing dual enrollment's potential as an effective outreach or recruitment strategy, institutions may in theory be translating this reduced financial burden into providing additional services to dually enrolled students, such as advising in course selection or how to handle a college course.

In Iowa, students have access to rigorous, college-level coursework at little to no cost because of concurrent enrollment and PSEO. Additionally, concurrent enrollment increases community college enrollment, as participating students become an ever larger proportion of the overall community college student body. The increasing percentage of concurrently enrolled students may also be helping to soften the overall decline in community college enrollment. A 2014 Iowa Department of Education report notes, "Since FY 2004, joint enrollment has increased 104 percent — approximately 7.4 percent per year. Enrollment growth of jointly enrolled students outpaced the growth of total credit enrollment, which declined 2.9 percent from last year."[11] Because of the state's commitment to offering concurrent enrollment, districts benefit from a supplemental student weight of 0.7 for each CTE course enrollment and 0.46 for each liberal arts and sciences course enrollment, offsetting the cost of providing these opportunities.

As demand for concurrent enrollment increases, districts and community colleges are looking for innovative ways to collaborate and share resources. One example is the regional center model, which stems from a partnership between a community college and several area school districts – usually contiguous and rural – that send their students to a central location where students enroll in CTE and arts and science concurrent enrollment coursework. In this way, school districts and the community college leverage resources and supplementary weighting funds to provide students access to high-quality, college-level coursework that may not be otherwise feasible.

What are the potential drawbacks of these funding approaches?

One significant drawback is that districts need to dip into operating expenses to cover tuition costs. Under-resourced school districts, in particular, may struggle to absorb this additional cost. However, notes Matthew Bouck, director of articulation for the Florida Department of Education, even prior to the 2013 legislation shifting tuition costs from postsecondary institutions to districts, some districts were encouraging AP or other acceleration methods over dual enrollment. Bouck adds that, generally speaking, most Florida districts have tried to set parameters on dual enrollment programs in their articulation agreements with postsecondary institutions, for instance, by limiting the number of credits a student may take, or limiting program access to the students who outshine their peers in meeting eligibility requirements.

Data from Florida and Iowa support the potential benefit of these funding approaches to student participation. Since the 2013 Florida enactment shifting tuition responsibility to districts, no significant upward or downward trends in dual enrollment participation have been observed, either statewide or within individual districts. In fact, dual enrollment participation has continued the growth trend that began before the 2013 policy change.

Iowa leads the nation in enrollment of students younger than 18 in community colleges. In the 2013-14 school year, roughly 30 percent of all Iowa community college students were high school students.[12] These figures translated into approximately 37,000 concurrent enrollment students and 3,335 PSEO students in FY 2014.[13] More details can be found in the state's 2014 *Joint Enrollment Report.*[14]

In Iowa, PSEO causes postsecondary institutions to lose funds because the $250 districts pay to cover tuition and fees, textbooks and course materials seldom covers the actual expenses of providing these courses. While concurrent enrollment generates an additional weight to offset course costs (and enrolls far more students in the state than PSEO), the program does pose challenges.

As Eric St. Clair of the Iowa Department of Education observes, the supplemental 0.46 weight for general arts and sciences courses and supplemental 0.7 weight for CTE courses covers only a portion of the cost of offering the course – it does not cover, nor is it intended to cover, the full cost of offering the course. The amount a district pays to a community college is not set by statute; rather, this amount is negotiated between the school district and community college. Districts are more likely to pay full or close to full tuition for certain CTE or science, technology, engineering and mathematics (STEM) courses that bear significant equipment costs. As districts offer an increasing number of concurrent enrollment courses, the amount the district must cover continues to grow as well. Finding the right balance of program offerings can be tricky in the face of large student and parent demand for concurrent enrollment.

What are the political or cultural considerations for states considering these approaches?

Bouck suggests that Florida's long-standing dual enrollment policy (adopted in 1993) and the large number of dual enrollment participants over the decades (close to 60,000 in the 2014-15 school year) have firmly rooted the program in the state, making the shift from tuition covered by postsecondary institution to district less problematic than might be in a state with a shorter history of dual enrollment or smaller percentage of participating students. Bouck adds that states must keep in mind how districts will be impacted by a potential loss of operating funds.

Florida's 2013 policy change has resulted in districts having to use about 40 percent of a participating student's full-time equivalent (FTE) to cover program costs. Another state following Florida's lead might need to lead up to a policy enactment by requiring districts receiving full FTE for dually enrolled students to either demonstrate that FTE costs were being used to cover dual enrollment costs, or show how loss of FTE revenue would negatively impact the district.

Lastly, Bouck proposes that states adopting Florida's approach consider statewide policies and guidelines governing local agreements and program implementation. Much of what happens in Florida is determined in local articulation agreements, which must align with numerous components set forth in statute and regulations. Not specifying the content and parameters of articulation agreements may result in numerous variations in program access or program quality from one district to another.

Iowa's St. Clair notes that providing an additional student weight for dually enrolled students would require a state to truly commit to dual enrollment. In 2013-14, districts received approximately $18 to $20 million from these additional weights.

> "Another state following Florida's lead might need to lead up to a policy enactment by requiring districts receiving full FTE for dually enrolled students to either demonstrate that FTE costs were being used to cover dual enrollment costs, or show how loss of FTE revenue would negatively impact the district."

When the state funds

In Minnesota, it is long-standing practice for the state to fund the cost for students earning both high school and postsecondary credit on a college campus. More recently, funding also supports students taking dual credit courses at the high school. Meanwhile, North Carolina community colleges have a long history of offering dual enrollment courses with no tuition cost to students. Yet the two states cover tuition costs through very different mechanisms.

Snapshot of North Carolina and Minnesota's dual enrollment funding mechanisms

North Carolina

North Carolina's Career & College Promise courses are offered primarily by community colleges. The state legislature reimburses FTE costs to the community college system based on participation reports from the previous academic year. Community colleges use this same mechanism for legislative reimbursement for traditional college students.

Minnesota

Minnesota offers two statewide dual enrollment programs. Under Postsecondary Enrollment Options (PSEO), the nation's first statewide dual enrollment policy, established in 1985, students may take postsecondary coursework at postsecondary campuses. Statute specifies a funding formula the Department of Education must use to reimburse colleges and universities: 88 percent of the product of the per-pupil formula allowance minus $425, multiplied by 1.2 and divided by 30 for institutions on a semester calendar, or divided by 45 for institutions on a quarter calendar.[15] In other words, for full-time PSEO students who do not take any courses at the high school, the formula above is used to fund the student taking PSEO courses at the postsecondary institution. The school district keeps the remaining 12 percent of the state per-pupil funding for that student.

For students enrolled in courses at the high school part time, the percentage of formula allowance is adjusted to reflect the amount of time a student receives instruction at the high school. Postsecondary institutions are reimbursed per credit for PSEO students each semester through this formula.

A postsecondary institution may not charge a student enrolled in a course for secondary and postsecondary credit for fees, textbooks, materials, support services or other necessary costs, except for equipment purchased by the student that becomes the property of the student.[16]

Under the more recent concurrent enrollment model, courses are taught by high school instructors or postsecondary faculty at the high school, or another location, according to an agreement between a public school board and the governing body of an eligible public postsecondary system or an eligible private postsecondary institution. The actual costs school districts must pay are determined by local agreements between districts and postsecondary partners. If the course is taught by a secondary instructor, the postsecondary institution may not require payment that exceeds the cost to the postsecondary institution that is directly attributable to providing that course.[17]

Statutory language states that districts must receive from the state up to $150 per student enrolled in a concurrent enrollment course; however, this is based on a fixed annual state appropriation, which is currently $2 million. If the appropriation does not cover the full $150 per-student, per-course cost, the district covers the balance. These appropriated funds must be used to defray the cost of delivering the course at the high school, with the school or district covering any remaining balance, including the cost of the high school teacher's salary, course materials and other classroom-related expenditures. However, for districts to be eligible for program aid, postsecondary programs offering the courses must be accredited by the National Alliance of Concurrent Enrollment Partnerships, in the process of being accredited, be shown by clear evidence to be of comparable standard to accredited courses, or be technical courses within a recognized career and technical education program of study approved by the commissioner of education and the chancellor of the Minnesota State Colleges and Universities.[18]

What are the benefits of these funding approaches?

North Carolina agency staff cite the following benefits of the Tar Heel State's dual enrollment funding approach:

- *Full funding for K-12 and postsecondary partners:* Students generate full average daily membership (ADM) for their districts and campuses do not lose funds due to program participation. Colleges don't have any disincentive or greater incentive to offer Career & College Promise courses — participants are just part of the student body.
- *Simple:* Students simply register as community college students. Sometimes they're in courses designed for high school students, sometimes they're enrolled in regular postsecondary courses.
- *Assists in program planning:* K-12 and postsecondary partners can more easily plan courses and budgets when they know they'll be fully funded for participating students. Full funding also does not restrict the schools from providing appropriate scheduling for each individual student. If funds were capped, compromises would be required and students wouldn't necessarily be allowed to maximize their opportunity for accessing appropriate coursework.

Lisa Eads of the North Carolina Community College System Office notes that under the state's articulation agreement, Universal General Education Transfer Component courses in the Career & College Promise college transfer pathway (that is, leading either to the Associate of Arts or Associate of Science) are recognized as transfer credit by all public two- and four-year institutions in the state. Because of this transfer agreement, the state is saving money by not funding courses that will only earn students elective credit at another public postsecondary institution in the state.

> "Because of North Carolina's transfer agreement, the state is saving money by not funding courses that will only earn students elective credit at another public postsecondary institution in the state."

Minnesota agency staff note that under both PSEO and concurrent enrollment:

- *The student is held harmless to participate in the program:* Students and their families incur no costs for participating in PSEO or concurrent enrollment.

In addition, under PSEO:

- *Eligible postsecondary institutions receive funding for participating students through the PSEO formula, which provides tuition revenue to the institutions:* PSEO students are also counted toward the full-year equivalent student enrollment formula from the state's appropriation model to public postsecondary institutions.
- *School districts are not involved in funding disbursements to postsecondary institutions:* Under PSEO the Department of Education, not districts, is responsible for the financial administration of the program.
- *From the state's perspective, no additional appropriation necessary:* Using general education funds to reimburse postsecondary institutions eliminates the need for a separate appropriation.
- *Funding is tied to general education funding:* Because the funding for PSEO is not tied to a fixed appropriation, unlimited students can be supported.

Under concurrent enrollment, agency staff observe:

- *Concurrent enrollment may be more accessible to students based on their geography or ability to get to and from a college campus.*
- *Local school districts and postsecondary institutions reach a local agreement that works for both partners:* This local agreement outlines the roles and responsibilities of each partner to create a mutually beneficial arrangement.
- *The full per-pupil funding for students taking concurrent enrollment courses remains at the school district:* Unlike the PSEO formula, this funding model may be more sustainable for school districts.

Postsecondary Enrollment Options (PSEO) Program Participation

PSEO Participants	FY 08 (2007-08)	FY 09 (2008-09)	FY 10 (2009-10)	FY 11 (2010-11)	FY 12 (2011-12)	FY 13 (2012-13)	FY 14 (2013-14)	Percent Increase (2007-14)
Free/ Reduced Price Eligible	828	939	921	992	1,139	1,319	1,371	40%
American Indian	46	64	43	47	60	63	78	41%
Asian/Pacific Islander	391	373	405	452	473	498	578	32%
Hispanic	100	119	32	132	156	226	226	56%
Black	304	357	281	321	334	410	408	25%
White	4,704	4,774	4,759	4,892	5,330	5,718	5,741	18%

Source: Minnesota Department of Education, *Rigorous Course Taking: Advanced Placement, International Baccalaureate, Concurrent Enrollment and Postsecondary Enrollment Options Programs, Fiscal Year 2014 Report to the Legislature,* February 2015.

Concurrent Enrollment Program Participation

Concurrent Enrollment Eligible for Aid	FY 09 (2008-09)	FY 10 (2009-10)	FY 11 (2010-11)	FY 12 (2011-12)	FY 13 (2012-13)	FY 14 (2013-14)	Percent Increase (2009-14)
Free/Reduced Price Eligible	2,744	3,460	3,204	3,495	3,859	4,309	36%
American Indian	186	230	202	239	254	237	22%
Asian/Pacific Islander	713	850	764	810	1,019	1,175	39%
Hispanic	288	405	424	432	552	678	58%
Black	386	507	391	430	543	659	41%
White	17,407	19,143	18,501	19,784	21,216	22,007	21%

Source: Minnesota Department of Education, *Rigorous Course Taking: Advanced Placement, International Baccalaureate, Concurrent Enrollment and Postsecondary Enrollment Options Programs, Fiscal Year 2014 Report to the Legislature,* February 2015.

Career & College Promise has been a boon to dual enrollment participation. Before multiple programs were consolidated in 2011, total state enrollment in various dual enrollment programs attained 10,808 students in 2008-09. Legislative changes from 2009 to 2011 led to decreases in program participation each subsequent year. However, after Career & College Promise had been in place for a full academic year (2012-13), participation soon exceeded former levels. In 2013-14, 11,389 FTE students took part in Career & College Promise and other joint enrollment programs, marking a 5.3 percent increase from the 2008-09 participation record.[19]

In Minnesota, participation in concurrent enrollment and PSEO is rising. From 2008-09 to 2013-14, concurrent enrollment participation grew 23 percent, from 18,980 to 24,731 public school students. During that same period, growth in student of color participation in concurrent enrollment was twice the growth in white students' participation – a 43 percent increase in student of color participation compared to a 21 percent increase in white students' participation. Over the five-year span the number of concurrent enrollment and PSEO students eligible for free/reduced lunch increased 36 percent and 40 percent, to 4,309 and 1,371 students, respectively, making 17 percent and 19.5 percent of the 2013-14 participants in these programs a low-income student.[20]

What are the potential drawbacks of these funding approaches?

North Carolina agency staff cited the potential that, if a community college had a limited number of faculty, a campus could offer fewer slots for Career & College Promise students in order to accommodate traditional or adult community college students.

Minnesota's funding mechanisms invite the following considerations:

- *Importance of linking program appropriations to program growth:* Unlike PSEO, which is supported by general education funds, concurrent enrollment is funded through a fixed appropriation. If there is a mismatch between program growth and the amount appropriated, the allocation may be insufficient to fully fund concurrent enrollment programs. This can create a budget burden for schools and districts to allocate discretionary funds to make up the difference between the state's appropriation and program costs. Appropriations need to take into account the growth of concurrent enrollment participation over time.
- *Importance of how funding structures may adversely impact school districts or postsecondary institutions:* The funding structure for PSEO, for example, can be a disincentive for small districts, which can be greatly impacted financially by any portion of their high school students electing to take their high school courses through PSEO on the college campus. For instance, when enrollment for high school courses is reduced by students taking PSEO courses, this can make it more difficult for schools to sustain courses and programming and even staffing for the students who remain at the high school for their courses. For some postsecondary institutions, the reimbursement amount of the PSEO funding formula may be less than the amount of the average course tuition.
- *Importance of program implications on school districts and postsecondary institutions:* Although school districts do not have to manage the financial administration of the PSEO program, they are still responsible for many other administrative processes, such as coding students correctly, advising students on which courses meet high school graduation requirements, supporting student success in the high school and college courses, and supporting student participation in extracurricular activities. Postsecondary institutions also incur administrative costs such as textbook management, student coding and student advising.
- *Importance of a shared responsibility funding model that incentivizes all partners:* Although Minnesota's funding model has allowed opportunities for students to have access to dual credit, the model can continue to be refined to create a win-win-win for K-12, higher education and students.

What are the political or cultural considerations for states considering these approaches?

North Carolina agency staff raised the following considerations:

- *Funding community colleges in arrears:* This may be a significant culture shift in some states.
- *Fully funding K-12 and postsecondary partners:* When states start taking money away from schools, the temptation arises to make decisions that are not in students' best interests. If states want children to benefit, K-12 and higher education need to be fully funded. Fully funding both partners may be a difficult sell to some legislatures, especially during lean budget years.

Minnesota agency staff echo North Carolina staff in the importance of fully funding both K-12 and postsecondary education costs for dual enrollment programs.

When the state covers most – but not all – costs

Utah legislation passed in 2007 provides a relatively unique approach to funding concurrent enrollment. The state continues to subsidize the program, but students now pay minimal tuition.

Snapshot of Utah's dual enrollment funding mechanism

Utah statute provides for an appropriation to be made to the state Board of Education, to be allocated proportionally, based upon student credit hours earned in the previous year, between courses that are taught by public school educators and postsecondary faculty. If a course is taught by a high school instructor, 60 percent of the allocation for that course is given the district or charter school and 40 percent is allocated to the board of regents. If a course is taught by a postsecondary faculty member, the formula is reversed.

The annual state appropriation to the state board is based on credit hours earned and the percentage increase in the value of the weighted pupil unit. Among other program reporting requirements, statute requires the state Board of Education and the board of regents to annually report data to their respective education appropriations subcommittee. The board of regents are charged with reporting what higher education tuition would have been charged for the hours of concurrent enrollment credit granted.[21]

This approach was developed in 2007 by Utah State Office of Education and Utah System of Higher Education (USHE) representatives, along with the governor's education advisor. Prior to 2007, districts and charter schools negotiated contracts with public postsecondary institutions and the district or charter school disbursed funds to institutions.

In 2013-14, 26,879 students in Utah completed 187,680 credits.[23] Fully half of the 2010 graduating seniors' cohort took at least one concurrent enrollment course in 11th and/or 12th grade.[24]

Statute does require a modest tuition contribution from the student or parent. Higher education institutions may charge students up to $30 per credit hour for courses taught by postsecondary faculty, up to $15 per credit hour for postsecondary-faculty-led courses delivered via videoconferencing, and up to $10 per credit hour for courses taught by high school instructors (or up to $5 per credit hour for free/reduced lunch-eligible students).[22] In practice, however, all concurrent enrollment students are currently charged $5 per credit hour, because the simplicity of this approach outweighs the institutional expense of verifying which students are in fact eligible for free/reduced lunch.

What are the benefits of this funding approach?

K-12 and higher education agency staff suggest numerous benefits to this approach:

- *Appropriation is embedded in public education budget:* Traditionally, public education's funding is more stable.
- *Appropriation is linked to the weighted pupil unit (WPU):* When the WPU increases, so does the concurrent enrollment appropriation.
- *60/40 formula represents an equitable distribution of funds based on which entity is delivering the course:* Instructional costs are the most expensive element of offering a course.
- *Minimal costs to students and families:* Students and parents currently pay $15 for a three-credit-hour course. This is a significant discount over what families would pay to enroll in a traditional postsecondary course.

What are the potential drawbacks of this funding approach?

Agency staff did not cite any potential drawbacks of this funding approach. Until two years ago, no tuition was charged to concurrent enrollment students. In the 2013-14 school year, the first year tuition was charged, enrollment dipped slightly, but has risen in the 2014-15 school year.

What are the political or cultural considerations for states considering this approach?

States considering implementing Utah's approach would need to ensure that legislators are committed to concurrent enrollment, as the program hinges on an annual appropriation. With legislative commitment and an annual appropriation, access to concurrent enrollment courses becomes less of an issue than it might be in other states. More complex issues, such as assuring equitable program participation by low-income students and first-generation and ethnic minority students, need to be actively addressed.

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Related ECS resources:

Dual enrollment course content and instructor quality (February 2015)
http://www.ecs.org/clearinghouse/01/17/16/11716.pdf

ECS 50-state dual enrollment policy database (last updated February 2015)
http://www.ecs.org/html/educationIssues/HighSchool/highschooldb1_intro.asp?topic=de

Dual enrollment: A strategy to improve college-going and college completion among rural students (June 2014)
http://www.ecs.org/clearinghouse/01/12/61/11261.pdf

CTE Dual Enrollment: A Strategy for College Completion and Workforce Investment (March 2014)
http://www.ecs.org/clearinghouse/01/11/50/11150.pdf

Increasing Student Access and Success in Dual Enrollment Programs: 13 Model State-Level Policy Components (February 2014)
http://www.ecs.org/clearinghouse/01/10/91/11091.pdf

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Computer science in high school graduation requirements

Jennifer Dounay Zinth

Computer science and coding skills are widely recognized as a valuable asset in the current and projected job market. The Bureau of Labor Statistics projects 37.5 percent growth from 2012 to 2022 in the "computer systems design and related services" industry – from 1,620,300 jobs in 2012 to an estimated 2,229,000 jobs in 2022.[1]

Yet some reports point to an alarming absence of female and minority students in courses such as Advanced Placement (AP) computer science. Of AP Computer Science A exam takers in the Class of 2013, 81 percent were male and 82.5 percent were white or Asian/Asian American/Pacific Islander.[2] Code.org reports nine out of 10 K-12 schools don't offer computer programming coursework.[3]

This ECS Education Trends report identifies states that are allowing or requiring districts to apply computer science coursework toward completion of high school graduation requirements in math, science or foreign language. This report also highlights several states that require computer science courses to fulfill requirements for a specialized diploma or endorsement to the standard high school diploma.

> To encourage districts to offer computer science courses – and to encourage students to complete computer science classes – some states have amended high school graduation requirements to either allow or require computer science to fulfill math, science or foreign language course requirements.

KEY TAKEAWAYS

Fourteen states require a student to be allowed to fulfill a math, science or foreign language credit for high school graduation by completing a computer science course.

Two states – Arizona and California – don't require computer science to be recognized statewide as fulfilling graduation requirements, though districts may allow computer science courses to apply toward math requirements.

At least four states – Louisiana, Massachusetts, Texas and Virginia – award a special diploma, endorsement or other recognition to high school graduates who have earned certain computer science credits.

Policies mandating awarding of math, science or foreign language credit

Fourteen states require that students be allowed to apply specified computer science courses toward completion of mathematics, science or foreign language graduation requirements for the standard diploma.

- **Florida**: One math or science unit may be completed by one unit in computer science and the earning of related industry certifications. Computer science may not fulfill Algebra I or higher-level math, or Biology I or higher-level science credit requirements. (West's F.S.A. § 1007.2616(3)(a))
- **Georgia**: Fourth science unit may be completed by Advanced Placement (AP) computer science. (Ga. Comp. R. & Regs. 160-4-2-.20)
- **Idaho**: One math unit may be completed by an AP or dual credit computer science or dual credit engineering course if the student has completed Algebra II. One science unit may be completed by one of these courses. Students taking these courses may not count such courses as both a math and science credit. (IDAPA 08.02.03.105.01(d), (e))
- **Illinois**: One math unit may be completed by an AP computer science course if the student completes Algebra II or an integrated math course with Algebra II content. If a school district offers an AP computer science course to high school students, the school board must designate that course as equivalent to a high school math course and note on the student's transcript that the AP computer science course qualifies as a mathematics-based, quantitative course. (105 ILCS 5/27-22(e)(3), (f-5)
- **Maryland**: AP computer science may fulfill a math credit towards graduation requirements. Another computer science course may fulfill a math credit requirement if the district determines the course meets the math standards required by regulation. (COMAR 13A.04.12.01(A)(2)(a))
- **Michigan**: The Algebra II credit may be partially or fully fulfilled by completing a department-approved formal career and technical education (CTE) program or curriculum, including in computer science, and in that program successfully completing the same content as the Algebra II benchmarks assessed on the department-prescribed state high school assessment, as determined by the department. The third science unit requirement may be fulfilled by completing a department-approved computer science program or curriculum. (M.C.L.A. 380.1278a(1)(a)(i), M.C.L.A. 380.1278b(1)(b))
- **Ohio**: Effective with students entering 9th grade in the 2014-15 school year (Class of 2018), one of the four math units must be chosen from computer programming, probability and statistics, applied mathematics or quantitative reasoning, or any other course approved by the department using standards established by the superintendent. (R.C. § 3313.603 (D)(5)(b))
- **Oklahoma**: 2014 legislation directs the state board to approve an AP computer science course to meet one of the math course requirements for the college preparatory/work ready curriculum if the course is taken in a student's senior year and the student is concurrently enrolled in or has successfully completed Algebra II. (70 Okl.St.Ann. § 11-103.6(G)(3))

  In addition, computer science is one of the units or sets of competencies students opting out of the college preparatory/work ready curriculum may complete to fulfill a math credit. To earn math credit, the course must be taught by a teacher certified to teach mathematics. (70 Okl.St.Ann. § 11-103.6 (D)(2); Okla. Admin. Code 210:35-9-31 (e)(B)(ii))
- **South Carolina**: One unit computer science, if approved by the Department of Education, may be counted toward math requirements. (§ 59-39-100(B))
- **Texas**: The third math credit under the Foundation High School Program (default diploma option effective with entering 9th graders in 2014-15 and available to students in grades 10-12 in 2014-15) may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from a number of courses, including AP computer science and Discrete Mathematics for Computer Science. (19 TAC § 74.12(b)(2)(B))

  Students under the existing Minimum, Recommended or Advanced high school programs (available to students in the Classes of 2015-2017) may earn one unit math credit for completing AP computer science or Discrete Mathematics for Computer Science.

(19 TAC § 111.61(d), 19 TAC § 74.72(b)(2)(B), 19 TAC § 74.73(b)(2)(B), 19 TAC § 74.74(b)(2)(A))

In addition, students under the Foundation High School Program may fulfill two units of Languages Other Than English (LOTE) by completing two credits in computer programming languages selected from Computer Science, I, II and III. To apply to the LOTE requirement, these credits must be earned before September 2016. Effective both before and after September 2016, if a student, in completing the first credit of LOTE, demonstrates that s/he is unlikely to be able to complete the second credit, the student may substitute another appropriate course, including computer programming languages. (19 TAC § 74.12(b)(5)(A), (B))

- **Utah:** The three science credits must be fulfilled, at a minimum, by two courses from the five science foundation areas, one of which is computer science. (R277-700-6(C)(3)(a)
- **Virginia**: 2014 legislation directs the state board to consider all computer science course credits to be math, science or CTE course credits, and to develop guidelines on how computer science credits can satisfy graduation requirements. (VA Code Ann. § 22.1-253.13:4(D)(8)) Under those guidelines, adopted by the state board in January 2015, AP Computer Science A may fulfill:
  - A standard graduation credit in math.
  - A standard graduation credit in science when students successfully complete lab science courses from the different science discipline areas in accordance with the 2012 Regulations Establishing Standards for Accrediting Public Schools in Virginia (SOA). For AP Computer Science A to be applied as a standard credit for lab science, the course must include a significant experimental component, as defined in state board guidelines. International Baccalaureate (IB) computer science coursework may be applied as a lab science as part of the recognized IB diploma requirement, which is currently governed under the 2012 SOA regulations.
  - A standard credit in CTE. (Virginia Board of Education Guidelines for the Use of Computer Science Courses to Satisfy Graduation Requirements, January 22, 2015)

  In addition, Virginia permits a student to use a computer science exam as the student-selected end-of-course assessment to fulfill high school exit exam requirements, provided a student completes a CTE program sequence in programming or a related programming sequence and scores 3 or higher on the AP Computer Science A exam. (8 VAC 20-131-50(B)(2), (Virginia Board of Education Guidelines for the Use of Computer Science Courses to Satisfy Graduation Requirements, January 22, 2015)
- **Washington**: Local boards must approve AP computer science as equivalent to high school mathematics or science and denote on a student's transcript that AP computer science qualifies as a math-based quantitative course for seniors taking the course. For a board to approve AP computer science as equivalent to high school math, the student must be concurrently enrolled in or have successfully completed Algebra II. (West's RCWA 28A.230.097(1))
- **Wisconsin**: Effective with diplomas granted in the 2016-17 school year, one math unit may be completed by a computer science course approved by the department of education. (118.33(1)(a)1.)

Policies permitting awarding of math or science credit

In two states, authority to award math and/or science credit toward high school graduation resides with district boards.

- **Arizona**: A district or charter school governing board may approve a rigorous computer science course to fulfill a math credit requirement only if the course includes significant mathematics content and the governing board determines the high school that will offer the course has sufficient capacity, infrastructure and qualified staff, including competent teachers of computer science. (A.R.S. § 15-701.01(B)(2), § 15-183(EE))
- **California**: A district that requires more than two units of math for high school graduation may award up to one math credit for successfully completing a category C-approved computer science course, defined as a course that meets the A-G admission requirements for the California State University and the University of California. (West's Ann. Cal. Educ. Code §51225.35)

Policies on awarding of credit for a specialized diploma/endorsement

In a small number of states, computer science credits may fulfill requirements for a specialized diploma or endorsement to the standard diploma.

- **Louisiana**: To complete a career area of concentration for the college diploma or career diploma, students must complete four elective primary credits in the career major and two related elective credits, including one computer/technology course. Computer Science I and II can each count toward completion of this requirement. (La. Admin Code. tit. 28, pt. CXV, § 2319(C)(2); La. Admin Code. tit. 28, pt. CXV, § 2318(C)(4))
- **Massachusetts**: To earn a Certificate of Mastery with Distinction, a student must, among other criteria, demonstrate accomplishment in both arts/humanities and mathematics/science (defined to include engineering and computer science). To demonstrate accomplishment, a student must achieve minimum scores on two AP exams, two SAT II exams, or one AP or SAT II exam, or one of these exams along with one other achievement, as defined in regulation. (603 CMR 31.02, 603 CMR 31.05)
- **Texas**: A student may earn any of five endorsements to the high school diploma by completing a fourth unit in math, among other requirements. The fourth math unit may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from a number of courses, including AP computer science or Discrete Mathematics for Computer Science (these courses may fulfill the third math credit requirement under the Foundation High School Program). One of the available endorsements is a STEM endorsement. One of the five pathways for completing the STEM endorsement is completion of a coherent sequence of four computer science credits selected from 13 course options. (V.T.C.A., Education Code § 28.025(c-1)(1); Tex. Admin. Code tit. 19, § 74.13(e)(2), (f)(1)(B))
- **Virginia**: A student may earn the Board of Education's Seal of Advanced Mathematics and Technology by, among other criteria, passing a board-approved exam that confers college-level credit in a technology or computer science area. (8 VAC 20-131-50(H)(4))

ENDNOTES

1 United States Department of Labor, Bureau of Labor Statistics, Employment Projections, "Table 2.3, Industries with the Fastest growing and Most Rapidly Declining Wage and Salary Employment," December 2013, http://www.bls.gov/emp/ep_table_203.htm (accessed Jan. 14, 2015).

2 College Board, 10th Annual AP Report to the Nation, Subject Supplement: Computer Science A, 2014 http://media.collegeboard.com/digitalServices/pdf/ap/rtn/10th-annual/10th-annual-ap-report-subject-supplement-computer-science-a.pdf (accessed April 10, 2015).

3 Code.org, Summary of source data for Code.org infographic, n.d. https://docs.google.com/document/d/1gySkltxiJn_vwb8HIIKNXqen184mRtzDX12cux0ZgZk/pub (accessed April 10, 2015).

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Educators, Google tackle the national CS teacher certification problem

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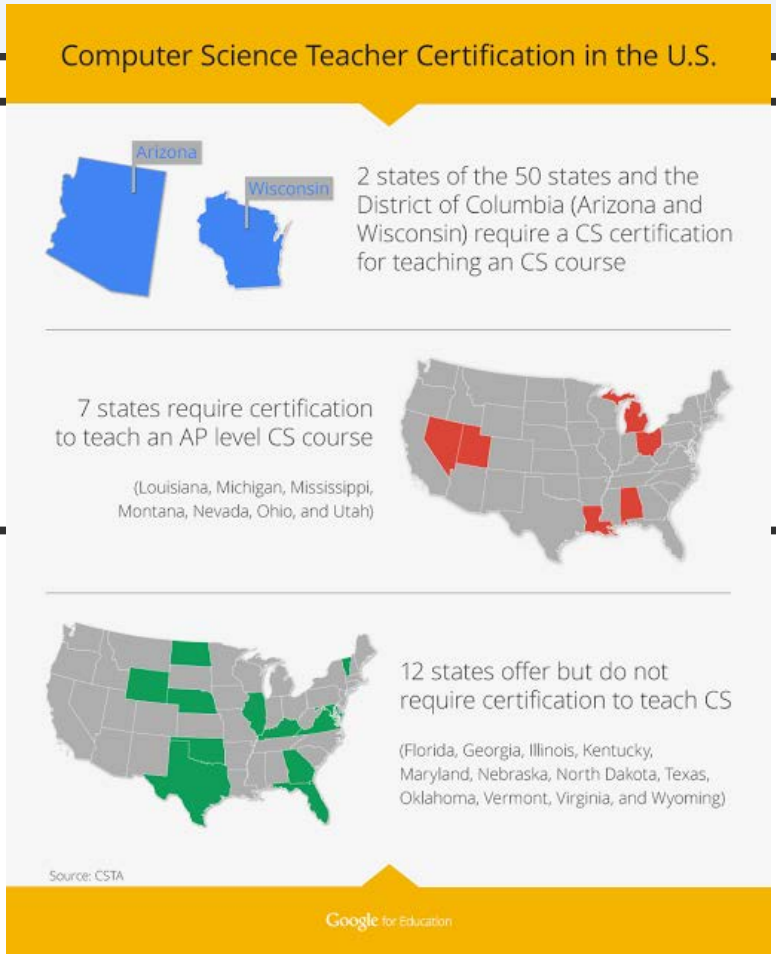

The current state of computer science teacher certification is very much in flux. Many states offer no CS certification courses for middle or high school teachers, and even fewer require teacher certifications before teaching CS classes.

Tech companies such as Google, Microsoft and Oracle are corporate

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sponsors of the Computer Science Teachers Association (CSTA), which advocates for uniform CS teacher certification policies nationwide. In its 2013 report (funded by Google), "Bugs in the System: Computer Science Teacher Certification in the U.S.," the CSTA highlighted states in which teachers with no CS experience could teach the subject, and where no certification programs exist to train them.

(Related: Computer science a big priority for employers)

Deborah Seehorn, a member and past chair of the CSTA's board of directors, said the report's most glaring theme is that due to confusing and conflicting regulations in all 50 states, CS teacher certification in the U.S. simply isn't working.

"We find that CS throughout the nation might be taught by a teacher with a formal CS background, or CS might be taught by a teacher who has a different background—perhaps mathematics, science, or business—who has taken professional development courses in order to teach CS," said Seehorn. "Some states allow any teacher to teach CS courses."

Teacher certification in every discipline varies on a state-by-state basis, just as it does with CS teacher certification. Seehorn, who is also a business, finance and IT education consultant at the North Carolina Department of Public Instruction, believed that if computer science were considered a "core" subject like mathematics or science (and thus required for graduation), it would help ensure individual state adoption of CS teacher certifications. The CSTA Advocacy and Leadership Team members in every state advocate toward this end.

The CSTA provides an interactive map of states that do or do not offer or require CS teacher certifications.

How the CSTA and Google are trying to help

Founded in 2004 as a subsidiary of the Association for Computing Machinery, the CSTA provides K-12 CS teachers and students a variety of curriculum resources, professional development resources, and certifications. In 2011, it published the CSTA K-12 Computer Science Standards, a framework matched to the Common Core standards for teachers, administrators and policy makers to develop K-12 computer science education offerings in their own states and school systems.

Next page >

1 2

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About Rob Marvin

Rob Marvin has covered the software development and technology industry as Online & Social Media Editor at SD Times since July 2013. He is a 2013 graduate of the S.I. Newhouse School of Public Communications at Syracuse University with dual degrees in Magazine Journalism and Psychology. Rob enjoys writing about everything from features, entertainment, news and culture to his current work covering the software development industry. Reach him on Twitter at @rjmarvin1.
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To bridge the gap between the CSTA's framework standards and the skills a CS educator needs, the organization encourages the computer science community to offer more "methods courses" to bring theory into educational practice.

"One big stumbling block in the CS teacher certification process is the dearth of computer science education methods courses," said Seehorn. "Whereas mathematics teachers can find methods courses in many colleges and universities, there are few if any offerings for CS teachers. Several states and universities are working to remedy that situation. We are making progress on CS teacher certification, but we are not quite there yet."

Google recently launched an online course called Computational Thinking for Educators. Aligned with the CSTA's standards, the free course teaches educators working with students aged 13-18 the fundamentals of computational thinking. The methods course focuses on concrete classroom use cases in posing and explaining complex and open-ended computer-science problems.

"Addressing the issues with the current teacher preparation and certification system is a complex challenge, and it requires the commitment of the entire computer science community," wrote Chris Stephenson, Google's head of Computer Science Education Programs, in a blog post. She was previously executive director of the CSTA.

"These kinds of community partnerships are one way that Google can contribute to practitioner-centered solutions, and help further the computer science education community's efforts to help everyone understand that computer science is a deeply important academic discipline that deserves a place in the K-12 canon, and well-prepared teachers to share this knowledge with students," she wrote.

A larger federal policy shift, one with the potential to supersede some of the state roadblocks, is currently at the mercy of Congress. The House of Representatives and the Senate are pushing dueling bills to rewrite the Elementary and Secondary Education Act. The Senate's recent rewrite, passed with bipartisan support on July 16, included a provision to consider Career and Technical Education as "core" courses, which Seehorn hoped is an indicator that CS courses will soon be considered core as well.

"Ultimately, CSTA hopes that every student in the U.S. has access to high-quality CS education provided by a high-quality, certified educator," she said. "There is an urgent, ongoing and increasing demand for CS professionals in every sector of the U.S. economy. All students need CS education to be able to function capably in the global knowledge economy."

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