

## COLLO

December 7, 2006 Conference Call

### Meeting Notes

**Present:** Marcie Boucouvalas, Marjean Buckner, Alex Charters, Regis Gilman, Phil Greasley, Alan Knox, Mary Beth Lakin, Jan Poley, Michele Shinn, Judy Wertheim

#### 1. AAACE Futures Report:

Alan Knox presented the work of the AAACE Futures Committee over the past four years and pointed us to their website - <http://www.aaace.org/futures>. The work of the Futures Committee is now completed, with the outcomes and directions shown on and through this web page. Among the outcomes was the AAACE strategic plan and the organization's emphasis on collaboration with other adult education organizations and on public issues (public responsibility, community development, bringing diverse groups together to address problems, making democracy work in the area of adult education). Among the listings are 50 organizations and their web sites as well as AAACE members who are also members of other organizations on this list and who serve as liaisons.

An additional listing with more AAACE Futures information appears at Alan's own site, at: <http://www.education.wisc.edu/elpa/people/faculty/knox/futures.htm>

The AAACE Futures effort has considered and included international elements, as does Alan's 1993 book *Strengthening Adult and Continuing Education: A Global Perspective on Synergistic Leadership*.

The work of the AAACE Futures group is now completed. Two people edit the monthly AAACE Futures column now.

#### 2. The Spellings Report:

Many news articles and other responses have appeared. The focus the Report and Education efforts following from it appears to be on two elements: 1) accreditation and forcing accrediting bodies to make accreditation results more clear, detailed, and public, and 2) the development of a "unit record" for each student, not using social security numbers but maintaining student privacy.

Opinions of the report differ by educational sector. The adult education sector seems to think it's worth considering student records and using them to probe for successes.

The draft report originally had much more on financial aid, lifelong learning, and adult students as well as for the need for a different set of goals by which to define "success" differently for adult students.

More emphasis is needed on financial aid for adult students. It wasn't mentioned at the Spellings press conference.

The Department of Education is trying to see what it can push through without going to congress.

### **How should COLLO proceed?**

The group feeling was that COLLO 1) should work collaboratively on adult education issues needing emphasis while remaining clear of the Spellings report and 2) COLLO and adult education entities should watch the bills the Democrats put forward related to adult and lifelong education in congress. We should determine where the opportunities for adult education are, where our interests intersect with those of other adult education associations and organizations, and how multiple adult learning organizations can work together to increase our strength and effectiveness (e.g. financial aid for adults). On point 1, we are best to talk about specific targeted elements (e.g., access, financial aid for adult students, etc.) We also need to make clear that the old terminology (e.g., “traditional students”) and postsecondary structures for dealing with them are now out of date and need to be replaced. Over 75% of the U.S. undergraduate population meet one or more characteristics associated with adult students –over 25, part-time, having family responsibilities of their own, etc.

Some post-report public comment/response sessions are being held. Where leaders like CAEL are invited to respond, it would be helpful if they would also identify themselves as COLLO members.

There is much interesting data being developed on the topics of “access” and “finance” at the state level. There should and will be some looking at what policies are working in specific states as a stepping stone for action across states and for possible future federal legislation.

Judy mentioned that there will be a meeting to discuss financial aid in Chicago. She will send the information to the group.

Discussion of this topic should continue at our next meeting.

### **3. Status of Action Items from September:**

A. Marjean Buckner reported on her discussions regarding **COLLO re-incorporation**. Multiple lawyers advised COLLO to retain the current EIN and go back to D.C. to work out the renewal of incorporation. Tina Peacher, a D.C. CPA who works with AAACE offered significant help. The two will meet over the next few weeks. Three early elements are likely to be needed: 1) a report on how COLLO handles travel, 2) all COLLO officers will need to sign federal form 990, ensuring no conflict of interest, and 3) an annual external audit is needed. Marjean will present additional information in January.

B. The date for **the next COLLO meeting** was discussed. All preferred money saving approaches. CAEL cannot attend (and report on their activities) on January 29. Marjean Buckner will talk with Jury’s again and see what rates she can get in February. We’ll then send the information out rapidly to all COLLO members and go with the

meeting date that produces the best attendance. Mary Beth Lakin reported that due to much construction and renovation of D.C. hotels, you must make arrangements several months in advance to get a good rate.

C. Regis Gilman is making progress on the list of **adult education organization and project web links**. She has sent them to Tom and Michele. Michele will send that list out to all COLLO members for additions. All will be posted on the COLLO (ACHE) web site.

D. Marjean Buckner has contacted **Lennox McLendon** and sent the information to Tom Kowalik. Phil will follow-up with Tom to see if Lennox can speak at the next COLLO meeting.

E. COLLO members on the conference call recommended that the outgoing/soon past president, **Tom Kowalik, oversee the nomination/election process**. Members will send nominations to Tom prior to the next meeting. Tom will send out a notice requesting info from the membership.

F. Phil Greasley announced that the COLLO executive committee has decided that it's best to **split the secretary and treasurer positions**, with the treasurer position being for a longer term to give stability to the funds, allow easier audits, etc.