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December 14, 2009

**MEMORANDUM**

**TO:** Legislative Education Study Committee

**FR:** David Harrell

**RE: STAFF BRIEF: DUAL CREDIT PROGRAM EVALUATION**

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During the September 2009 meeting, the Legislative Education Study Committee (LESC) heard a staff report about the implementation of the statewide dual credit program, which had been established through LESC-endorsed legislation in 2007 and amended, also as endorsed by the LESC, in 2008. Among other points, that LESC staff examination focused on the two fundamental issues that had prompted the 2007 legislation in the first place, as expressed in testimony to the committee as early as 2003:

1. the need for reliable data; and
2. the need for uniformity in program features and requirements.

In brief, the staff review found that, while progress has been made on both fronts – the need for reliable data in particular – issues remain in each case.

The report also addressed other aspects of the dual credit program, among them:

- the broad support for the dual credit program at both the secondary and postsecondary levels;
- the status of the appropriation for textbooks and course supplies that the 2009 Legislature had made;

- the special circumstances of state-supported schools; and
- the barriers encountered and changes suggested by secondary and postsecondary respondents to LESC questionnaires.

The staff report also noted the forthcoming first annual evaluation of the dual credit program by the Higher Education Department (HED) and the Public Education Department (PED).

As one of its provisions, the dual credit legislation requires HED and PED to “evaluate the dual credit program in terms of its accessibility to students statewide and its effect on:

1. student achievement in secondary education;
2. student enrollment and completion of higher education; and
3. school districts, charter schools, state-supported schools and public post-secondary educational institutions.”

The two departments are further required to make an annual report, including recommendations, to the Governor and the Legislature.

Because both legislation and agency rules have been in effect only since school year 2008-2009, there are limited data at this point related to these evaluation measures. Nonetheless, the LESC staff report provided some preliminary indications – for example, increased accessibility in terms of increased enrollment in dual credit courses, as shown by data provided by HED. And the attached evaluation by PED and HED provides additional insights.

After some background information, the evaluation report:

- provides an update on the distribution of dual credit textbook funds;
- previews some possible revisions to agency rules governing eligible courses, the Dual Credit Council, and the Uniform Master Agreement between secondary and postsecondary institutions;
- identifies two “areas of opportunity”: (1) the relationship between “articulated courses” and dual credit courses and (2) certain issues with the geographic areas of responsibility assigned to each two-year postsecondary institution; and
- reviews the fiscal impact of the dual credit program, in terms of the reimbursements for tuition waivers for dual credit students and of the projected long-term return on investment.

This first evaluation report contains no recommendations *per se* although it does indicate that, because the dual credit textbook fund process is under review “for improvement . . . , no legislation related to the process is being proposed at this time.”

**Presenters:**

Presenting the evaluation report to the committee are:

- Dr. Rick Scott, Director of P-20, HED;
- Ms. Ally Hudson, P-20 Policy Analyst, HED; and
- Dr. Don Duran, Assistant Secretary, Charter Schools Division, PED.

# ***2009 Annual Evaluation Report: Dual Credit Program***

***December 15, 2009***

## ***New Mexico Public Education Department***

***([www.ped.state.nm.us](http://www.ped.state.nm.us))***

Bill Richardson, Governor  
Diane D. Denish, Lieutenant Governor  
Dr. Veronica Garcia, Cabinet Secretary of Public Education  
Dr. Catherine Cross Maple, Deputy Secretary for Learning and Accountability

## ***New Mexico Higher Education Department***

***([www.hed.state.nm.us](http://www.hed.state.nm.us))***

Bill Richardson, Governor  
Diane D. Denish, Lieutenant Governor  
Dr. Viola Florez, Cabinet Secretary of Higher Education  
Mr. Tino Pestalozzi, Deputy Cabinet Secretary of Higher Education

### ***Dual Credit Council***

#### **New Mexico Public Education Department**

Dr. Melissa Lomax  
Dr. Don Duran  
Carolann Gutierrez

#### **New Mexico Higher Education Department**

Dr. Rick Scott  
Ally Hudson, M.Ed.  
Len Malry, MPA

## **MEMORANDUM**

**TO:** Legislative Education Study Committee  
Senator Cynthia Nava, Chair, Legislative Education Study Committee

**FR:** Dual Credit Council

<i>New Mexico Public Education Department</i>	<i>New Mexico Higher Education Department</i>
Dr. Melissa Lomax	Dr. Rick Scott
Dr. Don Duran	Ally Hudson, M.Ed.
Carolann Gutierrez	Len Malry, MPA

**RE: ANNUAL EVALUATION REPORT: DUAL CREDIT PROGRAM**

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### **INTRODUCTION**

At the September Legislative Education Study Committee (LESC) interim meeting, LESC Staff presented a report on the Statewide Dual Credit Program. In this report, Staff primarily focused on the collection of data and need for uniformity in program features and requirements during the 2008-2009 transitional year. The report also included an update on the status of the appropriation for textbooks and course supplies and outlined special circumstances and barriers for continued implementation of the program.

This report, drafted by members of the New Mexico Public Education Department (NMPED) and New Mexico Higher Education Department (NMHED), will serve as a continued, in-depth analysis of several of the aforementioned themes. It will further analyze issues that have arisen through the process of full implementation of the program, which began in the Fall of 2009.

As we anticipate continued growth and interest in the Statewide Dual Credit Program, it is crucial to continue valuable discussion on the complex details of this state-supported educational program. Only then can we begin to ensure its continued relevance and value for the students of New Mexico.

### **HISTORICAL CONTEXT**

In the 2007 regular session of the New Mexico Legislature, SB 943 (Nava) Dual High School and Postsecondary Credits was passed. SB 943 required NMPED, NMHED, school districts, charter schools, and public postsecondary institutions to collaborate in the creation of a statewide dual credit agreement. In April of 2007, public postsecondary and K12 representatives were invited to join the Statewide Dual Credit Agreement Committee. Representatives from each of these sectors were sought to participate in this important effort by committing to attend five meetings occurring between May and October to fulfill the law's mandate.

The resulting statewide dual credit agreement defined the roles, responsibilities, and liabilities of each school district or charter school, public postsecondary institution, and the student and

student's family. Identical rules were developed for guiding NMPED and NMHED entities. Public Hearings on the rule were held in November 2007, and the rule was recorded in January 2008.

During the 2008 regular session, SB 31 (Nava and Espinoza) Expand Schools in Dual Credit Program was passed. This bill related to education, including state-supported schools in the dual credit program, and provided for dual credit courses to be taken in the summer term. Appropriate rule revisions were made, public hearings were held, and the current version of the rule was adopted in June of 2008.

Complete records of NMHED, 5.55.4 NMAC and PED, 6.30.7 NMAC may be found at the following website:

<http://hed.state.nm.us/content.asp?CustComKey=434865&CategoryKey=434869&pn=Page&Do mName=hed.state.nm.us>

### **NMPED and NMHED Annual Evaluation of the Dual Credit Program**

NMPED and NMHED staff examination of the dual credit program focuses on three fundamental issues that prompted a rough organization of the report. They are:

1. Implementation Year Review: Academic Year 2008-2009; Fall 2009
2. Looking Ahead: Continued Policy and Implementation
  - a. Academic Year 2010-2011
  - b. Long-term Goals
3. Programmatic Cost-Benefit Analysis

Organized around these three themes, the main sections of the report discuss:

- Update on the disbursement of Dual Credit Textbook Funds
- Summary of proposed revisions to New Mexico Administrative Code:
  - Physical Education Activity (HPER) Courses
  - Audit-only Courses
  - Core vs. Elective Courses
  - Dual Credit Council Rotation Schedule
  - Dual Credit Master Agreement Data Elements
- Ongoing 'Areas of Opportunity':
  - Articulated Courses
  - GAR (NMAC 5.2.4)
- Fiscal Impact Review
  - Short-term & Long-term
  - Panoramic Overview: Benefits

### **Disbursement of Dual Credit Textbook Funds**

Tom Sullivan, Executive Director, New Mexico Council of School Administrators, recommended to Dr. Veronica Garcia, Secretary, NMPED, to estimate funds for dual credit instructional materials based on the amount each district and charter school requested in the annual Program Budget Questionnaire. This was done in September 2009, and resulted in obligation of \$1,033,004 for 79 districts and 23 charter schools, and 3 state charter schools. As of November 25, 2009, approximately 50% of eligible districts and schools have approved Budget Adjustment Requests for dual credit instructional materials funds.

The process will be reviewed for improvement, but no legislation related to the process is being proposed at this time. Districts will have more accurate estimates of dual credit textbook needs after SY 2009-2010 enrollments are completed. The textbook money should have an administrative percentage identified, as neither NMPED nor NMHED have staff specifically assigned to the reimbursement review, verification, and reconciliation process. Currently, a .25 FTE assignment has been spread among three PED non-financial staff members who are already operating in a staff shortage environment.

### **Proposed Revisions to NMAC 6.30.7**

#### **Physical Education Activity (HPER) Courses**

According to the proposed changes to rule, physical education activity courses will no longer be accepted as eligible courses within the Statewide Dual Credit Program. As explained by NMPED staff, physical education is an essential and integral component of a total education. As such, HPER courses taught in public high schools are required to meet NMPED Physical Education Content Standards with Benchmarks and Performance Standards. Physical education classes are not the same as athletics classes. The rules to offer and teach physical education classes are different from the rules to offer and teach athletics classes.

Although many secondary institutions offer a variety of health and physical education courses, it has been determined that the HPER requirement for high school graduation remains at the secondary level, and is therefore ineligible for inclusion in the dual credit program.

#### **Audit-Only Courses**

The Dual Credit Request Form states that 'audit' is not allowed for a dual credit course. In this context, 'auditing a course' means taking it without the benefit of receiving credit or a grade.

<http://hed.state.nm.us/content.asp?CustComKey=434865&CategoryKey=434869&pn=Page&DomName=hed.state.nm.us>

It is the intention of the Dual Credit Council to include language to this effect in the proposed revisions to the current dual credit rule.

#### **Core vs. Elective Courses**

Although current NMAC can be confusing with respect to core courses required for high school graduation, the legal opinion received by both NMPED and NMHED is that under current rule core courses may only be taken as part of the Dual Credit Program when there is an approved petition based on 'exigent circumstances.' To clarify, many core courses were allowed to be

taught in the 2008-2009 academic year through the Dual Credit Program because it was defined in rule as a year of transition. However, the Fall of 2009 marked full implementation of the program, and thus excluded any core courses without an appeal.

- One of the primary concerns articulated by NMPED was that core courses should be taught by a state licensed, ‘highly qualified’ teacher. Language to address this issue is currently being discussed by NMPED and NMHED.
- A second concern was a projected shortage of high school math teachers once the new math requirement (i.e. four years of required math in high school) is implemented. This concern led to a proposal to allow the fourth math course to be a Dual Credit Program course.
- A third concern focuses on those students that have outstripped the offerings of the high school curriculum. NMPED and NMHED are currently collaborating on the development of language to provide extended options for these students.

The changes to rule are being proposed to address the aforementioned concerns while leaving in the ‘exigent circumstances’ clause.

### **Dual Credit Council Rotation Schedule**

Leadership of the Dual Credit Council will now alternate every two years, occurring most naturally with the change of the fiscal year in July. Beginning July 2010, NMPED will take the lead for two years, followed by a return to leadership by NMHED in July 2012. The Council will vote on who will be selected as lead.

### **Dual Credit Master Agreement Data Elements**

The Dual Credit Council proposes amendments to the Dual Credit Request Form to request additional data elements including:

- “a unique state” student identification number.
- “student grade level or expected date of high school graduation”
- “student county of residence”
- “student gender”
- “high school credits year”

The addition of such information is critical in tracking progress more efficiently and effectively.

### **Areas of Opportunity**

#### **Articulated Courses**

As mentioned in the LESC September Staff Report, another form of collaboration between secondary and postsecondary schools known as articulated courses predates the Statewide Dual Credit Program. Typically, articulated courses are taught on the high school campus by a high school teacher, frequently in consultation with a postsecondary faculty member. Through arrangement with the college, students can demonstrate college-level competency and, after enrolling at the partnering institution, may earn college credit without repeating a similar course at the IHE.

The key difference between articulated courses and dual credit courses is the timeline for credit earning(s). Through the dual credit program, credits are earned simultaneously at both the secondary and postsecondary institutions. This is in contrast to articulation wherein credit is earned retrospectively, once the student enrolls in the postsecondary institution that was party to the articulation agreement. Up to this point, it has been the interpretation of NMHED that articulated courses are not eligible for funding. Consequently, districts and postsecondary institutions with a history of articulation agreements have encountered frustrating obstacles in adapting to the program's terms mandated in rule.

#### **GAR (NMAC 5.2.4)**

Geographic areas of responsibility (GARs) were created for public community colleges by NMHED rule in 2007. Their stated purpose is “to facilitate the effective planning and delivery of public two-year postsecondary educational programs and services throughout New Mexico, with due regard for economy and efficiency of delivery and the avoidance of unnecessary program duplication.” GARs were established in an effort to try and curtail program duplication and general inefficiencies caused by one community college offering courses and programs in an area traditionally served by another. The GAR map was drafted based off of the boundaries of existing public school districts. With the exception of Santa Fe Community College which only serves the Santa Fe Public School district, all but one of the GARs encompass multiple school districts. Five school districts are located within a Shared Area of Responsibility (SAR) and are serviced by two community colleges.

As a point of clarification, the rule on GAR only applies to two year institutions. Neither online courses nor four-year institutions of higher education are restricted by the boundaries defined in GAR rule.

Since the districts are clearly in the GAR of one or two community colleges, it is clear which community college(s) they should sign Master Agreements with for face-to-face courses in the Dual Credit Program. If for some reason a district in a particular GAR finds that the community college in their service area is unable or unwilling to offer a particular course for dual credit, that college should be agreeable in signing the specified “right of first refusal” so that another college may offer the course(s).

In general the GARs seem to have worked well for the Dual Credit Program; however, some conflicts have occurred:

- Some colleges, although unwilling to offer a specific course, have been reluctant to sign a “right of first refusal” letter to allow another college to offer it;
- Once a “right of first refusal” has been granted for one course, districts sometimes assume that it is for all courses;
- At times it is not that the college responsible for serving a specific GAR will not offer a course, but rather that from the perspective of the district(s) a college from outside the GAR offers something unique (e.g. a particular instructor or a willingness to have the course taught on the high school campus rather than having the students travel to the college campus);

- In one case, when a “right of first refusal” was requested the college guaranteed that it would offer the course, but did not; and
- It seems that many community colleges are unhappy with the restriction of the entrepreneurial spirit imposed by the GARs and/or resent that the four-year institutions are not constrained by GARs.

Complete text of the GAR rule (5.2.4 NMAC) can be accessed at:

<http://hed.state.nm.us/content.asp?CustComKey=193240&CategoryKey=204161&WebFileKey=378863&pn=webfilesview&DomName=hed.state.nm.us>

The GAR map can be found at:

<http://hed.state.nm.us/cms/kunde/rts/hedstatenmus/docs/1060305850-04-22-2008-16-36-53.pdf>

### **Fiscal Impact Review**

#### **Short-term & Long-term**

As a part of the dual funding aspect of the dual credit program, institutions of higher education get reimbursed through the tuition credit formula for the waived tuition of dual credit students. This method was developed and agreed upon effective with the FY09 funding formula (refer to "NMHED Procedure for Tuition Revenue Credit - Revised Feb08"). The reimbursement occurs with a two-year lag and is the result of deducting dual credit student credit hours (SCH) from the tuition credit calculations. Deducting credit hours from these calculations results in an increase in General Fund appropriations for the institutions.

The chart below is an illustration of the projected fiscal impact of the dual credit program on the funding formula. The chart depicts the actual number of student participants in the program and uses that data to estimate an average cost per student. NMHED FY08 data indicates that dual credit students took an average of five student credit hours (SCH) per semester. The chart provides cost estimations at both the 5 SCH and 1 SCH level.

	FY09 Funding Formula		FY10 Funding Formula		FY11 Funding Formula		TOTAL FY09 - FY11	
	Enrollment (FY07 SCH)	Formula Reimbursement	Enrollment (FY08 SCH)	Formula Reimbursement	Enrollment (FY09 SCH)	Formula Reimbursement	Enrollment	Formula Reimbursement
Four-Year Institutions	3,335	\$305,529	6,752	\$596,248	8,051	\$814,777	18,138	\$1,716,554
Branch Community Colleges	18,512	\$872,623	23,576	\$1,106,530	23,492	\$1,081,107	65,580	\$3,060,260
Independent Community Colleges	23,054	\$748,325	23,813	\$802,655	28,936	\$998,031	75,803	\$2,549,011
<b>Total</b>	<b>44,901</b>	<b>\$1,926,477</b>	<b>54,141</b>	<b>\$2,505,433</b>	<b>60,479</b>	<b>\$2,893,915</b>	<b>159,521</b>	<b>\$7,325,825</b>
Percent change from prior year			20.6%	30.1%	11.7%	15.5%		

# Students / Avg. cost per student	8,980	\$214.52	10,754	\$232.98	12,096	\$239.25	31,830	\$230.15
(FY08: average 5 SCH per student)	(estimate)		(actual)		(estimate)		(estimate)	
Average cost per student credit hour		\$42.90		\$46.28		\$47.85		\$45.92

The calculations provided by NMHED do not consider the potential effect of dual credit enrollment on other components of the funding formula.

**Panoramic Overview: Benefits**

Given that the P-20 student longitudinal data system has not yet been fully implemented, there is little state data on the positive outcomes of student participation in dual credit programs. Regardless, in researching national data NMPED and NMHED have identified a number of benefits for these types of educational opportunities, among them:

- *Reducing college costs:* Dual credit courses help families offset the expense of college tuition. College credits acquired through dual credit programs are considerably less expensive than tuition costs incurred during traditional college study.
- *Speeding time to degree completion:* One of the most consistent findings in studies of dual credit programs is that students participating in dual credit programs are able to complete their degrees in less time than non-participating students.
- *Improving the curriculum for high school students:* The addition of college coursework into high school curricula enhances the options available to high school students while adding college level rigor.
- *Facilitating the transition between high school and college:* Dual credit courses help prepare students for the transition to college by engaging them in college level work and developing pathways to degree attainment.
- *Enhancing connections between high schools and colleges:* Relationships established between high schools and colleges in developing dual credit programs improve communication between secondary and postsecondary education. This aids in developing alignment of curricula as well as articulation of courses and transfer modules.
- *Offering opportunities for improving degree attainment for underserved student populations:* Dual credit programs offer college credits to underrepresented students who are able to meet academic standards for participation. Some students may not consider attending college, but are encouraged to attempt such courses through dual credit because the costs are lower, the setting is more familiar, and the courses are readily accessible. Achieving success in these courses can act as a gateway to continuing down the college pathway.

Benefits of dual enrollment also extend to community colleges that offer a wide variety of technical and career-oriented programs. By enrolling in coursework from these programs, students can finish high school with a technical or industrial certification as well as the skills they need to find a job in the competitive professional market.

### Regaining Investment in the Program

The Statewide Dual Credit program may reduce the net tuition costs for students, as well as the cost to the state, per bachelor's degree. Data suggests that students who earn dual credit while in high school tend to complete their bachelor's degree with fewer state supported credits than those who do not participate and enter universities as traditional freshmen.

At the local level, support from businesses is an additional resource. It is not unusual for high school students to receive support, through scholarships from local businesses, to participate in college level courses.

Moreover, the long-term benefit to the state is one of a positive economic advantage. Students that finish college and enter the workforce more quickly and more highly qualified can generate a relatively higher level of income than those who do not.

### Data on Student Retention and Graduation

Dr. Joni L. Swanson from The University of Iowa, College of Education (May 2008) conducted a study entitled, "An Analysis of the Impact of High School Dual Enrollment Course Participation on Post-Secondary Academic Success, Persistence and Degree Completion." This study, comparing the high school and college transcripts of more than 400 students who participated in dual enrollment courses (but not in Advanced Placement or International Baccalaureate courses) with the transcripts of students with similar GPA's and class rank - but who took no accelerated learning courses - showed that:

- "Dual enrollment students were 11% more likely to persist through the second year of college than non-participating students" (p. 3);
- "Dual enrollment students were 12% more likely to enter college within seven months of high school graduation than non-participating students" (p. 3); and
- "Dual enrollment students who completed 20 or more credits in the first year of college were 28% more likely to persist through the second year in college than were students who did not complete dual-enrollment courses" (p. 3).

Swanson's data also suggests that dual enrollment "fosters more positive attitudes towards earning post-secondary degrees in students who did not previously hold these attitudes" (p. 4).

In 2007, the Columbia University, Community College Research Center, conducted a study, "The Postsecondary Achievement of Participants in Dual Enrollment: An Analysis of Student Outcomes in Two States." In this comprehensive study, researchers from Columbia's Community College Research Center examined the records of more than 300,000 dual enrollment students in Florida and New York. They found that students who took dual enrollment courses in high school were more likely to

- Graduate from high school;
- Enroll in college;
- Start college in a four year institution;
- Enroll in college fulltime; and
- Stay in college for a minimum of two years.

Three years after high school graduation, students who had participated in dual credit courses while in high school had earned both higher college GPAs and more postsecondary credits than their peers.