JBL Associates, Inc.
Kentucky Postsecondary Education
Comprehensive Affordability Analysis

General Description of Project

JBL Associates, Inc. will perform a comprehensive study of the affordability of Kentucky's postsecondary education system. This project will be coordinated with the WICHE *Changing Direction* Project.

Policy Questions

Key questions which must be addressed in the study shall include, but are not necessarily limited to:

- How does the current array of Kentucky's funding strategies (benchmark funding, tuition rate setting, external funds, and student financial aid, for example) impact postsecondary education access and other success measures such as retention and completion?

- Are there changes to the state's postsecondary finance policies other than those specifically related to financial aid programs that would enhance access for lower income or otherwise underserved populations of Kentucky students?

- To what extent is college affordable for Kentucky students? Are there gaps in relative affordability for certain students identifiable by institutional choice and by socio-economic, demographic, or regional variables? To what extent do these gaps alone impact access, continuing success, and completion?

- Are there changes to current student financial aid programs that could accomplish the system's goals of access, continuing success, and completion?

- Are there other student financial aid programs that could be made available to Kentucky students that could enhance effectiveness and efficiency, thus improving access for Kentucky's students, especially those with the least ability to pay, and encourage students to continue and ultimately to complete college?

- What innovative approaches or ideas are available from international, national, or regional studies, academic research articles and/or books that may provide insight to affordability issues in Kentucky? Are there innovative solutions to these issues already being adopted or considered by other entities that may be considered in Kentucky?

1. Policy Framework

- Policy development will be guided by three criteria: (1) participants should pay according to benefits accrued - participants are: student (analysis should address nonresident students separately), family, state, and federal government; (2) equity in funding; (3) efficiency-using funds to achieve greatest good.

- In addition to JBL staff, an expert panel will help develop a policy framework and provide suggestions on how the information can best be used in achieving goals of the project. The panel will include: Dr. David Breneman, Dr. Thomas J. Kane, and Dr. David Longanecker. Dr. John B. Lee (President of JBL Associates, Inc.) and Dr. Scott Swail (President of Educational Policy Institute) are the lead national researchers on the project.

2. Plan of Services

Major phases of the work to be performed:

- Orientation meeting to review policy context and goals.
- Identify innovative approaches or promising ideas from international, national, or regional studies and research that may be applicable in Kentucky.
- Identify data sources, data elements, and quantitative and qualitative measures that support a comprehensive, continuing analysis of affordability and other measures of student success.
- Develop a data collection plan, collect data, and compile existing data.
- Possible student surveys.
- Possible development of student aid projection model.
- Draft reports consistent with proposal.

Deliverables

Interim Progress Report:

The interim progress report is due at the Council offices in Frankfort, Kentucky, on or before 8:00 a.m. Monday, May 2, 2005.

Final Report:

The final report is due at the Council offices in Frankfort, Kentucky, on or before 8:00 a.m. Wednesday, August 31, 2005.