Practice & Operations Advisory Group Meeting Summary

January 22, 2020

The Practice & Operations Advisory Group provides a means for the public to offer recommendations to the California Cradle-to-Career Workgroup about how the data system could address improvement efforts at the institutional and regional level, support a case management approach to service delivery, and create tools that would be useful to students, families, and teachers.

This document provides a summary of the key points that emerged from substantive discussion over the course the day. More information about the meeting, including the background paper and the PowerPoint, are available at https://cadatasystem.wested.org/meeting-information/practiceoperations-advisory-group. The website also provides information on the overall process for how the data system will be designed.

The following advisory group representatives attended the meeting:

Craig Hayward, Bakersfield College; Reynaldo Dulaney, Jr., California Federation of Teachers; Sara Arce, Campaign for College Opportunity; Susan Savage, Child Care Resource Center; Rick Miller, CORE Districts; Laurie Scolari, Foothill College; Anthony Dalton, Futuro Health; Michele Bowers, Lancaster Unified School District; Roneeta Guha, Linked Learning Alliance; Kathleen Porter, Poway Unified School District; Catalina Cifuentes, Riverside County Office of Education, Nabil Shahin & Joell Hanson, Santa Clara County Office of Education; Lange Luntao, Stockton Unified School District; David Rattray, UNITE-LA; Kristin Clark, West Hills College Lemoore; and Jaclyn Pinero, uAspire.

Introductions and Level Setting

The meeting opened with a description of the benefits of a longitudinal data system, an overview of the California Cradle-to-Career Data System Act, and a description of the process that will be used to craft recommendations for the Governor's Office. Advisory group participants were encouraged to watch the listserv for alerts about the release of background papers and meeting notes, which will be posted on the project website: cadatasystem.wested.org.

The advisory group participants each introduced themselves and identified an early win or "low hanging fruit" for the first phase of work on the data system. Some of the common ideas that were shared included:

- Develop tools that will be easy for families and practitioners to use and provide actionable data
- Clarify what happens to K-12 students after they transfer to postsecondary and identify ways to reduce disparities
- Reduce the need for students and their families to fill out duplicative paperwork for services and financial aid
- Improve the accuracy of data
- Build trust between the partners and with the public

Identifying a possible scope for the first phase of development

The facilitation team introduced five "use cases" — examples of information that the partner entities hoped the data system might produce. Focusing on use cases is part of a user-centered design process

that places emphasis on tangible products that a data system could produce, rather than beginning with policies used to construct the data system. Advisory group participants were asked to rank the five options in order of priority and to suggest alternative use cases.

As the group sought to better understand the options they would be ranking, they surfaced several concepts that transcended the individual use cases. For example, one participant noted that some existing regional data systems and public-private partnerships hold information that is not in state-level datasets. The group felt that it would be helpful to create mechanisms that would allow information from the state data system to be securely shared with these existing tools, or for local data to be combined with state data for discrete research or evaluation purposes. They also specified that the state data system should ensure that nonprofits and community-based organizations that are supporting data-driven efforts can access information. Others noted that it might be helpful to develop a suite of tools under a larger umbrella, rather than try to solve all information needs with a single data tool.

Advisory group participants also focused on the question of how to make data actionable. Most felt that while historical trends or general information on student populations could support institution-level planning, data on individuals is most likely to drive meaningful improvement in students' lives—particularly because it enables educators to be proactive in providing information to students rather than putting the onus on individuals to determine their options. Ensuring that all students can easily access supports is important for addressing equity gaps. In addition, reviewing student-specific information can help to identify errors in underlying data.

Some participants noted that the way student pathways were being described presumes that people follow a linear path from high school to college to a job. However, many people pursue education in alternative ways, such as through the workforce system or by attending college later in life to learn new skills as jobs change. The data system may need to integrate additional datasets for training programs or competency-based learning models.

One additional use case was added to the five outlined in the background paper: the idea of providing information on the courses that students would need to take to complete a specific academic pathway and which jobs students could apply for based on those skills. This use case does not require student data to be shared and would help high school students pick colleges and majors, support community college students in preparing for transfer and jobs, and enable returning students to find the right pathway for moving up a career ladder.

Key considerations for the first phase of development

When advisory group participants completed the ranking exercise, the concept of automating eligibility was narrowly chosen as the top priority, with three other use cases tying for second: providing information to students, e-transcripts, and linking education and social service data. The group felt that it would be possible to integrate all four concepts and outlined several ways to do so.

- **Proactively identify eligibility.** The data system could link social service, employment, and education records to identify students who are eligible for other supports, provide this information directly to students and their families, and alert education institutions when individuals do not access supports for which they are eligible. For example:

- o *Simplify Social Service and Financial Aid Applications:* When determining eligibility for free and reduced-price lunch programs, increase match rates by including information from other services such as CalFresh. If a student is not already enrolled in another service with the same eligibility requirements, populate information into the application for that service. Combine K-12 and Franchise Tax Board data to determine eligibility for financial aid. Use FAFSA data to automatically populate Cal Grant applications.

- o *Support Academic Processes*: Create a mechanism where colleges can issue associate degrees to community college students who were eligible for but did not receive the award or to students who did not complete a bachelor's degree but fulfilled requirements for a two-year degree.

- **Offer information on possible eligibility.** Working with education institutions or through education planning tools, the data system could provide information about housing, food, childcare, and financial aid that students may be eligible for based on available data, so that the individual can authorize the transmission of additional data necessary to confirm eligibility. For example:

  - o *Make Going to College Seem Feasible*: In middle school and early in high school, send students and parents a notification about whether the student is on track to go to community college, California State University, or University of California, as well as what is needed to be eligible for each type of college. Inform students and parents about college costs for each segment and, based on the services the student is already receiving, the types of financial aid and social services they could receive while in college. Send the same information to counselors, to conduct follow-up outreach to families.

  - o *Address the Total Cost of College*: As part of college acceptance notifications, inform students about housing, food, and health services they may be eligible for based on their financial aid application. Connect students to a portal that allows them to learn more about each option and complete forms for desired services by transferring information they already provided, authorizing the exchange of information from other relevant data sources, and filling in any missing pieces.

- **Provide information to coordinate support.** The data system could share key information about student's histories when they start a new phase of education and prompt individuals to authorize providing additional information to support education and career planning. For example:

  - o *Provide Information on Student Context*: Share information on participation in home visitation or early education programs with elementary schools when a child enters kindergarten. When high school students apply to college, connect information on their foster status to their application record and share this information with the college once the student matriculates.

  - o *Provide Academic Information*: When students apply to college, automatically forward their transcript to the institution. For community college students, use the transcript to inform recommendations regarding math and English courses. Allow students to

authorize colleges to use transcript information and other school records to support education and career planning.

The group recommended that these types of options be further explored and prioritized in preparation for the April meeting. As part of this examination, information on existing efforts should be documented. This will help to identify essential features of effective tools and determine whether eligibility features could be integrated into these efforts, rather than building new tools from scratch. However, if the state data system intends to integrate with existing efforts, the governance model will need to address how to share responsibility and accountability between these organizations and the state. If the state data system develops new tools, they should be piloted rather than implementing them at scale in early phases of work. Because sharing identifiable, individual-level data is a greater privacy and security risk, and requires greater data fidelity, individuals and institutions should be allowed to opt-in to these types of tools. Finally, feedback should be gathered from students, families, and practitioners about the types of information that would be most useful to them.

The group also noted the importance of identifying how the data would be provided to students, families, and practitioners, to ensure they trust the information and can take action on it. For example:

- List what the individual is already eligible for and what else they may be eligible for
- Clarify what makes an individual eligible for a service
- Describe what the service is in plain language, including what is provided, how it is accessed, and any criteria for maintaining the benefit
- Ensure materials are written at an appropriate reading level and provided in multiple languages and formats, including print and video
- Provide information in small chunks so that individuals can access more information on the services they are most interested in
- Alert education institutions if individuals do not receive services for which they are eligible, so that counselors can reach out to these students and their families to ensure they can make an informed decision about accessing supports
- Ensure that individual-level information is only provided to those with the rights to view it

Finally, the group contemplated whether data should be provided directly from individual institutions or through state agencies. Of key concern was the need to align data on concepts that may be recorded in various manners by different institutions, such as how racial categories are coded. The participants felt it would be more feasible to draw information from state agencies because data elements have already been standardized. While data from individual institutions would be more timely and might be perceived as more accurate by practitioners, the group felt that it would be too difficult to gather information directly from each institution. However, given recent developments in how data can be gathered and stored, the group recommended that hybrid options be explored by the Technology & Security Sub-Committee and that this question be revisited over time. Furthermore, the sub-committee should address the question of whether information created in eligibility tools could flow back to state and local data systems to improve accuracy.

Information for Public Dashboards

In addition to the issues discussed in the meeting, Practice & Operations Advisory group participants had the opportunity to identify the types of information that would be most useful to students, families, and practitioners if the data system includes a public dashboard (this was one of the recommendations from the Policy & Analytics Advisory Group). Practice & Operations Advisory group participants submitted the following items through a survey, following the meeting.

Survey respondents specified that these measures should be available by various student characteristics, program of study, and geographic locations.

- Participation in early care and home visiting programs, by type, and years attended
- K-12 outcomes for students who participated in early care and home visiting programs including whether they were ready for kindergarten, 3rd grade reading level, graduated high school, enrolled in college, and completed college
- Impact of enrichment programs and special education on high school graduation, college-going rates, and college completion
- The highest level of math students completed and in what grade the course was taken
- Rate at which students completed a-g requirements
- Average high school GPA
- Average college GPA
- Average time to college completion
- Comparison of bachelor's degree completion rates between direct matriculants and community college transfers
- Employment rates during college
- Employment rates after students leave education
- Earnings after leaving education, over time
- Attainment of a living wage within a year of graduation
- Rate of qualifying for and receiving financial aid
- Rate of retaining financial aid over time
- Rate of receiving other types of support such as housing assistance
- Comparison of college completion rates between students who did and did not receive financial aid
- Average total amount of aid received