



California  
Community  
Colleges



# Direct Assessment Competency-Based Education

**IMPLEMENTATION BLUEPRINT**



## ACKNOWLEDGMENTS

This Blueprint was developed in partnership with the Chancellor's Office, the Success Center, and Jobs for the Future (JFF), with key contributions and support from the Competency-Based Education Network (C-BEN), RAND, and the California Virtual Campus (CVC).

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## ABOUT THIS BLUEPRINT

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The Direct Assessment CBE Implementation Blueprint was developed in collaboration with the eight early innovator community colleges and supporting partners of the Direct Assessment CBE Collaborative. This blueprint provides guidance and best practices for community college leaders, faculty, and staff to develop direct assessment CBE programs aligned with Vision 2030. As institutions use this blueprint, they must ensure compliance with all applicable federal and state regulations governing direct assessment CBE program requirements and standards.

### Intended Audience

This Direct Assessment CBE Implementation Blueprint encompasses major aspects of program development and implementation, from building institutional capacity to continuous program improvement. The blueprint is designed for the following audiences:



**1. Institutional Leadership and Decision-Makers:**

Chancellors, presidents, CEOs, and other educational leaders responsible for strategic planning and decision-making within educational institutions.



**2. Instructional Faculty (Faculty) and Instructors:**

Qualified faculty and instructors engaged in delivering direct assessment CBE programs and designing and developing content and curriculum.



**3. Counselor Faculty (Counselors), Administrators, and Classified Staff:**

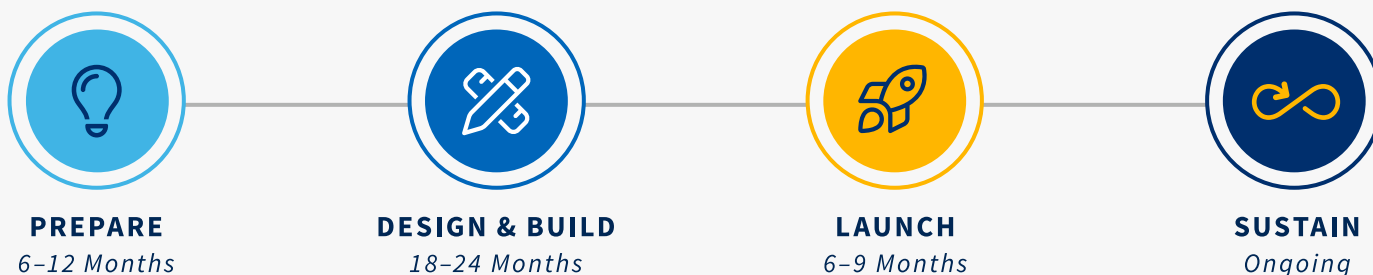
Administrators and staff, including but not limited to financial aid staff, technology/IT staff, and student services.





## How to Use this Blueprint

The blueprint is organized into phases coordinated with the major milestones you will undertake in designing and implementing direct assessment CBE programs:



Each phase is divided into major design decisions that you will need to consider in developing your program. Design decisions are organized based on the approximate time frame needed, the sequential order for obtaining approvals, and dependencies among decisions.

**Each decision point is structured to assist your college in effectively navigating toward a programmatic decision. The key components include:**



### KEY DESIGN DECISION OVERVIEW

Introduces core concepts, regulatory considerations, and essential background for each design decision.



### EQUITY IN ACTION CONSIDERATIONS

Callout boxes in each section offer strategies and considerations to ensure equitable program design and implementation.



### KEY DECISION

Presents a critical question to guide decision-making with an equity-centered approach.



### PLANNING QUESTIONS

Provides guiding questions for teams to explore equitable and sustainable solutions.



### KEY DECISION-MAKERS

Identifies institutional stakeholders essential for the decision-making process.



### EXAMPLE ACTIVITIES

Includes templates, college spotlights, and innovative solutions for engaging key decision-makers.



# Introduction

## California's Drive Toward Equitable Access in Educational Pathways and Career Opportunities

In 2023, Dr. Sonya Christian, Chancellor of the California Community Colleges, unveiled [Vision 2030](#), a framework for supporting students and communities across California. Vision 2030 outlines three goals for transformational change: 1) Equity in Success, 2) Equity in Access, and 3) Equity in Support. Each goal addresses persistent systemic barriers that disproportionately affect underserved communities. The bold plan aims to drive equitable student outcomes and economic advancement statewide. To achieve the goals outlined in Vision 2030, the California Community College (CCC) system is exploring innovative approaches to teaching, support, transfer, and workforce preparation.

Direct assessment competency-based education (CBE) is a powerful tool for transforming the CCC system and leading the nation in advancing equity-centered education and training programs. This teaching and learning modality empowers students to progress at their own pace by prioritizing the mastery of skills and knowledge while making time variable. It accommodates diverse abilities, learning styles, and backgrounds through flexibly-paced learning that focuses on what students know and can do rather than the time spent in the classroom.



“Direct Assessment CBE reimagines education by putting students at the center—empowering them to master skills at their own pace and on their own terms. It opens doors wider to access and opportunity for learners across California.”

—Chancellor Sonya Christian

Direct assessment CBE supports personalized learning experiences, enabling students to progress at a flexible pace while gaining the skills needed for workforce readiness or transfer to four-year institutions — aligning with **Vision 2030's** goals.

**Characteristics of direct assessment CBE that differ from traditional credit-hour programs include:**



### **FLEXIBLY-PACED PROGRESSION**

Students advance through content at a flexible pace, mastering each competency before moving forward.

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### **ENROLLMENT OPTIONS**

Programs offer multiple start dates and pauses, enabling students to start and stop as needed without penalties.

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### **PROACTIVE, SUPPORTIVE SERVICES**

Students receive proactive support tailored to help them succeed, including academic and career counseling.

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### **RECOGNITION OF PRIOR LEARNING**

Programs value and incorporate students' prior knowledge and experience, allowing them to accelerate through material they have already mastered.

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### **ADAPTABLE DEADLINES**

Flexible deadlines prioritize mastery, helping students balance school with personal and professional commitments.

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### **GROWTH-ORIENTED ASSESSMENTS**

Assessments focus on learning and development, providing support and feedback that emphasize growth and mastery without penalizing students.





## Direct Assessment CBE Benefits Students, Industry, and Educational Institutions

Direct Assessment Competency-Based Education is a flexibly-paced learning model where students earn credentials and degrees by demonstrating what they know and can do — rather than advancing according to a set term or class schedule. Progress is based on mastery, with faculty designing and assessing every step to ensure rigor, inclusivity, and alignment with real-world needs. It allows students to engage curriculum and assessments at the dates and times that work best for them. Freed from the credit hour, direct assessment programs both allow students to move more quickly through familiar competencies and take more time where needed — honoring the life experience, job skills, and learning that many students bring and is inclusive of a variety of learning styles and backgrounds.

As institutions implement direct assessment CBE programs, the benefits to students, industries, and educational institutions alike become more and more apparent, particularly in the post-pandemic era.



### BENEFITS TO STUDENTS

Direct assessment CBE can be tailored to accommodate diverse students, including those with different abilities, learning preferences, and backgrounds. This is especially true for nontraditional students, who benefit from flexible approaches to learning that better align with their lived experiences.

- **Targeted Support.** Students receive individualized learning support from faculty and coaches, ensuring that learners balancing work, caregiving, and other responsibilities have the support they need to reach the finish line.
- **Greater Flexibility.** Students learn at a flexible pace. This flexibility allows for variance in how and when learning occurs, so students can continue their education while meeting the demands of their daily lives.
- **In-Demand Skills.** Students are equipped with skills that increase their employability and value in the workforce so they can secure quality jobs or earn promotions.



### BENEFITS TO INDUSTRY

Direct assessment CBE programs are designed in alignment with industry standards and, in some cases, in direct collaboration with industry experts to ensure programs meet employer needs.

- **Skilled Workforce.** Industry partners help identify in-demand competencies so that learners graduate with proven, workforce-ready skills.
- **Industry-Responsive Curriculum.** Programs can adapt quickly as workforce needs shift. This agility ensures that direct assessment CBE credentials and degrees signal real value to hiring managers.
- **Fast Results.** Given the more flexible and variable pacing for direct assessment CBE, program completions can happen throughout the year, enabling employers with open roles to fill them faster.



### BENEFITS TO EDUCATIONAL INSTITUTIONS

Direct assessment CBE allows educational institutions to provide quality service to students.

- **Mastery and Proficiency Learning.** Direct assessment CBE programs are centered around the mastery of competencies, allowing students to build and demonstrate practical workforce skills at proficiency levels expected by employers. This competency-focused approach ensures students fully develop each required skill before advancing, creating a strong foundation of applicable knowledge and capabilities.
- **Reimagine Teaching and Support Services.** The implementation of direct assessment CBE programs creates an opportunity to re-envision how teaching and student support services meet the needs of students. Institutions can create efficiencies and foster collaboration across departments to improve the student experience.
- **Enrollment Growth.** Direct assessment CBE programs enable institutions to expand their reach and enrollment by serving adult students seeking flexible pathways to credentials, particularly those who are currently underserved by traditional programs.

## Direct Assessment CBE In California

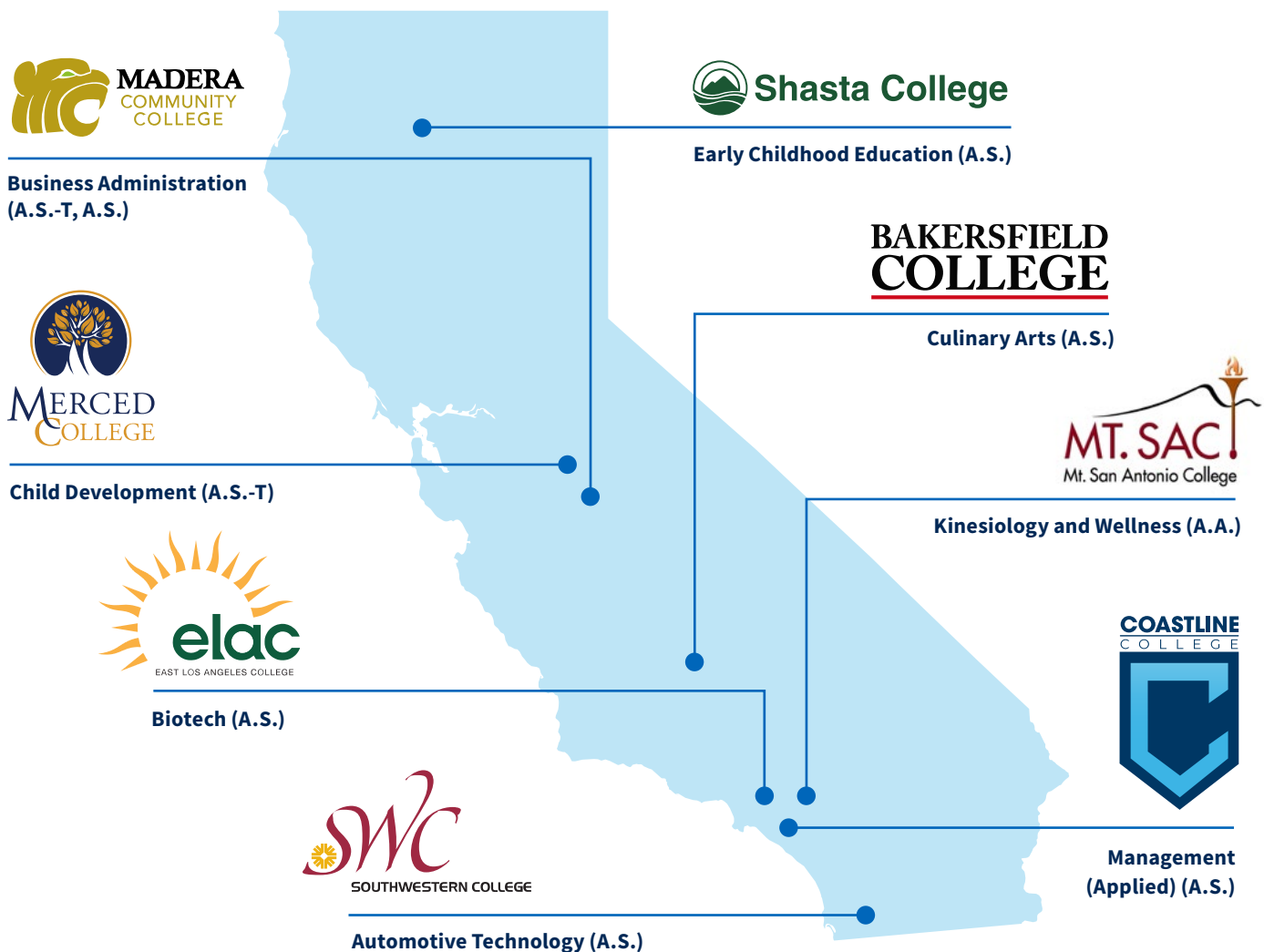
### Establishment of A Regulatory Framework and the Direct Assessment CBE Collaborative

To facilitate the implementation of direct assessment CBE, the California Community Colleges Chancellor's Office has laid the groundwork for successful program implementation. Recognizing the need for regulatory approval, especially to support students' access to financial aid, the Chancellor's Office partnered with the California Community College Curriculum Committee (5C) to develop a [Title 5 regulatory framework](#), in California Code of Regulations, which the CCC Board of Governors adopted in 2021.

These regulations draw upon national practices and quality standards for direct assessment CBE and were tailored to fit the unique context of the California Community Colleges system.

Additionally, in June 2021, the Chancellor's Office launched the Direct Assessment CBE Collaborative, a multi-year, grant-funded initiative comprising eight pilot colleges tasked with developing California's first direct assessment CBE associate degree programs. Led by the Chancellor's Office's Division of Educational Services and Support, this peer learning and support community served as an incubator for direct assessment CBE. Insights, learnings, and recommendations from the collaborative have been incorporated throughout this blueprint to provide a guiding framework for the systemwide implementation of direct assessment CBE programs.

### California Collaborative Colleges



## Collaborative Partners and Support

To ensure success, the Chancellor’s Office engaged various partners to provide essential tools, guidance, and expertise. The Collaborative benefited from the efforts of the following key partners:



California  
Community  
Colleges

California Virtual Campus  
Online Network of Educators

Each partner played a role in equipping pilot colleges with resources needed for program development, from curriculum design to administrative support. They helped colleges align programs with local, state, and federal regulations and facilitated continuous assessment to support improvement. This coordinated support enabled each college to lead both local and systemwide direct assessment CBE efforts.





# Prepare

Congrats, your college is moving forward with designing a direct assessment competency-based education (CBE) program!



If you want to learn more about direct assessment CBE in California and its alignment to Vision 2030, go back to the [Introduction](#) before proceeding.

Jump ahead to [Design and Build](#) if you are ready to begin designing your program and initiating approval processes.



You Are Here



**PREPARE**

*6–12 Months*



**DESIGN & BUILD**

*18–24 Months*



**LAUNCH**

*6–9 Months*



**SUSTAIN**

*Ongoing*

## HOW TO USE THIS SECTION

The Prepare phase will help you and your key decision-makers navigate several big decisions for your institution, while prioritizing equity to ensure your direct assessment CBE program meets the diverse needs of your target students. Below is an overview of key decisions covered in this phase:

**Follow these steps to get started:**

1. **[Take the Institutional Readiness Assessment for Direct Assessment CBE](#)** to examine whether your institution has the necessary support and resources to implement direct assessment CBE. This tool will help you determine if these programs align with your institution's goals and capabilities.
2. **[Create a Direct Assessment CBE Program Leadership Team](#)**. These individuals will set the vision and intent of the program and answer foundational questions with a focus on equitable access and outcomes for all students. The Leadership Team should include representation from across the college — faculty, student support, information technology, financial aid, and other key college decision-makers. See the [OVIS chart](#) for a list of decision-makers you may want to consider for the Leadership Team. (Note: An OVIS chart shows who owns, vetoes, influences, and supports a decision.)
3. **[Review the Direct Assessment CBE Equity Framework](#)** as a team to begin developing a shared understanding of how direct assessment CBE can advance equity in alignment with the [Vision 2030 Goals, Outcomes, and Metrics](#).
4. Next, proceed through the remaining sections of the [Prepare phase](#).



Use the [Year One Workplan Template](#) to help keep track of the key decisions you'll make throughout the Prepare phase.



# Step 1: Assess Readiness for Direct Assessment CBE

## Instructions for Completing the Institutional Assessment for Direct Assessment CBE

- 1. Identify a small workgroup of leadership, faculty, staff, and administrators.** Establish a cross-functional group of institutional decision-makers who can serve on a workgroup to determine your institution's readiness for implementing a direct assessment CBE program at your college. These workgroup members do not have to be the people who will be developing your direct assessment CBE program but should be able to determine institutional readiness (i.e., they need a vantage point into the items in the assessment below). See our [OVIS chart](#) for a list of decision-makers you may want to consider for the workgroup. (Note: An OVIS chart shows who owns, vetoes, influences, and supports a decision.)
- 2. Convene the workgroup to complete the readiness assessment.** Use the assessment tool below to support workgroup deliberations to determine readiness. As a group, review each bold statement and associated questions. Rate each bold statement from 1 to 5 based on how strongly you disagree or agree (1 = strongly disagree and 5 = strongly agree). Alternatively, you can rate each statement using a more qualitative label like hot, warm, cold or true/not true. Be sure to take notes in the "notes" column to help document reasoning as you go.
- 3. Synthesize workgroup meeting notes.** Document who, when, and where key insights are shared and saved in accessible places to ensure common understanding, serve as a historical record of agreements, and create transparency for decision-makers outside the group. The ideas generated during these early discussions can help inform your work in the Prepare phase and beyond.
- 4. Review the "Understanding Your Results" section below** for recommended next steps.

## HELPFUL HINTS

- Prior to completing this assessment, consider reviewing [C-BEN's Quality Framework for Competency Based-Education Programs](#) to get a sense of what it takes to develop a robust direct assessment CBE program. Pay particular attention to the Demonstrated Institutional Capacity for CBE Innovation section. This will help contextualize deliverables on resources and program design for a direct assessment CBE program.
- You may also want to adopt a change management framework to better understand strategies you can employ for building and maintaining momentum for this effort. This framework does not necessarily have to be specific to direct assessment CBE. For example, [Achieving the Dream's Institutional Capacity Assessment Tool \(ICAT\)](#) is a strong tool that outlines how to shift institutional culture and align resources during change.







## ASSESSING READINESS FOR DIRECT ASSESSMENT CBE PROGRAM IMPLEMENTATION

Note: You can download this form as a [fillable pdf](#).

### INSTITUTIONAL ASSESSMENT FOR DIRECT ASSESSMENT CBE

**The institution has a clearly defined opportunity for improvement that aligns with direct assessment CBE.**

- What do your students need?
- What do your employer partners need?
- What needs are present in your broader community?
- How would a direct assessment CBE program specifically help meet these needs?
- What labor market needs are evidenced by data?
- What targeted populations of students could you serve?
- What are your value proposition(s) for direct assessment CBE?

**The institution understands how direct assessment CBE will help meet institutional mission, vision, and goals.**

- How does direct assessment CBE align with your institutional mission, vision, or goals?
- How does direct assessment CBE align with Vision 2030 and CCC system goals?
- What equity-centered goals are you hoping to achieve through direct assessment CBE?
- What impact do you hope to have by designing and implementing a direct assessment CBE program?

**Senior leadership and board members understand what direct assessment CBE is, are committed to supporting program development and implementation, and understand the level of investment required.**

- What role do institutional leaders think direct assessment CBE programs could play in furthering or enhancing institutional and CCC system priorities?
- What is needed to build institutional leadership support for implementing a direct assessment CBE program?
- What evidence is there that institutional leaders do or could support the creation, continuous improvement and ongoing growth of direct assessment CBE at your college?



### The institution has or can acquire resources to support development and implementation.

- What institutional resources, across relevant academic and nonacademic departments, are in place to support development and implementation of a direct assessment CBE program (e.g., staff, curriculum, technology, student support, funding, etc.)?
- How could the direct assessment CBE business model differ from other approaches (e.g., staffing, tuition structure, enrollment, etc.)?
- What additional resources might be needed to support development and implementation?
- What rationale can you provide for the investment necessary for the development and implementation of the direct assessment CBE program?
- What evidence supports the anticipated return on investment for the direct assessment CBE program?

### The institution is equipped to manage a major change.

- What major changes has your institution undergone recently?
- What have you learned from recent change management processes?
- What are the risks and challenges involved?
- What organizational barriers may hinder change?
- What evidence do you have to suggest your faculty/staff/leaders/students are “change fatigued”?
- Why might this be the right time to experiment with direct assessment CBE for your institution?

### Faculty and staff have a strong understanding of the unique features of direct assessment CBE and have interest in and commitment to design and implementation.

- What interest or commitment have general education and subject-matter faculty shown toward direct assessment CBE?
- What concerns could key decision-makers have about direct assessment CBE?
- What faculty and staff capacity would be needed to support development and implementation?
- What mindsets, skills, or knowledge may need to change to ensure successful implementation of an innovative, campuswide initiative?
- What biases or assumptions may exist toward CBE or educational innovations in general?
- What evidence do you have that departments at the campus are ready to embrace change and innovation? What structures are in place and what departments do you think are most receptive?
- How do you know that administrators, academic senate, and leadership are committed to implementation?
- What evidence is available that faculty champions are energized to work on direct assessment CBE?
- What systems are in place for gathering input from staff, faculty, students, industry partners, and community partners?

## Understanding Your Results

Once you’ve completed the assessment with your workgroup, add up your score and review the scenarios below:

- If you scored 18 or above in total and >2 for all statements, your institution has the building blocks to begin developing your direct assessment CBE program. Proceed to the next section of this blueprint, [Establishing a Direct Assessment CBE Leadership Team](#) and [Center Equity](#).
- If you scored <2 in any statement, your institution might benefit from taking more time to build interest, commitment, and capacity before proceeding. Review the example activities on the following pages for ideas on increasing your institution’s readiness for launching a direct assessment CBE program.

## Activities to Build Interest, Commitment and Capacity

*Here are example scenarios and suggested activities that your college can engage in to build interest, commitment, and capacity.*

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### **The institution does not have a clearly defined need or does not understand how direct assessment CBE could meet local needs.**

- Hold focus groups with students, employers, and community members to talk about workforce preparation and upskilling.
  - Encourage faculty and staff to learn more about direct assessment CBE through conferences, workshops, and other professional development experiences (e.g., C-BEN events such as CBExchange, SLO Talks about CBE, academic senate webinars, etc.).
  - Reach out to a California community college that offers direct assessment CBE to learn about how the program is meeting their local needs.
  - Conduct labor market research to understand the demand for a direct assessment CBE program in the target market. Leverage the services offered by the [Centers of Excellence](#).
- 

### **The institution does not have a clear idea how direct assessment CBE will help meet institutional mission, vision, and goals.**

- Review institutional strategic documents to refamiliarize yourself with your mission, vision, and goals.
  - Review the [Center Equity](#) section to develop a deeper understanding of how direct assessment CBE aligns with system equity goals.
  - Develop a structured, formal theory of change or theory of action for how you think the direct assessment CBE program will impact students.
- 

### **Senior leadership and board members do not understand direct assessment CBE and/or are not committed to supporting program development/implementation.**

- Provide Professional Development (PD)/training for senior leadership and/or board members to familiarize them with direct assessment CBE.
  - Develop a high-level timeline and preliminary budget to give leadership a sense of the level of commitment required.
  - Include your senior leadership and board members in outreach to other institutions to develop their familiarity with direct assessment CBE.
  - Retake the [readiness assessment](#) with senior leadership at your college to structure conversations about direct assessment CBE.
- 

### **The institution does not have resources to support development and implementation.**

- Reach out to the Chancellor's Office at [CBE@cccco.edu](mailto:CBE@cccco.edu) to share your interest in launching a direct assessment CBE program and ask about opportunities for state support.
- Research public (state or federal) and private funding opportunities that could support some or all of your program development and launch costs.
- Consider leveraging existing funding streams in new ways to support development.
- Collaborate with other colleges to share the workload and cost of development and/or implementation (e.g., developing curriculum together, team teaching, etc.).

### The institution is not in a good place to manage a major change.

- Talk with local decision-makers about recent institutional changes. Use their feedback to develop a more effective and responsive change management strategy for direct assessment CBE.
- Wait for the right time. Develop a longer-term timeline for direct assessment CBE. Use the slower pace to ensure necessary resources are in place.

### Faculty and staff do not have a strong understanding of the unique features of direct assessment CBE or have limited interest or commitment.

- Encourage faculty and staff to learn more about direct assessment CBE through conferences, workshops, and other professional development experiences (e.g., C-BEN's annual conference, CBExchange, SLO Talks about CBE, academic senate webinars, etc.).
- Gather input and feedback from faculty and staff about the proposed program to ensure you understand and can alleviate concerns.
- Engage in early dialogue with faculty and staff to understand their reluctance about direct assessment CBE.
- Deliver direct assessment CBE 101 presentations to different college groups (e.g., administrators, academic senate, and others) to engage interest holders about the benefits and value of direct assessment CBE.
- Develop a process for interested faculty to participate in development of a direct assessment CBE program to create direct assessment CBE champions at your college.







## Step 2: Establish a Direct Assessment CBE Program Leadership Team

Designing and operating a direct assessment CBE program requires time, resources, and buy-in from a broad range of internal and external decision-makers.

To coordinate this effort and ensure your program remains aligned with your equity-centered [vision](#), it is essential to assemble a Direct Assessment CBE Leadership Team (Leadership Team).

Your Leadership Team will lead, advise, and guide the project. They will motivate, empower, and collaborate with colleagues, building trust, enhancing productivity, and ultimately creating an impactful program. When developing your team, you will need individuals who are 1) committed to the direct assessment CBE approach and 2) have capacity to complete tasks in a timely manner.

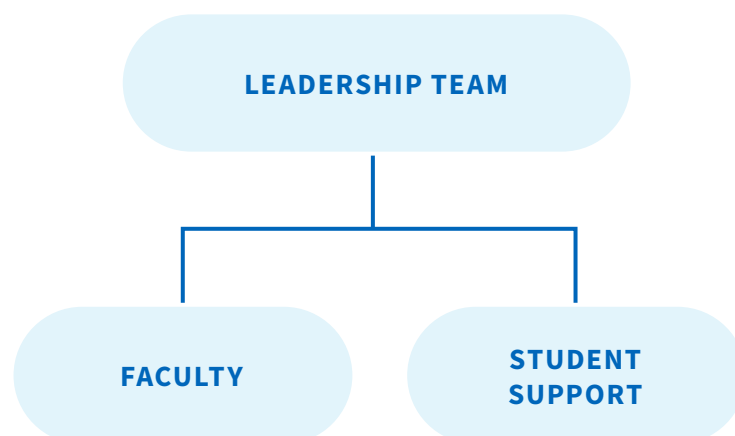
### Identifying Potential Team Members

Consider including decision-makers from the following groups who have appropriate formal authority (through their title and role) to make decisions or who have critical perspectives to share. Review the [OVIS chart](#) to determine additional decision-makers to include on your Leadership Team.

- Deans (operational leaders)
- Deans (academic leaders)
- Academic Senate
- Admissions and Records
- Bargaining Unit
- Classified Senates
- Equal Opportunity and Diversity Office
- Student Support Services (Counselors, Advisors, etc.)
- Employer Partners
- Financial Aid Directors
- Institutional Effectiveness, Data, and Research
- IT Directors
- General Education and Direct Assessment CBE Program Faculty
- District leaders or multi-campus leads
- Students
- Student Senate/Student Senate President

**As you enter the Design and Build phase you will create a Faculty Team and Student Support Team to lead different workstreams.**

While the Leadership Team will continue to support overall strategy, the Faculty and Student Support teams will make more tangible decisions that shape the student experience both in and out of the classroom.





## Example Activities

Here are some recommended activities and resources to help you establish your Leadership Team.

**Create a [Leadership Team Charter](#) to outline roles and responsibilities.**

- Review this sample [Charter and Implementation Team Membership from Mt. San Antonio College](#) for inspiration.

**Clarify decision-making authority and processes for selection of Leadership Team members.**

- Consider utilizing a [RACI decision-making framework using this template](#).

**Identify candidates for the Leadership Team.**

- Review these [planning questions](#) to help inform candidate selection.
- Learn more about what [leadership characteristics](#) helped accelerate the work for the California direct assessment CBE pilot colleges.
- Consider applying approaches from [Coastline College's process for building a direct assessment CBE leadership team](#).

**Evaluate and finalize candidates for the Leadership Team.**

- Consider utilizing or developing a rubric such as [this one](#) for finalizing your candidates.

## TIPS FOR CREATING AN EFFECTIVE IMPLEMENTATION TEAM

1. Think about who will champion student voices.
2. Choose members with the appropriate authority and leverage any existing direct assessment CBE expertise from college faculty and staff.
3. Ensure faculty are leading the process.
4. Select implementation team members who are passionate and excited about innovation.
5. Select individuals who can build coalitions and buy-in among decision-makers. Team members may be most effective when they have authority and the respect of the college community to drive change.
6. Ensure members have the time and resources to engage sufficiently in the work.
7. Consider core versus full advisory team members. Core members are those who will be consistently engaged throughout the implementation process, whereas noncore members step in and provide leadership and/or support when their expertise is needed.
8. Commit to knowledge management to track the ongoing work and key decisions, and facilitate coordination.





## SPOTLIGHT: COASTLINE COLLEGE



### BUILDING A TEAM FOR SUCCESS

Coastline College, known for its innovative approach to education, was the first college in California to achieve federal approval to launch a direct assessment competency-based education (CBE) program for an associate degree in management. To achieve this, Coastline needed to mobilize a cohesive team to effectively support students and drive the project forward.

#### Cross-Functional Team Design

To create a program centered around student success, Coastline assembled a diverse team rooted in student-centered learning. Leading the team was the dean of innovation and career education, whose role overseeing online and career technical programs made them ideally suited to guide the initiative. Supporting the dean were a tenured instructor contributing subject matter expertise and curriculum development, and a project manager focused on organizing team activities and timelines. Additional members from institutional research, financial aid, and student services participated as needed, bringing a comprehensive, cross-functional perspective to the project.

Recognizing the time-intensive nature of direct assessment CBE implementation, Coastline College leveraged strategic support to enable the team's success. The college secured funding from the Chancellor's Office to reduce the teaching load of the core faculty members, allowing them to concentrate on competency development, curriculum design, and program advocacy. Additionally, Coastline benefited from participation in the California Community College Direct Assessment CBE Collaborative to gain insights from peer institutions, and, critically, hired a part-time project manager to maintain project momentum and coordination.

#### Centralized Project Management Support

The project manager emerged as the key to smooth implementation by centralizing communications, organizing meetings, tracking deadlines, and managing documentation. This strategic role freed the other team members to focus on their specific responsibilities, ultimately streamlining the program's development. By building a well-structured, collaborative team supported by targeted funding and resources, Coastline College successfully set the stage for a direct assessment CBE program designed to both serve students more effectively and model best practices for other institutions.





## Step 3: Center Equity:

### Review the Direct Assessment CBE Equity Framework

[Vision 2030](#) establishes clear equity goals in success, access, and support to ensure equitable access to educational pathways and career opportunities, with a focus on students who are harmed by persistent systemic barriers linked to their racial and ethnic identities.

These goals encourage the system to change and evolve to ensure the needs of all students are met, across race, ethnicity, religion, class, and gender.

Systemwide investment in direct assessment CBE can advance these equity goals in alignment with Vision 2030. Direct assessment CBE is a teaching and learning modality that empowers students to progress at

their own pace by prioritizing the mastery of skills and knowledge while making time variable. Programs create equitable access to educational pathways and career opportunities through scaffolded end-to-end programs that prepare graduates with the in-demand skills needed in the job market. Programs accommodate diverse abilities, learning styles, and backgrounds through flexibly-paced learning that focuses on what students know and can do rather than on the time spent in the classroom.

Your work to center equity spans all phases and design decisions. The Direct Assessment CBE Equity Framework on the next page provides some specific examples of how colleges can advance equity through the design of their programs and align with the [Vision 2030 Goals, Outcomes, and Metrics](#).

As you move through this blueprint, you will see references to these equity goals of success, access, and support as you work through key programmatic decisions.





## EQUITY FRAMEWORK

|         | VISION 2030 OUTCOME                                                                                                                                                                                                                                              | PROGRAM DESIGN EXAMPLES                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| GOAL #1 | <b>Equity in Success:</b> Ensure the academic and career success of all Californians who are current and prospective California community college students.                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|         | <b>OUTCOME 1: COMPLETION</b><br><i>Increase, with equity, the number of California community college students who complete a meaningful educational outcome.</i>                                                                                                 | Program uses subscription-based calendars, empowering students to accelerate progress within a term and maintain progress across terms.<br><br>Program embeds credit for prior learning (CPL) opportunities at the competency level to accelerate adult student completion.                                                                                                                                                                                                             |
|         | <b>OUTCOME 2: BA ATTAINMENT</b><br><i>Increase, with equity, the number of California community college students attaining a baccalaureate degree.</i>                                                                                                           | Program's general education competencies align with Cal-GETC for transfer to University of California and California State University systems.<br><br>Program uses the Program Pathways Mapper (PPM) from enrollment to possible points of transfer.                                                                                                                                                                                                                                    |
|         | <b>OUTCOME 3: WORKFORCE</b><br><i>Increase, with equity, the number of California community college students who earn a living wage.</i>                                                                                                                         | Program selection uses Labor Market Analysis to ensure alignment with in-demand skills and jobs.<br><br>Program designers consult with employers, workers, and other experienced subject matter experts to ensure competencies align with high-need, high-value occupations.                                                                                                                                                                                                            |
| GOAL #2 | <b>Equity in Access:</b> Broaden the opportunities for all Californians to participate in higher education by starting or continuing their higher education at a California community college.                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|         | <b>OUTCOME 4: STUDENT PARTICIPATION</b><br><i>Increase, with equity, the number of students attending a California community college, with particular emphasis on the number of underserved Californians.</i>                                                    | Program utilizes monthly enrollment dates, allowing students with life commitments to start at times of the year that best coincide with their schedules.<br><br>Program outreach targets industry-employed adult students who can accelerate through the program.<br><br>Counselors, mentors, and coaches proactively monitor and engage with students to ensure retention in the program and progress through it.                                                                     |
| GOAL #3 | <b>Equity in Support:</b> Partner with other systems, agencies, institutions, and community-based organizations to provide students the academic, financial, and social supports necessary to thrive, by bringing educational opportunities to all Californians. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|         | <b>OUTCOME 5: FINANCIAL AID</b><br><i>Increase, with equity, the number of California community college students receiving state and federal aid for which they are eligible to better support their educational journey.</i>                                    | Program offers subscription-based financial aid awarding, allowing students to receive aid as they progress through the program without worrying about the quantitative component of Satisfactory Academic Progress (SAP).<br><br>Program offers subscription-based enrollment, enabling students to pay a flat rate and complete an unlimited number of competencies during that enrollment period, reducing enrollment costs and preserving financial aid eligibility for the future. |
|         | <b>OUTCOME 6: REDUCING UNITS TO COMPLETION</b><br><i>Decrease, with equity, the number of units in excess of 60 units for the Associate Degree for Transfer (ADT).</i>                                                                                           | Program is a fully self-contained (end-to-end) 60 credit unit associate degree for transfer.<br><br>Students utilize clear, personalized academic counseling throughout the program so that they do not take excess credits and they make progress toward completion.                                                                                                                                                                                                                   |



# Prepare

## Decisions for the Leadership Team

The Direct Assessment CBE Program Leadership Team will address the common decision points for implementing a direct assessment CBE program within the California Community College system. This Blueprint will help the Leadership Team work through the key decision points, identify dependencies, and discuss the implications of each decision as you progress throughout. As you make decisions, review applicable federal, accrediting agency, state, and local requirements (e.g., U.S. Department of Education, ACCJC, [California Code of Regulations Title 5](#), etc.). Related decisions will be more explicitly laid out in the Design and Build phase.

As you work your way through the Prepare Phase, consider using this [work plan template](#) to help track completion of key decisions. Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

### In what order should I make these decisions?

These decisions can be explored in whatever order you want, but many have dependencies, which we will point out as we go. There is no one right order to take on these design decisions. In general, your institution will move through the Prepare phase in six to 12 months.

#### PREPARE PHASE LEADERSHIP TEAM DECISIONS

|                                                                          |                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><u>Set an Equity-Focused Vision and Outcomes</u></b>                  | <i>What is the college's equity-centered vision for the direct assessment CBE program? What student outcomes does the college hope to achieve that address historic barriers to success, access, and support?</i> |
| <b><u>Cultivate Direct Assessment CBE Champions and Build Buy-In</u></b> | <i>How will direct assessment CBE champions be identified and onboarded?<br/>How will the college build buy-in?</i>                                                                                               |
| <b><u>Select a Program</u></b>                                           | <i>What direct assessment CBE program will the institution offer and what credentials will graduates earn?</i>                                                                                                    |
| <b><u>Determine Your Target Populations</u></b>                          | <i>What student populations at the college can benefit from direct assessment CBE and how will this modality serve them?</i>                                                                                      |
| <b><u>Determine Resources and Capacity</u></b>                           | <i>What resources are available to design, launch, and sustain the direct assessment CBE program?</i>                                                                                                             |
| <b><u>Assess Technology Needs</u></b>                                    | <i>What technology is needed to develop, deliver, and support the direct assessment CBE program?</i>                                                                                                              |
| <b><u>Map External Partners</u></b>                                      | <i>What partners are needed to design and successfully operate a direct assessment CBE program?</i>                                                                                                               |



# Set an Equity-Focused Vision and Outcomes

A vision statement is a clear, brief declaration of *why* your institution is pursuing direct assessment CBE.

Outcomes are the quantitative and qualitative measures of programmatic impact. The process of defining a vision and outcomes can solidify shared intentions, uniting key institutional leaders around direct assessment CBE. This is one of the first and most exciting steps for your college.

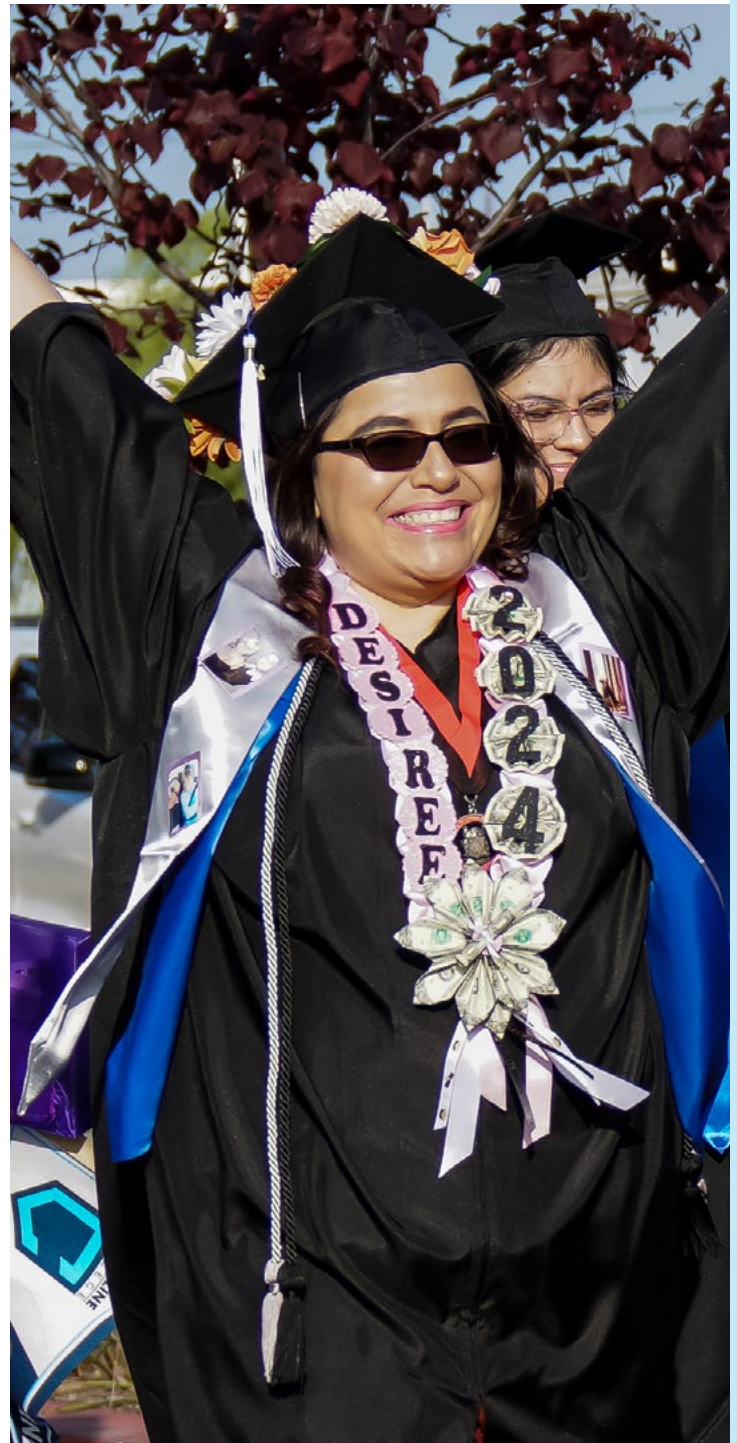
## Set an Equity-focused Vision

In [Center Equity](#), we explored different ways direct assessment CBE can accelerate degree completion, increase credential attainment and transferability, align programs with high-demand occupations, offer flexible and accessible learning opportunities for underserved students, and provide robust, personalized support systems to ensure financial and academic success for all students. Your vision should reference one or more of these impacts.

## Establishing Clear Outcomes

All data collected by the system will be applicable to direct assessment CBE programs. See the [Management Information Systems](#) and [Submission Data Elements](#) for more information. However, colleges should keep in mind that direct assessment CBE programs may yield outcomes not captured by existing metrics or may need to convert existing metrics to account for competencies as opposed to credit hour as the basis of measurement. For example, if the college's vision is that direct assessment CBE accelerates time to completion, it may be advisable to explore outcomes around pace of competency and program completion and student perception of pace.

Colleges will identify more specific metrics based on the vision for their direct assessment CBE during the [Design and Build phase](#). See additional metric suggestions in [RAND's findings](#) from the pilot.







## EQUITY IN ACTION

*To ensure direct assessment CBE benefits underserved adult populations, institutions must intentionally center equity in their program design and outcomes. Adult students — often balancing work, family, and education — can thrive in flexible, skills-based learning models, but only if programs address the barriers they face and measure success equitably. Example strategies include:*

### **Define and measure equitable outcomes.**

Establish clear goals for success, access, and support, with metrics that track progress for diverse adult student populations, disaggregated by race, ethnicity, income, and prior learning.

### **Prioritize learner-centered design.**

Collaborate with adult students to codesign programs that reflect their lived experiences, needs, and aspirations, ensuring culturally responsive and inclusive approaches.

### **Integrate data to drive improvement.**

Collect and analyze data that captures the full student experience — academic, financial, and personal — to identify equity gaps and continuously refine program delivery and support.

### **Eliminate barriers to participation.**

Address systemic barriers by offering flexible enrollment policies, credit for prior learning (CPL), and wraparound supports such as career coaching, childcare, and financial aid guidance.

## KEY DECISION

**What is the college's equity-centered vision for the direct assessment CBE program?**



**What student outcomes does the college hope to achieve that address historical barriers to success, access, and support?**



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What are the core values and mission of your institution and how should they inform your program outcomes?
- What gaps or needs have you identified in your current programs that direct assessment CBE aims to address? What data informs this perspective?
- What are the short-term and long-term outcomes you wish to achieve and how will you prioritize them?
- How do you envision your program contributing to student success, retention, graduation rates, transfer, and employment?
- How can you use your intended outcomes to create a compelling narrative about the value of this program?





## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Develop and validate an equity-centered vision statement that explains why your institution is pursuing direct assessment CBE.

- Validate and refine the vision with not only faculty, administrators, and employers, but also representation from the groups you hope to impact through the program, including students, alumni, and community advocates.
- Collect and share stories from decision-makers about their educational experiences to underscore the importance of your direct assessment CBE program and the vision statement. Stories can be a powerful tool for [building support for direct assessment CBE](#).

### Explore direct assessment CBE programs at other institutions that have achieved equitable outcomes to learn more about program design decisions.

### Use the [Learner Data Audit](#) to explore existing data about students, deepening your understanding of their needs.

- Consider who is not being served well and what inequities currently exist at the institutional, departmental, or programmatic level.
- Define who in the community needs access to the direct assessment CBE program.

### Utilize a [Goal Setting Worksheet](#) to capture your program's resources, activities, outputs, outcomes, and impact.

### Define goals and impact measurements for continuous improvement.

- Review local and state strategic plans to identify metrics and performance indicators. (e.g., [Vision 2030 Strategic Directions](#) and [Outcomes and Metrics](#)). [C-BEN's Intentionally Designed and Engaged Learner Experience](#) also offers some sample indicators to measure performance.
- Refer to the [Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs](#) guide as you define goals and measures of success.

- Consider measuring success and outcomes in the following areas, disaggregated by race/ethnicity, gender, region, sexual orientation, age, and other demographic categories:

#### ▶ **Student Learning/Competency Acquisition:**

*average level of mastery by competency or by program, level of student engagement in required and optional content, time to completion of individual competencies.*

#### ▶ **Completion:** *competency completion, completion rate, time to competency completion, time to program completion.*

#### ▶ **Persistence:** *students returning term-to-term.*

#### ▶ **Program Impact and Employability:** *job placement rates, employer satisfaction with work experience participants or program graduates they have hired, salary.*

#### ▶ **Satisfaction:** *survey students and other internal and external decision-makers to gauge satisfaction with the direct assessment CBE format and outcomes.*

#### ▶ **Equity and Access:** *access and success of marginalized student groups, retention rates.*

#### ▶ **Program Efficiency and Cost-Effectiveness:** *cost per graduate, cost to students, institutional return on investment.*

### Establish benchmarks where possible using existing institutional data so that you can conduct effective analysis of the impact of the direct assessment CBE program.

- Consider partnering with other California institutions to benchmark against their data if you do not have your own.
- Consider working with institutions in other states if there are no California institutions available for data partnership. You can find potential partners through a national data sharing project such as the [American Association of Community Colleges' Voluntary Framework of Accountability](#) or the [Postsecondary Data Partnership at the National Student Clearinghouse](#).



# Cultivate Direct Assessment CBE Champions and Build Buy-In

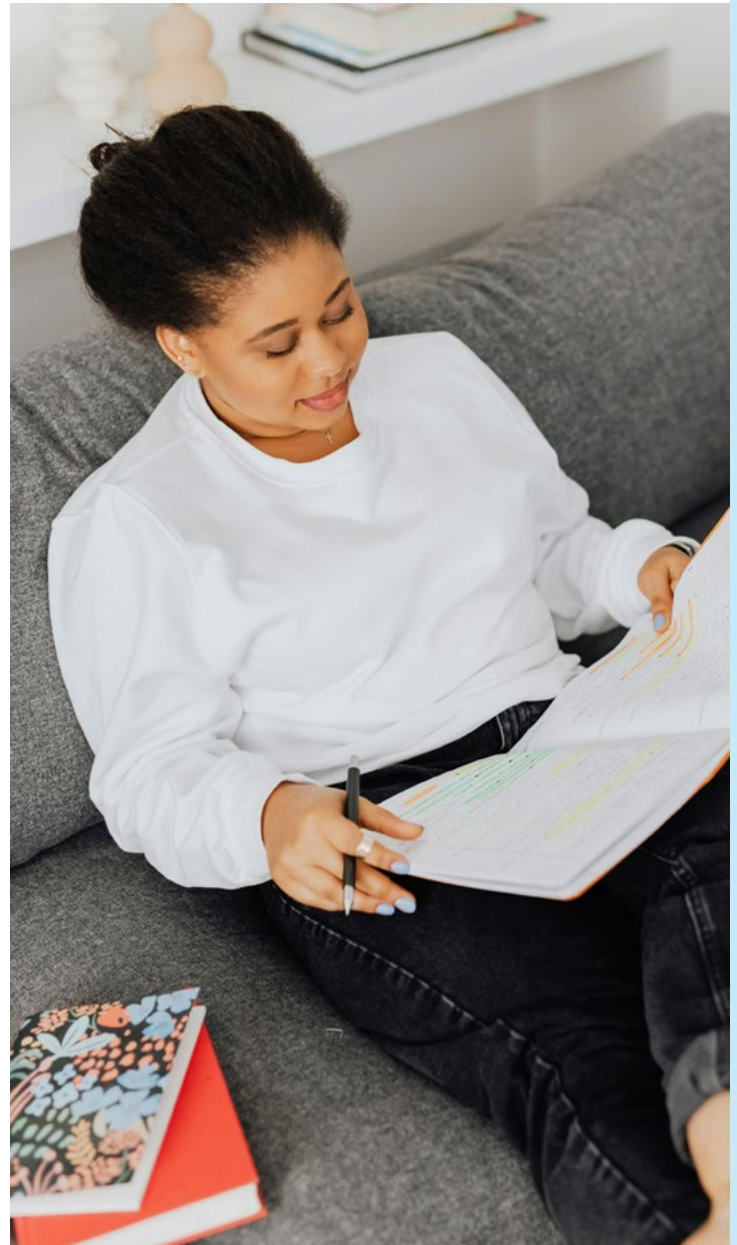
Direct assessment CBE champions are institutional decision-makers who are passionate about direct assessment CBE as an innovative practice and play a pivotal role in program success.

While they may not hold formal leadership positions, their dedication and support can significantly impact the program's development and implementation. Direct assessment CBE champions often provide tangible resources, such as time or expertise, and actively work to build buy-in among a wider range of decision-makers. By fostering a collaborative environment and ensuring that diverse perspectives are considered, direct assessment CBE champions contribute to increased support, collaboration, and a shared commitment to the program's vision and outcomes.

Building broad buy-in among a variety of institutional decision-makers representing different areas can help to overcome potential resistance or resolve challenges that may arise during implementation. This ensures a smoother transition to new practices and policies. Communicating the value of direct assessment CBE while addressing potential concerns and uncertainty early on can help build broad buy-in.

## LEVERAGE ALUMNI EXPERTISE IN PROGRAM DESIGN

Bakersfield College leveraged the firsthand experience of key faculty, many of whom are program alumni, to inform curriculum design to enhance relevance for future students. Additionally, the college developed partnerships with alumni-turned-employers that enriched program development and facilitated valuable career opportunities.







## EQUITY IN ACTION

*A strong communication strategy is essential for cultivating champions who not only support your program's vision but also understand the direct link between direct assessment CBE and equitably advancing student outcomes. The strategies below can help you emphasize the equitable and inclusive nature of your program, swaying champions and building buy-in so that your program can advance equity in success, access, and support:*

**Provide a cohesive picture of how your direct assessment CBE program is connected to Vision 2030 as well as district and college equity goals.**

See [Center Equity](#) for additional information on this alignment.

**Include student voices through panels, videos, or speaking engagements.** Creating opportunities for students to directly share their stories and hopes for the potential impact of the program can help convince institutional decision-makers to consider and support direct assessment CBE.

**Review communication materials (including materials shared with your internal audiences) to ensure that the language, imagery, and stories highlighted resonate with diverse audiences.** Consider using a standard set of equity-minded questions to determine whether materials are suitable (e.g., does this material perpetuate harmful stereotypes, does the material emphasize student assets, does the material use people-first language, etc.?).

## KEY DECISION



**How will direct assessment CBE champions be identified and onboarded?**  
**How will the college build buy-in?**



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- How can your communication strategy be tailored to meet the needs and interests of different decision-making groups and perspectives?
- What strategies will you employ to ensure all decision-makers understand the equity implications and benefits of direct assessment CBE?
- How can you ensure transparency in your communication, especially regarding the challenges of direct assessment CBE?
- How will you build and maintain institutional awareness and commitment to the direct assessment CBE program among college leadership, faculty, and staff?
- What feedback mechanisms will help ensure decision-makers feel heard and their concerns are addressed?
- What steps will you take to secure formal endorsements and support from key committees and departments within the college?
- How can you leverage the influence of well-regarded faculty and staff to champion the direct assessment CBE program and engage their peers to support it?



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

**Learn more about change management and campus engagement to ensure you mitigate risks involved with implementing direct assessment CBE.**

- Learn more about [Shasta College's efforts to cultivate direct assessment CBE champions in their college spotlight](#).
- Review [Planning for Postsecondary Competency-Based Learning A Field Guide to Reimagine a System-Wide Approach to CBE](#) from the Kentucky Community and Technical College System (2022), particularly pages 43-57 for recommendations and considerations in change management and engaging key college decision-makers.
- Use the [“Policies and Procedures Review: Competency-based Education”](#) report produced in 2025 to get a sense of the breadth of institutional functions impacted by implementing direct assessment CBE that will need to be accounted for in your change management plans.

**Create a communication plan using this [Communication Plan Template](#) to articulate how and when you will engage different decision-making groups:**

- Consider a range of ways to engage decision-makers like the college cabinet, the board of trustees, academic senate, and student government. These can include:
  - ▶ **Interdepartmental meetings** to provide updates and gather feedback.
  - ▶ **Individual meetings with targeted groups** to address specific concerns (e.g., academic senate presentation, presentations during professional development days, etc.).
  - ▶ **Asynchronous campus communications** to inform the entire campus community of your direct assessment CBE plans (e.g., utilizing a monthly newsletter, discussion forum, listserv, etc.). You can utilize existing communication channels or create new ones as appropriate.

**Promote professional development around direct assessment CBE to generate interest and excitement.**

- Send a small team of faculty to learn more about direct assessment CBE at conferences or other professional development events such as C-BEN's annual event [CBExchange](#).
- Visit the [CCC Direct Assessment CBE website](#) for more information on upcoming events.
- Curate and share resources about direct assessment CBE nationally such as this [AIR CBE Model Map Brief](#) or C-BEN's close-captioned video [“What is CBE?”](#)

**Formalize buy-in to ensure that faculty and staff concerns are addressed and opportunities to get involved in design are managed according to established policies and procedures.**

- Work with the academic senate to pass a resolution to support the development of direct assessment CBE programs. *Note: For some colleges, this may not be a formal approval process.*
- Check your progress against C-BEN's rubric for [“Demonstrated Institutional Commitment To and Capacity For CBE Innovation.”](#)

**Create marketing materials to effectively communicate why you are building a direct assessment CBE program.**

- Develop a roadshow slide deck that can be adapted for different audiences. Be sure to use the deck to tell a clear, data-infused story about what direct assessment CBE is and how this effort aligns with Vision 2030 and your institutional mission and vision.
- Review [Merced College's presentation to their academic senate](#) for additional ideas on presenting to faculty.

**Review [Determine Resources and Capacity](#) to learn more about how securing leadership and commitment from dedicated faculty in both the program's discipline and general education will support development of your first direct assessment CBE program.**



## SPOTLIGHT: SHASTA COLLEGE



## FACULTY LEAD THE WAY IN DIRECT ASSESSMENT PROGRAM DEVELOPMENT

Driven by the imperative to upskill early childhood educators in response to new legislative requirements, Shasta College developed a direct assessment CBE degree in early childhood education (ECE). Shasta prioritized faculty engagement from the start, ensuring that their expertise shaped the program's development.

### Prioritizing Faculty Engagement

The leadership team launched a roadshow to present the vision for the direct assessment CBE program to key faculty bodies, including the academic senate and curriculum committee. These interactive sessions allowed faculty to ask questions, share concerns, and provide feedback, building trust and fostering a collaborative approach. Early involvement ensured that naturally inclined faculty, particularly in early childhood education, felt welcomed and eager to participate.

### Building Faculty Capacity

Shasta faculty engaged in capacity-building workshops with direct assessment CBE subject-matter experts and were encouraged to read “A Leader’s Guide to Competency-Based Education,” which became a key resource. This involvement ensured that faculty were not only informed but also actively contributing to the design of the program, ensuring it met the college’s academic standards and student needs. Faculty interest was sparked through external conferences such as CBExchange and existing program review processes. These activities helped prepare faculty, building readiness for innovation.

### Leveraging Social Capital

A unique aspect of Shasta’s approach was the program leader’s ability to leverage existing relationships with faculty. Strong ties facilitated trust-building and collaboration, helping to address potential resistance and promote a shared commitment to the program’s success. The involvement of respected leaders, such as the ECE faculty coordinator and the president of the academic senate, helped to solidify support for the direct assessment CBE initiative.



## TIPS FOR BUILDING BUY-IN

- 1. Hold town hall meetings for all faculty and staff.** These meetings can also be used for updating stakeholder groups, as well as for listening to and addressing their concerns. Colleges may experience resistance to direct assessment CBE from stakeholder groups for several reasons (e.g., faculty may be uncomfortable with new modality for learning, staff may be unsure about having sufficient resources). Holding town hall meetings can help maintain transparency and open communication.
- 2. Attend and present at committee meetings.** Implementing direct assessment CBE requires engagement and approval with several key college committees (e.g., curriculum). Your program will require approvals from several committees so addressing concerns early on will help accelerate your approvals later.
- 3. Leverage the support of trusted faculty or college leaders to build campus buy-in.** The presence of respected faculty or campus leaders may help make direct assessment CBE implementation a more legitimate consideration and help allay concerns and doubts about it. Identify and engage these key individuals early on in the process as this can help minimize pushback.
- 4. Hold one-on-one meetings with faculty.** Faculty members may have concerns or questions that they are not comfortable sharing in front of others. Holding one-on-one meetings gives faculty another opportunity to engage, be heard, and provide feedback. Implementation teams may consider bringing in a trusted faculty member, such as a department chair, to these one-on-one meetings with faculty to foster open and effective dialogue.
- 5. Leverage internal communication channels.** Utilizing internal communication channels can help elevate awareness of direct assessment CBE, maintain transparency, share major milestones, and demonstrate the implementation team's intent to engage the broader campus community.
- 6. Emphasize potential of CBE to reach learners in a different way.** Focusing on direct assessment CBE as an additional approach to reach students who may not otherwise have access to a higher education program rather than as a replacement for what faculty do now can be an effective strategy. Focus on direct assessment CBE as an innovation that will open doors for new students and address the needs of underserved populations can allay fears faculty may have that direct assessment will supplant traditional instruction.







# Select a Program

In many ways, the prescribed activities for direct assessment CBE program selection (e.g., consulting labor market data, [meeting with industry decision-makers](#), etc.) mirror the program approval processes that are encouraged for all new programs developed at colleges.

Refer to the [Program Course Approval Handbook \(PCAH\)](#) for general guidelines and instructions for direct assessment CBE program approval.

*Your program selection should be determined based on several considerations:*

- **Labor market need and employment opportunities.** Labor market analysis showing which degrees are in demand and offer the greatest opportunities for students.
- **Potential to impact target population of students.** Institutional commitment to serving adult students and students from marginalized communities to advance diversity, equity, inclusion, and accessibility (DEIA). See more in [Determine Target Populations](#).
- **Existing resources and partnerships.** Institutional commitment to the implementation of direct assessment CBE that includes a willingness to make financial investments and build capacity for innovation. See more in [Determine Resources and Capacity](#).
- **Available faculty support and capacity.** The readiness and willingness of the program to develop a direct assessment CBE program. See more in [Cultivating Direct Assessment CBE Champions](#).

## USING LABOR MARKET INFORMATION

Having accurate labor market information (LMI) helps colleges decide if they should create new programs, align education with job demands, and ensure students have the right skills for the job market. When creating new programs, colleges need to assess whether there is significant demand for workers in that specific field (i.e., high-need occupations), and consider if jobs in the field offer family-sustaining wages (i.e., high-value occupations).

- **High-need occupations have a shortage of workers.** This can be assessed by looking at the difference between current and projected demand (i.e., how many workers local employers need) and the supply of talent (i.e., the number of students being trained at all institutions in your region).
- **High-value occupations have demonstrated value for workers in terms of earnings (i.e., paying a living wage), benefits, and/or well-defined pathways to future economic mobility (i.e., opportunities for advancement).** The most common way to assess high-value is by looking at whether workers in entry-level employment in an occupation earn a regional living wage, but nonmonetary benefits and pathways to advancement can have value for many workers. It will be important to define value in multiple ways as your LMI analysis becomes more sophisticated. For example, there are some occupations critical to a community that offer low earnings for workers yet have other value (e.g., early childcare education workers sometimes receive free or discounted childcare).



## EQUITY IN ACTION

*When selecting your program, your institution can engage in the following to increase the academic and career success of students.*

**Inclusive decision-making.** Engage a broad group of decision-makers in the program selection process to ensure your program meets the needs of a diverse community. You want to balance student and industry needs to create a program with both students' career goals and the needs of the local economy at the center.

**Reversing occupational segregation.** When looking at LMI, disaggregate by race/ethnicity, gender, age, and other demographic categories to identify occupational segregation in the workforce. Design programs that create education and training pathways specifically for populations overrepresented in low-wage occupations or underrepresented in careers that support economic mobility. (See [Job for the Future's End Occupational Segregation Action Plan, 2023](#).)

**Addressing inequities in current educational outcomes.** Consider selecting a program where the features and flexibility of direct assessment CBE could address equity gaps in current student outcomes.

**Fostering equitable policies and culture.** The rigorous nature of direct assessment CBE development requires a close examination of your institution's culture, policies, and processes. This can reveal hidden barriers that might be preventing certain student groups from succeeding. By addressing these issues during program development, you can create a more equitable program from the ground up.

**Building transfer pathways.** Colleges can create certificate or degree programs. Opting for an AA/AS degree can create a pathway to transfer to a four-year college or university to increase baccalaureate attainment.

## KEY DECISION



**What direct assessment CBE program will the institution offer and what credentials will graduates earn?**



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What are the most high-need/high-demand occupations in the region?
- Are there specific occupations experiencing labor shortages or surpluses?
- Will the number of graduates you anticipate having each year meet or exceed market needs?
- How are different demographic groups represented within the overall workforce and in these particular occupations or industries (i.e., are certain demographic groups over/underrepresented)?
- What occupations offer the most value for workers in terms of earnings or opportunities for advancement?
- How do occupations map to local education and training programs offered by all relevant local institutions, including other community colleges and private and public four-year colleges and universities in your region?
- What certificates, degrees, or other credentials align with these workforce needs?
- Which program area at your institution has the most capacity to develop and launch a direct assessment CBE program at this time?



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Review relevant rules, regulations, and guidelines.

- Review the [Program and Course Approval Handbook \(PCAH\)](#) guidance on LMI.
- Review [California Education Code \(CEC\) 78015](#) and [California Code of Regulations, Title 5 § 55130](#).
- Consider reviewing [California's 2024-2027 Unified Strategic Workforce Development Plan](#) to ensure alignment with existing investments.

### Determine workforce needs with your regional Center of Excellence and partners.

- Submit an exploratory request to your [regional](#) Center of Excellence to conduct a review of existing labor market-related literature and data on prospective programs in your region.
- Meet with your regional Center of Excellence director to review the labor market data they compiled to identify occupations that have labor market demand and good potential labor market outcomes for students.
- Gather input on current and projected workforce needs from employers, employer associations, and workforce development boards using existing advisory boards or dedicated focus groups. Weigh the relevant labor market information from your exploration against information gathered from local employers about their needs and institutional priorities and capacity. See [Map external partners](#) for more on engaging partners in direct assessment CBE development.
- Use the worksheet on pages 11-12 of the [“Designing with Equity in Mind An Action Toolkit for Competency-Based Education”](#) to facilitate discussions on labor market information.

### Select up to five potential program options for decision-makers to consider offering as direct assessment CBE.

- Meet with your regional Center of Excellence director to review the labor market data compiled and identify occupations that have labor market demand and good potential labor market outcomes.
- Map occupations to potential program options.
- Use the [Indicators of Potentially Good Program Fit for direct assessment CBE](#) to discuss potential program options and program/department capacity, need, and alignment in developing a direct assessment CBE program.

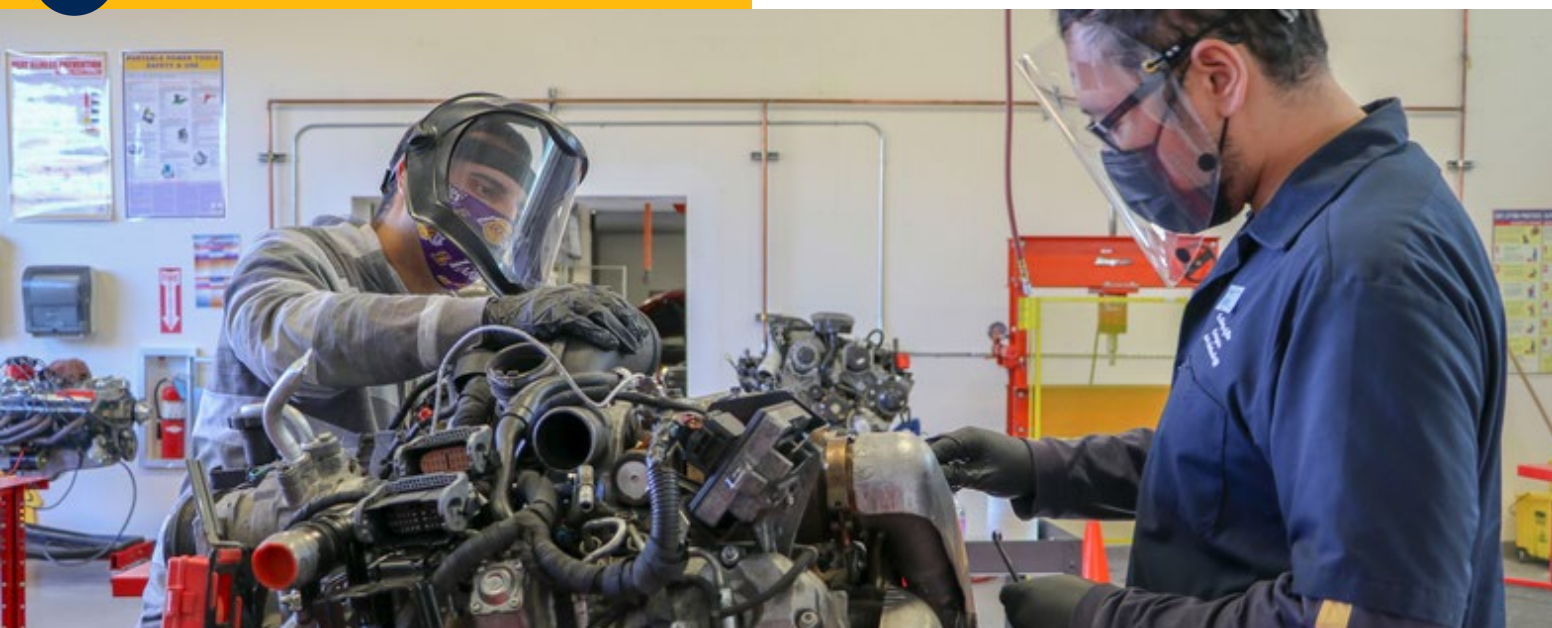
### Assess existing programs to narrow down options in selecting a program.

- Map potential program options to existing programs to assess student outcomes. Note: If your college lacks a corresponding traditional program, assess student outcomes at nearby colleges.
- Work with your institutional research department, as they will likely have access to more complete and recent data for your college on these measures.
- Disaggregate existing program participation and outcomes data by student characteristics such as race/ethnicity, gender, age, economically disadvantaged status, and any other available demographic data of interest to identify equity gaps your direct assessment CBE program can address.
- Review [Questions to Consider When Looking at Existing Program Outcomes](#) to guide assessment of existing programs and narrow down program selection.

### Request a full labor market study from your regional Center of Excellence for the program selected for your direct assessment CBE.

- Include the full report as part of your application to the Chancellor's Office and the Regional Consortium recommendation process for CTE programs.




**SPOTLIGHT: SOUTHWESTERN COLLEGE**


## MEETING WORKFORCE DEMAND FOR SKILLED TECHNICIANS IN ELECTRIC VEHICLES

To meet the rising demand for skilled automotive technicians in an evolving job market, Southwestern College selected its automotive technology program as the focus for a direct assessment CBE pilot.

### Program Selection Process

After evaluating several options including culinary arts, drone technology, and environmental technology, Southwestern College chose automotive technology for their direct assessment CBE pilot due to its inherent alignment with direct assessment CBE principles. The program's existing task-based curriculum and hands-on assessments made it ideal for competency mapping.

### Industry Alignment

The direct assessment CBE assessment approach mirrors industry hiring practices, evaluating candidates as either competent or not competent rather than using traditional letter grades. This binary assessment system particularly resonates with automotive employers, who need absolute certainty that new hires can perform critical safety and technical tasks. Unlike traditional grading systems where a "B" or "C" grade might leave questions about specific skills gaps, direct assessment CBE's competency-based evaluation provides employers with clear assurance of a candidate's capabilities.

### Strategic Considerations

Growing federal and state investment in electric vehicle technology indicates increasing demand for skilled technicians. The program aligns with California Community College's Vision 2030 goals for workforce development and economic advancement, positioning it for potential additional support and resources. By aligning with these broader state initiatives, Southwestern strategically positioned their direct assessment CBE program to address both immediate industry needs and long-term workforce development goals. This alignment with system-level priorities strengthens the program's sustainability and potential for future expansion.



# Determine Your Target Population

A thoughtful approach to identifying and defining your target students will help ensure that your program is accessible and impactful for those who stand to benefit the most across lines of race, ethnicity, religion, class, region, and gender, with a focus on students who are harmed by persistent systemic barriers linked to their racial and ethnic identities.

The flexibility of the direct assessment CBE model is especially advantageous for adult students who have historically been underserved by higher education, by offering tailored benefits such as flexibly-paced progression, flexible enrollment, and recognition of prior learning. Key groups who can benefit include:

- **Underemployed individuals.** Those who are unemployed or working in roles that do not provide family-sustaining wages. *Flexibly-paced progression and enrollment options* allow these students to upskill or reskill without sacrificing job searches or limited income opportunities.
- **Adults with incomplete degrees.** Students who have some college credits but have not yet earned a degree. *Recognition of prior learning* enables them to build on their existing knowledge and accelerate toward degree completion.
- **Groups experiencing systemic barriers.** Individuals who have experienced systemic discrimination or barriers in traditional higher education environments. *Proactive, supportive services* ensure these students receive the guidance and resources needed to succeed in a more inclusive environment.



- **Career-focused students.** People seeking to acquire specific skills for employment or to advance in high-demand fields. *Growth-oriented assessments and adaptable deadlines* help them focus on mastering competencies aligned with their career goals while balancing other responsibilities.
- **Tech-comfortable students.** Adults who are familiar with and comfortable using technology, such as online learning platforms. *Flexible enrollment options and adaptable deadlines* make it easier for these students to engage with programs on their terms, leveraging technology for a personalized learning experience.

But without proper planning, the program may create unintended challenges for some students. For example, without robust and intentional outreach, engagement, accountability, and resource navigation plans, students engaged in flexible pacing models may progress through their program of choice at a pace that is slower than ideal.



## EQUITY IN ACTION

*It's important to not only define your target population, but also to articulate how your direct assessment CBE program will support them specifically — addressing any equity concerns related to mitigating potential barriers and ensuring that the program's structure actively works to remove these obstacles.*

**Ensure students have the necessary technology.** Ensure all students have the necessary tools and skills to succeed in a technology-driven program. This includes providing access to computers and broadband where needed and incorporating computer literacy into the enrollment process or as supplemental curriculum. Removing technology barriers helps create an inclusive and supportive learning environment.

**Foster a welcoming college environment.** Design program structures that actively welcome direct assessment CBE students to the college. Focus on clear communication about how to navigate academic and nonacademic resources, ensuring students feel supported and included, especially those with limited or negative prior experiences with higher education.

**Partner with community organizations for wraparound support services.** Collaborate with local organizations to offer critical wraparound services, such as childcare or family-centered support. This is particularly important for adult students balancing caregiving responsibilities. Community partnerships can enhance your program's ability to meet students' holistic needs and ensure their success.

**Remove barriers through inclusive program design.** Avoid implementing restrictive entry criteria that may exclude potential students. Instead, focus on providing just-in-time upskilling opportunities to prepare students for success. For instance, rather than requiring a predetermined level of digital literacy, use orientation as an opportunity to assess and teach technology skills.

## KEY DECISION



**What student populations at the college can benefit from direct assessment CBE and how will this modality serve them?**



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- Who are underserved or underrepresented groups within our existing program(s) that could benefit from more flexible educational opportunities?
- Who is excelling in our existing program(s) and what are the demographic characteristics of groups that are seeing poorer outcomes related to completion, obtaining employment after the program, and/or transferring to a four-year college or university?
- What aspects of your current academic program structure pose the greatest barriers for your students? What data informs your answer?
- What prior learning experience do potential students bring that could be recognized and credited in a direct assessment CBE program?
- What do our alumni tell us about the experiences, challenges, and benefits they received from our programs? How can we use this information to better define and support future target students?
- Are there specific underserved groups that other programs have successfully reached that we could also target?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Review existing research to inform equity-centered program design.

- Review existing resources including C-BEN and JFF's [Designing with Equity in Mind Toolkit](#) to guide discussions on program equity.
- Examine recommended target student populations and potential equity impacts in [How Competency-Based Education May Help Reduce Our Nation's Toughest Inequities](#).

### Complete the [Equity Data Audit](#) to identify and address equity gaps.

- Analyze program outcomes and equity data from your institution's existing programs or similar programs at other colleges to uncover disparities and opportunities for improvement.
- Partner with your institution's research department or use self-service tools like the Community College Pipeline to access relevant data. Find modules on collecting and using data, including local community population estimates and the Postsecondary Education Data System, in the [Vision Resource Center](#).

### Facilitate structured discussions about learner success using data insights.

- Use this [Learner Success Exploration guide](#) to help structure internal college conversations about data.
- Identify key trends, barriers, and opportunities to inform program design decisions.

### Engage students and potential students to codesign equitable program features.

- Consult with current students, alumni, prospective students, and staff who provide direct services to gain a well-rounded perspective of your current services. Use different formats such as focus groups and surveys to gather insights into each group's educational needs, barriers, and preferences.
- Define specific features of a direct assessment CBE program that must be in place to remove barriers and support student success. Aspects may include flexibility, hybrid or online delivery, embedded student supports, equitable assessment, etc.

### Identify and validate potential equity challenges to inform solutions.

- Use resources like [Equity in Competency Education: Realizing the Potential, Overcoming the Obstacles](#) (November 2014) to understand barriers different student groups may face.
- Collaborate with faculty, staff, and external partners to design program elements that actively mitigate these barriers and foster student success.



## TARGETING ADULT LEARNERS AT MT. SAC

Mt. San Antonio College designed their direct assessment CBE Kinesiology program with a specific focus on adult students over 30. Through collaboration with the Los Angeles Center of Excellence, their Equity and Labor Market Information report revealed an enrollment gap among adult students in Kinesiology. Recognizing that these students often balance work and family commitments, Mt. SAC tailored their program to provide the potential for flexible, accelerated pathways for those with prior experience in fields like personal training.





# Determine Resources and Capacity

Creating a direct assessment CBE program impacts the full range of college operations, making it critical to carefully consider resources and capacity before beginning the Design and Build phase.

*In C-BEN's [Quality Framework for Competency Based-Education Programs](#), institutional capacity includes:*

- **Commitment** to a direct assessment CBE approach
- **Leadership support** for the creation, continuous improvement and ongoing growth of direct assessment CBE programming
- **Faculty, staff, and administrators** capable of developing and implementing a new direct assessment CBE program
- **A well-defined approach** to direct assessment CBE that is compliant with internal and external policies, rules, and regulations
- **A feasible and sustainable business model** that efficiently utilizes institutional resources
- **Appropriate technology** (e.g., student information systems, financial aid delivery systems, learning management systems)
- **Well-developed, clearly communicated plans** for program development, operation, data collection, evaluation, and other processes

Much of this capacity is built during the Design and Build phase. However, careful planning during the Prepare phase can help build capacity early and lay the groundwork for a strong program. Review the [Assessing Readiness for Direct Assessment CBE](#) section for additional capacity-building strategies.



Another critical element of capacity is funding to support personnel, resources, and other program costs incurred during start-up or operation. The following section reviews cost drivers commonly seen in direct assessment CBE programs. Many categories are familiar but may represent more funding or a larger portion of the overall budget in a direct assessment CBE program compared to a traditional program. The primary revenues for direct assessment CBE programs will be apportionment. For guidance and information on how your program is funded, see the [Program and Course Approval Handbook \(PCAH\)](#) and California Code of Regulations, Title 5.



## DIRECT ASSESSMENT CBE COST DRIVERS

**Personnel is typically the largest expense and includes:**

- **Faculty.** Faculty may need to be hired or reassigned to focus on curriculum development, instruction, and assessment. Implementing direct assessment CBE programs often requires new faculty loading models, which should be negotiated with local unions to align with program needs.
- **Instructional designers.** Staff who support faculty in the design and development of curriculum/courseware, with a focus on self-directed learning.
- **Staff.** Personnel in nonacademic areas of the college such as financial aid or enrollment management who contribute to the design and operation of programs.
- **Administration.** Admin across academic and nonacademic units who may need to commit time to support development.
- **Consultants.** Technical assistants who can make your development processes easier, faster, more efficient, and more impactful. You may want to hire multiple consultants for different areas to fill gaps in your institutional capacity or expertise (e.g., a direct assessment CBE subject matter expert, technology consultants, etc.).
- **Project Director/Manager.** A project lead for your direct assessment CBE initiative who manages day-to-day tasks, building institutional capacity.

**Resources such as equipment, materials, and tools can comprise a significant portion of the budget if the college does not leverage existing options:**

- **Learning resources.** Curriculum materials (including assessment instruments), library resources (e.g., databases, journals, and textbooks), as well validating high-quality, low/no-cost texts and content.
- **Technology.** Hardware and software such as a learning management system (LMS) to support program delivery. Technology contracts may also include built-in costs for configuration, customization, implementation support, installation, testing, and other services.
- **Equipment and facilities.** Any on-campus classrooms, labs, or facilities and specialized labs or equipment specific to the program's needs.

**Other costs can include:**

- **Marketing and communications.** Costs associated with marketing the program to potential partners and students.
- **Evaluation services.** Consultants who perform evaluation activities on behalf of your institution; in-house or third-party evaluators who assess the efficacy of your programming.
- **Accreditation or licensure fees.** Fees paid to partners to review, license, and/or accredit your new program.



## EQUITY IN ACTION

*Resource allocation directly impacts your ability to design programs that remove barriers and ensure success for all students. Thoughtful planning includes the following strategies:*

**Develop a targeted marketing and outreach strategy.** Ensure you have allocated resources to support robust marketing and communication plans that prioritize reaching your target students. Tailor messaging to resonate with your target populations.

**Invest in student support services.** Direct assessment CBE students often progress at varying paces and may engage with the program during nontraditional hours. Consider allocating resources to hire academic coaches and support staff who can provide personalized, on-demand assistance aligned with the program's flexibility and students' individual needs.

**Develop and maintain competency-aligned open educational resources (OER).** Direct assessment CBE relies on clear, well-defined competencies. Invest in OER that are competency-aligned, reducing costs for students while ensuring they have access to high-quality learning materials that support mastery of specific skills.

**Support technology and infrastructure for flexibly-paced learning.** Direct assessment CBE programs require robust technology platforms to track student progress, facilitate regular and substantive interaction (RSI), and provide access to learning resources. Allocate funds to implement and maintain systems that meet these unique demands and ensure equitable access for all students.

**Plan for iterative program evaluation and improvement.** The innovative nature of direct assessment CBE programs means continuous evaluation is essential. Invest in data collection and analysis to understand how flexibly-paced and competency-based models impact equity outcomes. Use findings to refine program features and ensure they meet the diverse needs of students.



## KEY DECISION



What resources are available to design, launch, and sustain the direct assessment CBE program?



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below. Note that developing your program budget will come in a later section.

- What funding do you have to support the development and operation of a direct assessment CBE program?
- What resources do you have?
- What resources might you need to acquire?
- What other costs might you incur during startup or operation?
- Can you leverage partners to fill in resource gaps and build capacity?
- What personnel do you have?
- What personnel might you need to hire?
- Do you have faculty, staff, and administrators capable of developing, implementing, and sustaining a direct assessment CBE program?
- Do you have personnel with deep knowledge of internal and external policies, rules, and regulations and/or consultants capable of supporting decision-making?
- Do you have personnel with project management experience?







## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

**Determine a change management framework model to help structure your capacity building process.**

- [Achieving the Dream's Institutional Capacity Assessment Tool \(ICAT\)](#) provides a framework for building and maintaining momentum for higher education reform.
- [Kotter's 8 steps for leading change](#) is a widely used framework that emphasizes the need for leading, motivating, and managing people.

**Estimate startup costs to better understand what resources you need to launch a new program.**

- [Review the Rpk Group's Study of Four New Models and Their Implications for Bending the Higher Education Cost Curve](#) for more information on cost drivers and how they impact program design and quality.
- If you feel you have enough information, estimate operational expenses. Your operational budget will be adjusted as you make decisions about your direct assessment CBE program. Keep this budget current and ensure key decision-makers have appropriate visibility to inform their decisions.

- Refer to the [Assess the Impacts and Costs of Programs](#) section of the Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs guide for additional guidance on thinking about program costs.

**Identify funding opportunities that align with your program (e.g., state or federal funders that invest in sectors with labor shortages).**

- Leverage existing funding streams in new ways to support development.
- Find ways to collaborate with other colleges to share the workload and cost of development and/or implementation (e.g., developing curriculum together, team teaching, etc.). Consider utilizing this [Sample Cost-Sharing Conversation Protocol](#) to support collaborative conversations about this topic.

**Consider the [Benefits of Adding a Project Manager to the CBE Team](#) to build capacity.**

**Conduct a [Student Supports Audit](#) to enhance your understanding of current resources and supports.**

- This audit builds a shared understanding of what services are already available, who is accessing them, and where gaps exist for current and potential future students. This can help clarify new vs. existing cost drivers.

**Review this [spotlight of Merced College's exploration of resources and capacity to learn from their experience](#).**



## SPOTLIGHT: MERCED COLLEGE

## BUILDING INTERNAL AND EXTERNAL CAPACITY FOR DIRECT ASSESSMENT CBE

Merced College's direct assessment CBE program was initiated by the Vice President of Instruction, with child development faculty volunteering to participate. Merced's experience highlights key elements for successful implementation in the following ways: First, internal support came from a core group of champions, including the Dean of Innovation, directors of Admissions and Records and Financial Aid, discipline faculty, and cabinet-level leaders. Second, the college's most pivotal decision was hiring a full-time curriculum specialist to manage daily operations, shepherd proposals through governance processes, and maintain decision-maker communication.

This dedicated position, supported by Chancellor's Office funding, proved essential for maintaining momentum and completing critical tasks. Finally, Merced strengthened their implementation through strategic partnerships. They engaged subject matter experts from C-BEN to guide curriculum development and hosted joint forums to demonstrate direct assessment CBE's value to students. The choice of child development for their direct assessment CBE program emerged from advisory committee discussions that revealed urgent workforce needs in their service area, with sufficient faculty interest to support the initiative.



# Assess Technology Needs

Good news — most of the technology you need to implement direct assessment CBE is already available at your college!

However, assessing your technology ecosystem early on will help ensure your team is prepared for any modifications, customizations, or additional vendors that will be required to support students in your programs and comply with program approval requirements.



## COMPONENTS OF A TECH INFRASTRUCTURE

### FOUNDATION COMPONENTS

- Learning Management System
- Student Information System/Enterprise Resource Planning System
- Data Infrastructure
- Financial Aid
- Customer Relations Management System
- Competency Management System

### TEACHING/LEARNING & SUPPORT COMPONENTS

- Curriculum Courseware (includes personalized/adaptive curriculum)
- Student Service Supports
- Assessment
- Collaboration Tools

### SKILLS EVIDENCE

- Dual Transcripts
- Digital Portfolios
- Credential Manager

## KEY DECISION



What technology is needed to develop, deliver, and support the direct assessment CBE program?



### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What technologies does the college use now that can also effectively support direct assessment CBE, and what gaps exist that will require new systems?
- How can you integrate platforms, systems, and applications to move data efficiently and provide task automation where possible?
- Are there any opportunities to share technology infrastructure, solutions, and automation of processes with colleges in your district or the CCC system?
- When will each new system or application for direct assessment CBE need to be licensed, installed, tested, and ready to use?



## EQUITY IN ACTION

*Leveraging technology is foundational to creating equity-centered direct assessment CBE programs. Technology solutions not only support the unique flexibly-paced, competency-based model but also help eliminate systemic barriers, enabling equitable success, access, and support for all students. Key strategies include:*

**Enable personalized learning paths.** Your technology solutions should allow students to progress at their own pace and leverage platforms that adapt to individual learning styles and life circumstances. Create personalized pathways, ensuring that students can balance education with other responsibilities.

**Provide anytime, anywhere learning.** Web-based learning materials and assessments are essential for direct assessment CBE programs, enabling students to work toward mastery from any location at any time. This flexibility broadens access, especially for students in rural areas, working adults, and those with caregiving responsibilities.

**Deliver real-time feedback and analytics.** Integrated technology platforms can track student progress, offering real-time feedback and analytics. These insights help students understand their learning trajectories while enabling timely interventions and support from faculty and staff, fostering equitable outcomes.

**Offer comprehensive online support services.** Direct assessment CBE students often require fully online student services, including counseling, tutoring, digital libraries, mental health resources, and career advice. Investing in robust, integrated platforms ensures all students — whether online or on campus — have equitable access to these critical supports.

**Ensure accessibility for students with disabilities.** Technology can be a powerful tool for creating accessible learning experiences. Use tools freely available at the [CCC Accessibility Center](#) to ensure learning resources, such as PDFs, meet accessibility standards. This approach ensures that all students, regardless of ability, can fully participate and succeed in the program.





## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

**Explore how other California Community Colleges have leveraged technology to support direct assessment CBE.**

- Review [analysis and recommendations for technology solutions](#) for California Community Colleges on how to best leverage existing technologies.
- Review resources including [C-BEN's Considerations for CBE Technical Architectures in Postsecondary Education](#).

**Conduct a technology inventory survey to assess current technology applications and key process decisions.**

- Use this [Technology Inventory Survey](#) to highlight technology decisions that have technology interdependencies related to direct assessment CBE program design and implementation (e.g., competency equivalency, financial aid, faculty loading, transcription).

**Create a [Technology Plan](#) for your institution to clarify how you will transition from your current state to a technology ecosystem supportive of your program.**

- Include phased implementation timelines, resource allocation, and contingency plans to address potential challenges during the transition.
- Incorporate scalability considerations to ensure the system can adapt to future program growth or changes in enrollment.



## SPOTLIGHT: MERCED COLLEGE



## TECHNOLOGY ASSESSMENT STRATEGY FOR DIRECT ASSESSMENT CBE IMPLEMENTATION

Merced College began the technical implementation of their direct assessment CBE program by engaging their VP of Technology and ITS department to identify system-level needs. Following a C-BEN assessment, they partnered with Strata Information Group (SIG) to redesign their student information system, integrate Canvas, and develop direct assessment CBE transcripts.

The four-month implementation required close collaboration between SIG and Merced's programming team, including staff training for sustainable operations. The process necessitated updates to college policies around grading, course repetition, and curriculum development to accommodate direct assessment CBE evaluative symbols and cross-system communication between Colleague and Canvas.



# Map External Partners

Aligning program offerings to meet the ever-changing needs of students and the marketplace is an ongoing challenge.

Partners can serve many roles during development and implementation such as codeveloping curriculum, helping to design the student experience, mentoring, recruiting, providing work experience opportunities, supporting students directly, or validating that the program is accessible and inclusive. Partners can also serve on an advisory board or steering committee.

Mapping current and potential external partners during the Prepare phase will help you to plan future engagement during the Design and Build phase.

## Types of Partners to Consider

- **Employers.** While you always engage with employers in program development, direct assessment CBE programs across the nation have shown that these partnerships can take on new and more integral roles such as:
  - ▶ **Identifying competencies** and assessments or validating ones developed by faculty.
  - ▶ **Recruiting and onboarding participants** for incumbent worker training that leads to promotion for existing employees.
  - ▶ **Providing feedback** on curriculum design and programming.
  - ▶ **Supporting students directly.**
  - ▶ **Offering work-based learning experiences** including field work, paid internships, apprenticeships, or direct employment for recent graduates.
- **Local businesses** and industry associations. These groups can provide insights into current and future workforce needs, the skills and qualifications sought by employers, and potential work-based learning experiences including paid internships, apprenticeships, or direct employment opportunities for graduates.
- **Professional organizations.** Associations relevant to the program's field can offer guidance on curriculum development, potential certifications, and industry trends.
- **Nonprofits and community-based organizations.** Groups working in related fields may offer unique perspectives on community needs, potential partnerships for program delivery or recruitment, and student support services.
- **Local government agencies.** Government agencies dealing with workforce development, economic development, or social services might have insights into community needs and funding opportunities.



- **Workforce development boards.** These boards may be government agencies or separate nonprofits focused on workforce development in a given community.
- **Education and training providers.** Partnerships can facilitate smooth transitions for students, and offer opportunities for dual enrollment, early college programs, or transfer. Collaboration with universities in particular can create equitable pathways for graduates to maximize credit transfer and earn a BA. Partners can include:
  - ▶ **Four-Year Colleges and Universities**
  - ▶ **High Schools**
  - ▶ **Vocational Schools/Trade Schools**
  - ▶ **Other Career and Technical Education Programs**
  - ▶ **Adult Education Providers**
- **Community leaders and advocacy groups.** Leaders and advocacy groups can offer perspectives on community needs and how the college can benefit residents.
- **Prospective students and alumni.** Your future students and alumni can offer valuable input on program design, ensuring your offering aligns with their needs and preferences. Finding a group of prospective/former students who you can regularly engage may be challenging. Consider creating a short-term workgroup or working through another partner such as an employer or nonprofit to access a captive/knowable audience. If you engage people in a workgroup and their participation is not part of a paid job role, consider offering them compensation for their time.

Direct assessment CBE programs provide an exciting opportunity to rethink and expand how you are collaborating with external partners, including employers, community-based organizations, and workforce partners. Depending on your context, you may also want to consider key technology vendors in your map.



#### SPOTLIGHT: BAKERSFIELD COLLEGE

## STRATEGIC PARTNERSHIPS SHAPE CULINARY PROGRAM DESIGN

Bakersfield College launched a direct assessment competency-based culinary program tailored to meet the evolving needs of the local restaurant industry, catalyzed by the anticipated opening of a new Hard Rock Casino. While traditional labor market information (LMI) provided a foundation, it was the partnership with the California Hospitality Board that illuminated critical regional opportunities not evident in LMI analysis alone. These insights from external partners proved pivotal in guiding the decision to pilot a direct assessment CBE program that aligned with industry forecasts.

The college also leveraged the support of internal staff to maintain strategic partnerships necessary to their success. Bakersfield College has a Native American Student Support and Success Program. The Program Manager was critical to building and maintaining a strong connection with the local tribe associated with the casino and leveraging it for their program development.

Additionally, the college tapped into its alumni network, leveraging former students who had become local employers to help define the essential competencies for culinary careers in Bakersfield. To ensure the program's structure was practical for working students, current student feedback was incorporated. This collaborative approach — melding industry expertise, alumni input, and student perspectives — allowed Bakersfield College to design a program that anticipates market growth and supports student success.







## EQUITY IN ACTION

*Mapping current and potential external partners during the Prepare phase will help you to plan future engagement during the Design and Build phase. Strategic partnerships help address barriers to access and ensure the program is designed to meet the unique needs of the students and communities it serves. Consider the following to determine which partners to include in your map:*

**Engage partners who represent and understand your community.** Focus on finding partners that understand and represent the students you plan to serve and your community as a whole. Engaging these partners ensures that your program is grounded in equity and access and reflects the lived experiences of your target population.

**Customize partnerships to regional contexts.**

While there are common barriers to access and attainment across California, each region has distinct strengths, weaknesses, assets, and opportunities. Also, the same type of partner may function in a different role from one region to another; this is particularly true for organizations with national or international reach (e.g., Goodwill Industries, UnidosUS, United Way, Salvation Army, etc.). Who you engage and how you engage them must be customized to this context to ensure accessibility of services.

**Collaborate around shared frameworks and principles.**

Each organization has a unique vision and strategy for resolving barriers. Ensuring all of your partners have an asset-based approach is key in general, but you may also wish to identify other frameworks or principles that unite your selected partners (e.g., a two-generation approach, a holistic support model, or a multi-tiered system of support, etc.). For example, [Friends of the Children Los Angeles](#) uses a two-generation approach to tackle intergenerational poverty. [Plumas Rural Services](#) uses a family-centered, holistic approach that provides education, services, and support across different categories to wrap participants with all of the resources they need.

**Leverage population-specific service models.**

Leveraging partners with population-specific service models can be a great way to build institutional capacity. For example, [Centro Latino de San Francisco](#) is a place-based nonprofit focused on the Latinx community. The [Rural Youth Outreach program at Queer LifeSpace](#) focuses on LGBTQIA+ students in rural communities.

**Conduct due diligence on partner organizations.**

Certain partners can increase your credibility and goodwill with prospective students while others can damage your reputation through association. Be sure to conduct careful research into the history and current activities of your partners, and have transparent.







## SPOTLIGHT: EAST LOS ANGELES COLLEGE



## BUILDING PARTNERSHIPS WITH AMERICA'S JOB CENTERS

East Los Angeles College (ELAC) recognized the need to connect with local working adults for its direct assessment CBE program but faced a significant challenge: Many local workforce partners were unfamiliar with the program's unique structure and student benefits. Without shared understanding, building an effective referral system to link working adults with college programs seemed out of reach.

To bridge this gap, the college focused on educating local America's Job Centers of California (AJCC) on direct assessment CBE principles and how the model could benefit working adults. Through workshops, informational sessions, and regular meetings, ELAC worked to demystify the program and address partner questions, fostering a collaborative relationship built on mutual understanding.

### KEY DECISION



**What partners are needed to design and successfully operate a direct assessment CBE program?**



#### Key Decision-Makers

(Review the [OVIS chart](#) to modify this list for your campus):

- Direct Assessment CBE Program Leadership Team



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What external decision-makers have formal or informal relationships with your college?
- What external decision-makers could be potential partners?
- Why would these partnerships be advantageous? What strengths and assets do they bring? What weaknesses and liabilities do they bring?
- Do the partners you selected cover your entire service area or areas where students are likely to live?
- What college representatives and internal processes are in place for connecting with external partners and gathering input in a structured way?
- Do conversations with external partners need to be vetted or overseen by anyone at the college?



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

**Conduct a [self-assessment for external partnerships](#) to help identify suitable partners.**

**Conduct desk research and informational interviews to learn more about potential partners.**

- Learn what training and services are already available in the community related to your direct assessment CBE program.
- Connect with partners including workforce boards, industry, and community-based organizations, as well as regional collaboratives and initiatives involving education and workforce development.
- You may want to specifically partner with organizations connected to the Workforce Innovation and Opportunity Act (WIOA).

**Use data to inform development of partnerships.**

- Develop a rubric for selecting partners that [centers equity](#) and aligns with your institution's [vision](#) for direct assessment CBE. You may want to include some of the following indicators on the rubric: strengths, level of experience, reputation, availability of resources, timeliness, capacity, quality of services, philosophical alignment, understanding of target populations, etc.
- Assess the quality of your partnerships using [C-BEN's Performance Indicators for Collaborative Engagement with External Partners](#).
- Consider leveraging a framework or tool such as the [U.S. Chamber of Commerce Foundation developed Talent Pipeline Management](#) to support your strategy for developing partnerships.

**Engage potential partners to build and cultivate relationships.**

- Develop an outline for early partner engagement that includes intentions for communication frequency, topics to be discussed, and engagement strategies (e.g., meeting, invite to workgroup, add to existing standing meeting agenda, etc.).
- Have an initial conversation with potential external partners to determine next steps to cultivate a relationship.
- See this [employer engagement PowerPoint](#) for additional ideas on engaging employer partners.

**Engage students as key decision-makers through creative partnerships.**

- Work with education partners to convene a prospective student focus group (e.g., recent high school graduates, adult students) to provide insights into program interest, preferred formats (online, evening classes), and potential barriers to enrollment.
- Partner with community organizations to reach diverse groups of potential students and understand their unique challenges and aspirations.





## SPOTLIGHT: SHASTA COLLEGE



## PARTNERSHIP ECOSYSTEM TO SUPPORT RESPONSIVE PROGRAM DESIGN

In order to develop a program that adapted to the changing landscape of early childhood education (ECE) policy in California, an ecosystem of external partnerships was critical to maintain strong connections to the field. Shasta College developed a partnership model that built on existing partnerships to understand the landscape of early childhood education and develop a program implementation strategy that is responsive to the needs of the field.

### Understanding the Landscape

Shasta College began by studying new California legislation aimed at elevating ECE standards and creating common competencies. This analysis revealed pressing shortages of qualified ECE professionals and urgent upskilling needs. The college positioned their direct assessment model as a solution, allowing employees to demonstrate competencies rapidly without lengthy semester-based courses.

### Building on Existing Partnerships

The college leveraged their collaborative relationship with the Shasta County Office of Education's Early Childhood Services, which provides educational scholarships for ECE employees. Through active engagement with local employers via advisory boards and the California Commission on Teaching Credentialing, the college maintained consistent communication throughout the three-year development process.

### Implementation Strategy

The pilot program will launch with 25 individuals currently employed in local early childhood settings, recruited through ECE Advisory Committee connections. The college has designed comprehensive feedback mechanisms spanning from program start through one year post completion to ensure continuous improvement and responsiveness to employer needs.





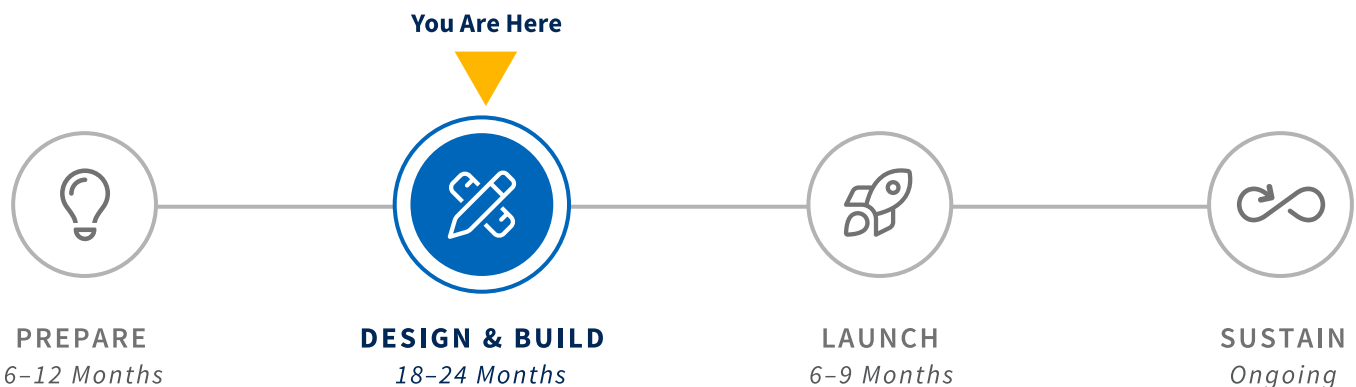
# Design & Build

Congrats, your college is moving forward with designing a direct assessment competency-based education (CBE) program!



Go back to the prior phase, [Prepare](#), if you are still exploring what direct assessment CBE is and whether it would be a good fit for your institution.

Jump ahead to the next phase, [Launch](#), if you are ready to start marketing your program and enrolling students.



## HOW TO USE THIS SECTION

The Design and Build phase will help you and your key decision-makers navigate several big program design decisions for your institution and ensure programs are equity-centered.

Unlike in the Prepare phase, where decisions were made by your Direct Assessment CBE Program Leadership Team, this phase is broken into three workstreams: [Leadership Team](#), [Faculty](#), and [Student Support](#) to indicate the college faculty and staff that should lead the decision-making for the program. Each workstream can work simultaneously with support and coordination from the Leadership Team to address important program design decisions. Revisit the [OVIS chart](#) as you develop these workstreams to inform the potential decision-makers.

### In what order should I make these decisions?

The Design and Build phase includes decisions that will need to be determined prior to launching your program to ensure you have the technology, personnel, and approvals ready to go. Colleges that have already launched a direct assessment CBE program at the same degree level may accelerate through this section, as they will not need to seek U.S. Department of Education or Chancellor's Office approval for subsequent programs at the same degree level.

There is no required order in which to make each decision and there are many dependencies and interconnections you'll discover along the way. In general, each workstream will move through each of their major decisions over the next 18 months to two years. Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.



### DECISION-MAKING TIP! O-V-I-S

**Define and document decision-making responsibilities clearly.**

*Who owns, vetoes, influences, and supports each decision?*



# Design & Build

## Decisions for the Leadership Team

The following section is intended for members of the Direct Assessment CBE Program Leadership Team building a direct assessment CBE program.

Designing and launching a successful direct assessment CBE program will take time, commitment, and input from all decision-makers. If your college is ready for that challenge, then as the Leadership Team, it is time to roll up your sleeves and dive into program design!

The Leadership Team will need to address the following common decision points for implementing a direct assessment CBE program within the California Community College system. As with all aspects of designing a direct assessment CBE program, there is no right order in which to take on these design decisions. This blueprint will help the Leadership Team work through the key decision points, identify dependencies, and discuss the implications of each decision as it progresses through the blueprint. As you make decisions, review applicable federal, accrediting agency, and state requirements (i.e., [U.S. Department of Education, ACCJC](#), and the [California Code of Regulations Title 5](#)) to ensure compliance. These related decisions are laid out more explicitly in the Design and Build phase. The Leadership Team should also coordinate decision-making with the [Faculty](#) and [Student Support](#) workstreams.

Use this direct assessment [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

| DESIGN & BUILD PHASE LEADERSHIP TEAM DECISIONS                    |                                                                                                            |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b><u>Establish Academic Calendar</u></b>                         | <i>What academic calendar model will support target students and meet financial aid requirements?</i>      |
| <b><u>Establish Financial Aid Model</u></b>                       | <i>What financial aid model best aligns with the chosen academic calendar and maximizes access to aid?</i> |
| <b><u>Determine Process for Recognizing Prior Learning</u></b>    | <i>When and how will students be assessed for prior learning?</i>                                          |
| <b><u>Define Business Model, Budget, and Pricing Strategy</u></b> | <i>What business model will ensure the program is affordable, accessible, sustainable, and scalable?</i>   |
| <b><u>Establish Academic Policies and Local Approvals</u></b>     | <i>What local academic policies will be impacted by the direct assessment CBE program?</i>                 |
| <b><u>Determine Coordinated Technology Infrastructure</u></b>     | <i>What technology infrastructure will ensure the program is impactful, efficient, and effective?</i>      |



|                                                                                         |                                                                                                                                                               |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><u>Develop ACCJC Application and Seek Approval from Programmatic Accreditors</u></b> | <i>What is the process for developing, vetting, and submitting an ACCJC application in a timely manner?</i>                                                   |
| <b><u>Coordinate Chancellor's Office Approval Processes</u></b>                         | <i>How will the college ensure timely development, review, and submission of the Program Map?</i>                                                             |
| <b><u>Manage U.S. Department of Education Approval</u></b>                              | <i>How will the college ensure timely development, review, and submission of the U.S. Department of Education application to meet the timeline to launch?</i> |
| <b><u>Faculty and Staff Model Considerations</u></b>                                    | <i>What faculty/staff model will the college adopt?</i>                                                                                                       |
| <b><u>Map Out Student Journey</u></b>                                                   | <i>How will the college provide high-touch, high-quality academic and nonacademic support for students?</i>                                                   |
| <b><u>Create a Plan for Data Use and Improvement</u></b>                                | <i>How will data and evidence be used to evaluate and improve the direct assessment CBE program?</i>                                                          |
| <b><u>Develop a Strategic Communications Plan</u></b>                                   | <i>How will the college maintain open channels of communication to internal and external stakeholders?</i>                                                    |





# Establish Academic Calendar

Direct assessment programs CBE can be offered through a range of calendar options. Choosing an academic calendar should happen early in your design, as there are several dependencies and implications for other program components.

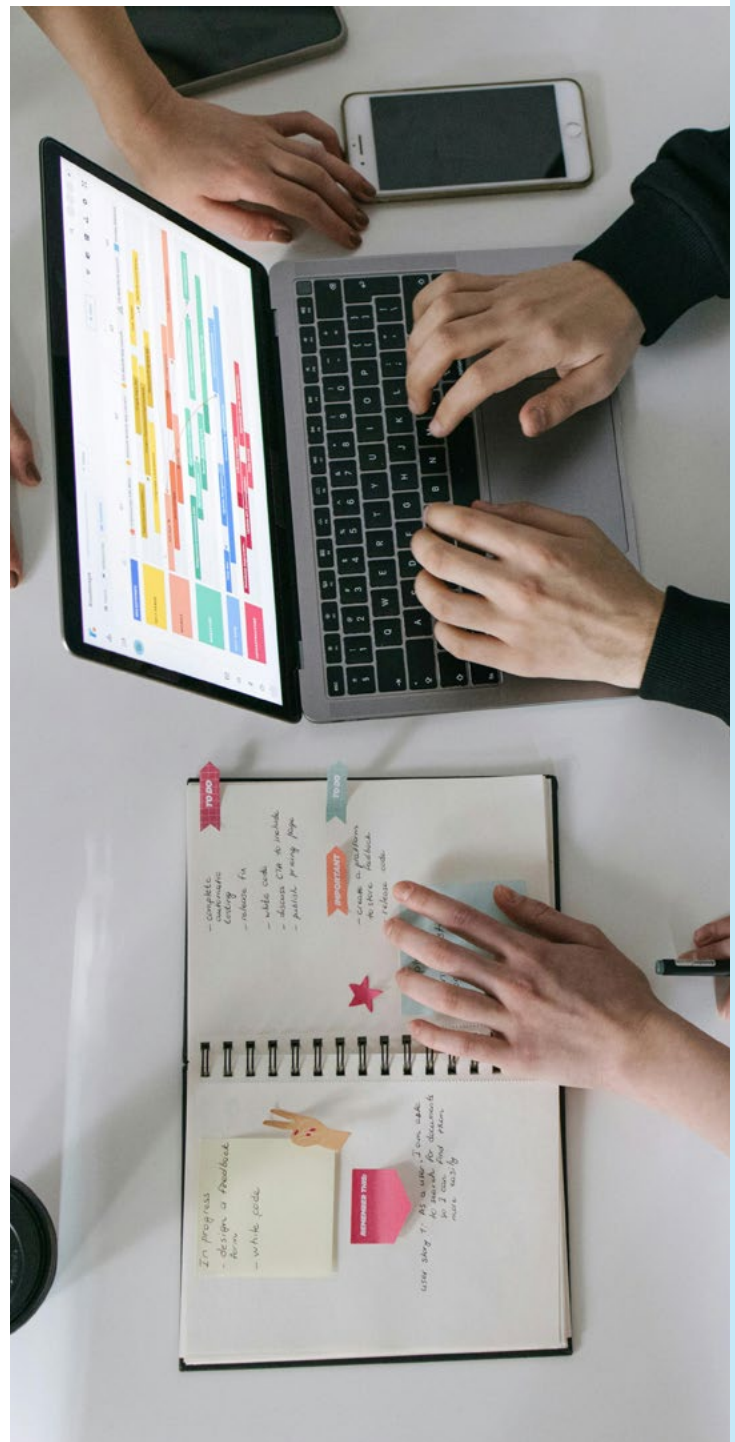
## Understanding the different calendar options

Per the U.S. Department of Education, Title IV programs may have one of the following academic calendars; full definitions are available in the [Federal Student Aid Handbook](#) which is updated annually:

- **Standard term**
- **Nonterm**
- **Nonstandard term**
- **Subscription-based\***

You must review the [Federal Aid Student Handbook](#) and the [California Code of Regulations, Title 5 regulations](#) related to academic calendar types carefully, especially if you opt to use a different calendar than your traditional programs. Academic calendars not only determine students' access to learning, they also affect the disbursement of federal and state financial aid.

**\*Note:** Subscription-based financial aid disbursements are separate from a subscription-based program model and refer to how financial aid is distributed to students enrolled in a subscription-based academic calendar. Financial aid is disbursed based on the student's enrollment in the subscription period rather than traditional terms of semesters.



## Assess student and program needs to determine the best calendar option

For additional details on how the academic calendar model impacts financial aid, please refer to the [Financial Aid](#) decisions in this blueprint.

### CONSIDERATIONS FOR DIFFERENT CALENDAR OPTIONS

| CALENDAR ASPECT                         | STANDARD TERM CALENDAR                                                                                                                                                                                                                                                                           | SUBSCRIPTION-BASED CALENDAR                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ease of Implementation</b>           | <i>Familiar structure, easier to implement using existing systems and schedules.</i>                                                                                                                                                                                                             | <i>Will require significant changes to existing systems and policies.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Flexibility for Students</b>         | <i>Students must adhere to a fixed term or semester schedule.</i>                                                                                                                                                                                                                                | <i>Students can start, pause, and complete competencies at their own pace.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Cost to Students</b>                 | <i>Students pay per course or per credit hour equivalent, potentially raising costs for slower learners.</i>                                                                                                                                                                                     | <i>Students pay a flat rate per subscription period, potentially reducing costs for faster learners.</i>                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Completion Time</b>                  | <i>Fixed semesters can extend the time it takes to complete a program.</i>                                                                                                                                                                                                                       | <i>Students can accelerate their learning, completing programs faster.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Institutional support</b>            | <i>Clear, predictable enrollment periods; easier to manage.</i>                                                                                                                                                                                                                                  | <i>More challenging to manage enrollment and staffing.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Technological Compatibility</b>      | <i>Existing technology systems are designed for a standard term-based calendar, making it easier to track students and to support interoperability (e.g., SIS/LMS/IR, etc.). Some modifications may be needed to your SIS and LMS to accommodate dual-transcripts, and instructional design.</i> | <i>Existing systems will need to be modified to accommodate the subscription-based model, including SIS and LMS to account for dual transcripts. Will require adjustments and there are few “out of the box” solutions.</i>                                                                                                                                                                                                                                                                                                 |
| <b>Financial Aid Disbursement</b>       | <i>Traditional calendar aligns with established federal financial aid processes, making administration straightforward.</i><br><br><i>Financial aid processes will mirror existing programs, with some modifications for flexibly-paced delivery.</i>                                            | <i>Subscription models require adjustments to financial aid processing and can complicate aid disbursement.</i><br><br><i>Financial aid processes will need to be modified for subscription-based disbursement to provide transparent, flexible, and timely access to support. This may include disbursement timing to coincide with the subscription period, pro-rating or adjusting disbursement based on enrollment mid-period, and/or flexibility for overlapping periods, creating dynamic disbursement schedules.</i> |
| <b>Learning Pace</b>                    | <i>Standard term has a true start and end date; students have flexibility within that time frame. Students must still comply with SAP.</i>                                                                                                                                                       | <i>Start and end dates are flexible and students set their own pace. Students have control over their pace, allowing them to progress as quickly or slowly as needed. Because subscription-based financial aid disbursement aligns with completion requirements, students will not be placed on academic probation due to SAP completion criteria.</i>                                                                                                                                                                      |
| <b>Upfront Costs and Sustainability</b> | <i>Infrastructure for technology to support standard terms is already in place, limiting startup costs and making it easier to scale.</i>                                                                                                                                                        | <i>May require additional technology, staff PD/training and policy adjustments to launch and sustain subscription-based programs effectively. May need to implement more than one direct assessment CBE program to realize ROI.</i>                                                                                                                                                                                                                                                                                         |





## EQUITY IN ACTION

*Choosing the right academic calendar is crucial for advancing equity through direct assessment CBE. Here's how calendar selection directly supports equity goals:*

**Link calendar design to institutional equity goals by demonstrating how flexible scheduling and pacing aligns with Vision 2030 outcomes, particularly completion rates and reduced time to degree.** Emphasize how student-directed pacing enables historically underserved populations to succeed while balancing work and family commitments.

**Center student experiences when explaining calendar benefits.** Share specific examples of how subscription-based models and flexible scheduling help working adults, caregivers, and students with basic needs insecurities complete their education. Consider featuring student testimonials about how calendar flexibility impacts their academic journey.

**Design equitable support systems that leverage calendar flexibility to provide targeted interventions.** Subscription-based models can reduce financial barriers while enabling unlimited competency enrollment, making education more accessible and affordable. This approach particularly benefits students who have historically faced systemic barriers.

*California Community Colleges are encouraged to adopt subscription-based calendars for direct assessment CBE programs to maximize flexibility and affordability, directly supporting Vision 2030's equity goals in success, access, and support.*

## KEY DECISION



**What academic calendar model will support target students and meet financial aid requirements?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Financial Aid Director/Dean and other Financial Aid Leads
- Faculty Workstream and Student Support Workstream Teams
- Board of Trustees
- College Leadership (President and Cabinet)





## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What academic calendar type provides the greatest flexibility for students, especially those who have historically faced systemic barriers?
- How does program's academic year, term lengths, and full-time student definitions accommodate diverse student needs, such as varying personal and professional responsibilities, including those who may need to study part-time?
- Does the calendar offer sufficient flexibility for students to enroll and progress in competencies at their own pace, including the option to overlap terms?
- How will the chosen calendar impact the operational sustainability of the college, including faculty load and financial aid administration?
- Academic calendar and financial aid. There are several decisions related to your academic calendar that have dependencies with your Financial Aid model. These conversations are best made in unison. Example questions that impact both decisions include:
  - ▶ *If considering subscription-based financial aid disbursement, does the financial aid office director/staff have capacity to disburse financial aid in two different methods (ex. standard terms for course/credit-based CBE students and subscription-based for direct assessment CBE students)?*
  - ▶ *Does the current technology system support administration of the desired calendar type in a way that ensures equitable access and support for all students (e.g., direct assessment CBE and course/credit-based CBE)? Are there limits on configuring multiple calendars in the same instance and/or department that could impact certain student populations disproportionately? Would the college need to purchase and implement new software to administer subscription-based financial aid, and does the IT team have capacity for that implementation and continued support for a new application?*





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Align with federal and state requirements to ensure compliance.

- Review relevant rules, regulations and guidelines from the U.S. Department of Education and California Code of Regulations, Title 5 including:
  - ▶ [Federal Student Aid \(FSA\) Handbook](#)
  - ▶ [Dear Colleague Letter \(GEN-24-02\) Applying for Title IV Eligibility for Direct Assessment \(Competency-Based\) Programs](#)
  - ▶ [California Code of Regulations, Title 5](#)
  - ▶ [The Program and Course Approval Handbook](#)

### Set academic calendar parameters that reflect local needs and student priorities.

- Define parameters for the calendar given pre-determined local decisions such as existing policies on academic calendar structure, resource availability, and technology readiness to ensure alignment with institutional policies and constraints.
- Consider the specific students you are aiming to serve, focusing on understanding the unique needs of your student population.
- Review the [Program Map](#) for Title 5 approval of direct assessment CBE programs.

### Develop a workplan to streamline approvals and ensure equity.

- Outline what local approvals will be necessary and a timeline/schedule for obtaining these approvals.
- Ensure the plan includes steps to address equity considerations at each stage.

### Use a decision matrix to evaluate calendar options.

- Include equity impacts in your matrix to evaluate how each decision will affect different student groups.

### Conduct an assessment of current systems and institutional capacity to align resources with new calendar model.

- Assess availability and timing of academic counseling, library services, IT support services, career counseling, and other essential services to ensure they will align with a new calendar model.
- Identify any time-based gaps (e.g., limited weekend or evening availability) that may impact students with nontraditional schedules, such as working adults, caregivers, or students in rural areas.
- Review the current learning management system (LMS) and student information system (SIS) to determine if they can support flexible start dates, rolling enrollments, or subscription-based terms.
- Identify any limitations in data tracking that could prevent real-time monitoring of student progress and engagement, especially for students who may need additional support.
- Determine whether the institution's financial aid and billing systems can accommodate different academic calendar models, such as subscription-based or competency-based terms.
- Identify gaps in financial aid disbursement schedules that might cause delays in funding access for students reliant on federal or state aid.





### Contact others operating direct assessment CBE programs.

- Learn more about their experience, focusing on how they address equity in their academic calendar decisions.
- Use insights to inform your institution's equity-centered approach to making an academic calendar decision.
- Review this example calendar from [Southwestern College](#) to understand practical implications.

### Engage the U.S. Department of Education to address key questions.

- Ensure you understand how best to utilize different structures to maximize student flexibility and minimize liabilities.

- Ask specific questions about how different academic calendar types can support equitable outcomes.

### Leverage key resources to inform decision-making.

- [C-BEN's Questions Financial Aid Professionals Should Ask About Competency-Based Education Programs A Resource Guide](#). Although specifically for financial aid decisions, this resource is helpful to review in tandem with the academic calendar decision-making given the equity implications for financial aid disbursement. See pages 16-23 in particular on academic calendar information.

## EXAMPLES OF CALIFORNIA COMMUNITY COLLEGE'S ACADEMIC CALENDARS

| COLLEGE                                                                             | ACADEMIC CALENDAR                                                                                             | FINANCIAL AID                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <i>Nonstandard, subscription-based calendar with 14-week trimesters.</i>                                      | <i>Subscription-based financial aid disbursement aligned with the 10 planned starts per year.</i>                                                                                                                                       |
|  | <i>Standard terms under the USED's definition of standard term.</i>                                           | <i>Existing financial aid structure used. Disbursement periods align with subscription terms.</i>                                                                                                                                       |
|  | <i>Standard term-based academic calendar.</i>                                                                 | <i>Initially funded through scholarships and FAFSA-based aid (California College Promise Grant). Post-DOE approval: Aid increases as competencies are completed, using financial aid in modules. Pell Grant: Formula 1; Loans: SAY.</i> |
|  | <i>Standard term with sequential modules and two designated entry points per term.</i>                        | <i>Payment periods align with semester-based structure (fall, spring, summer).</i>                                                                                                                                                      |
|  | <i>Nonstandard, subscription-based calendar with multiple starts. Students can be part-time or full-time.</i> | <i>Three equal disbursement or payment periods within one academic year using a subscription-based disbursement approach. Each subscription period is considered a payment period.</i>                                                  |

**SPOTLIGHT: MERCED COLLEGE****LEVERAGE EXISTING CALENDARS WHILE IMPLEMENTING FLEXIBILITY FOR STUDENTS**

Merced College opted to initially adhere to the existing calendar to ensure a smooth launch of the new direct assessment CBE program. This approach allows alignment with established processes and accommodates the immediate needs of a diverse student body who are working to balance personal, professional, and academic responsibilities.

The academic year consists of two semesters and a summer term, with the flexibility to include short-term courses within the semester, providing multiple entry points for students throughout the year. The built-in calendar flexibility supports both full-time students — defined as those taking 12 units or more in fall and spring — and part-time students, who can enroll in fewer units and utilize summer courses for accelerated degree completion.

Students begin the semester enrolled in a set number of competencies which equate to 1-unit equivalents and work with counselors to create personalized educational plans. As students progress through competencies, they can opt to take additional units

within the semester time frame, fostering a tailored educational experience. Due to the adoption of the existing calendar model, current systems are able to effectively support calendar administration from a technology standpoint, ensuring equitable access for both direct assessment CBE and course/credit-based assessment CBE students by having the flexibility for direct assessment CBE students to add competencies.

Overall, Merced College is committed to refining its calendar in the future to enhance flexibility while meeting the academic needs of its diverse student population. The academic calendar is reevaluated on an annual basis by the Board of Trustees and is approved roughly one and a half years in advance.





# Establish Financial Aid Model

Once you've determined your [Academic Calendar](#), it's time to make other decisions related to financial aid. Proper administration of Title IV aid is crucial not only for compliance but also for ensuring all students receive the appropriate funding to progress through the program without financial hardship.

How you develop your financial aid policies can prevent delays in completion, reduce financial barriers, and support the diverse needs of your student population. Noncompliant policies and practices can put your institution at risk of losing eligibility for other programs, so be sure to take your time with these decisions and lean on expertise from across your college team. Refer to the "[Policies and Procedures Review: Competency-based Education](#)" report produced in 2025 to help identify existing institutional policies and procedures that could be impacted by implementation of direct assessment CBE.

*Your financial aid model will be defined by different decisions, each with significant implications for equity.*

**Credit/clock hour equivalency.** [Per 34 CFR 668.10\(a\)\(3\)](#), direct assessment CBE programs must map competencies to credit/clock hours. You can map in different ways; see more in [Develop Competency Set](#).

**Satisfactory Academic Progress (SAP).** Direct assessment CBE programs must have a plan for evaluating a student's pace quantitatively and qualitatively per [34 CFR 668.34](#). Ensure your SAP policies are fair and provide adequate support for students who may struggle to meet these standards due to external factors.

**Payment Periods.** If you aren't using a term-based academic calendar, you will need to determine the length of your payment periods. How you structure payment periods can impact the flexibility afforded to students. The structure of your payment periods will also impact the timing and frequency of disbursements, as well as Return to Title IV.

**Withdrawals and Return of Title IV Funds.** As with other programs, direct assessment CBE programs must adhere to [34 CFR 668.22](#) and the [Federal Student Aid Handbook](#) Volume 5. Whatever academic calendar your college chooses, your financial aid team must ground the financial aid model in a clear strategy for how to handle students enrolling in one payment period and not completing a competency until the following period, ensuring policies are supportive and minimize financial penalties for students facing unforeseen challenges.

**Credit for Prior Learning (CPL).** Financial aid from California or institutions cannot be used to pay for CPL. CPL does count toward the maximum time frame, which can make students ineligible for financial aid. (See [Prior Learning](#)). Ensure your CPL policies are clearly communicated and provide pathways for students to leverage their prior knowledge and skills effectively.

**Federal Approval.** To ensure your direct assessment CBE program is considered an eligible program for Title IV financial aid you must receive U.S. Department of Education approval.







## EQUITY IN ACTION

*Financial aid design plays a crucial role in advancing equity through direct assessment CBE programs. Consider these key strategies to support equity goals:*

**Implement flexible subscription models that accommodate nontraditional schedules while minimizing barriers for low-income students.**

California Community Colleges are encouraged to adopt subscription-based financial aid for direct assessment CBE programs, allowing students to pay a flat rate per period for unlimited competencies.

**Align financial aid with completion goals by creating models that support Vision 2030's emphasis on meaningful educational outcomes.** Subscription-based financial aid enables students to progress at their optimal pace while maintaining federal and state compliance. This flexibility particularly benefits historically underserved populations working toward degree completion.

**Remove financial barriers to access through cost-effective subscription models that serve diverse student needs.** Flat-rate pricing for unlimited competencies per period makes education more affordable for working adults, caregivers, and students with basic needs insecurities. This approach directly supports Vision 2030's goal of broadening participation in higher education.

**Structure support systems for sustainability by carefully assessing implementation costs while maximizing student benefits.** Financial aid disbursement systems should balance institutional resources with student needs, ensuring long-term program viability. This strategic approach helps deliver Vision 2030's promised academic, financial, and social supports.

## KEY DECISION



**What financial aid model best aligns with the chosen academic calendar and maximizes access to aid?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider:

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Financial Aid Director/Dean and other Financial Aid Leads
- IT Leadership who support financial aid systems
- Board of Trustees
- College Leadership (President and Cabinet)





## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- How will students be charged: per subscription term or per competency? Which option provides the most equitable and affordable access, especially for low-income and part-time students?
- Will students be permitted to attend on a part-time or full-time basis?
- What will be your college's Satisfactory Academic Progress (SAP) policy? How does this align with the learning model and ensure flexibility for students with nontraditional schedules or those balancing work and family responsibilities?
  - ▶ What is the qualitative measure (i.e., grade-based), and how does it support diverse students?
  - ▶ What is the quantitative measure (i.e., time-based), and how does it accommodate varying paces of learning?
  - ▶ When will SAP be evaluated to maximize student success and retention?
- How will interruptions (e.g., withdrawals, reentries, "pause outs", leaves of absence) be handled to ensure minimal disruption to students' progress and access to financial aid?
- When will students be able to enroll in additional units? What criteria need to be met to permit enrollment in additional units, and how can the college ensure that the process is transparent, accessible, and equitable for all students?
- Can the current technology system support administration of financial aid for the direct assessment CBE program?
  - ▶ Can it handle multiple disbursement models and does it offer flexibility to accommodate diverse student schedules and financial needs?
  - ▶ Are there opportunities to improve workflow efficiencies by integrating financial aid technology that supports both traditional and direct assessment CBE models?
- Is there additional training or knowledge acquisition needed to administer new Title IV approaches beyond what the college already uses? Are resources available to secure or develop expertise longitudinally?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Form a financial aid work group to drive collaborative decision-making.

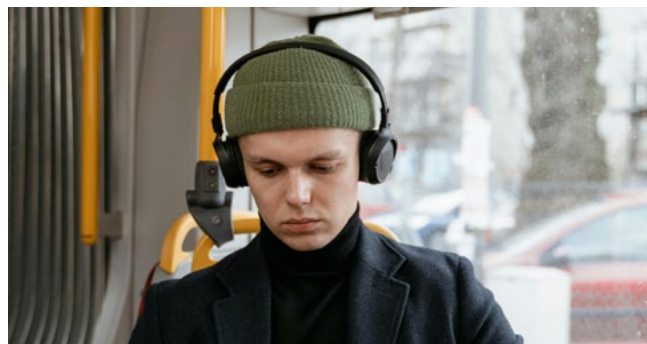
- Ensure representation from financial aid, academic affairs, information technology, and student support.
- Include checkpoints for decision-maker engagement and communication to maintain transparency and collaboration.
- Use the [“Policies and Procedures Review: Competency-based Education”](#) report produced in 2025 to ensure the right stakeholders are represented on the work group or built into communication plans based on which institutional policies and procedures could be impacted.
- Learn about how Shasta College put together their team in this [case study](#).

### Gather key inputs to design and comprehensive financial aid model.

- Review federal, state, and local regulations.
- Connect with other peer institutions to understand their financial aid models and learn from their experiences. Explore options to customize existing systems based on insights gathered and best practices.
- Review national resources like C-BEN’s [Questions Financial Aid Professionals Should Ask About Competency-Based Education Programs: A Resource Guide](#) and C-BEN’s [Enrollment Management & Competency-Based Education](#), particularly definitions and considerations around disbursement, time-bound scholarships and grants, as well as the role of registrars and financial aid professionals and program design and implementation.

### Develop and/or update your work plan for financial aid approvals and implementation.

- Outline necessary steps for local approvals including financial aid committees or board approvals.
- Create a timeline that aligns with your institution’s academic calendar, ensuring sufficient time for exploration, approvals, technology customization, and training.



### Facilitate decision-maker discussion using a [decision matrix](#).

- Include discussions to compare the benefits and considerations of different financial aid decisions, such as Satisfactory Academic Progress, and Payment Periods.

### Conduct a needs assessment of current technology systems and staff capacity for financial aid processes.

- Evaluate the existing financial aid disbursement technology and assess its capability to support direct assessment CBE models.
- Perform a gap analysis comparing current system capabilities with the needs of administering direct assessment CBE programs.
- Plan for staff training or additional resources required to implement new financial aid processes.
- Use this tool when considering how to customize existing financial aid disbursement technologies.

### Establish financial aid policies, ensuring eligibility for Title IV funds.

- Develop clear policies for Title IV eligibility, focusing on compliance with federal regulations.

### Prepare for the U.S. Department of Education approval process.

- Prepare for the approval process by ensuring that the financial aid model meets the Title IV eligibility criteria for direct assessment CBE programs. Note that you will only need approval for your first direct assessment program at the same degree level.
- See more in [Manage U.S. Department of Education Approval Process on assessing eligibility requirements](#).





## SPOTLIGHT: SHASTA COLLEGE



## BALANCING OPERATIONS & PROGRAM DESIGN FOR FINANCIAL AID POLICY DEVELOPMENT

Shasta College developed a direct assessment CBE degree in early childhood education (ECE) to meet new legislative requirements for upskilling educators. The development of their financial aid policy, a two-year process, exemplifies the complex interplay between operations and program design.

The college built capacity through strategic research and collaboration. They studied subscription-based funding models, consulting with experienced institutions like UMass and other pilot colleges. To ensure comprehensive policy development, Shasta integrated a financial aid expert into their program leadership team and actively engaged faculty in discussions about the subscription model's implications for competency module sequencing and aid eligibility. Input from Student Support Services Managers and approvals from key decision-makers —

including the Director of Financial Aid, Associate Dean of Student Services, and Vice President of Student Services — was essential to this process.

Three principles guided their approach: innovation and adaptability to accommodate accelerated programs and student needs, cross-departmental collaboration to ensure shared understanding, and long-term sustainability of implemented systems.

Ultimately, Shasta decided against a subscription model based on several factors. Their experience with the adult student Accelerated College Education (ACE) program had already highlighted challenges with alternative calendars and financial aid disbursement. Additional concerns included the capacity for change amid concurrent systemwide initiatives (common course numbering and CalGETC) and the feasibility of integrating new vendors within existing structures and budgets.



# Determine Process for Recognizing Prior Learning

Credit for Prior Learning (CPL) offers a transformative opportunity to accelerate degree and credential completion by recognizing the value of students' prior experiences and knowledge.

By awarding credit for what students already know and can do, CPL enables students to move more quickly through their academic programs, potentially saving time and money.

The economic impact of CPL is substantial. According to recent research, CPL recipients complete programs at higher rates than nonrecipients, with significant positive impacts for Hispanic, Black, and Pell-eligible students. When paired with direct assessment CBE, CPL policies can accelerate a flexible, student-centered learning environment that acknowledges and values learning, regardless of where it occurs.

The California Community Colleges Chancellor's Office (CCCCO), in partnership with the Mapping Articulated Pathways (MAP) Initiative, leads the systemwide implementation of CPL across all 116 California community colleges. The MAP Initiative provides culture, technology, and policy support

at no cost to colleges to help build capacity and procedures to maximize CPL opportunities for their working adults, apprentices, and veterans.

Rather than creating new CPL policies specifically for direct assessment CBE, you can leverage existing CPL frameworks while ensuring seamless integration with your program. You will still need to ensure any new processes "such as admission to the program, determination of registration and enrollment status, acceptance of transfer credit, and handling of credit for prior learning, are documented [and] if eligibility processing for [direct assessment] CBE students will occur in a separate software system, ensure those processes are documented in Sections 7 (File Review) and 12 (Satisfactory Academic Progress)." Use the ["Policies and Procedures Review: Competency-based Education"](#) report to help identify existing institutional policies and procedures that should or could be updated.

## KEY DIFFERENCES BETWEEN CPL AND DIRECT ASSESSMENT CBE

|                                  | CREDIT FOR PRIOR LEARNING                                                                         | DIRECT ASSESSMENT CBE                                                                          |
|----------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Program Integration</b>       | <i>Preprogram certification of CPL to satisfy program requirements</i>                            | <i>Certification of current learning within the program</i>                                    |
| <b>Achieving Mastery</b>         | <i>Preprogram experiences outside of program influence</i>                                        | <i>Facilitated by faculty and program content</i>                                              |
| <b>Evaluation by Examination</b> | <i>Credit by examination for assessment of prior learning with variable levels of performance</i> | <i>Examination of competency mastery requiring a high-level of performance (80% or higher)</i> |

*This decision offers several advantages:*

- Students can leverage prior knowledge across both traditional and direct assessment CBE pathways
- The current CPL course eligibility list can expand to include new competencies
- Students with extensive experience can accelerate their progress
- Program flexibility allows adaptation to evolving industry standards

## KEY DECISION



**When and how will students be assessed for prior learning?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- CPL Coordinator and CPL Counselor
- Faculty Workstream and Student Support Workstream Teams
- General Education and Direct Assessment CBE Program Faculty (or other Faculty with CPL Experience)
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- Students/Student Senate/Student Senate President
- Board of Trustees
- College Leadership (President and Cabinet)



## EQUITY IN ACTION

*When paired with direct assessment CBE, Credit for Prior Learning (CPL) policies can accelerate a flexible, student-centered learning environment that acknowledges and values learning, regardless of where it occurs. This can be done in the following ways:*

### Design accelerated learning pathways.

This helps students accelerate degree completion, ensuring they are not required to repeat competencies they have already mastered. By offering CPL at the competency level, colleges can reduce both time and cost barriers, creating inclusive pathways that recognize and validate students' prior learning and experiences.

### Create flexible financial models.

Consider subscription-based options that allow students to progress at their own pace. By combining CPL with flexible financial aid, colleges can reduce the overall cost of attendance, making education more affordable and accessible, especially for students from low-income backgrounds.

### Develop clear CPL communication systems.

Recognize the limitations set by the U.S. Department of Education, which restricts CPL from being financial aid eligible, as it is not inclusive of credit-bearing instruction. Structure CPL offerings thoughtfully to maximize support for students. Use tools like MAP's college-branded CPL websites and outreach resources to ensure all potential students can discover and understand their CPL opportunities.





## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- How will your college's CPL policies and initiatives align with the equity goals of the direct assessment CBE program? Will a revised policy be needed to expand CPL to ensure alignment?
- How will CPL be integrated into the onboarding process to ensure all new students are aware of and have access to CPL opportunities?
- How will CPL decisions for direct assessment align with and support standardization with existing efforts at the college and complement other CPL initiatives such as the MAP Statewide Faculty Credit Recommendations?
- What are the financial and sustainability impacts of implementing CPL within the direct assessment CBE program?
- How will CPL be reflected on transcripts, particularly for dual transcripts in traditional and direct assessment CBE programs, ensuring consistency and clarity for students and external stakeholders (e.g., employers)? (See [Create Dual Transcripts](#).)
- What policies impact the amount of CPL awarded and how can these be adjusted to maximize opportunities for students without compromising the integrity of the program or its equity goals?
- How will the college leverage MAP resources, including college-branded CPL websites, statewide faculty credit recommendations, and other MAP implementation tools to support alignment with direct assessment CBE goals.



### SPOTLIGHT: SHASTA COLLEGE

## DETERMINING CREDIT FOR PRIOR LEARNING IN COMPETENCY-BASED EDUCATION

Shasta College developed their Credit for Prior Learning (CPL) [policies](#) for their direct assessment CBE program through comprehensive decision-maker collaboration, including instructional faculty, the Vice President of Student Services, the academic senate Chair, a direct assessment CBE Counselor, and C-BEN consultants.

A critical focus of faculty training was clarifying the distinction between CPL (for previously acquired knowledge) and direct assessment CBE (for learning yet to occur), particularly regarding federal financial aid regulations, which cannot apply to prior learning.

Two key policy decisions emerged: CPL evaluations must precede any competency work and students must demonstrate B-level or higher mastery through CPL to meet direct assessment CBE program requirements. Additionally, Shasta revised their course repetition policy to allow students with prior C grades to pursue direct assessment competency-based approaches. These decisions reflect Shasta's commitment to equity, preventing unnecessary repetition of learning while ensuring academic rigor.

“If a student has already demonstrated that they have the knowledge, skills, and abilities equivalent to a competency through another method (previously taken coursework or CPL), why would you require that student to spend additional time and money showing you again that they have mastered and can apply the content?”

— **Buffy Tanner, Director of Innovation and Special Projects**



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Review and align policies to support CPL in direct assessment programs.

- Review to understand state regulations for offering CPL.
- Examine U.S. Department of Education requirements [34 CRF 668.10](#) in [GEN-24-02 Applying for Title IV Eligibility for direct assessment \(Competency-Based\) Programs](#) to determine how federal financial aid policies apply to CPL within direct assessment CBE programs.
- Identify any limitations or requirements specific to Title IV eligibility that must be addressed in your program's CPL model.

### Leverage statewide tools and resources for effective CPL integration.

- Participate in multi-college faculty workgroups developing statewide recommendations.
- Use models from [Shasta College](#) and [Merced College](#) as examples of CPL integration into direct assessment CBE programs.



### Update local policies to remove barriers and advance CPL.

- Update existing college policies to align with state and federal requirements and support the direct assessment CBE model.
- Review recommendations from the MAP CPL Workgroup: [Recommended AP 4235 Credit for Prior Learning](#) to identify potential policies to be revised to remove barriers. Examples include:
  - ▶ *Raise CPL Total Unit Limit to 45 or No Limit*
  - ▶ *Eliminate Minimum GPA or Good Standing Requirements*
  - ▶ *Eliminate Residency (12 units) Requirement*
  - ▶ *Eliminate Requirement for Minimum Traditional Units (50%) for a Certificate or Degree*
  - ▶ *Eliminate All Charges for CPL (Credit by Exam)*
  - ▶ *Clarify Grade Option P/NP (explore options in Recommended AP 4235)*
  - ▶ *Eliminate Petition Requirement*
- Access sample policies and procedures from successful implementing colleges at the MAP Library.

### Integrate CPL into the student journey for seamless access.

- Integrate CPL into your [Student Journey](#) mapping process, ensuring it is a clear, accessible, and navigable part of the pathway from program entry to completion.
- Define specific steps for students to identify, apply for, and receive CPL, making sure each step aligns with the competencies.
- Develop a comprehensive communication plan that informs students and staff about the availability, benefits, and processes for CPL.
- Include clear, accessible information on costs associated with CPL, if any, and ensure information reaches all target student populations, particularly those from nontraditional and underserved backgrounds.
- Highlight how CPL can accelerate degree completion, supporting the college's equity goals and providing pathways for students to leverage their prior learning.

### Build staff capacity to promote and administer CPL.

- Offer training sessions for advisors, faculty, and support staff to build their capacity in evaluating CPL materials and guiding students through the CPL process.
- Emphasize how CPL supports direct assessment CBE, ensuring that staff understand the importance of promoting CPL as an accessible option for all students.
- Provide resources and ongoing professional development opportunities to maintain and enhance staff expertise in CPL assessment.

### Evaluate technology and institutional capacity for CPL administration.

- Conduct a needs assessment of current technology systems to determine their ability to support CPL for direct assessment CBE.
- Identify gaps in current technology and infrastructure that may affect the efficient administration of CPL and explore solutions such as new financial aid technologies or system upgrades.
- Align system capabilities with program goals to ensure CPL is administered efficiently and equitably, minimizing barriers for students and staff.
- Develop a college-branded CPL website.
- Set up a MAP platform for CPL processing.

### Monitor CPL's impact on program and institutional goals.

- Develop a system for monitoring the financial impact of CPL on the institution, including costs associated with implementation and revenue considerations.
- Track the effectiveness of CPL in your direct assessment CBE program, such as accelerating completion rates for underserved students and increasing access to credentialing opportunities.
- Use data from this assessment to make informed adjustments to CPL policies and practices, ensuring continuous improvement and alignment with equity objectives.
- Track CPL outcomes through MAP dashboard metrics.
- Document student success stories.







## SPOTLIGHT: MERCED COLLEGE



## INTEGRATING CPL WITH DIRECT ASSESSMENT CBE

Merced College developed a comprehensive approach to Credit for Prior Learning (CPL) that complements their direct assessment competency-based education (CBE) program, creating multiple pathways for students to accelerate their degree completion. Their process demonstrates how institutions can effectively recognize students' existing knowledge while maintaining academic integrity.

### Strategic Leadership and Implementation

At the heart of Merced's CPL process is a dedicated task force bringing together essential decision-makers: faculty representatives, admissions and records staff, administrators, and a CPL coordinator. This group meets regularly to fine-tune policies, reconvening whenever adjustments are needed to better serve student needs. Their recent addition of a full-time CPL curriculum specialist further strengthens this commitment to student success. Merced was able to utilize existing CPL policies for the direct assessment CBE program and did not require additional policy modifications.

**By maintaining this student-centered approach while ensuring academic rigor, Merced created a CPL process that advances both equity goals and degree completion rate.**

### Assessment and Implementation

Merced's process begins early, with a preenrollment survey that gathers information about students' prior knowledge and experience. This proactive approach helps identify CPL opportunities immediately, allowing qualified students to advance directly to summative assessments without unnecessary delays.

### Communication and Outreach

The college prioritizes clear communication about these opportunities through multiple channels:

- Regular presentations at faculty forums and academic senate
- Explicit clarification of differences between CPL and direct assessment CBE
- Marketing campaigns highlighting accelerated completion pathways
- Recruitment efforts emphasizing the value of prior experience



# Define Business Model, Budget, and Pricing Strategy

Embarking on the journey of building a direct assessment CBE program is both an exciting and challenging endeavor.

As with any new program, it's essential to thoughtfully consider the costs and potential revenue from the outset. In Determine Resources and Capacity from the [Prepare](#) phase, you assessed institutional capacity and identified the range of resources and cost drivers to consider in creating a direct assessment CBE program. This foundational work is critical, as it helps ensure that your program design aligns with available resources and goals.

This section focuses on the specifics of developing a business model that efficiently utilizes institutional resources, maximizes funding opportunities, and aligns with your program's goals. Now you will need to consider balancing costs, planning for revenue, and identifying potential funding streams while maintaining affordability and access for all students. By building a feasible and flexible business model, your college can lay the groundwork for a sustainable and impactful direct assessment CBE program that supports equitable student success.

Refer to the [Assess the Impacts and Costs of Programs](#) section of the *Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs* guide for more detailed information about how to design in ways that support future cost analysis.

The primary revenues for direct assessment CBE programs will be apportionment and [student fees](#). The apportionment model is currently being tested. Once a final apportionment model is determined and codified in California Code of Regulations, Title 5, further guidance will be provided.





As discussed in the [Prepare](#) phase, key cost drivers may include:

**Program development, curriculum, and instructional design.** This may include faculty release time to identify, map, and validate competencies; creating or redesigning curriculum to be modular, flexible, and competency-based; designing, implementing, and validating authentic assessments that measure competencies effectively; and instructional design.

**Technology infrastructure.** Including customizations for Canvas (the Learning Management System) to support flexibly-paced learning, personalized learning paths, and integration with other systems; data systems to track student progress, competencies, and outcomes data; technology to disburse financial aid and handle subscription-based programs or varying term lengths; developing dual transcripts; design software or adaptive learning platforms; customer relationship management (CRM) systems to support promotion, recruitment, and in-program communications; and developing or licensing digital learning materials, tools, and resources tailored for direct assessment CBE.

**Facilities.** Considerations for hybrid programs.

**Faculty and staff orientation and training.** Training faculty and staff on direct assessment CBE principles, assessment techniques, and the new roles they will play (e.g., coaches, mentors).

**Student support services.** Additional costs associated with providing fully online counseling and mentorship services; developing tailored academic support services, such as tutoring or supplemental instruction aligned with competencies.

**Marketing and recruitment.** Developing targeted outreach strategies to attract nontraditional students who would benefit from direct assessment CBE and create equitable opportunities for potential students who are shut out of the time-based education model; implementing new enrollment models to manage the unique enrollment patterns of direct assessment CBE students; and engaging employers.

**Sustainability and scaling.** This may include running pilot programs to identify effective practices and create solutions for challenges within your program, which may require dedicated resources before scaling; investing in continuous program evaluation and improvement to ensure long-term success and alignment with equity goals.

## KEY DECISION



What business model will ensure the program is affordable, accessible, sustainable, and scalable?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Enrollment Management Director/Dean and other Enrollment Leads
- Faculty Workstream and Student Support Workstream Teams
- Board of Trustees
- Financial Aid Director/Dean and other Financial Aid Leads
- Information Technology Leadership
- College Leadership (President and Cabinet)







## EQUITY IN ACTION

*When developing a business model for direct assessment CBE programs, consider cost-effective solutions that reduce financial barriers and align with Vision 2030's equity goals:*

**Design sustainable pricing structures that include transparent, upfront costs for all essential fees, technology, textbooks, and associated expenses.**

Regular monitoring and adjustment of total attendance costs ensures continued affordability and supports Vision 2030's goal of maximizing financial aid effectiveness.

**Implement subscription-based models that enable unlimited competency enrollment for a flat rate.**

This approach reduces excess unit accumulation while supporting students' individual progression pace, directly advancing Vision 2030's goal of decreasing units to completion.

**Scale resources strategically by optimizing technology, faculty, and staff models to achieve program sustainability within three to six years.**

This careful resource management ensures long-term ability to provide comprehensive student support services aligned with Vision 2030's equity objectives.

**Monitor financial impact through regular assessment of student costs, completion rates, and program sustainability.** This data-driven approach helps ensure the business model continues to advance goals of increasing meaningful educational outcomes while maintaining affordability.



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What major costs are associated with the direct assessment CBE program and how will they impact affordability and accessibility?
- What unique startup costs are anticipated and how can the institution prioritize allocating funds for these expenses?
- What unique costs are associated with the direct assessment CBE faculty and staff model (e.g., differences in load, additional advisors, etc.)?
- How will the program generate revenue? If revenue is insufficient to cover expenses, how will the program be sustained?
- Will the college need external funding (e.g., grants, gifts, etc.) to support direct assessment CBE?
- What is the institution's risk tolerance and fiscal viability in operating the program for multiple years before breaking even?
- What is the total cost of attendance for students, including all relevant fees? How will the college adjust the total cost of attendance to ensure students have affordable and equitable access to the program?
- How will the fees be structured for out-of-state students and what financial support options can be offered?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Identify and plan for local and state pricing approvals.

- Identify specific local or state entities that require approval for the pricing model, including any regulatory bodies or college governing boards.
- Outline the steps and timeline needed to secure approvals, ensuring alignment with state and institutional policies for equitable access.

### Develop a three-year project budget to outline expected costs, revenue, and funding for your program.

- Confirm what budget information will be required to submit for the [ACCJC substantive change application](#) to ensure alignment with that requirement.

### Explore resources to aid in financial planning best practices.

- Analyze existing models to understand best practices in costs and revenue.

### Design a pricing model that reflects costs and student needs.

- Develop a pricing model that reflects the costs associated with running the program.
- Ensure the model is flexible enough to accommodate different student types and maintains an overall low cost for completion.

### Create a payment schedule aligned with academic calendars to explore impacts on students.

- Design a payment schedule that aligns with various academic calendar options, ensuring it supports subscription-based or traditional term models.
- As you are also considering your academic calendar, provide an example of a payment schedule for each calendar type, demonstrating how different models affect affordability and access for students.

### Estimate startup and operational costs to finalize budget planning.

- Building off your work in [Determine Resources and Capacity](#), estimate your startup costs and operational expenses, updating the budget as program decisions are finalized.
- Refer to the [Assess the Impacts and Costs of Programs](#) section of the *Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs* guide for more detailed information about how to design in ways that support future cost analysis.
- **Identify and apply for external funding to support startup costs.**
- Research federal and state funding opportunities, including grants for sectors experiencing labor shortages.





# Establish Academic Policies and Local Approvals

There are several local policies that need to be reviewed, updated, and/or created to develop a direct assessment CBE program.

These policies provide opportunities to address barriers to success, access, and support including grading, repetition and redirection, and more to improve equitable student outcomes.

Use the “[Policies and Procedures Review: Competency-based Education](#)” report produced in 2025 to help identify existing institutional policies and procedures that should or could be updated.

*While the specific policies you may need to revise at your college will vary, policies that may need to be reviewed and modified to facilitate direct assessment CBE programs include:*

- AP 4230 Grading: Colleges will need to update existing policies to reflect the California evaluative symbols and determine use of optional nonevaluative symbols per [California Code of Regulations Title 5 § 55270.8. Academic Record Symbols and Grade Point Average](#).
- AP 4225 Repetition and Redirection or AP 4255 Dismissal and Readmission: This is a required district policy per [California Code of Regulations Title 5 § 55270.9. Repetition](#), and will include approving policy on repetition, summative assessment attempts, and redirecting students between traditional and direct assessment CBE programs at your institution or another.
- AP 5130 Financial Aid: This financial aid policy is related to accreditation for the district. It includes references to [California Code of Regulations § 55031 Probation and Dismissal](#) and [§ 58600 Student Financial Aid](#). This policy should be reviewed in particular to address Satisfactory Academic Progress and Return to Title IV.
- AP 4235 Credit for Prior Learning: ([See Determine Process for Recognizing Prior Learning](#)).
- AP 5030 Fees: Colleges utilizing subscription-based fees should review these policy references [California Code of Regulations Title 5 § 58500 Enrollment Fee](#) and [Differential Enrollment Fee and § 58509 Refund of Enrollment Fees and Withdrawal due to an Extraordinary Condition](#).
- AP 4105 Distance Education: This policy governs the implementation and quality standards for distance education courses in the district. It includes references to the [California Code of Regulations Title 5 § 55204 Instructor Contact](#) and [§ 55206 Separate Course Approval](#). This policy should be reviewed to ensure compliance with regular and substantive interaction requirements and alignment with accreditation and federal financial aid standards.
- A policy to account for regular and substantive interaction to ensure that the policy is relevant for direct assessment CBE: [See California Code of Regulations Title 5 § 55270.6. Instructor Contact](#) and the [U.S. Department of Education Dear Colleague Letter \(GEN-24-02\)](#). Check to make sure your college’s RSI policy does not reference time (i.e. two times per week, etc.) as that might not apply to your direct assessment CBE offerings.
- A policy to account for dual transcripts as outlined per [California Code of Regulations § 55270.8. Academic Record Symbols and Grade Point Average](#).

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**Note:** Both federal and state regulations are subject to change and there may be additional policies a college will need to consider that are not listed here. The numbering system in the above examples is based on the Community College League of California numbering system which may differ from your local taxonomy for policies.



## KEY DECISION



**What local policies will be impacted by the direct assessment CBE program?**



## EQUITY IN ACTION

*Reviewing, updating, and creating local policies for a direct assessment CBE program presents an opportunity to dismantle barriers to support students. The policies you have the opportunity to review and revise per California Code of Regulations, Title 5, including grading, repetition, and redirection, will support the outcomes for Vision 2030 and the [Equity Framework](#). Consider the following when looking at local policies:*

**Review and revise grading and repetition policies.** Update grading policies to include nonevaluative symbols that foster a more inclusive environment. Revise repetition policies to allow nonpunitive retakes of summative assessments, supporting students who need additional time or resources.

**Align financial aid policies with the needs of direct assessment CBE students.** Ensure policies are equitable and provide necessary support for direct assessment CBE students' financial aid eligibility.

**Update dual transcript policies for transparency.** Revise dual transcript policies to clearly represent student achievements in both traditional and direct assessment CBE programs, enhancing recognition and clarity for students, employers, and transfer institutions.

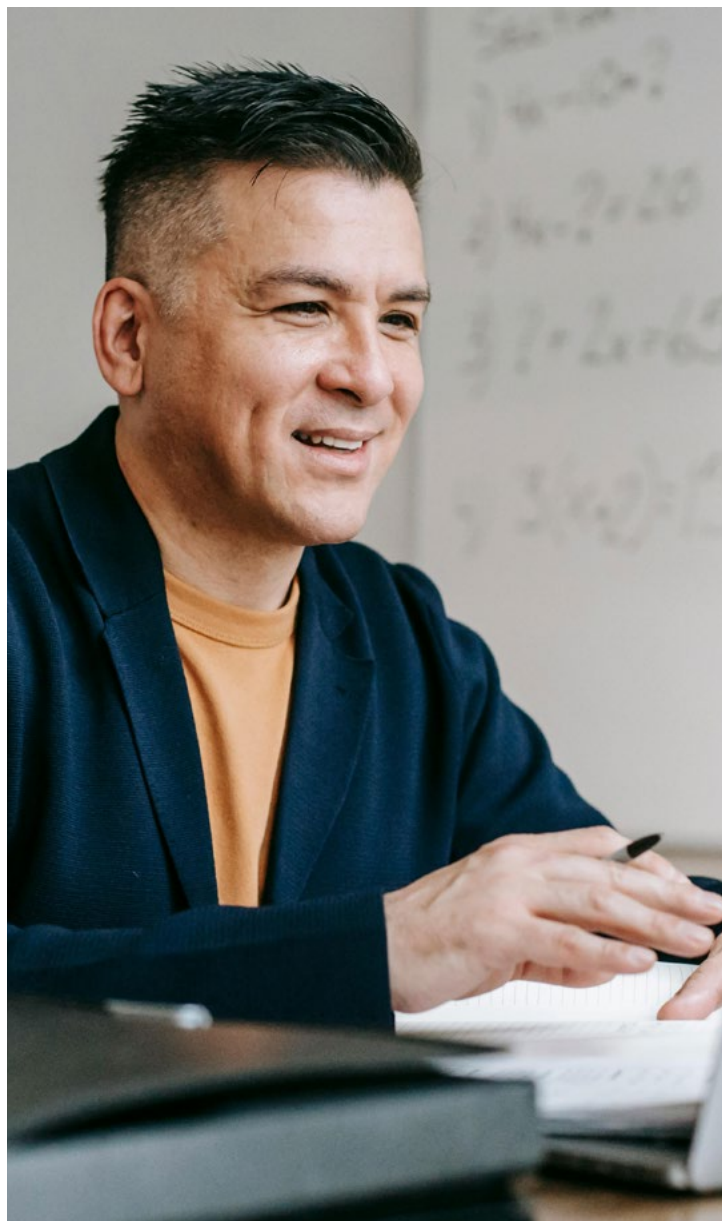
**Engage diverse decision-makers in policy development.** Collaborate with key decision-makers, including the academic senate and participatory governance groups, to ensure that policy changes reflect the needs and perspectives of a diverse student body and faculty.



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Enrollment Management Director/Dean and other Enrollment Leads
- Faculty Workstream and Student Support Workstream Teams
- Students/Student Senate/ Student Senate President
- Financial Aid Director/ Dean and other Financial Aid Leads
- College Leadership (President and Cabinet)
- Participatory Governance Groups, including the Board





## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What key committees and timelines will need to be met to develop and approve new policies, ensuring diverse representation and input?
- What policies and processes apply to students who are repeating summative assessments, and how can they be designed to support mastery without penalizing students who need additional attempts?
- What policies and processes will support students who withdraw from the direct assessment CBE program? How can these be created to ensure students have pathways to re-enroll or transition to other programs without a disadvantage?
- What policies and processes will support redirection of students to traditional credit hour programs?
- How can the academic senate be engaged to ensure their involvement in new policy development?
- How can faculty development and student rights and responsibilities be addressed in your college's policy?
- Will a new approval process need to be developed at the local level or can existing structures be adapted?
- How and when will the college communicate policies and procedures to students, staff, faculty, and other relevant decision-makers, ensuring that information is accessible and clear?
- What local policies and procedures regarding distance education need to be added or adapted to accommodate direct assessment CBE programs that are being offered online?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Determine which policies will need to be modified to facilitate a direct assessment CBE program at your college.

- Use the “[Policies and Procedures Review: Competency-based Education](#)” report produced in 2025 to help identify existing institutional policies and procedures that should or could be updated.
- Conduct a comprehensive review of existing academic policies to determine modifications for your direct assessment CBE program.

### Incorporate policy development and approvals into your work plan.

- Incorporate timelines and milestones specific to policy development, decision-maker engagement, and approval processes into your existing work plan.
- Ensure the work plan aligns with institutional governance structures and prioritizes collaboration with diverse decision-makers, including student representatives, to promote transparency and equity.

### Ensure policies reflect program mission and equity goals.

- Consider the [Equity Framework](#) and your program’s [Vision](#) to ensure policies are consistent.
- Review examples like [UMass Global’s CBE Academic Policies](#) to see how other institutions have integrated their principles into their policy framework.

### Leverage example language from other colleges to guide policy development.

- Examine the repetition and redirection policy language from Bakersfield College to support the unique needs of your direct assessment CBE program.

### Convene relevant decision-makers to review and draft new policies or modifications.

- Engage faculty, staff, students, and other key decision-makers to collaboratively define parameters for new or modified policies.
- Use the “[Policies and Procedures Review: Competency-based Education](#)” report produced in 2025 to ensure the right stakeholders are included in conversations based on which institutional policies and procedures could be impacted.

### Utilize a decision-making framework to develop key policies such as repetition and redirection.

- Apply a structured framework to explore options and make informed decisions that align with the equity and student-centered goals of the program.
- Engage cross-functional teams to evaluate the implications of different policy choices and prioritize nonpunitive measures.







# Determine Coordinated Technology Infrastructure

Technology plays a pivotal role in supporting the development and delivery of direct assessment CBE programs, particularly in hybrid and online formats.

A well-coordinated technology infrastructure can streamline program administration, enhance learning accessibility, and make education more flexible and engaging for students.

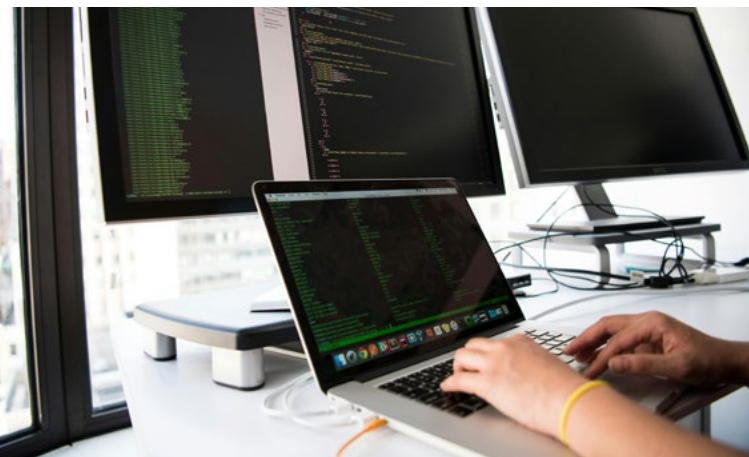


Decisions around technology solutions need to be initiated early in the Design and Build phase and involve a wide range of college decision-makers. Given the potentially significant costs and long-term impact, the Leadership Team will oversee these decisions, ensuring alignment with institutional goals and equity commitments. When possible, they will identify opportunities to leverage technology available through state paid or discounted service agreements such as those offered through CollegeBuys, CCC Tech Center, CCC TechConnect, and the California Virtual Campus. Certain decisions, such as customizing the Learning Management System (LMS), will be led by faculty, who are directly engaged with instructional delivery. The Leadership Team will also consider technology needs during the Design and Build phase. (See [Establish Academic Calendar](#), [Establish Financial Aid Model](#), and [Create Evaluation Plan](#).)

*During the Design and Build phase, your Leadership Team will build upon the technology assessment conducted in the Prepare phase and develop a technology plan. Key features of that plan can include:*

## Instructional Support Technologies

- **Learning management systems** like Canvas serve as virtual classrooms, hosting course materials, assignments, discussion forums, evaluation, and communication tools.
- **Video conferencing platforms** like Zoom facilitate real-time interaction between students and instructors, regardless of location.
- **Online libraries and databases** like ProQuest or those offered through a library management system like [Alma](#) [Primo](#) provide access to learning resources.
- **Digital learning platforms** like [TestOut](#), [Mursion](#), [ShiftIQ](#), can include learning resources, simulations, and assessments with adaptive learning tools to personalize the educational experience and make it more inclusive and engaging.
- **Data management and visualization software** like Tableau, Intelligent Insights by Instructure, eLumen, Intelliboard, and Power BI can make it easier to track individual student processes and present that information to faculty, staff, and students.
- **Classroom and lab resources** such as computers (e.g., desktops, laptops, tablets), interactive whiteboards, and discipline-specific equipment (e.g., 3D printers, robotics kits, welding machines, CPR mannequins, etc.)
- **Adaptive technology** (e.g., screen readers, braille displays, captioning software, adaptive computer equipment, etc.) limits or removes barriers for students with disabilities.
- **Instructional design and development software** such as CidiLabs tools, Feedback Fruit, JobSpeaker, Ease Learning with Skillways, and Skillscommons can help faculty and staff design high-quality direct assessment CBE courseware quickly and efficiently.



## Student Support Technologies

- **Student Information Systems (SIS)** like Ellucian (Banner, Colleague), Oracle PeopleSoft, or Anthology serve as the primary database for student information.
- **Customer Relationship Management (CRM)** systems like Technolutions Slate, Element 451, EAB Navigate 360, and Liasion TargetX provide a communication platform for recruitment, in-program interactions, and postgraduate relations. A CRM can support a case management approach to providing personalized academic and nonacademic support to students.
- **Financial Aid Management (FAM) systems** like Ellucian Banner, CampusLogic, Colleague Financial Aid, or Regent Education support financial aid management and reporting.
- **Online tutoring systems** offered by vendors such as Link-Systems International (NetTutor) provide platforms and tools to enable college tutors to support students fully online. These systems are also used to support students taking onsite programs when they cannot travel to campus. (Link-Systems offers favorable licensing to CCCs with support offered by CVC.)
- **Other tools** that support automation, interoperability, document management, career planning, communication, retention, other functions and access, such as low-cost mobile hotspots.

*All systems or applications need to be reviewed to confirm that they comply with federal and state accessibility and data security (FERPA) regulations.*



## EQUITY IN ACTION

*By building a technology infrastructure for direct assessment CBE programs, colleges can expand access to flexible learning and provide targeted support systems that meet the diverse needs of all students. Below are considerations to incorporate equity into your technology planning:*

### **Align with workplace readiness by incorporating industry-standard tools that prepare students for employment.**

Select technologies that build professional confidence and marketable skills aligned with Vision 2030's workforce outcomes.

**Remove technology barriers through early assessment of student needs.** Provide laptops, internet access, and essential equipment through institutional lending programs or community partnerships. Monitor and address accessibility gaps to support Vision 2030's goal of increasing student participation.

**Build digital literacy with targeted orientations and training sessions.** Support students with limited computer skills through customized instruction that ensures full program engagement and academic success.

**Optimize for affordability by regularly reviewing technology usage and eliminating redundant tools.** Develop cost-effective plans that reduce student expenses while maintaining quality, supporting Vision 2030's financial aid maximization goals.

**Leverage community resources by partnering with employers and organizations to provide discounted or free technology solutions.** Create sustainable support networks that expand access for historically underserved populations.

**Leverage partnerships to expand access to technology** by collaborating with employers, community organizations, and vendors to offer technology solutions tailored for underserved populations, such as free internet access, discounted software, or loaned equipment.

## KEY DECISION



What technology infrastructure will ensure the program is impactful, efficient, and effective?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

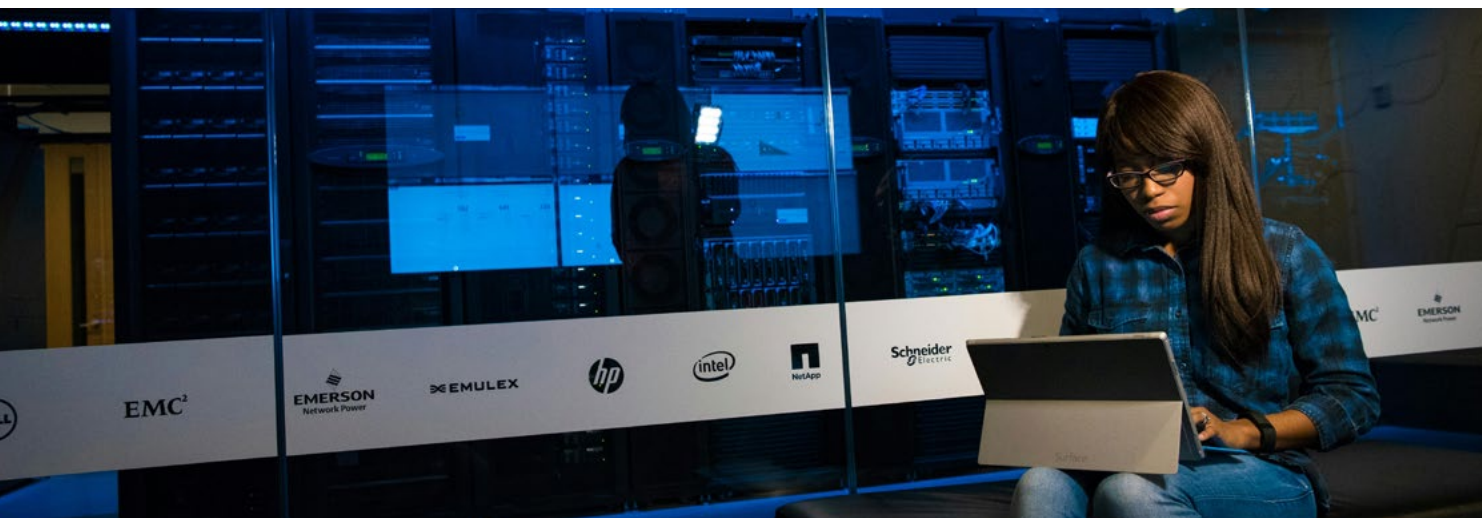
- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Chief Information Officer & other IT Leads
- IT System Managers: LMS, SIS, Data, Fin Aid, CRM, Student Support, Transcripts, etc.
- Deans (Operational Leaders)
- Academic Senate
- Enrollment Management Director/Dean and other Enrollment Leads
- Student Support Services (Counselors, Advisors, etc.)
- Bargaining Unit
- Classified Senates
- Admissions and Records (Registrar, etc.)
- Financial Aid Director/Dean and other Financial Aid Leads
- Deans (Academic Leaders)
- Data Governance
- College Leadership (President and Cabinet)
- Board of Trustees



## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What are the core technology infrastructure needs of the direct assessment CBE program?
- What are the gaps between the current state of systems/ infrastructure and the future state? How do these gaps impact students with limited technology access or skills?
- Which of the software vendors provide the most comprehensive, accessible, and inclusive technology solutions to meet these needs?
- What is the cost to implement these new systems/ modifications to existing systems?
- What IT staffing does the institution need? Will the college contract with technology vendors for technical assistance and support to build additional capacity?
- What technology implementations can wait until later in the direct assessment CBE program development process? How can this phased approach minimize disruption for students?
- How will the college support, train, and build capacity across faculty, staff, students, and other decision-makers to use these systems, particularly those with limited technology skills?
- What is your technology plan to implement these changes including a timeline, roles and responsibilities, and resources?







## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Review technology recommendations and best practices to inform your technology plan.

- Review the [Analysis & Recommendations for CBE Technology 2023-2024](#) developed by the Direct Assessment CBE Collaborative, which includes key sections such as the use of the Learning Management System (Canvas), Customer Relations Management (CRM) Systems, Financial Aid: Regent Education, Dual Transcripts, and Technology Needs Assessment.
- Consider C-BEN's [Considerations for CBE Technical Architectures in Postsecondary Education](#) to identify national best practices.
- Review [Coastline College's online library management system](#) as a model for developing an effective online library resource.

### Develop or update your technology plan using the California Direct Assessment CBE Collaborative's Template for Direct Assessment CBE Technology Planning Resource.

- Revisit your [Technology Inventory Survey](#) to update current technology applications and key process decisions that have technology interdependencies related to program design and implementation.

### Develop a strategic technology plan and implementation roadmap aligned with program goals.

- Evaluate and acquire new technology as needed.
- Outline a 12-24 month technology implementation plan that includes a timeline and roles and responsibilities for setting up technology, maintaining tools and resources, and evaluating sustainability.

### Collaborate on technology training and professional development to build capacity across users.

- Assess training needs related to technology use and build inclusive orientation sessions for students with varying technology skills.

### Oversee licensing, installation, and testing of technology solutions.

- Oversee the licensing, creation, installation, and implementation/testing of any new technology required for the direct assessment CBE program, including systems or applications needed to offer student supports fully online.
- Test technology solutions for accessibility and effectiveness, ensuring they are suitable for all users, including those with limited access.





# Develop ACCJC Application and Seek Approval from Programmatic Accreditors

One of the most important program approval steps for your first direct assessment CBE program will be your institutional programmatic accreditation.

A change of an instructional program from clock or credit hours to direct assessment of student learning is considered a substantive change and requires approval from The Accrediting Commission for Community and Junior Colleges (ACCJC). Federal law mandates that accrediting agencies require institutions to obtain accreditation approval of a substantive change before it is included in the scope of the accreditation granted to the institution. The Leadership Team will oversee this decision as it involves coordination across multiple college decision-makers.



**The ACCJC Substantive Change Manual outlines all of the steps and requirements for submitting a substantive change. Be sure to consult the most recent ACCJC manual.**

*Generally, the process follows these steps:*

1. Review ACCJC's Substantive Change Manual and Policies.
2. Submit a [Substantive Change Inquiry Form](#) through your Accreditation Liaison Officer (ALO).
3. Complete the *Substantive Change Application Form* with support from your ALO. This will involve coordination across key campus decision-makers including faculty, information technology, financial aid, and student support.
4. Obtain any local approvals required from governance approval processes for your institution and/or district.
5. Submit your *Substantive Change Application Form* to the ACCJC 30 days prior to the scheduled meeting of the Substantive Change Committee. (Dates are announced on the [ACCJC website](#).)
6. Pay relevant fees. (Fee schedules are available on the [ACCJC website](#).)
7. Receive notification of action from the ACCJC. Potential actions are outlined in the [Substantive Change Manual](#).
8. Participate in a site visit, if requested. Federal regulations require that certain substantive changes include a site visit as part of the approval.



## EQUITY IN ACTION

*As the institution moves through the accreditation process, the application process itself can set the tone for how equity will be operationalized within the program by demonstrating the institution's commitment to supporting students. When developing the application, the following considerations can be incorporated:*

**Build collaborative planning teams.** Involve diverse voices in the application process, including representatives from student groups, community-based organizations, and faculty who are committed to supporting underserved populations. Ensuring these voices are part of the planning and decision-making processes will create a more inclusive program design that reflects the needs of all students.

**Address structural barriers.** As part of the application, identify potential access barriers that students may face (e.g., technology, flexible scheduling) and propose solutions. Highlight how the program will be structured to provide resources and supports like loaner technology or extended service hours to accommodate nontraditional and working students.

**Design flexible student policies.** Ensure the application reflects policies that are student-centered and nonpunitive, such as flexible enrollment options, opportunities for re-engagement after breaks, and support systems for students needing additional time to complete competencies. Emphasizing these elements in the application demonstrates a commitment to retaining and supporting all students.

**Create clear information systems.** Develop a plan within the application for communicating program details transparently and accessibly to all potential and enrolled students. This includes information on program structure, financial aid options, and available support services, ensuring that students have the resources they need to navigate and succeed in the program.

## KEY DECISION



**What is the process for developing, vetting, and submitting an ACCJC application in a timely manner?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- College Leadership (President and Cabinet)
- Accreditation Staff Liaison



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What are your local approval processes and timeline for securing approvals?
- Who will provide final approval on all forms before submission?
- Who will review and validate the direct assessment CBE program design?
- How will you mitigate any potential risks or conflicts with other ongoing accreditation processes? (e.g., Are you up for reaffirmation? Have you had any recent actions?)





## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

**Use the [application template](#) to understand which key questions and design decisions must be addressed prior to submission.**

- Review [ACCJC Substantive Change Website](#) and the program approval application materials.

**Build a collaborative team to draft, review, and finalize the ACCJC Substantive Change application. Assign clear responsibilities and timelines for task force members to ensure effective collaboration.**

- Key members for the task force may include:
  - ▶ Academic Affairs
  - ▶ Institutional effectiveness researchers
  - ▶ Financial Aid
  - ▶ Faculty
  - ▶ Student supports
  - ▶ Information technology



**Use successful examples and expert recommendations to strengthen your application.**

- Review [UMass Global's program approval process](#) PowerPoint to understand decision-maker involvement and recommendations.
- Examine a [successful ACCJC Substantive Change application from Mt. Sac College](#) for insights.
- Consider the [Direct assessment CBE program approval comparison chart](#).
- **Develop and execute a localized plan for securing internal approvals for your program.**
  - Create or update your work plan to ensure the proper reviews and account for approvals. Note that this may look different and require extended timelines for single vs. multi-college districts.
  - Review the updated plan with executive leadership for alignment and guidance.
  - Key considerations for your work plan:
    - ▶ Ensure each section has at least one secondary reviewer.
    - ▶ Assign at least one secondary reviewer for each section of the application.
    - ▶ Review plans and drafts with executive leadership for alignment and feedback.
    - ▶ Gather input from key decision-makers before, during, and after completing the draft application to ensure comprehensive representation and support.



# Coordinate Chancellor's Office Approval Processes

As noted in [California Code of Regulations, Title 5 §55270.2. Approval of Direct Assessment Competency-Based Education Programs](#), direct assessment CBE programs must submit a *Program Map*, which among other things, will require a sample learner journey, methods of assessment, student outreach plan, professional development plan, and evaluation plan. For the most recent guidance on requirements and process for submission review the PCAH.

Navigating the Chancellor's Office approval process for direct assessment CBE programs requires thoughtful planning, coordination, and flexibility. Colleges that have successfully completed this process emphasize the importance of starting early, engaging decision-makers strategically, and building in time for unforeseen challenges. This process is also an opportunity to align institutional priorities, streamline internal processes, and ensure the program meets the needs of students and the broader community.





## Key Strategies for Success

### Plan early and map milestones

- Start the process well in advance to allow time for iterative reviews and approvals.
- Develop a clear timeline that includes internal review stages (e.g., curriculum committees, governance councils).
- Align key milestones with institutional academic calendars, financial aid cycles, and recruitment efforts.

### Structure stakeholder conversations effectively

- Engage faculty, academic leadership, and student services early to build buy-in and surface potential concerns.
- Facilitate cross-functional collaboration by involving departments like financial aid, IT, and admissions to address interdependencies.
- Establish a steering committee or task force to oversee the process and ensure consistent communication across teams.

### Leverage peer insights and resources

- Learn from other colleges that have completed the process to understand effective strategies and potential challenges.
- Utilize tools and resources from C-BEN to navigate policy challenges and stakeholder alignment.

### Allocate time for complex and collaborative tasks

- Expect curriculum mapping to require iterative collaboration with faculty and program leads.
- Allow extra time for aligning financial aid structures with the CBE direct assessment model, as this often involves complex adjustments to federal and state guidelines.
- Coordinate closely with IT to ensure student information systems and learning management systems can support competency-based education.
- Build time for governance approvals, particularly if the program requires approvals from multiple committees or councils.

### Integrate equity goals into the process

- Ensure alignment with institutional equity goals by collaborating with diversity, equity, and inclusion teams.
- Consider how the program can address equity in success, access, and support for all students.

Following Chancellor Office approval, colleges will be able to apply for the [U.S. Department of Education Title IV approval](#).





## EQUITY IN ACTION

*The Chancellor's Office Program Map requirements provide a critical opportunity for colleges to align their direct assessment CBE programs with systemwide equity goals. By embedding equity principles into program design, colleges can address barriers to entry, accelerate completion, and ensure comprehensive support for all students. As you engage the Chancellor's office approval process consider the following to ensure collaboration with key partners and alignment with local and system goals:*

**Foster inclusive decision-making.** Engage campus committees, faculty, staff, and student leadership groups, particularly those representing historically underserved populations. Their input during the application development process ensures the program design reflects community needs and supports Vision 2030 goals of increasing participation among underserved students.

**Integrate equity initiatives.** Align program goals with Student Equity Plans and Vision 2030 objectives. Connect outreach strategies and evaluation metrics to institutional efforts that promote equitable access and completion. Review and refine existing equity-oriented policies to ensure direct assessment CBE programs complement and strengthen broader institutional equity work.

### **Develop targeted outreach strategies.**

Build partnerships with community-based organizations and employers to reach populations identified in equity plans as disproportionately impacted. Design strategies to drive successful enrollment and persistence, supporting Vision 2030's aim to broaden educational participation and address equity gaps.

### **Create data-driven evaluation processes.**

Regularly track equity gaps in access, completion, and workforce outcomes to inform continuous improvement. Use data insights to identify areas requiring additional support and ensure the program meets equity goals. Reference *Creating a Plan for Data and Improvement* for detailed guidance.

**Prioritize equity-focused professional development.** Implement ongoing training in culturally responsive practices for faculty and staff. Partner with equity practitioners to design professional development that equips educators with the skills needed to effectively support diverse students, advancing Vision 2030's commitment to comprehensive student support. See *Develop Faculty Orientation and Professional Development* for actionable steps.



## KEY DECISION



How will the college ensure timely development, review, and submission of the Program Map?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- College Leadership (President and Cabinet)



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What are the college's local approval processes and timeline for securing approval?
- Who are the key decision-makers to involve in the process?
- Who will provide final approval on all forms before submission?
- How will the college mitigate any potential risks or conflicts such as ongoing approval processes, audits, accreditation reviews, committee review, and approval timelines, etc.?



### Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

#### Create or update your work plan for submitting for Chancellor's Office Program Approval.

- This will look very similar to your existing [program approval processes](#) and will include key decision-makers and committees required for the approval process.
- Explore this case study on how [Coastline College organized their program approval](#).

#### If your college is part of a multi-college district, account for district-level approval processes to ensure alignment.

- Consider additional approval activities for multi-college districts.
- Plan for coordination of shared resources and services and collaboration with district committees.
- Address student transfer and articulation pathways within the district to ensure that students have seamless options across colleges.





# Manage U.S. Department of Education Approval Process

Congratulations on reaching the final approval step for launching a direct assessment CBE program! Submitting your application for U.S. Department of Education approval will be among the last steps in the Design and Build phase, requiring that major program components are finalized.

Before submission, you must already have approval from the [ACCJC](#), as Department of Education approval hinges on prior approval from your regional accreditor.

The Department of Education application process involves submitting an application, drawing largely upon the decisions already laid out in this blueprint. The department will engage you in a dialogue to clarify program details, a process which may take up to 18 months before your program is approved and eligible for federal student aid. Department approval is key to ensuring your direct assessment CBE program supports students' access to federal and some state financial aid programs, helping you achieve your equity goals for increasing student success, access, and support.

*To review the specific components required by the Department of Education, refer to [CFR 668.10](#).*

While your application is under review, you can continue preparing the program for launch. This time can be used to finalize Canvas setup, solidify learner journey maps, secure local approvals, provide professional development for faculty and staff, and address final program elements.

## Key Considerations

### **Plan the timing of your application submission.**

Several foundational decisions must be finalized before moving forward with submitting your application. Decisions regarding the financial aid model, academic calendar, and faculty/staff model should be made early in the program development process, as the U.S. Department of Education application will be one of the final steps in ensuring your program is ready for implementation. Submitting the application after these decisions are in place allows for greater alignment and reduces the risk of inconsistencies or revisions later on.

### **Engage college leadership early and consistently.**

Early and frequent engagement of college leadership is important to your application development. College leadership such as your board of trustees, faculty union representatives, district administrators, and curriculum committee members should be included in discussions around major program decisions leading up to the application. Their input and support are invaluable for ensuring the program aligns with institutional goals. During the application process itself, college leadership can contribute through collaborative development sessions, application reviews, and by providing critical feedback.

**Clarify roles and establish a project lead.** Clarifying roles and responsibilities is key to efficiently managing the application process. Assigning a dedicated individual to steward the application as a project ensures that the process is well-organized and cohesive. This individual should oversee tasks such as scheduling meetings, developing and maintaining a detailed work plan, facilitating collaborative note-taking, and maintaining decision logs. To further support the process, transparent file management practices using shared platforms can help ensure all decision-makers have access to the most current materials and updates. Treating the application as a project with clear oversight and organization can significantly improve the likelihood of a successful and timely submission.



The good news? Once the Secretary initially approves a direct assessment CBE program, additional direct assessment CBE programs at the same or a lower academic level can be deemed eligible for federal financial aid without requiring further federal approvals. However, if you plan to offer a program at a higher academic level than the one originally approved, you will need to submit a new application for approval. This means that the effort you put into securing initial approval will facilitate the growth and scaling of your direct assessment CBE program portfolio. Note that your institutional accreditor may still require approval for each new program, regardless of academic level.

## KEY DECISION

How will the college ensure timely development, review, and submission of the U.S. Department of Education application to meet the timeline to launch?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- College Leadership (President and Cabinet)
- Accreditation Lead at College
- Accreditation Liaison Officer at ACCJC



## EQUITY IN ACTION

*Receiving approval from the U.S. Department of Education is essential to ensure that students are eligible for federal financial aid. Below are some strategies to consider as you engage in the application and approval process:*

**Align program design with equity objectives.** As you finalize the components required for approval, explicitly connect each element (e.g., assessment methodology, program structure, support services) to the program's goals of increasing access, supporting student success, and providing tailored pathways for historically marginalized students.

**Ensure equitable access to federal financial aid.** Document how the program meets Title IV requirements, emphasizing how the structure enables all students, especially low-income and nontraditional students, to access and maintain eligibility for financial aid. This could include flexible enrollment options and support systems designed to address the financial and academic challenges faced by these populations.

**Engage diverse stakeholders in application development.** Include feedback from students, faculty, staff, and community organizations in shaping the application. This will help ensure that the program's design is reflective of and responsive to the needs of the communities it aims to serve.





## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What local processes must be followed to secure approval (including approval from participatory governance groups and the Board)? What is the timeline for these processes?
- How will the college gather and incorporate feedback from diverse decision-makers to inform the application development?
- Who will provide final approval on all forms before submission?
- How will the college mitigate any potential risks or conflicts with other audit or program review processes? [e.g., Does the college have any outstanding Title IV reports? Recent findings such as miscalculations or late Return to Title IV (R2T4)?]
- How will the college ensure transparent and accessible communication throughout the approval process?



### SPOTLIGHT: SOUTHWESTERN COLLEGE

## CAMPUS COLLABORATION IN DEVELOPING THE U.S. DEPARTMENT OF EDUCATION APPLICATION AT SOUTHWESTERN COLLEGE



After receiving ACCJC substantive change approval, Southwestern College embarked on a 12-month collaborative process to develop their U.S. Department of Education (ED) application. Under the leadership of the Vice President

of Student Affairs, a core team worked to align the application with local and state curriculum standards. This team brought diverse expertise. The financial aid director provided critical insight on federal regulations and disbursement policies; discipline faculty ensured academic rigor and appropriate competency assessment, deans of enrollment and instruction addressed operational logistics, and the direct assessment CBE lead/curriculum chair guided alignment with existing college frameworks.

Throughout the process, Southwestern utilized C-BEN expertise and resources, including detailed reviews of ACCJC documents and ED materials on subscription-based calendars. Their success hinged on strong organization — using a central tracking document that mapped responsibilities, deadlines, and dependencies across teams. Early establishment of the academic calendar and instructional structure proved crucial, particularly for coordinating financial aid disbursement schedules with competency completion tracking and ensuring compliance with Title IV requirements.

*Southwestern's comprehensive stakeholder engagement included:*

**Academic senate:** reviewed curriculum elements, focusing on competency assessment methods and faculty roles.

**Executive leadership team:** examined planning timelines, budget implications, technology needs, and staffing resources.

**Student services council:** explored integration with existing support services.

**Associated student government:** provided valuable input on academic calendar structure and potential impacts on student schedules.

**Classified staff union:** raised important considerations about workload and scheduling for year-round programming, influencing final calendar design.

**College president and academic senate:** provided final governance approval and faculty model review.



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Use key guidance documents to inform your application strategy.

- Consult the [Federal Student Aid \(FSA\) Handbook](#) and the [Dear Colleague Letter \(GEN-24-02\) Applying for Title IV Eligibility for Direct Assessment \(Competency-Based\) Programs](#) for guidelines on applying for direct assessment CBE programs.

### Analyze and learn from approval processes to streamline your application.

- Review the [Direct Assessment CBE program approval comparison chart](#).
- Study how [UMass Global created their program approval processes](#), including decision-maker involvement and key recommendations for California community colleges.
- Read this case study on how [Coastline College navigated the program approval process](#) and key recommendations.
- Learn how [Southwestern College mobilized campus resources](#) to develop their application.
- Review example questions that the direct assessment CBE Collaborative colleges received from the Department of Education after their initial applications.

### Map out and prepare for local approvals to ensure alignment.

- Create or update your work plan to ensure the proper reviews and account for approvals. Note that this may look different and require extended timelines for single vs. multi-college districts.
- Review plans with executive leadership to ensure alignment and support.

### Engage decision-makers early to build consensus and support.

- Incorporate input and feedback from diverse decision-makers throughout the application process.
- Identify key decision-makers to support developing each portion of the application utilizing the [Application Requirements worksheet](#).

### Draft and refine the application with input from key decision-makers.

- Use this [Application Template](#) and share with leadership.
- Gather input from key decision-makers before, during, and after completing the draft application and appendices.

### Establish a process for responding to the U.S. Department of Education's questions.

- Establish a clear process for reviewing and addressing feedback or questions received from the U.S. Department of Education during the application evaluation.
- Ensure the process includes timely responses and thorough documentation to support the program's approval.







## SPOTLIGHT: COASTLINE COLLEGE



## DEVELOPING THE U.S. DEPARTMENT OF EDUCATION APPLICATION

“Just get started.” This was Coastline College’s guiding principle as they tackled their U.S. Department of Education (ED) application for their direct assessment CBE program. They discovered that the writing process itself would surface important questions, naturally shaping subsequent sections of the application.

The college’s project manager launched with a practical approach: creating a comprehensive chart of ED regulations. This foundation ensured the college would respond fully and completely to requirements. And this content transformed easily into specific questions that guided application development.

This systematic method also revealed which stakeholder conversations needed to happen and when. For instance, the program manager identified exactly which departments needed to provide input for specific sections, ensuring no crucial perspectives were missed. With their lead administrator serving as primary author, the team developed each section methodically, gathering targeted feedback from key departments like financial aid along the way.

Success came through smart collaboration. Coastline built a powerful support network by engaging with the California Community Colleges Chancellor’s Office and C-BEN. A game-changing decision was bringing in an experienced consultant who had successfully navigated the ED application process — their insights helped decode complex regulations and avoid common pitfalls.

Coastline’s commitment to campuswide transparency proved crucial. Despite not requiring academic senate approval, they chose to actively involve the senate throughout the process, recognizing the importance of broad institutional support. Regular updates flowed through multiple channels — senate meetings, institutional planning sessions, FLEX days, and the president’s newsletter. This comprehensive communication strategy helped maintain community understanding and support, even as plans evolved.

One surprising discovery? The ED staff themselves proved to be allies rather than obstacles. Their questions sought clarity rather than created barriers and they readily scheduled calls to resolve concerns. This collaborative relationship, combined with Coastline’s systematic approach and expert guidance, paved the way for a successful application.



# Faculty and Staff Model Considerations

Designing your faculty and staff model presents an exciting opportunity to rethink who engages with students and how.

The primary driver of this shift is the flexibility created through direct assessment CBE. Students will enter and progress through your program at different paces with unique academic and nonacademic needs and wants. You must consider how this shift will impact the day-to-day work of faculty and other staff as students set the pace and schedule of their learning.

While budgetary constraints will remain a central factor in decision-making, you should also maintain a focus on your equity-centered vision. Take this time to test your team's innovative ideas for mobilizing faculty and staff. Consider how the program will meet the diverse needs of your target population through greater accessibility to instruction, adaptability and responsiveness in student support, and improved efficiency and cost-effectiveness through optimizing resources and passing on savings to students.



## Key Considerations

**Specialized roles and responsibilities.** Direct assessment CBE programs offer colleges the opportunity to rethink and redefine specialized roles to effectively support program design, delivery, and student success. Faculty and staff responsibilities may include creating instructional content, developing and refining assessments, providing direct instruction, evaluating student performance, and conducting program reviews. Additional roles, such as academic coaches, career mentors, and faculty trainers, may be integral to ensuring students receive personalized support and guidance. Institutions should strategically align roles with faculty and staff expertise to meet the unique demands of direct assessment CBE programs.

**Workload management and flexibility.** Workload considerations are central to developing an effective faculty and staff model. Faculty assignments should be clearly delineated, including identifying active students and ensuring adequate support for students during flexible hours, such as evenings and weekends. Meeting the federal requirements for regular and substantive interaction (RSI) adds another layer of responsibility, requiring institutions to consider technology solutions for tracking student progress and identifying those who may need interventions.

**Union contracts and negotiations.** Union agreements and faculty contracts play a critical role in shaping the faculty and staff model. Colleges should engage in early and ongoing conversations with union representatives to address considerations specific to direct assessment CBE programs, such as flexible scheduling, RSI requirements, and new faculty roles. Clear communication and collaborative planning can help mitigate challenges and align contractual terms with program needs.

**Evolving models with enrollment growth.** The faculty and staff model may need to evolve as enrollment grows. During the pilot phase, interim approaches, such as assigning multiple roles to faculty or relying on cross-functional teams, may be necessary. As enrollment increases, institutions can transition to more specialized and scalable staffing structures to meet the expanding needs of students and the program.

**Ongoing support for faculty and staff.** Sustained support for faculty and staff is essential for the long-term success of direct assessment CBE programs. Beyond initial onboarding, institutions should prioritize continuous professional development, such as biweekly direct assessment CBE faculty meetings, peer-driven quality checks, and training sessions to address emerging challenges. Administrative support for faculty, particularly in managing program logistics and student interactions, should also be integrated into the model to ensure faculty can focus on their core responsibilities. By fostering a collaborative and supportive environment, colleges can enhance program quality and faculty satisfaction.

**Faculty passion and commitment.** Passionate faculty are key to maintaining long-term commitment, especially during the development of the first programs, which will act as “trailblazer programs” for the institution. Faculty involved in these early efforts must navigate uncertainty, adapt institutional processes, and invest significant time in curating high-quality learning resources, such as sourcing open educational resources. Their commitment is critical for ensuring program success and institutional alignment with the direct assessment CBE model.



## EQUITY IN ACTION

*When designing faculty and staff models for direct assessment CBE programs, create flexible support systems that embed equity throughout student engagement. The faculty model decision is particularly aligned to the [Equity Framework's](#) principles on equity in access through the following:*

### **Structure flexible engagement by designing roles that accommodate flexibly-paced, asynchronous learning.**

Faculty and staff interactions should create a responsive environment addressing diverse student needs, particularly for those balancing work and caregiving responsibilities. This advances Vision 2030's goal of increasing participation among underserved populations.

### **Implement integrated support through a combination of technology and personalized guidance.**

Deploy coaches, mentors, and instructors who proactively monitor progress and provide timely interventions, supporting Vision 2030's completion objectives through responsive learning environments.

### **Maximize resource access by connecting students with diverse expertise in instruction, assessment, and counseling.**

Build comprehensive support networks that particularly benefit students from historically underserved communities, ensuring equity is embedded in every aspect of student engagement.

### **Center student relationships by developing faculty models that promote consistent, meaningful engagement.**

Foster supportive connections that build trust and encourage persistence among populations who have faced educational barriers, creating an inclusive environment that addresses diverse student needs.





## KEY DECISION



What faculty and staff model will the college adopt?



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Union Representatives
- Students
- Student Senate/Student Senate President
- College Leadership (President and Cabinet)



## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What will be the different roles and responsibilities for faculty and staff?
  - ▶ Who will develop and build content, including curating or creating learning resources and assessments?
  - ▶ Who will teach and engage students (synchronously and/or asynchronously)?
  - ▶ Who will administer assessments and student evaluations?
  - ▶ Who will be the student's primary contact for career counseling, academic counseling, coaching and other support?
- As the program grows enrollment, will roles/responsibilities for faculty and staff be redistributed? How?
- How will the faculty/staffing model impact collective bargaining requirements?
- How will the faculty/staffing model impact faculty load and compensation structures?
- How will the college ensure the faculty/staff model meets the requirements of [California Code of Regulations Title 5 10+1 Policy](#) accreditation or other licensure requirements?
- Will the college work toward a faculty/staff model that is bundled, unbundled, or a combination of these while considering faculty capacity and the impact on creating equitable learning experiences for all students?





## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Consult established models to design an effective faculty and staff model.

- Compare roles between traditional and direct assessment CBE programs using the [role comparison between traditional and direct assessment CBE programs chart](#).
- Review [examples of faculty and staff models](#) from Brandman University and Northern Arizona University.
- Reference [Navarre Cleary's C-BEN Snapshot](#) on faculty and staff roles and responsibilities in competency-based education programs for additional insights.
- Investigate how [Shasta College](#) developed their faculty models for a direct assessment CBE program.
- Identify best practices and lessons learned that can be applied to your own program's faculty model.
- Review California Code of Regulations, [Title 5 § 55270.7. Program Development, Instruction, and Student Support](#) for more on faculty roles.

### Engage negotiating teams to align on vision and roles.

- Organize a session with negotiating teams to communicate the purpose and vision of the direct assessment CBE approach.
- Establish a shared understanding of the program's iterative nature and the roles needed for successful implementation.

### Educate faculty and key decision-makers on faculty and staff model development.

- Ensure these sessions provide clear explanations of the direct assessment CBE model and its implications for faculty and staff roles.

### Assess current technology capabilities to support faculty and staff management.

- Evaluate whether the current technology can automate faculty loading and compensation for the chosen model.
- Consider whether a new system or application will be needed to support the program's faculty management requirements.

### Use checklists and rubrics to finalize and evaluate the faculty and staff model.

- Use a [Direct Assessment CBE Faculty Model Checklist](#) to ensure all key roles and responsibilities are considered within the faculty model.
- Use this checklist to verify that no critical functions or responsibilities are overlooked.
- Utilize the [Instructor Model Planning Rubric](#) as a guide to structure and evaluate the faculty model.
- Align the rubric's criteria with your program's goals and needs to ensure a comprehensive plan.





# Map Out Student Journey

Your direct assessment CBE program will encapsulate everything from targeted recruitment, prior learning integration, flexible learning, high-touch supports, and transfer or job placement.

This whole path is referred to as the student journey. Unlike traditional programs that follow a linear, time-based path, a student journey in direct assessment CBE programs focuses on the specific milestones, touchpoints, and challenges students may encounter as they progress at their own pace.

*A student journey map provides a visual of the entire student experience within your program, including:*



## MILESTONES

**The significant steps students take as they advance through the program. These include:**

- Major actions such as applying, enrolling, attending orientation, developing personalized learning plans, completing assessments, and meeting graduation requirements.
- Outlining the combination of competencies that lead to specific qualifications for state licensures, conferment of certificates, and conferment of degrees.
- Defining these milestones helps establish the structure and key checkpoints of the program.



## TOUCHPOINTS

**Points of direct interaction between students and institutional decision-makers, such as instructors, advisors, and support services. Considerations include:**

- Where and when to build touchpoints to offer support and guidance.
- Determining the frequency of interactions that best support student progress.
- Identifying triggers for these touchpoints and outlining processes to ensure they occur effectively.



## PAIN POINTS

**Anticipated struggles or challenges that could hinder student progress. This involves:**

- Identifying potential obstacles along the student journey and when they may arise.
- Developing strategies and processes to proactively address these pain points and minimize their impact on students.



## SUCCESS POINTS

**Positive experiences and encounters that facilitate or accelerate student progress. Examples include:**

- Celebrating achievements like competency completions, competency mastery, or career milestone accomplishments.
- Incorporating success points that recognize and motivate students, reinforcing their progress and achievements.



During the mapping process your team may find it helpful to create personas. Personas are fictional characters based on the demographic data of your student body. Working with personas can deepen insights and help you adjust the student journey to accelerate time to completion, provide more flexibility than traditional programs, accelerate transferability, and reduce overall costs for students.

Creating your student journey is key to ensuring your direct assessment CBE program is offering students flexibility and cohesive academic and nonacademic supports that are high-touch and personalized.

### **Integrate regular check-ins with students to enhance engagement and retention**

Southwestern College has established a system for monitoring student progress through milestone check-ins at 20%, 60%, and 80% completion. This strategy can improve student engagement and provide opportunities for intervention if students are falling behind.



## **EQUITY IN ACTION**

*Creating a student journey map for your direct assessment CBE program is a powerful way to ensure that every stage of the student experience is designed for all students. When developing a student journey map, consider:*

**Providing flexible enrollment options.** Allow students to start their learning journey when it best fits their personal and professional commitments, enabling greater accessibility for those balancing multiple responsibilities.

**Tailoring interventions at critical points.** Build in opportunities for support at key stages where students may encounter challenges, including understanding how financial aid can be accessed and calculated in their program. These proactive measures ensure students receive timely guidance, helping to prevent barriers that may impede progress.

**Identifying and designing touchpoints.** Develop a system where counselors, mentors, and coaches can proactively monitor progress, deliver targeted interventions, and provide motivating communication throughout the student's journey. These touchpoints ensure that each student feels supported and stays on track.

**Strategic planning.** Plan major milestones, such as financial aid disbursements, within your academic calendar model and build proactive touchpoints around these critical stages. This allows for timely support and helps maintain student momentum.

**Establishing clear communication and referral processes.** Determine what will trigger a student intervention or referral and outline a process to ensure students receive the right support at the right time. This coordination helps faculty and staff work together seamlessly to serve student needs.

**Adapting the student journey for different pacing.** Given that direct assessment CBE programs are not time-bound, develop multiple versions of the student journey map to accommodate various student progressions. This flexibility ensures that every student, regardless of their pace, has a clear pathway to success.

**Mapping student activities and assessments.** Create a clear, student-focused walkthrough of the activities they will engage in, formative assessments they will complete, and the steps needed for submitting summative assessments. This clarity helps students understand their path and stay engaged.

## KEY DECISION



**How will the college provide high-touch, high-quality academic and nonacademic support for students?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Student Support Services (Counselors, Advisors, etc.)
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- Students
- Student Senate/Student Senate President
- College Leadership (President and Cabinet)
- Board of Trustees
- Institutional Effectiveness, Data, and Research
- IT System Managers: LMS, SIS, Data, Fin Aid, CRM, Student Support, Transcripts, etc.



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What does the college know about the target students? How will the college assess the academic, nonacademic, and intersectional needs of students using data?
- What evidence-based data will be collected to understand and support student needs?
- How will the student journey be structured to support individual progress and your college's equity goals?
- How will technology be leveraged to track progress, automate notifications, and provide individualized support throughout the student's journey?
- How will the college ensure proactive and consistent support for students?
- How will external partnerships be developed and utilized to support student needs? How will the college allocate resources to support these efforts?
- What metrics will be used to monitor student progress and program effectiveness? How often will students be assessed and reassessed to ensure ongoing support and responsiveness to evolving circumstances?





## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Conduct a student support audit to assess gaps in services specifically relevant to direct assessment CBE students.

- Review all communication touchpoints and evaluate the effectiveness of communications students receive, such as welcome emails and exam reminders, ensuring they align with the needs of direct assessment CBE students.

### Organize learning sessions to build decision-makers' understanding of the student journey in direct assessment CBE.

- Use [example slides and discussion questions](#) to support the learning session conversations.
- Share resources such as the Guild's [Learner Experience Design: Intentionally Building for Working Adults](#) to provide context and insights before or during the sessions.
- Review this [case study on Coastline College's process](#) to develop a learning journey.

### Gather direct student feedback through interviews or focus groups.

- Utilize trusted personnel such as faculty or staff to lead discussions, ensuring students feel comfortable sharing their experiences.
- Gather firsthand accounts from students to ensure the student journey reflects the real challenges and milestones experienced by students, making the program inclusive and supportive.

### Develop personas to visualize and understand student experiences.

- Facilitate the creation of personas using tools like the [learner profile worksheet](#) and collaborative platforms such as a [Miro board](#) to gather and visualize student information and experiences.
- Understand nuanced needs of students enrolled in work experiences associated with the direct assessment CBE program.



### Leverage technology to monitor student progress and support needs.

- Identify technology solutions like Canvas Pace Plans or Course Pacing that can monitor individual student progress and automate notifications for decision-makers.
- Develop a process for determining what happens when curricular content is updated in the learning management system (LMS) while a student is engaged in that material but hasn't mastered the competency yet.
- Set up automated notifications to ensure timely alerts for students, faculty, and staff to provide support and guidance as students reach different milestones.

### Execute formal agreements for additional services and supports.

- Establish partnerships and formalize agreements with community-based organizations and external partners to provide additional services and supports tailored to the needs of direct assessment CBE students.

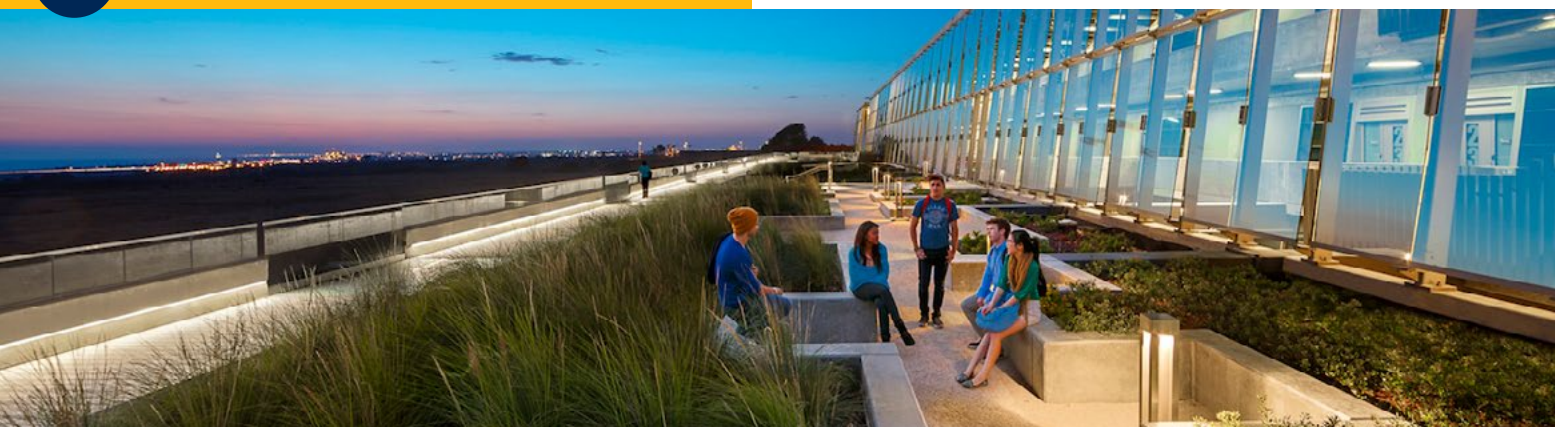
### Plan and execute seamless onboarding and ongoing student support.

- Refer to the [Design Enrollment Model](#) to support planning of initial orientation and ongoing support including strategies for welcoming and supporting students as they enter the program, ensuring a seamless and supportive onboarding experience.





## SPOTLIGHT: COASTLINE COLLEGE



## BUILDING A STUDENT-CENTERED LEARNING JOURNEY

Coastline College developed their direct assessment CBE program through a methodical, collaborative approach. The college established a dynamic learning community of faculty, instructional designers, and project leaders who met monthly in person and collaborated continuously online. This regular interaction proved crucial for maintaining momentum and solving problems collectively.

### Designing with Purpose

Coastline's design process centered on two key frameworks: Universal Design for Learning (UDL) and backward design principles. The team created a comprehensive principles document incorporating culturally relevant pedagogy, which guided their development of competency definitions. This marked a significant shift from traditional Student Learning Outcomes (SLOs) to more actionable, measurable competency statements that aligned with real-world skills.

Coastline also committed to mastery learning in their program design. Faculty set an ambitious standard: Students must achieve 90% on formative assessments to demonstrate competency mastery. This standard ensured students truly understood each competency before advancing and set them up for success on summative assessments — a cornerstone of their student success strategy.

**By addressing these challenges head-on and maintaining their commitment to student success, Coastline created a learning journey that truly serves their community college population while upholding rigorous academic standards.**

### Navigating Challenges

*Two significant hurdles emerged during development:*

#### 1. Technology Integration

- Balancing technological capabilities with pedagogical vision
- Letting technology dictate learning design
- Developing alternative tools when needed
- Learning to adapt rather than rely on existing templates, particularly since most direct assessment CBE examples came from private colleges rather than community colleges

#### 2. Cultural Transformation

- Facilitating faculty transition through regular workshops
- Using visual aids and principles documents to clarify the shift from SLOs to competencies
- Providing crucial faculty reassigned time for program development
- Maintaining consistent communication channels



# Creating a Plan for Data Use and Improvement

Program data for continuous improvement are core to how all community college programs operate, and direct assessment CBE programs are no exception.

Per California Code of Regulations, Title 5 [§55270.10. District Evaluation Plans](#), each district must develop and implement an evaluation plan for its direct assessment CBE programs. This plan will be included as an element of the Program Map your district submits to the Chancellor's Office to obtain [program approval](#) and must include:

- **A strategy for collecting and disaggregating data by race and ethnicity, AND**
- **A review, assessment, and evaluation of outreach strategies for traditionally underserved students**

To minimize administrative burden, your approaches to using data to assess and improve direct assessment CBE programs should build on existing program evaluation and data-informed improvement approaches, existing data collection efforts for system-level and institutional reporting, and your outreach office's program annual review and evaluation plans. Many of the metrics used to assess your direct assessment CBE program will be similar to those used for traditional programs and there is value in having comparable metrics across programs. However, you will also likely need to track some metrics that are unique to your direct assessment CBE program.

As you plan, refer to the [Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs](#) guide for additional guidance and worksheets that can steer you towards using data more intentionally.







## EQUITY IN ACTION

*As faculty and staff, your role in this process is crucial to ensuring that the evaluation framework is grounded in providing you with useful information to understand student success, access, and support. Consider the following in your evaluation design:*

**Disaggregate data.** Collect and analyze data by race, ethnicity, socioeconomic status, and other relevant demographics to identify trends and disparities in student outcomes. This approach allows the program to target interventions where they are most needed, ensuring all student groups have the opportunity to succeed.

**Evaluate outreach effectiveness.** Assess how outreach strategies engage traditionally underserved student populations. Consider tracking which strategies lead to successful enrollments and which need to be refined or expanded to reach students who may not yet have access to the program.

**Use metrics aligned with equity goals.** Use metrics that align with student success goals and disaggregate data to examine equity.

**Integrate student voice.** Incorporate student feedback into the evaluation process to understand the lived experiences of your students. Focus groups, surveys, or open forums can provide invaluable insights into the challenges students face and what supports they find most effective. Using student voice ensures that the evaluation framework reflects their needs and promotes equitable outcomes.

**Focus on continuous improvement.** Data can help to support an ongoing effort to refine and enhance program components. Honing in on the key hurdles underserved populations face in direct assessment CBE programs, testing strategies and supports for these students, and assessing whether the strategies and supports were successful can help to support equity within the program.



## KEY DECISION



How will data and evidence be used to evaluate and improve the direct assessment CBE program?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Institutional Effectiveness, Data, and Research
- Board of Trustees
- College Leadership (President and Cabinet)



## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What data and metrics do you currently track (at the student and program level)?
- What are your existing college processes and timelines for data use and evaluation?
- What new data and metrics will you need to track?
- How will the college use data to support the program?
  - ▶ Will you track common metrics over time? What are the benchmarks for success?
  - ▶ How will you disaggregate data on student success to identify and address inequities?
  - ▶ Will you identify key problems of practice (e.g., program operations, student progress with certain competencies) and engage in a structured continuous improvement process like Plan-Do-Study-Act?
  - ▶ Will you try to assess the impacts of the program or new refinements to the program?
  - ▶ Will you try to link impacts to costs to assess return-on-investment?
- Do you have sufficient internal capacity or will you work with an external partner to assess data?
- What steps can you take to ensure that your data analysis leads to actionable insights and to address disparities in access and success for historically underserved communities?
- What mechanisms are in place to gather ongoing feedback from students, faculty, and employers and how will this feedback fit into your data use plan?



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Establish clear aims and a comprehensive plan for evidence collection and program assessment.

- Refer to the [Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs](#) guide for additional guidance and worksheets that can steer you towards using data more intentionally.
- Consider existing ways that the college uses data and identify opportunities to build on those efforts.
- Establish a clear plan that includes aims, processes, timelines, and roles and responsibilities.
- Present the plan for evidence use and direct assessment CBE program assessment to relevant decision-makers for feedback and refinement.

### Establish measurable outcomes that align with equity goals in areas focusing on equity in success, access, and support.

- Refer to tools such as [AIR's Measuring Student Success in Post-secondary Education Programs](#), and [Southwestern College's evaluation and data plan](#) for examples.

### Review current data and identify gaps to inform new metrics.

- Collaborate with your institutional research and IT teams to review and understand the data currently available.
- Determine which data points are missing and which new metrics are needed to track direct assessment CBE students effectively.
- Use a template such as page 11 of [The CBE Equity Collaboratory: Action Plan](#) for guidance on identifying and tracking new data metrics.

### Develop a data collection strategy integrated with program review processes to streamline processes.

- Involve faculty, staff, and administrators in the strategy development to enhance data accuracy and relevancy.
- Consider internal and external capacity for supporting the data collection.



### Establish clear data analysis procedures to measure impact and drive equity.

- Use analysis approaches that align with your aims (e.g., measuring impact requires more rigorous approaches than continuous improvement).
- Identify the appropriate benchmarks and/or comparison groups (e.g., similar programs delivered through traditional instruction, other direct assessment CBE programs).
- Use analysis to support equity through various approaches such as disaggregating data and using continuous improvement to target barriers for underserved populations. See [Equity in Action](#) above.
- Consider internal and external capacity for supporting data analysis.

### Engage decision-makers in interpreting and acting on data findings.

- Use continuous improvement processes that engage decision-makers systematically to identify problems of practice they care about, identify and test solutions, and collaboratively interpret and document findings.
- Create internal reporting tools for sharing progress and findings with internal decision-makers such as faculty, staff, and leadership.
- Establish external reporting processes to communicate outcomes to external stakeholders like community partners, employers, and accreditation bodies.



# Develop a Strategic Communications Plan

Effective communication is a critical and ongoing activity for the Leadership Team managing a direct assessment CBE program.

In the Prepare phase, your efforts focused on Cultivating Direct Assessment CBE Champions by building awareness and generating interest.

In the Design and Build phase, your strategic communications plan should shift to broaden the engagement of decision-makers in the program's design and development. This includes providing professional development and training, engaging internal decision-makers such as faculty and staff to build capacity in direct assessment CBE, and building partnerships with external partners, including community-based organizations, employers, and policymakers to strengthen the relevancy of the program and connection to career pathways for graduates.







## EQUITY IN ACTION

*Consider the following strategies to ensure your communications are inclusive, transparent, and effectively build trust among students, staff, and the community:*

**Ensure transparency and clarity in messaging by using accessible language that avoids jargon and incorporates visual elements when needed.** This approach makes information easily understandable for all students, particularly those who may be unfamiliar with higher education terminology, and helps break down communication barriers that could impede program access.

**Connect your program to broader equity goals by creating a cohesive narrative that demonstrates alignment with system, district, and college equity initiatives.** Highlight specific metrics and outcomes that show how the program advances institutional priorities and creates meaningful opportunities for underserved populations.

**Center student voice and experiences by incorporating authentic stories through various media formats that showcase the program's transformative impact.** These narratives help demonstrate how the program effectively addresses barriers and creates genuine opportunities for historically underserved communities.

**Root messaging in the values of direct assessment CBE by consistently communicating the program's equity-driven mission and core principles.** Emphasize how personalization, flexibility, and comprehensive support create an educational experience that meets diverse student needs and promotes successful outcomes.

## KEY DECISION



**How will the college maintain open channels of communication to internal and external stakeholders?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- College Leadership (President and Cabinet)
- Faculty Workstream and Student Support Workstream Teams
- Director of Marketing and Public Relations
- Board of Trustees



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- Who are the key internal and external stakeholders/ audiences?
- What messages need to be delivered at each stage of the program design and development process?
- What data and information will help tell the story of how direct assessment CBE can address current programmatic or institutional disparities in educational success, access, and support?
- How will the college engage the community to build understanding of the new program offering?
- What channels and methods will be used to deliver messages to ensure communications are accessible and resonate with different decision-makers?
- How will students be involved in designing communication materials and strategies?
- Who is responsible for leading the strategic communications plan?
- What resources (e.g., funding, staff, technology) are needed to support strategic communications?



## Example Activities

Here are some example activities and resources to help answer the key design question and supporting planning questions above.

### Develop and implement a communications plan.

- Organize regular internal meetings to keep decision-makers informed, ensuring alignment with college committees, advisory groups, and other relevant engagements.
- Review this case study on [Mt. SAC's efforts using a strategic communications plan](#) for insights and examples on how to refine your own approach.

### Update your [work plan](#) for creating a communications plan that aligns tasks with specific timelines.

### Engage faculty, staff, and external partners to build awareness and support for your program.

- Identify internal and external partners essential for designing and building your direct assessment CBE program.
- Use the [“Policies and Procedures Review: Competency-based Education”](#) report produced in 2025 to ensure the right stakeholders are included in conversations based on which institutional policies and procedures could be impacted.
- Develop targeted messaging and value propositions for employers and workforce needs, referencing [C-BEN's Employer Engagement Best Practices](#).
- Convene faculty, staff, and relevant offices (e.g., instructional design, evaluation, finance) to build awareness and foster collaboration.
- Shift from targeted outreach to broader engagement as the program design matures.

### Develop communication materials to inspire and inform decision-makers.

- Incorporate stories and narratives to showcase the impact of direct assessment on students, staff, and faculty, leveraging [C-BEN's A Strategic Storytelling Toolkit](#). In particular, see the Audience Message Alignment Tool on page 10 to workshop what key messages need to be communicated to various internal and external decision-makers.
- Align key messages across decision-making groups.

### Leverage technology to manage and track communication efforts efficiently.

- Use technology (e.g., project management software) to manage and track communication efforts efficiently.





## SPOTLIGHT: MT. SAN ANTONIO COLLEGE

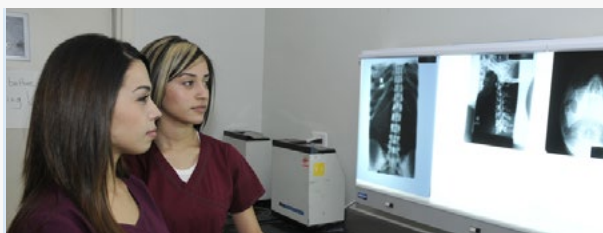


## ENGAGING DECISION-MAKERS THROUGH DATA AND DIALOGUE

Mt. San Antonio College (Mt. SAC) developed a strategic communications plan for their direct assessment CBE program in kinesiology that offers valuable lessons in stakeholder engagement and message development. Their approach focused on serving individuals seeking career advancement and transfer opportunities to four-year institutions.

### Understanding Student Needs

A crucial element of Mt. SAC's strategy was conducting focus groups with potential students before developing their plan to communicate with campus faculty. This research proved valuable because they found that their target population wasn't currently on campus. These focus groups provided authentic student perspectives on program benefits and their insights helped shape compelling stakeholder messaging. These focus group findings became powerful tools for building stakeholder support, as they demonstrated clear alignment between program design and student needs.



### Strategic Messaging Led to Success

*Mt. SAC's faculty outreach succeeded through three key approaches:*

#### 1. Leading with Student Benefits

- Framed direct assessment CBE as a solution for the student population identified in research
- Connected program goals to educational equity
- Demonstrated how direct assessment CBE could reach students not well-served by traditional models

#### 2. Using Data-Driven Insights

- Shared labor market analysis findings
- Presented clear profiles of target direct assessment CBE students
- Educated faculty about potential student impact

#### 3. Facilitating Collaborative Problem-Solving

- Brought faculty together across disciplines
- Encouraged creative thinking about direct assessment CBE implementation

Through this comprehensive approach to communications planning, Mt. SAC successfully built support for their direct assessment CBE initiative while ensuring it would effectively serve its intended audience.





# Design & Build

## Decisions for Faculty

It's time to roll up your sleeves! As the Faculty Team, you are ready to dive into program design. The following section is intended for members of the Faculty tasked with building a direct assessment CBE program.



Go back to the prior phase, [Prepare](#), if you are still exploring what direct assessment CBE is and whether it would be a good fit for your institution.

Jump ahead to the next phase, [Launch](#), if you are ready to start marketing your program and enrolling students.



Faculty will need to address the following program design decisions when building a direct assessment CBE program. Common decision options for California community colleges and the implications of each decision are presented throughout this blueprint for your consideration and guidance in leading your team in designing a program. As with all aspects of designing a direct assessment CBE program, there is no right order to take on these design decisions, but there are several dependencies with other design decisions in this blueprint that are noted here as you move through conversations with your team. Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

### DESIGN & BUILD PHASE FACULTY TEAM DECISIONS

|                                                                        |                                                                                                                         |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <b><u>Develop Competency Set</u></b>                                   | <i>What knowledge, skills, and abilities do graduates need to be competitive in the workforce?</i>                      |
| <b><u>Create Formative and Summative Assessments</u></b>               | <i>What formative and summative assessments align with the competency set?</i>                                          |
| <b><u>Determine Learning Resources</u></b>                             | <i>What learning resources will help students develop mastery and perform well on summative assessments?</i>            |
| <b><u>Outline Program and Learning Journey</u></b>                     | <i>What learning experiences will students have during the program and within each set of competencies?</i>             |
| <b><u>Develop Faculty Orientation and Professional Development</u></b> | <i>What professional development, including orientation and ongoing supports, will the college provide for faculty?</i> |
| <b><u>Coordinate Curriculum Approval</u></b>                           | <i>What will be different about the local curriculum approval process for direct assessment CBE programs?</i>           |

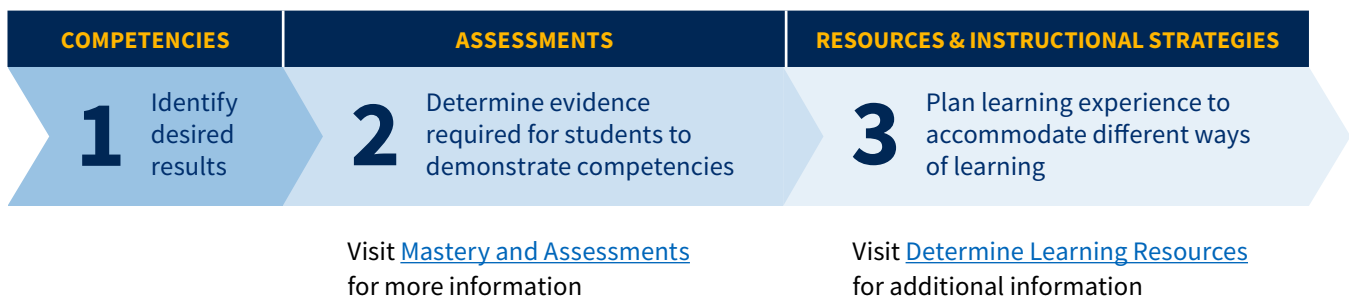


# Develop Competency Set

Developing your competency set is a fundamental component of your program, enabling you to innovate within your direct assessment CBE program, respond dynamically to regional labor market demands, and ensure that your curriculum is aligned with equity goals, thereby creating opportunities that are accessible and beneficial for your students.

The methodology to develop competencies, credit-hour equivalencies, as well as related competencies, will be part of your Program Map submission to the Chancellor's Office for program approval ([§ 55270.2. Approval of Direct Assessment Competency-Based Education Programs](#)).

*[Backward Design](#) is an approach to curriculum development that involves three main steps:*



*Backward design was popularized by Wiggins and McTighe in [Understanding by Design](#). This blueprint will refer back to the Backward Design approach. Let's begin with competencies.*

Competencies are statements that describe all of the knowledge, skills, and abilities students gain throughout a program — for both general education and technical requirements. (Visit [§ 55270.1. Definitions](#) for definitions outlined in Title V.)

- All competencies should be clear, measurable, and meaningful statements that use language accessible to students and other audiences, such as employer partners.

- Since postsecondary programs generally teach multiple competencies, each program can group competencies with one competency or group of competencies into a competency set.
- Depending on how your college groups curricula, your direct assessment CBE degree program can range in the number of competencies included; direct assessment CBE degree programs in California have anywhere from 17 to 150 competencies.

## DIFFERENT COMPETENCY DEVELOPMENT METHODS

You can use different processes to develop competency sets. The method you select should reflect your institutional capacity and culture. You can also blend any of these approaches to create a process that works best given your institution's needs.

|                                             | Review and Deconstruct Existing Curriculum                                                                                     | Construction From the Ground Up                                                                                                                                                                                                         | Build From an Industry-Recognized Framework                                                                                                                                                                                                                                |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>When Would This Approach Be Suitable</b> | <i>You have a course/credit-based CBE program that already has strong academic outcomes.</i>                                   | <i>You do not have an existing program with strong academic outcomes or you are developing a brand new program.</i>                                                                                                                     | <i>You have a program with well-established industry standards or you are creating a customized training program for an employer partner based on their specifications.</i>                                                                                                |
| <b>Considerations</b>                       | <i>Could limit opportunities for faculty to consider whether all of the content is actually needed or to seek new content.</i> | <i>Faculty have maximum control over the content of the new direct assessment CBE program.</i><br><br><i>Frees faculty to think creatively about the new program instead of being restricted by the structure of existing programs.</i> | <i>Helps ensure that employers will see the alignment between your intended program outcomes and their needs.</i><br><br><i>Many manufacturing, healthcare, IT, and other occupations have robust frameworks that clearly articulate knowledge, skills, and expertise.</i> |
| <b>Time Commitment</b>                      | <i>Less time consuming</i>                                                                                                     | <i>More time consuming</i>                                                                                                                                                                                                              | <i>Less time consuming</i>                                                                                                                                                                                                                                                 |







## EQUITY IN ACTION

*When developing competencies for direct assessment CBE programs, implement these strategies to advance Vision 2030's completion goals:*

**Create accessible language by using clear, approachable terminology that resonates with diverse student populations.** This includes eliminating academic jargon, incorporating culturally relevant examples, and testing language with target student groups. Well-presented outcomes enhance program value perception and student engagement, supporting Vision 2030's goal of increasing underserved student participation.

**Structure efficient pathways through streamlined organization of competencies.** Design clear progression steps that help students advance efficiently toward completion, while offering stackable credentials as meaningful milestones, aligning with Vision 2030's emphasis on meaningful educational outcomes.

**Integrate industry standards by aligning competencies with recognized credentials and certificates.** Enable students to earn credit for prior learning without mastering a group of competencies, accelerating completion rates for working adults and supporting Vision 2030's workforce outcomes.

**Facilitate transfer opportunities by designing competencies that support movement between programs and institutions.** This granular approach promotes efficient pathways and reduces excess units, directly advancing Vision 2030's goal of decreasing units to completion.

## KEY DECISION



**What knowledge, skills, and abilities do graduates need to be competitive in the workforce?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- General Education and Direct Assessment CBE Program Faculty
- Instructional Designers
- Employer Partners
- Professional or Licensing Bodies
- Students
- Student Senate/ Student Senate President
- Deans (Academic Leaders)
- Board of Trustees
- College Leadership (President and Cabinet)
- Curriculum Committees or Academic Senates





## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What competencies should students master to meet program and industry standards, including necessary behaviors and skills?
- How do these competencies align with industry-defined standards?
- Will competencies be developed through deconstruction of existing curriculum, built from scratch, derived from industry frameworks, or will a blend of methods be used?
- How will competencies be organized (e.g., subcompetencies, domains), and should they be sequenced or completed in a flexible order to provide transparency and flexibility for students?
- How will competencies be framed in accessible, inclusive language?
- What process will engage internal (e.g., faculty, staff, leadership) and external (e.g., industry partners, students, graduates) decision-makers in competency development and validation?
- What resources (e.g., personnel, budget, training materials) are needed to support competency development?
- Does the college have funding and formal agreements for partner engagement, particularly for validation of competencies?



### SPOTLIGHT: BAKERSFIELD COLLEGE

## TAILORING EDUCATION TO WORKFORCE DEMAND



Bakersfield College's transition to direct assessment competency-based education (CBE) in its culinary arts program emerged from a deep understanding of their regional workforce needs. Through careful labor market analysis, the college identified a

significant gap: Many experienced culinary professionals in the region needed advanced credentials, but the traditional program structure wasn't able to adequately recognize their prior learning and work experience.

Bakersfield College developed a distinctive learning journey that prioritizes personalized, flexible experiences with real-world application to address this challenge. Their approach brought together key stakeholders including faculty, current students, and former students who had become industry employers. This diverse group provided crucial insights into both industry needs and student experiences.

The development process centered on collaborative brainstorming sessions where the team evaluated their traditional culinary program's curriculum. They focused particularly on identifying essential workforce skills while considering the existing expertise many students would bring to the program. Using an iterative approach with sticky note exercises, the team categorized and refined competencies based on industry relevance and applicability.

Throughout this process, students from diverse backgrounds provided invaluable input, which helped shape a more inclusive program. Their feedback helped the college balance comprehensive competency-based learning with industry-aligned experiences that met the demanding requirements of the hospitality and culinary sectors.

This student-centered approach ensured the program would effectively serve its target population while maintaining high academic and professional standards.



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Explore California examples to inform and refine your approach to competency set development.

- Read the spotlight on [Coastline College's competency set](#) and approach.
- Review an example of how [Mt. San Antonio College utilized a backward design process](#) to develop their competency set.

### Access key resources and frameworks to enhance your expertise in competency set development.

- Learn more from the “Questions for Quality Practice” sections of the [Hallmark Practices in CBE Assessment Guide](#).

### Use structured exercises and tools to create meaningful and actionable competencies.

- Follow the activities for developing competencies outlined in [this resource](#).

### Review credit hour equivalency compliance requirements to ensure you are compliant with applicable rules and regulations.

- Review regulations for direct assessment CBE programs in the [California Code of Regulations, Title 5](#)
  - ▶ [§ 55270.12 Direct Assessment Competency-Based Education Credit Equivalency](#)
  - ▶ [§ 55061 Associate Degree Course Requirements](#)
  - ▶ [§ 55062 - Types of Courses Appropriate to the Associate Degree](#)

### Develop your credit hour equivalency methodology to determine the number of credit or clock hours to which the program is equivalent.

- Define a clear process for credit equivalency, such as deconstructing a current credit-based program into competencies and key domains.
- Review Shasta College's sample competency/credit equivalent crosswalk below:

| COMPETENCY/CREDIT EQUIVALENT CROSSWALK                                            |                                       |
|-----------------------------------------------------------------------------------|---------------------------------------|
| Curricular Module                                                                 | ECE 17:<br>Principles & Practices     |
| CBE competencies department, number, title (units)                                | ECE 1cb:<br>History of ECE (1)        |
|                                                                                   | ECE 2CB:<br>Theory & Practice (1)     |
|                                                                                   | ECE 3CB:<br>Professional Roles (1)    |
| Crosswalked courses for traditional transcripts department, number, title (units) | ECE 17:<br>Principles & Practices (3) |

### Leverage existing frameworks for credit hour baselines to ensure equivalence between the number of credit hours required in the college's direct assessment CBE program and the number of credit hours awarded in the traditional program.

- Consider utilizing a credit equivalency baseline already established for a reasonable timeline based on the Distance Learning Amendment forms approved for the course equivalents when creating a direct assessment CBE program from an existing credit-hour course.

### Engage decision-makers for approval and alignment to ensure the workload and unit value align with your institution's Board Policies and Administrative Procedures to maintain compliance and rigor.

- Present your proposed credit hour equivalency methodology to your academic senate and curriculum committee for feedback and approval.





## SPOTLIGHT: COASTLINE COLLEGE



## COMPETENCY SET DESIGN THROUGH A COLLABORATIVE INTEGRATED APPROACH

Coastline College created their direct assessment CBE program competencies through a distinctive approach integrating key stakeholders that bring a real-world perspective. The college began by examining established frameworks, including O\*NET industry competency sets and the OSI Polaris® leadership model. However, they quickly recognized that these frameworks needed some adaptation for their specific context.

### Building Through Collaboration

*Coastline's development process brought together diverse perspectives from the start with three key stakeholder groups:*

- Faculty teams spanning both general education and program-specific disciplines engaged in cross-disciplinary conversations. For example, when developing technology competencies, they brought together IT faculty, industry professionals, and general education instructors to ensure the skills would be both academically sound and practically applicable.
- Industry leaders participated through special advisory board meetings, providing real-time feedback on skill requirements and industry relevance.
- External organizations like C-BEN and experienced management professionals helped validate competency selections.

### Coastline's Approach Was Innovative

- **Interdisciplinary Integration.** Coastline College incorporated critical thinking components across all competencies and created competencies that addressed both technical skills and durable skills simultaneously.
- **Industry-Academic Partnership.** Coastline worked directly with local employers to identify skill gaps based on real workplace scenarios. They also created technology competencies reflecting current industry software and tools and incorporated feedback from alumni working in target industries.
- **Flexible Iteration.** As stakeholders continued their discussions, they came to a greater understanding regarding the needs of the industry and updated technology requirements accordingly.

By combining established frameworks with extensive stakeholder input and maintaining flexibility throughout the process, Coastline developed a competency set that serves both academic rigor and real-world relevance.



# Create Formative and Summative Assessments

There are two types of assessments used in direct assessment CBE programs to create a comprehensive picture of student learning, guiding improvement and recognizing achievements: formative and summative assessments.

In a [Backward Design approach](#) these assessments articulate what your institution considers to be acceptable evidence that students have gained the competencies you previously defined. A strong approach to assessment can create an environment in which students are equal partners in their own learning — aware of their knowledge, skills, and abilities and prepared to demonstrate their competence.

## Summative Assessments

Summative assessments are usually longer activities such as exams, major projects, and papers. Summative assessments validate that a student is able to demonstrate one or more competencies.

- Sometimes these are called “assessments of learning” because they are used to validate learning that has already happened.
- Summative assessments are considered to be “high stakes” because they determine whether a student is able to progress to the next competency or competencies.
- Some examples of summative assessment formats:
  - ▶ **Performances:** *Students demonstrate skills in music, dance, drama, or other arts*
  - ▶ **Standardized tests:** *Large-scale assessments to measure student achievement against a benchmark (e.g., GMAT, SAT, ACT, etc.)*
  - ▶ **Cumulative exams:** *Comprehensive tests covering all competencies taught*
  - ▶ **Oral presentations:** *Students deliver speeches or presentations to an audience*
  - ▶ **Lab reports:** *Students document experiments and findings in a formal report*
  - ▶ **Papers:** *Students conduct in-depth research and write a comprehensive paper*
  - ▶ **Capstone projects:** *Culminating projects that integrate knowledge and skills*



## Grading Summative Assessments

When a student demonstrates competency on a summative assessment by earning a passing grade, they have demonstrated “mastery.” Per [California Code of Regulations § 55270.1. Definitions](#), mastery means “a student has mastered the competency by meeting or exceeding the minimum requirement of 80 percent or higher on the summative assessment.” Mastery (evaluative symbol = M) is equivalent to a “B” with a grade point of 3.0.

Students who pass a summative assessment with 90 or higher earn mastery with distinction (evaluative symbol = M+), which is equivalent to an “A” with a grade point of 4.0 (See [California Code of Regulations, Title 5 § 55270.8. Academic Record Symbols and Grade Point Average](#)).

Summative assessments result in a transcribed grade.

In California, students may have up to three attempts to pass a summative assessment. Per [California Code of Regulations § 55270.9. Repetition](#), if they do not pass after three attempts, they may receive a nonevaluative mark on their record (e.g., Progress Withdrawal or PW) or be redirected to a traditional program, depending on district policy.

### THE ROLE OF THE ASSESSOR



In many programs a single faculty member serves as the sole manager of teaching and learning. They are responsible for defining competencies, developing assessments and learning resources, designing a course around the content, instructing students/lecturing, coaching students, ensuring regular and substantive interaction, providing feedback and grading assessments, mentoring students, training peer faculty, engaging with internal and external stakeholders, and more.

Your assessment strategy might include space to create a dedicated role related to creation, delivery, and grading of assessment: an assessor. For example, you may have one faculty member responsible for curriculum development and instruction and a different faculty member delivering assessments and feedback to students.





### Use Canvas Analytics to Monitor Student Performance and Engagement

Merced College leverages Canvas's built-in analytics tools to track student engagement with course materials and assessments, helping faculty identify students who may need additional support. This data-driven approach allows for timely interventions, ensuring that all students can succeed in the college's AgTech program.

## Formative Assessments

Formative assessments are typically short, periodic exercises like quizzes, labs, and in-class activities that provide ongoing feedback to faculty and students on student progress. These assessments identify what students are learning and where they might have opportunities for academic growth. They are valuable tools for faculty looking to create a more personalized and engaging educational experience.

- Sometimes these assessments are called “assessments for learning” because they are used during the learning process to facilitate a deeper grasp of required content.
- These assessments are considered to be “low stakes” because a student would not receive a formal, transcribed grade for these assessments.
- Formative assessments can be used to gauge a student's readiness for a summative assessment, to avoid a student attempting and failing a summative assessment before they are fully prepared.
- Some examples of common formative assessment formats include:
  - ▶ **Exit tickets:** *Brief questions answered at the end of a synchronous class session to assess understanding*
  - ▶ **One-minute papers:** *Students write for one minute about what they learned or found most interesting*
  - ▶ **Group lab activities:** *Observe student interactions, problem-solving, and teamwork*
  - ▶ **Class discussions:** *Observe student contributions to a group discussion topic*
  - ▶ **Portfolios:** *Ongoing collection of student work to demonstrate growth*
  - ▶ **Self-assessments:** *Students reflect on their own learning and progress*
  - ▶ **Mini-projects:** *Small projects that focuses on practicing certain sub skills within the whole competency*
  - ▶ **Practice exams:** *Examinations modeled after a summative assessment to familiarize students with the format (e.g., time limits, testing environment, type of questions, etc.)*

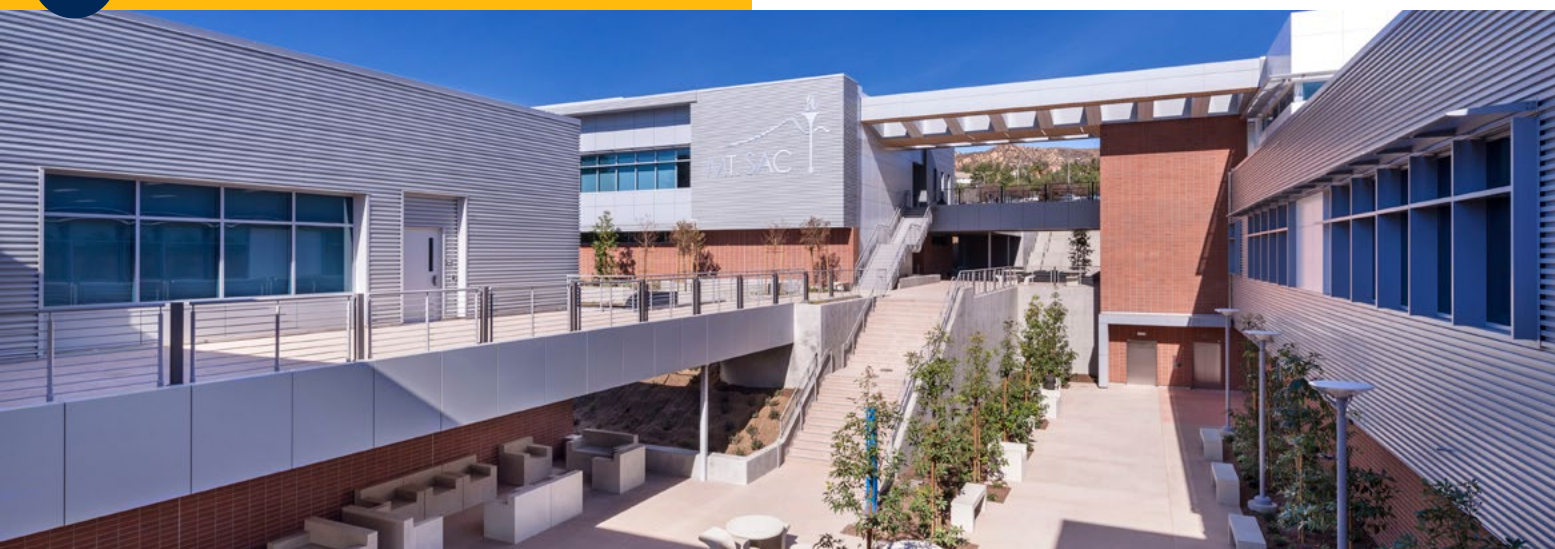


## Grading Formative Assessments

Formative assessments may be ungraded where students do not receive a score at all. If graded, scored results may be shared directly with students or stored in a course-level gradebook, but will not appear on a student's transcript. Whether graded or ungraded, students should always receive some sort of feedback on formative assessments so they can use the results to direct their progress.



### SPOTLIGHT: MT. SAN ANTONIO COLLEGE



## DESIGNING INCLUSIVE ASSESSMENTS FOR DIRECT ASSESSMENT CBE

Mt. San Antonio College encountered the challenge of creating assessments that met traditional credit course standards while addressing students' unique learning pathways and diverse backgrounds. The faculty leading this initiative brought valuable experience to the process. While they were seasoned online teachers, the direct assessment CBE framework required a new approach to assessment design.

To meet this challenge, faculty began by using a backward design process, where assessments are created based on desired competencies and aligned with performance indicators for "Developed" or "Highly Developed" levels. With support from C-BEN, Mt. SAC faculty — trained in culturally responsive practices — then crafted assessments that consider the varied experiences of students. Many faculty members utilized expertise gained through CORA training in areas such as Implicit Bias,

Microaggressions, and Course Design for Racial Equity, as well as completing the ACUE Effective Teaching Practices course for development assessments.

In designing their assessment structure, Mt. SAC took an innovative approach to competency evaluation. While they generally plan one summative assessment per competency, they deliberately created opportunities for competency crossover where appropriate. A prime example of this integrated approach is their Public Speaking competency summative assessment. When students deliver a persuasive speech, Communications faculty evaluate their presentation skills while faculty from other disciplines, such as Kinesiology, can simultaneously assess subject-matter competency if the speech topic falls within their domain.

This strategic approach helps students progress more efficiently through the program by reducing redundant demonstrations of knowledge and skills.



## EQUITY IN ACTION

*When transforming assessment practices in direct assessment CBE programs, implement strategies that create inclusive learning environments and support student success. Consider these approaches to advance Vision 2030's completion goals:*

### **Establish growth mindsets through assessment practices that normalize learning from failure.**

- Share comprehensive assessment strategies including types, timing, feedback processes
- Address test anxiety through open discussions and proactive support resources
- Guide students in setting realistic progression paces based on individual circumstances
- Teach students to use feedback strategically for self-awareness and content mastery
- Structure regular faculty-student conversations using frameworks like [Columbia's Assessing Equitably](#)
- Make engagement count toward regular and substantive interaction requirements

### **Optimize assessment timing to maximize student success.**

- Deploy formative assessments to identify knowledge, skill, and ability gaps
- Personalize support and resources based on individual student needs
- Leverage student interests and strengths revealed in formative assessments to maintain motivation
- Ensure summative assessments are only given to students who demonstrate content mastery
- Align formative assessment structure with summative expectations
- Use formative results to predict summative readiness



### **Design culturally responsive tools that acknowledge diverse student backgrounds.**

- Incorporate varied cultural experiences and perspectives into assessment content
- Offer multiple assessment formats including multimedia presentations
- Enable knowledge demonstration through methods that resonate with student identities
- Connect assessments to real-world experiences and cultural contexts
- Ensure inclusivity through diverse assessment options
- Support different learning and expression styles



## KEY DECISION



**How will formative and summative assessments align with the competency set?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- General Education and Direct Assessment CBE Program Faculty
- Instructional Designers
- Deans (Academic Leaders)
- Employer Partners
- Professional or Licensing Bodies
- Students
- Student Senate/ Student Senate President
- Board of Trustees
- College Leadership (President and Cabinet)



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- How will the college's assessment structure promote a growth mindset and normalize failure as a learning opportunity?
- How can formative and summative assessments work together to maximize student success and individualize support?
- How will the college incorporate culturally responsive assessment tools to recognize and value diverse student backgrounds?
- How will assessment logistics be designed to meet diverse student needs and support equitable access?
- How will institutional technology and resources support an equitable and efficient assessment process?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Review equity-centered resources for developing assessments to ensure you are considering fairness, maximizing opportunities to learn, and carefully considering the consequences of design decisions on diverse student populations.**

- Explore best practices in [“Reflections on equity-centered design”](#).
- Review the [Every Learner Everywhere Equity Review Tool](#).
- Explore resources like [Next Generation Learning Challenges](#) or [New America](#) on culturally responsive assessment strategies.
- Consider adopting a framework that centers equity and inclusion principles such as the Framework for [Reviewing Inclusion, Diversity, Equity and Accessibility \(IDEA\) in Open Educational Resources \(OER\)](#) developed by the University of Southern Queensland.

**Review examples of formative and summative assessments and use this formative assessment rubric to support the development of your own rubric.**

- Consider how Coastline College created assessment through these examples: Financial Acumen [M1](#), [M3](#), [M8](#), and [M9](#).

**Develop an assessment strategy to address potential pain points (e.g., if an assessment involves recording a video presentation, think of students who may need to record using their phone or who have limited-to-no internet access).**

- Consider using the “Credential-Level Assessment Strategy with Robust Implementation” rubric in [C-BEN’s Quality Framework](#) to assess how your assessment strategy aligns with quality indicators. Explore C-BEN’s [“Hallmark Practices in CBE Assessment”](#) for a deeper dive into assessment examples and process steps for creating assessments.

**Design authentic, work-aligned assessments to engage and prepare students.**

- Design assessments that feature complex, realistic, work-aligned problems.
- Use hands-on or project-based assessments to keep students engaged and motivated.
- Ensure assessments reflect diverse cultural experiences and professional contexts to increase relevance and inclusivity.

**Work with faculty to align competencies with assessments to demonstrate mastery.**

- Assign at least one summative assessment to each competency, ensuring it allows students to fully demonstrate mastery.
- Align multiple competencies to a single summative assessment when appropriate to streamline evaluation without sacrificing rigor.

**Develop and use standardized rubrics to support objective and consistent evaluation of student work.**

- Create rubrics that define mastery and mastery with distinction for each competency.
- Include clear language to articulate performance levels below mastery (e.g., below 80%) to guide student improvement.
- Train faculty on how to use rubrics effectively for consistent application across assessments.

**Consult with diverse decision-makers to identify and address potential biases in assessment design.**

- Review assessments and rubrics for cultural bias to ensure they reflect diverse perspectives.
- Incorporate examples and scenarios in assessments that reflect the lived experiences of diverse student populations.



# Determine Learning Resources

The selection of learning resources concludes the [Backward Design](#) process. Learning resources are materials accessed by students to support learning (e.g., textbooks, articles, videos, lectures, exercises, graphics, slide decks, etc.).

The primary question that faculty should focus on is: *What resources and instructional strategies would help a student develop mastery and perform on assessments?* By focusing this process around supporting student growth, faculty can think creatively about eliminating low-impact resources, identifying new content, and emphasizing free/low-cost options to drive equity in access.

## **Keep these concepts in mind as you select learning resources.**

- Each competency should have multiple learning resources in different formats designed to help students with different academic needs, learning styles, and preferences develop mastery (e.g., can a student read, or watch a video, or complete an exercise to learn more about a given concept?).
- Students are *not* required to engage with all learning resources, but should interact with the content most likely to help them develop mastery. Determining what learning resources are most appropriate is a dynamic process between individual students and faculty. Encouraging students to choose their learning resources can foster their confidence and responsibility for their own education, leading to a more personalized learning journey.
- Faculty should develop an understanding of how each learning resource connects to competencies and assessments so that they can quickly direct students to the most appropriate resources. A learning management system (LMS) can help with tagging and organizing learning resources to make referencing them easier.





## KEY DECISION



What learning resources will help students develop mastery and perform well on summative assessments?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- General Education and Direct Assessment CBE Program Faculty
- Instructional Designers
- Deans (Academic Leaders)
- Employer Partners
- Professional or Licensing Bodies
- College Leadership (President and Cabinet)
- Board of Trustees



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- How will curriculum developers obtain learning resources: curation, development, or a combination?
- How will learning resources be curated, maintained, and shared across disciplines?
- How will learning resources be accessed and delivered to students?
- What is the budget, technology, and personnel needed to support the learning resources?



## EQUITY IN ACTION

Learning resources should be culturally responsive and inclusive to increase engagement and [deepen learning](#).

**Encourage critical thinking by presenting multiple, and sometimes conflicting, perspectives from experts representing diverse backgrounds.** By using resources that represent a variety of viewpoints, you can better engage students from traditionally marginalized groups. When selecting learning resources for direct assessment CBE programs, implement these strategies to support affordability and inclusion:

**Curate [culturally responsive](#) content that represents diverse perspectives.**

- Include multiple viewpoints from experts of varied backgrounds
- Present conflicting perspectives to encourage critical thinking
- Select materials that reflect student experiences and identities
- Choose resources that engage traditionally marginalized groups

**Minimize costs through strategic resource selection such as prioritizing Open Educational Resources (OER) or implementing zero-cost textbook options. You can access materials through [CVC-OEI](#) or utilize national resources such as [ASCCC's OERI](#), [OpenStax](#), and [Libre Texts](#).**

**Share resources effectively to reduce duplication.**

- Develop resource-sharing systems within institutions
- Partner with other colleges to minimize duplicate curriculum development
- Build shared repositories of effective materials
- Support the Chancellor's Office recommendation for collaborative resource sharing



## Example Activities

*Here are some example activities and resources to help answer the key question and supporting planning questions above.*

**Identify and source free or low-cost learning materials including open educational resources (OER) to reduce costs for students.**

- Utilize resources like the California Digital Open Source Library (CDOSL), [COOL4Ed](#) or an alternate source such as [Libre Texts](#).
- Determine if faculty will curate, develop, or combine different sources of content.

**Use a framework that centers equity and inclusion principles to support development of culturally responsive and inclusive learning resources such as this one by the University of Southern Queensland [Reviewing Inclusion, Diversity, Equity and Accessibility \(IDEA\) in Open Educational Resources \(OER\)](#).**

**Design a maintenance and update schedule for learning resources to outline how and when content will be updated, allowing for flexible adaptation to new information or student needs.**

- Identify timelines for updating resources (e.g., annually or biannually), specifying when updates will be implemented in course shells.

**Ensure learning resources are accessible for all students to promote inclusion.**

- Determine if learning resources will be fully online or if any materials will be accessible on campus for hybrid programs, ensuring equity in access.
- Plan how students will access resources, including post completion access for graduates.

**Train faculty and staff in developing high-quality resources to ensure they are ready to implement culturally responsive and accessible curriculum design practices.**

- Consider using the “Intentionally Designed and Engaged Learner Experience” rubric in [C-BEN’s Quality Framework](#) to assess how your learning resources strategy aligns with quality indicators.



## SPOTLIGHT: BAKERSFIELD COLLEGE



## DEVELOPING STUDENT-CENTERED LEARNING RESOURCES FOR DIRECT ASSESSMENT CBE PROGRAMS

Bakersfield College, part of the Kern Community College District, designed an innovative direct assessment competency-based education culinary program in response to the expanding restaurant industry and new Hard Rock Casino development. The college recognized that the program's success would depend heavily on carefully curated learning resources that truly served their diverse student population.

The Student Affairs Leadership Team (SALT) was the driving force behind this resource development effort. Led by the Dean of Student Success, SALT proved its commitment to meeting students' needs during COVID-19 by successfully transitioning resources to online platforms while maintaining strict standards for accessibility and educational pathway alignment.

Accessibility remains at the heart of resource delivery for the direct assessment CBE program. By implementing a hybrid model, Bakersfield College ensures students can access materials both online and on campus, meeting

students where they are and accommodating different learning preferences and situations.

SALT also worked to make learning resources inclusive by actively collaborating with ethnic studies faculty to develop culturally responsive learning materials that reflect their students' diverse backgrounds and experiences.

The college's forward-thinking approach includes a sustainable business model for maintaining these resources. This model encompasses dedicated personnel, targeted budget allocations, and ongoing training materials. Regular content updates and campuswide accessibility training support continuous improvement efforts.

Through careful curriculum optimization and redesign initiatives, Bakersfield College has created a flexible system that adapts to administrative changes while consistently enhancing the student learning experience.





# Outline Program and Learning Journey

In a traditional program, students rely on a program of study (e.g., course requirements, course sequence, program map, academic plan, etc.) to guide their academic pathway. However, the direct assessment CBE model creates the opportunity to redesign the learning journey and resolve common pain points.

Students do not enter programs with the same levels of experience and your program design can be structured to help students complete curriculum content in a sequence that is tailored to their unique needs. Direct assessment CBE programs allow for an individualized pace and personalized learning experience, which can support equitable success and access, especially for traditionally underserved groups.

A learning journey is a flexible outline of the learning experiences students will encounter in your program. It serves as a guide and a framework for working collaboratively with each student to design a more personalized learning experience.

Learning journeys can be high-level for the entire program (like a course sequence), or low-level, detailed looks into the experiences of a particular competency set (like a syllabus). At both levels, your learning journey will reference the competencies, assessments, and learning resources you developed, as well as other elements that support academic success such as work experience education opportunities, access to academic resources, participation in learning communities, or certification/licensure exams.

In the [Student Journey](#) section, we introduced a framework for organizing student experiences that includes milestones, touchpoints, pain points, and success points. This framework can be helpful as you develop your learning journeys, too.

## Sequencing Competencies

Most of the milestones of your high-level journey will be tied to competencies. Competencies should be sequenced in a recommended order so that each competency set builds on knowledge mastered in the previous competency set and new concepts are introduced gradually.

*Here is an example of some of the elements that could be included on your high-level learning journey:*



**MILESTONES:** Completion of first competencies, completion of final general education requirement, participation in work experience, enrolling in final competency, completion of external certification or licensure exam, etc.



**TOUCHPOINTS:** Biweekly faculty-student meetings, monthly learning community meetings, optional weekly study sessions, etc.



**PAIN POINTS:** Failing a summative assessment attempt, taking longer than planned on a competency set, unexpected illness/nonacademic barrier, feeling overwhelmed by curriculum, etc.



**SUCCESS POINTS:** Passing a summative assessment, accelerating past enrollment designation, reaching an off-ramp, earning an industry-recognized credential.

## Developing a Syllabus for Your Competency

Here is an example of some elements that might be found on the learning journey for a college success competency (e.g., a syllabus):



**MILESTONES:** Create a campus log-in, define SMART academic goals, develop a campus map, create a personal schedule, locate key academic and support services, etc.



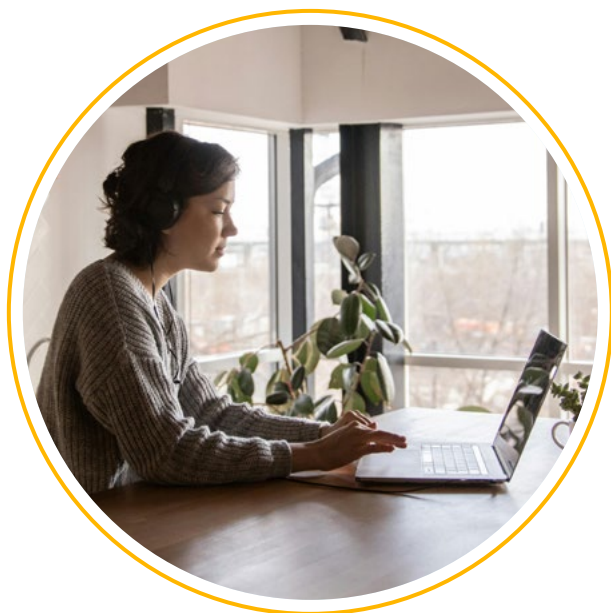
**TOUCHPOINTS:** Campus tour, orientation sessions, academic counseling appointments, etc.



**PAIN POINTS:** Difficulty accessing campus resources, feeling overwhelmed by campus size and complexity, navigating online systems, etc.



**SUCCESS POINTS:** Independently access campus resources, create a personalized academic plan, demonstrate knowledge of policies and procedures, etc.



**Alternatively, your detailed map could have a simpler format that uses only two types of engagements: assessments and activities.**

- Formative assessment(s) available at predetermined points within the competency set or on-demand to help students and faculty identify gaps in knowledge, skills, and abilities (a formative assessment given at the entry point is sometimes called a diagnostic assessment)
- Summative assessment(s) to determine master of the competency(ies) covered
- Activities that guide students to use learning resources supporting learning

**Here is an example of how you could mix and match these elements to create an intentional journey in a College Success competency:**

1. Diagnostic assessment
2. Activity - Orientation week
3. Activity - Counseling Session (Additional sessions available upon request)
4. Activity - Goal setting worksheet (Goal setting study session optional)
5. Formative assessment - Written journaling or video blog about first week

**Remember, direct assessment CBE programs must still provide regular and substantive interaction. Ensure the learning journey includes required, faculty-initiated activities such as:**

- Attending a synchronous class, lecture, recitation, or field or laboratory activity, physically or online, where there is an opportunity for interaction between the instructor and students
- Submitting an academic assignment
- Taking an assessment or an exam
- Participating in an interactive tutorial, webinar, or other interactive computer-assisted instruction
- Participating in a study group, group project, or an online discussion that is assigned by the institution
- Interacting with an instructor about academic matters

## KEY DECISION



What learning experiences will students have during the program and within each set of competencies?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- Direct Assessment CBE Program Leadership Team
- General Education and Direct Assessment CBE Program Faculty
- Instructional Designers
- Student Support Services (Counselors, Advisors, etc.)
- Equal Opportunity and Diversity Office
- Enrollment Management Director/Dean and other Enrollment Leads
- Students/Student Senate/Student Senate President
- Employer Partners
- Deans (Academic Leaders)
- Institutional Effectiveness, Data, and Research
- Board of Trustees
- College Leadership (President and Cabinet)



## EQUITY IN ACTION

*Designing your program and learning journeys is an opportunity to personalize student experiences to align with their unique goals and career aspirations. Here are a few ways to embed equity throughout your learning journey design:*

### Center student goals and aspirations.

Actively engage with students to understand their goals, especially for those facing systemic barriers to educational advancement. Personalize learning experiences to help them realize goals and career aspirations.

**Facilitate early wins through credentials of value.** Sequence learning experiences in a way that allows students to earn credentials of value when possible. For example, bundling certain competencies to create stackable credentials could help students achieve milestones sooner in the program.

**Use journey maps to guide and support progress.** Learning journey maps are a powerful way to provide students with constructive feedback on their progress. Regular, timely feedback can encourage students to stay on track or make necessary adjustments. Guiding students thoughtfully through the sequence of competencies can prevent costly delays and help them avoid competencies that don't directly support their goals, ultimately lowering the cost of attendance and time to completion.





## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- How will the program leverage the strengths and experiences of students to support their unique learning needs and help them overcome challenges?
- How many competencies will the program include and how will they be sequenced?
- What options and flexibility will students have in sequencing competencies and content?
- What experiential learning opportunities will be part of the program?
- How will partnerships with employers and community-based organizations enhance student learning journeys through work-based learning opportunities, job site experiences, other career-aligned activities, or support services including housing assistance, mental health supports, or childcare?
- What support roles will faculty and staff play in guiding the learning journey?
- How will the LMS and course shells support students' unique learning journeys, including flexibility in course sequence, access to resources, and tailored guidance?
- What metrics will the institution collect to track progress and outcomes?

### Think about how the structure of your competencies can impact technology decisions or other processes.

For instance, you might consider creating online course shells with multiple competencies. This will serve to reduce the number of tiles on each student's Canvas home page and allow them to move forward to the subsequent competencies more easily. In addition, if the direct assessment CBE course shells mimic equivalent traditional courses, the work of schedulers and faculty can be simplified.





## Example Activities

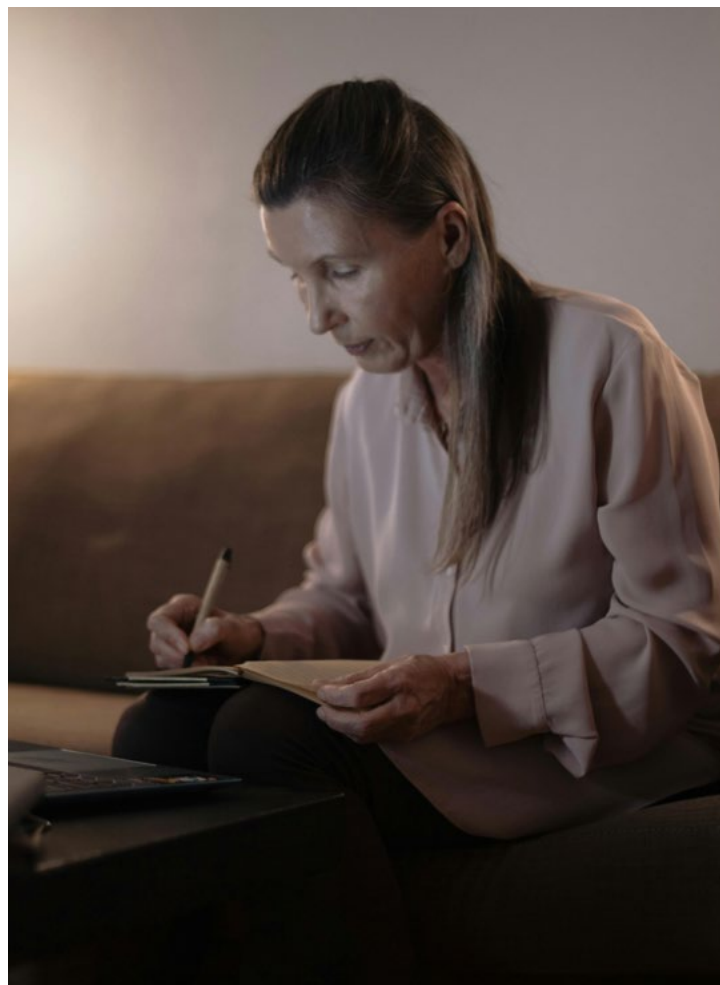
Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Review these approaches from California Direct Assessment CBE Collaborative pilot colleges to adapt for your college.**

- See this example of [Shasta College's Learner Journey](#).
- For a student-facing learning journey, see [Merced College's FlexEd Pathway Map](#).

**Create a syllabus for each competency to outline requirements, resources, and expectations for students.**

- See this [example syllabus created by Coastline College](#) and utilize the template to create your own.
- Consider where and how the learning journey can be customized for different students (e.g., *Can the diagnostic identify individual learning resource needs and preferences and provide a custom list of resources based on that information?*). The learning journey map can work hand-in-hand with a pacing guide to help students manage their time and complete a competency set in a timely manner.
- Explore tools within your LMS to support development of the learning journey and student tracking once competencies are live. For example, within Canvas, faculty can use the Course Pacing feature to track each individual student's pace and monitor progress.
- Create two or three template learning journey maps that show how your program can accommodate different learning styles and paces. For example, a full-time map, a part-time map, a fully remote map, and a hybrid option with on-campus experiences.



**Develop partnerships between institutions of higher education and employers who can offer benefits to students such as field work, internships, pathways for promotion of existing employees, and employment opportunities for new graduates.**

**Use the “Intentionally Designed and Engaged Learner Experience” rubric in C-BEN’s Quality Framework to assess how your learning resources strategy aligns with quality indicators.**

**Review the [Final CVC Analysis & Recommendations for CBE Technology 2023-2024](#).**

- Review recommendations for learning resources including zero cost textbooks.



# Develop Faculty Orientation and Professional Development

Providing a robust orientation and continuous professional development (PD) can help ensure that your faculty are aware of changes in learning and business processes and systems and fully onboard with direct assessment CBE.

You will not be able to meet your equity goals and realize the full impact of direct assessment CBE if faculty are actively or passively opposed to the new approach. This is also your opportunity to utilize PD to cultivate faculty as champions of diversity, equity, inclusion, and accessibility (DEIA).

Your orientation to direct assessment CBE should focus on building a culture of innovation and developing direct assessment CBE champions — faculty who actively advocate for a direct assessment competency-based approach. Consider incorporating your orientation into an existing faculty PD day or creating a dedicated half-day/full-day session on the topic. The timing and structure of your orientation will directly impact the composition and size of your audience.

For ongoing PD, dive deeply into specific topics that impact implementation. PD should be frequent enough to ensure faculty are learning about new concepts continuously and are able to apply their learnings immediately to support students.

*Specific topics to cover in your orientation and PD might include:*

- Understanding direct assessment CBE 101 and the Backward Design process
- Understanding the andragogy and teaching strategies that support adults learning in flexibly-paced environments
- Curating high-quality assessment tools
- Curating engaging learning resources
- Empowering students to manage their learning
- Leveraging instructional technology to support personalization and engagement to deepen learning
- Implementing culturally relevant and inclusive teaching practices
- Developing student testimonials: Hearing about the pros/cons of direct assessment CBE from students





*Offer faculty the same flexibility you plan to offer students by leveraging different formats to meet different needs, such as:*

- **Webinars:** Online presentations with some interaction through chat or Q&A.
- **Videos:** Prerecorded video lessons that faculty can watch at their own pace without live interaction. Short videos can be a great tool for creating early interest or answering pointed questions.
- **Workshops:** Interactive, in-person or virtual sessions with hands-on activities and group discussions.
- **Self-paced, web-based competencies:** Online learning of competencies with structured content, formative assessments, and interactive elements, allowing faculty to progress independently.
- **Class shadowing/mentorship:** Guided learning through a one-on-one relationship with an experienced professional.
- **Community of practice:** Colleges can also create communities of CBE practice composed of faculty willing to share challenges, solutions and otherwise support each other beyond initial training.
- **Direct assessment CBE certification:** An in-house certification program to recognize faculty who participate in a series of direct assessment CBE PD opportunities. Guided by their academic senates, colleges can create competencies for these faculty certification programs with summative assessments to demonstrate each faculty member has achieved mastery.



## EQUITY IN ACTION

*Not all faculty have the same professional background and experiences. Use development opportunities to level-set critical skills across your direct assessment CBE faculty so everyone can support students in the classroom:*

**Build culturally responsive capacity** through training that addresses specific populations like student parents, develops inclusive classroom skills, and teaches strategies for reengaging disconnected students. Foster faculty empathy for diverse student experiences and varied learning needs.

**Define comprehensive support roles** by clarifying high-tech/high-touch delivery expectations, establishing coaching partnerships, and explaining program design principles. Help faculty understand how their support connects to student academic goals and Vision 2030 outcomes.

**Leverage technology effectively** through clear guidance on CRM system usage and data-driven interventions. Set expectations for using technology to enable personalized learning and track student progress, ensuring timely and targeted support.



## KEY DECISION



**What professional development, including orientation and ongoing support, will the college provide for faculty?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- Academic Senate
- Professional Development Office or Committee
- Direct Assessment CBE Program Leadership Team
- Deans (Academic Leaders)
- Instructional Designers
- General Education and Direct Assessment CBE Program Faculty
- Board of Trustees
- College Leadership (President and Cabinet)



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What knowledge and/or skills do faculty need to implement and sustain a direct assessment CBE program?
  - ▶ *What existing skills do faculty have that support direct assessment CBE?*
  - ▶ *What skills are they lacking?*
  - ▶ *How will the college assess skills (e.g., tests, projects, surveys)?*
- What content needs to be designed and/or procured for PD activities that are equity-centered in design and implementation? What PD opportunities are already available that cover direct assessment CBE-related topics?
- How will the effectiveness of the orientation and PD activities be assessed?
- Which faculty need to be included in training and what are their needs (e.g., information gaps, technology training, new processes)?
  - ▶ *Are we targeting particular disciplines?*
  - ▶ *Will the college require specialized training prior to teaching in and/or developing direct assessment CBE programs?*
- Who will facilitate orientation and PD?
- What is the college's sustainability plan for PD, including updating orientation and PD content?
- What resources are needed to support this effort (e.g., personnel, budget, training materials, etc.)?



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Review sample professional development plans for inspiration.**

**Use a [Backward Design approach](#) to plan your faculty orientation and professional development.**

- Define competencies (i.e., the desired result of your faculty orientation and PD). For example, you might expect faculty to be able to explain three ways direct assessment CBE is different from traditional approaches.
- Identify appropriate assessments such as a scenario-based word problem for group discussion.
- Create and curate learning resources that provide learning opportunities for faculty. For example, you might provide faculty with a list of 10 recommended readings about competency-based approaches.

**Identify all audiences who would benefit from PD so that you can consider how to serve the needs of multiple audiences with minimal duplication and the greatest efficiency.**

- Create a list of stakeholders who could benefit from PD (e.g., faculty, counselors, external partners, recruiters, administrators, etc.).
- Share content across different stakeholder groups to help foster a culture of community and collaboration and reduce redundancies.

**Develop professional development materials to engage and support faculty.**

- Consider creating a checklist to guide faculty through their learning, such as [Coastline College's direct assessment CBE New Team Member Checklist](#).
- Develop job aids and support processes to assist faculty beyond their initial PD.







# Coordinate Curriculum Approval

Your direct assessment CBE program must be approved through a local approval process per [California Education Code § 70902.b.1: Functions and responsibilities of governing board of community college district](#).

Since the direct assessment CBE program will differ from traditional courses, consider forming a curriculum committee that includes faculty who are familiar with the principles of direct assessment competency-based education. Remember, committee structures must be agreeable to the college and/or district administration and the academic senate, so leave adequate time for forming a local committee.

Once local approval is complete, colleges can engage in Chancellor's Office approval, in which colleges will submit materials to COCI.

## Developing GE Competencies

With the goal of developing direct assessment CBE Associate Degrees for Transfer (ADT) and transferable associate (AA/AS) degrees, the Collaborative recognized an urgent need to develop universal, discipline-agnostic [General Education \(GE\) Competencies](#) that could be adapted and adopted to meet local needs. In response, the Chancellor's Office partnered with the statewide [Academic Senate for California Community Colleges \(ASCCC\)](#) to develop universal (GE) competencies that support scaling direct assessment CBE transfer pathways.

GE competencies were informed by frameworks such as Bloom's Taxonomy, [AAC&U VALUE Rubrics](#), and the [Degree Qualifications Profile](#), and organized in alignment with California General Education Transfer Curriculum (Cal-GETC), a single general education pathway for California community college students that outlines the lower-division GE requirements needed for transfer admission to both the California State University and University of California systems. This resource includes a list of the Cal-GETC areas and the universal competencies developed.

Across disciplines, faculty were assigned to their respective Cal-GETC area to define clear, measurable, and broadly applicable competencies across broader GE areas. Rather than focusing on siloed, discipline-specific skills, competencies needed to emphasize real-world skills while minimizing redundancy across GE areas.

Consensus around competencies was easier to achieve in aligned fields but required negotiation in diverse GE areas where disciplines vary. For example, philosophy and theater arts satisfy the Arts & Humanities GE requirement, but faculty define what skills students must demonstrate very differently from their own disciplinary perspectives. This required deeper philosophical reflection on the value of the GE area to ground broad enough competencies that support the development of authentic assessments and effective instructional experiences. Once developed, faculty revisited the competencies through the lens of their own disciplines to test usability and applicability. This step validated the work, ensuring competencies were both general enough to support GE and practical enough to be applied in teaching across varied fields.

The ASCCC's participation brought legitimacy and representation to this innovative process. Their engagement amplified faculty perspectives beyond those within the Collaborative and uplifted the frontline faculty doing this work to support students. Importantly, this partnership signaled that the development of GE competencies was not merely a Collaborative initiative but a systemwide academic priority. Having them onboard led to the eventual ASCCC endorsement, ensuring the work will be embraced across California community colleges and disciplines. Colleges can integrate the competencies directly into their program design, supporting the expansion of transfer-intending direct assessment CBE programs.

## KEY DECISION



What will be different about the local curriculum approval process for direct assessment CBE programs?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Faculty Workstream Team
- Curriculum Approval Committee
- Direct Assessment CBE Program Leadership Team
- Deans (Academic Leaders)
- General Education and Direct Assessment CBE Program Faculty
- Board of Trustees
- College Leadership (President and Cabinet)



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- Will you provide committee members with an orientation to your direct assessment CBE program(s)?



## EQUITY IN ACTION

Curriculum approval for direct assessment CBE programs offers a unique opportunity to ensure that course design, structure, and content meet the needs of all students. Here are strategies to incorporate equity in curriculum approval:

**Include diverse decision-makers in the curriculum committee.** Engage a diverse group of faculty, staff, and students in the curriculum committee to ensure multiple perspectives, particularly those of historically marginalized populations, are included in curriculum decisions. Invite faculty with experience in direct assessment competency-based education and consider representation from departments that support student success initiatives.

**Provide professional development on direct assessment CBE.** Provide training to the curriculum committee on what direct assessment CBE is and how it can support students, like adult learners, whose needs are not being met. This can build a common understanding and shared language around inclusivity and support, as well as deepen understanding of equitable curriculum design and the unique aspects of direct assessment CBE.

**Embed equity-centered curriculum review criteria.** Incorporate focused criteria into your curriculum approval framework, such as culturally responsive teaching practices, accessibility of learning materials, and flexible learning pathways. This can guide committee members to evaluate curricula for inclusivity and ensure materials do not inadvertently reinforce biases.





## Example Activities

*Here are some example activities and resources to help answer the key question and supporting planning questions above.*

**Review [California Code of Regulations, Title 5 § 55270.4. General Academic Standards and Program Approval](#) to ensure you are designing in compliance with applicable regulations.**

**Form a dedicated direct assessment CBE curriculum committee to align direct assessment CBE processes with existing governance structures (e.g., policies and procedures) and create a clear avenue for formal faculty engagement.**

- Orient the committee to direct assessment CBE.
- Present to curriculum committee re: crosswalk of credit hour to competency.
- Create a work plan and timeline.

**Plan for the development of general education competencies.**

- Find out when your college review happens for your district. All new courses and courses with substantial changes must be approved by UC-TCA.
- Submit courses for GE approval in December after the UC-TCA is approved (approvals are between August and September). CSU & UC reviewers begin reviewing community college courses beginning in January and we usually get our decisions in late April or early May.

**Engage your college's curriculum committee and academic senate to initiate approval process.**

- Gain approval by your college's curriculum committee and academic senate to ensure the workload and unit value in your competency set are commensurate and align to your board policies and administrative procedures.





# Design & Build

## Decisions for Student Support

It's time to roll up your sleeves, Student Support Team, and dive into program design! The following section is intended for members of the Student Support Team building a direct assessment CBE program.



Go back to the prior phase, [Prepare](#), if you are still exploring what direct assessment CBE is and whether it would be a good fit for your institution.

Jump ahead to the next phase, [Launch](#), if you are ready to start marketing your program and enrolling students.



Intentional and integrated student support is key to ensuring direct assessment CBE programs achieve their intent reducing equity gaps in recruitment, retention, completion, and placement into quality career pathways. Programs will require rethinking student support in tandem with academic program delivery, including staffing, resource allocation, and coordination with community partners and employers.

As you consider the student support decisions, ensure your workstream is reviewing and considering the pertinent California Code of Regulations, Title 5 for direct assessment CBE.

### In what order should I make these decisions?

These decisions can be explored in whatever order you want, but many have dependencies, which we will point out as we go. There is no one right order to take on these design decisions. The entire Design and Build phase will generally take your institution 18 months to two years to complete. Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

#### DESIGN & BUILD PHASE STUDENT SUPPORT TEAM DECISIONS

##### Develop Student Support Staff Orientation and Professional Development

*What orientation and professional development will be provided for student support staff?*

##### Design Enrollment Model

*What is the enrollment model (e.g., recruitment, admissions, and orientation approach)?*

##### Create Dual Transcripts

*What is the process for creating dual transcripts?*



# Develop Student Support Staff Orientation and Professional Development

To ensure your staff are aware of changes in support and business processes and fully onboard with direct assessment CBE, you must provide an orientation and continuous professional development (PD) as you design, build, and implement your program.

Your orientation to direct assessment CBE should focus on building a culture of innovation and developing direct assessment CBE champions — staff who actively advocate for a direct assessment competency-based approach. Consider incorporating your orientation into an existing staff PD day or creating a dedicated half-day/full-day session on the topic. The timing and structure of your orientation will directly impact the composition and size of your audience.

For ongoing PD, dive deeply into specific topics that impact implementation. These meetings should be frequent enough to ensure staff are learning about new concepts continuously and are able to apply their learnings immediately to support students.

*Specific topics to cover in your orientation and PD might include:*

- Understanding direct assessment CBE 101 and the mastery-based approach to instruction
- Identifying students who will thrive in a direct assessment CBE program
- Scheduling and progress in direct assessment CBE
- Empowering students to manage their learning journey
- Leveraging customer relationship management (CRM) technology to track students and provide high-touch service
- Partnering with faculty to keep students engaged, supported, and progressing
- Coaching students in refining their skills and strategies after assessment setbacks or strategic learning pauses (e.g., “pause outs”)
- Implementing trauma-informed, culturally sensitive practices in counseling and coaching
- Increasing and maintaining engagement for hybrid and online students
- Informing partners about direct assessment CBE (employers, community-based organizations, transfer partners, etc.)
- Understanding CPL and direct assessment CBE to support the student journey and success
- Developing student testimonials





*Offer staff the same flexibility you plan to offer students by leveraging different formats to meet different needs/wants, such as:*

- **Webinars:** Online presentations with some interaction through chat or Q&A.
- **Videos:** Prerecorded video lessons that staff can watch at their own pace without live interaction. Short videos can be a great tool for creating early interest or answering pointed questions.
- **Workshops:** Interactive, in-person or virtual sessions with hands-on activities and group discussions.
- **Self-paced, web-based competencies:** Online learning competencies with structured content, formative assessments, and interactive elements, allowing staff to progress independently.
- **Class shadowing/mentorship:** Guided learning through a one-on-one relationship with an experienced professional.
- **Direct assessment CBE certification:** An in-house certification program to recognize staff who participate in a series of direct assessment CBE PD opportunities.



## EQUITY IN ACTION

*By intentionally embedding equity-driven principles into the orientation and professional development of student support staff, you can ensure that all students receive the guidance and resources they need to thrive.*

**Incorporate equity into professional development (PD) offerings.** Equip staff with knowledge and skills to work effectively with a broad range of student populations, including those underserved by traditional programs (e.g., student parents, adult students, veterans, etc.). Include content on creating an inclusive environment, such as leveraging trauma-informed practices to build trust and rapport with students.

**Maximize support systems through high-tech/high-touch approaches.** At each touchpoint, clarify the roles and responsibilities involved in providing support. When using tools like a customer relationship management (CRM) system to track learner progress, explain the system's functions to staff and set clear expectations on how it can be used to offer timely, personalized support.

**Embed equity-driven principles in all program touchpoints.** Ensure that support mechanisms in the program, such as success coaches, reflect and uphold the program's commitment to equity. Equip staff to understand the purpose and impact of these systems to create a consistent, equity-centered approach across the program.





## KEY DECISION



What orientation and professional development will be provided for student support staff?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Student Support Workstream Team
- Professional Development Office or Committee
- Admissions and Records (Registrar, etc.)
- Financial Aid Director/Dean and other Financial Aid Leads
- Deans (Operational Leaders)
- Student Support Services (Counselors, Advisors, Etc.)
- Direct Assessment CBE Program Leadership Team
- Deans (Academic Leaders)
- Institutional Effectiveness, Data, and Research
- IT System Managers: LMS, SIS, Data, Fin Aid, CRM, Student Support, Transcripts, etc.
- College Leadership (President and Cabinet)
- Board of Trustees



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.

- What knowledge and/or skills do student support staff need to implement and sustain a direct assessment CBE program?
- Which staff roles should be included in direct assessment CBE training and what are the specific needs for the training?
- What content needs to be designed and/or procured for PD activities that are equity-centered in design and implementation?
- What PD opportunities and/or materials are already available that cover direct assessment CBE-related topics?
- What is the college's sustainability plan for ongoing PD in direct assessment CBE?



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Identify specific competencies needed to effectively support a diverse learner population.

- Incorporate familiarity with equity-centered practices, trauma-informed approaches, and the program's high-tech/high-touch support model.

### Assess current skills and identify gaps to inform training needs.

- Consider surveys or self-assessments to identify training needs, including technology proficiency, process knowledge, and equity-focused student supports. Use the findings to pinpoint areas where additional training is needed.

### Design professional development using a [Backward Design approach](#).

- Define desired outcomes for staff orientation and professional development, then identify competencies and appropriate assessments to measure success.
- Curate or create learning resources to help staff achieve the identified goals.

### Develop or procure equity-centered training materials for staff to help them include content on inclusivity, support for nontraditional students, and the program's high-tech/high-touch support model.

- Before creating new content, review existing resources like *A Leader's Guide to Competency-Based Education* (pages 69-72).

### Identify and engage decision-makers for professional development.

- Compile a list of stakeholders who would benefit from professional development, including faculty, counselors, external partners, recruiters, and administrators.
- Design content that can serve multiple audiences to reduce redundancy and foster collaboration across departments.

### Develop an orientation program for support staff in direct assessment CBE programs.

- Consider including a checklist to guide staff through their learning and responsibilities.





## Design Enrollment Model (Recruitment, Admissions, and Orientation)

Your enrollment model includes your approach to recruiting, admitting, and orienting students. The way that you design these processes should account for the needs of your target population and the structure of your direct assessment CBE program.

When recruiting for your direct assessment CBE program you should consider adopting a targeted approach where students likely to benefit most from the program are invited to participate. This may include direct mail, media advertising, targeted internet promotion, or recruitment through a particular employer partner.

When admitting students into direct assessment CBE programs, they will be able to apply through the CCCApply process. Colleges can customize their application by adding local questions to gauge students' interest in a direct assessment CBE program to prompt follow-up, further promotion, and eventually, admission into the program.

Students enrolled in a direct assessment CBE program should be provided with an additional set of orientation activities and resources to support them as they navigate the program, including use of technology, grading policies, online resources, and other items pertaining to direct assessment CBE.





## KEY DECISION



**What is the enrollment model (e.g., recruitment, admissions, and orientation) approach?**



## EQUITY IN ACTION

*Thoughtfully designing your enrollment and support model can ensure your program remains accessible and beneficial for all students, particularly for those from historically underserved communities. When developing your model, consider the following:*

**Engage with community-based organizations and employers to reach student populations underserved by traditional programs.** Establish trusting relationships within communities that may not have a history with your institution.

**Leverage the flexibility of the direct assessment CBE format to prioritize support for students' basic needs, knowing that, as research like the [RealCollege survey](#) shows, two out of three California community college students experience basic needs insecurity.**

**Assess and connect students to support services early.** Use admission and orientation processes to identify individual needs and proactively connect students to nonacademic supports that promote a stable learning environment, including food security, housing, and mental health resources.



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Enrollment Management Director/Dean and other Enrollment Leads
- Student Support Workstream Team
- Deans (Operational Leaders)
- Financial Aid Director/Dean and other Financial Aid Leads
- Admissions And Records (Registrar, etc.)
- Student Support Services (Counselors, Advisors, etc.)
- Students
- Student Senate/Student Senate President
- Employer Partners
- Direct Assessment CBE Program Leadership Team
- Deans (Academic Leaders)
- General Education and Direct Assessment CBE Program Faculty
- Board of Trustees
- College Leadership (President and Cabinet)



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What unique recruitment strategies, personnel, and community partnerships will support effective outreach to target students for your direct assessment CBE program?
- How will the college adapt technology and admissions processes to support direct assessment CBE recruitment and enrollment?
- What navigational and onboarding support will students need before beginning the program?
- How will the college ensure orientation materials are inclusive and accessible?
- How will the college strengthen internal and external communication and coordination to quickly identify students with basic needs and connect them to support?



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Develop recruitment strategies tailored to reach your target students.

- Develop partnerships with community-based organizations and local employers to reach students underserved in traditional programs.
- For fully online programs, determine where target students live and set up remote communication methods to support them throughout onboarding.
- Adjust recruitment policies and practices to ensure inclusive access to program information.

### Learn from established enrollment models to inform your approach.

- Consider [this spotlight](#) on Southwestern College's enrollment model.
- Review the [Launch Stories](#) in the Sustain phase for more about how Collaborative colleges addressed enrollment, recruitment, and retention.

### Adjust enrollment and admissions policies and processes to enhance access.

- Add a supplemental question to CCCApply for students enrolling in the direct assessment CBE program. Consider examples of supplemental questions at the end of this section.
- Ensure student information is captured in the CRM to enable follow-up for promotions and recruitment.
- Design an enrollment calendar that aligns with program flexibility and student needs.
- Streamline admissions workflows to create a welcoming entry point for diverse students.

Use the [“Policies and Procedures Review: Competency-based Education”](#) report produced in 2025 to help identify existing institutional policies and procedures that should or could be updated.

### Design and deliver an orientation program that prepares new and prospective students.

- Define your audience and determine parameters, such as whether orientation will be combined for new and prospective students or separated by program.
- Establish clear goals for orientation, such as:
  - ▶ *Building understanding of direct assessment CBE.*
  - ▶ *Highlighting differences from traditional education.*
  - ▶ *Introducing students to faculty, staff, and peers.*
  - ▶ *Creating networking opportunities.*
- Develop an agenda that supports these goals, assigning clear roles to faculty and staff to ensure alignment with capacity.
- Curate inclusive and accessible materials for the orientation (e.g., handouts, slides, and assessment materials) with guidance from your college's disabled student services.
- Test the orientation format with faculty, staff, and a small group of students to refine content and delivery.

### Modify technology systems to support the enrollment process.

- Identify and implement any required technology modifications, ensuring systems align with direct assessment CBE recruitment, admissions, and enrollment needs.

### Strengthen support systems to address students' basic needs during enrollment.

- Enhance internal and external communication to quickly identify students with basic needs and connect them to support resources.
- Consider involving external service providers, such as community-based organizations and social service departments as partners in the enrollment process to provide additional support.



## SPOTLIGHT: SOUTHWESTERN COLLEGE



## CENTERING EQUITY IN CBE AUTOMOTIVE TECHNOLOGY PROGRAM

Southwestern designed their direct assessment CBE Automotive Technology program to address regional workforce demands, particularly in emerging areas like electric vehicles, while focusing on accessibility for working adults. The program specifically targets existing mechanics in dealerships and independent shops who lack formal training, with plans to explore employer-supported tuition options.

*To ensure student success, Southwestern developed a customized enrollment and support structure:*

- Separate CCCApply admissions program to streamline the application process
- Inclusive, accessible orientation materials designed for direct assessment students
- Dedicated student success coach trained in direct assessment CBE, providing guidance on program-specific elements like pacing and financial aid
- Partnerships with community-based organizations and local social services to provide comprehensive support.

This intentional approach removes traditional barriers to education while maintaining strong connections to industry needs and student support services.





# Create Dual Transcripts

Dual transcripts are official records of academic progress and performance that include completed and attempted competencies with mastery-based grades, as well as traditional credit hour grades (See [Formative and Summative Assessment](#) for more on what mastery means.)

A dual transcript can include all student achievement in one document, or it can include two documents: one presenting competency mastery (i.e., competency-based transcript) and the other presenting all the traditional equivalent courses earned (i.e., credit-hour equivalency transcript). If the transcript is one document, it will need to be separated for transfer purposes. California community colleges are required to offer direct assessment CBE students a dual transcript in the [California Code of Regulations, Title 5 55270.8](#).

*These sections of the regulations specify the mastery-based evaluative and nonevaluative symbols that colleges must use:*

- **Mastery (M)** which is equivalent to a B
- **Mastery with Distinction (M+)** which is equivalent to an A
- **Progress Withdrawal (PW)**

*Colleges may also use these nonevaluative symbols:*

- **Incomplete (I)**
- **Withdrawal (W)**
- **In Progress (IP)**
- **Military Withdrawal (MW)**
- **Report Delayed (RD)**
- **Excused Withdrawal (EW)**



“We are bringing competency-based education to the forefront by recognizing and valuing the experience, training, and knowledge students already possess when they enroll at the college. We will then build on that experience by creating a curriculum that is flexibly-paced, giving students the opportunity to learn on their own timeline. Our goal is to empower students to progress on their own schedule with support at every juncture along their journey.”

— **Dr. Mark Sanchez, Superintendent/  
President of Southwestern College**

## KEY DECISION



**What is the process for creating dual transcripts?**



## EQUITY IN ACTION

*Dual transcripts can be a powerful tool for students to showcase academic progress and skills mastered with employers and other educational institutions:*

**Transferability.** Credit-hour equivalency transcripts support transfer by providing a clear equivalency of competencies mastered in a traditional credit structure to share with four-year institutions. This supports student transfer as most colleges and universities do not have a protocol for accepting competency-based transcripts directly.

**Accessibility.** The competency-based transcripts provide a clear record of the specific skills that graduates have mastered, not just course names as with traditional programs, which do not clearly communicate content. This documentation is helpful for students and graduates who need to be able to understand and articulate what they have learned. Transcripts can be a powerful tool in empowering students to discuss their progress and performance with faculty and staff. These conversations can also help ensure students benefit from appropriate academic and nonacademic support.

**Industry alignment.** Students can share the competency-based transcript outlining the specific industry-aligned skills they have mastered to demonstrate their employability with employers assessing job-relevant abilities.



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Student Support Workstream Team
- Institutional Effectiveness, Data, and Research
- Deans (Operational Leaders)
- Student Support Services (Counselors, Advisors, etc.)
- Direct Assessment CBE Program Leadership Team
- Deans (Academic Leaders)
- General Education and Direct Assessment CBE Program Faculty
- Board of Trustees
- College Leadership (President and Cabinet)



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities outlined below.*

- What information will be included in the dual transcript to support students' academic and career goals?
- How will competencies be written in the curriculum and/or transcription systems?
- What modifications or new systems are needed to support dual transcripts?
- How will the college manage transcription for students who have a mix of both traditional courses and competencies?
- What workflow will trigger a completed competency on the competency-based transcript and for the course equivalency transcript?
- How will completed competencies connect to broader systems such as digital badging, digital wallets, learner employment records, and your regional skills ecosystem?
- What training and technical skills will faculty and staff need to support dual transcripts?
- How will the college engage external decision-makers and students in the dual transcript design and implementation?



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Identify essential information for the dual transcripts to ensure clarity and relevance for students, institutions, and employers.

- Identify the necessary information for students, transfer partners, and prospective employers.
- Consult with employers, transfer partners, and other decision-makers during the development of the transcript format to ensure clarity and alignment with their needs.

### Assess technology and formatting requirements for the course-equivalency transcript.

- Consider dual transcript recommendations from the California Virtual Campus (CVC) in the [Analysis and Recommendations for CBE Technology 23-24](#).
- Outline workflows that will trigger transcription for both competency-based and traditional course records.
- Review technology capabilities and needs, including potential modifications to current systems or new systems (e.g., badging provider integration) to ensure accuracy and accessibility.
- Determine if data from the system of record (SIS) will feed into a third-party dual transcript application or you will adjust the current transcript to display the direct assessment CBE data.
- Ensure you are partnering with faculty and instructional designers when developing in Canvas to make certain your approach aligns to the transcription approach.

### Standardize transcription competency language for clarity and alignment across systems.

- Create or ensure uniform language for competencies, considering any character or word count limits that may impact readability.

### Build capacity through training and resources for transcription management.

- Identify new skills or training needed by faculty and staff to effectively use transcription tools and manage workflow processes.

### Create and test a mockup of your course-equivalency transcript.

- Develop a sample transcript based on your current template to maintain consistency. Your final transcript should not look vastly different.
- Review character limits and formatting to ensure competencies are clearly presented and understandable across systems.
- Consider sharing your mockup with employer partners to ensure they understand the new format and can leverage it appropriately to support hiring of graduates or hosting work experience opportunities for current students.

### Engage with external partners to refine and validate the transcript format.

- Plan for follow-up engagement after implementation to gather feedback and enhance transparency.





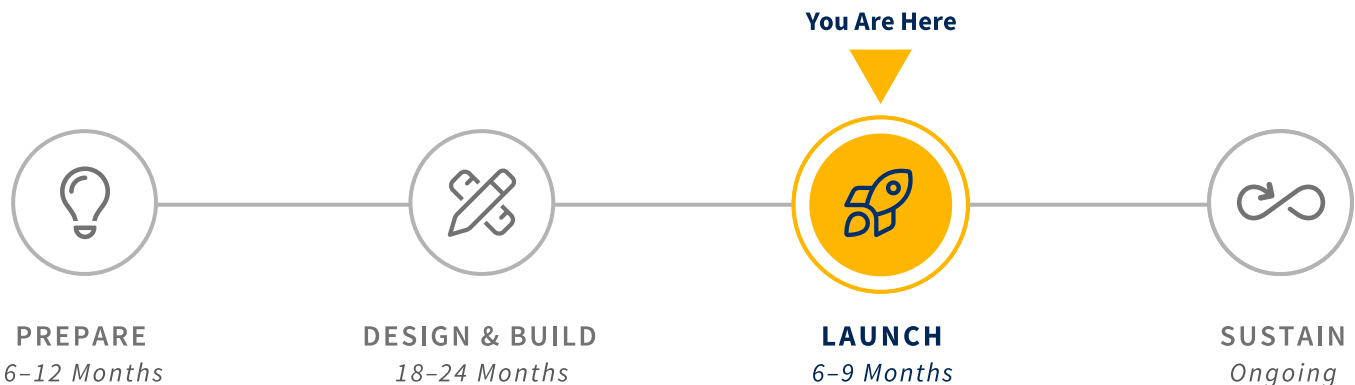
# Launch

Congrats, your college is ready to launch a direct assessment competency-based education program!



Go back to the previous phase, [Design and Build](#), to continue designing the program and initiating approval processes.

Jump ahead to the next phase, [Sustain](#), if you are ready to focus on continuous improvement efforts that build on the program launch.



## HOW TO USE THIS SECTION

Faculty and staff have spent months preparing for this moment, securing buy-in from key stakeholders, and diving into the weeds of dozens of key decisions. Now, it's time to put all of those plans into action, begin enrolling students, and launch this new approach to teaching and learning.

The Launch phase will focus on providing resources to help you put plans into action, operationalize the program launch, and make real-time adjustments based on student needs. You worked hard to make a lot of plans during the [Design and Build phase](#). Now is the time to put those plans into action!

Just like the [Design and Build phase](#), the Launch phase is broken into three workstreams: [Leadership Team](#), [Faculty](#), and [Student Support](#) to indicate who on campus should lead program implementation and final decision-making. Each workstream can work simultaneously and in any order with support and coordination from the Leadership Team to address alignment and coordination. Revisit the [OVIS chart](#) to ensure all key decision-makers are considered.

While there will be some new decisions made during this phase, for the most part your team will be focused on execution, supporting real students, operating real systems, and honoring the college's equity-centered vision.

Use this direct assessment [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

### In what order should I make these decisions?

The Launch phase includes decisions that must be made during the three to six months leading up to the day when your first cohort of students begins their first competency, continuing through the first subscription period or term.

There is no required order in which to make each decision and there are many dependencies and interconnections you'll discover along the way. In general, each workstream will move through each of their major decisions over the next six to nine months.



Photo by Allison Shelley / Complete College Photo Library



# Stories from the Direct Assessment CBE Collaborative



Photo by Allison Shelley / Complete College Photo Library

The case studies presented in this section highlight the experiences of four colleges involved in the [California Direct Assessment Competency-Based Education Collaborative](#) who launched or plan to launch in 2026 : [Coastline College](#), [Mt. San Antonio College](#), [Shasta College](#), and [Southwestern College](#).

Each of these stories offers valuable insights into their distinct program designs and the local impact of these innovative educational approaches. For more information about the design of other collaborative programs check out the [Direct Assessment CBE Collaborative College Program Design Overview](#) on the next page.

Please review these stories before proceeding through the remaining sections of the [Launch phase](#). Consider how each institution's design and approaches might apply to your local institutional context, how their target student populations influenced design decisions, what barriers they overcame, and how they are already planning for scaling their direct assessment CBE programs.





## DIRECT ASSESSMENT CBE COLLABORATIVE COLLEGE PROGRAM DESIGN OVERVIEW

### BAKERSFIELD COLLEGE

|                                                                                   |                                                                                                   |                                                                        |                                                |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Associate of Science in Culinary Arts Management</i> | <b>Launch Date</b><br><i>TBD</i>                                       | <b>Faculty &amp; Staff Model</b><br><i>TBD</i> |
|                                                                                   | <b>Academic Calendar</b><br><i>TBD</i>                                                            | <b>Regional Accreditation</b><br><i>Approved</i>                       |                                                |
|                                                                                   | <b>Key Technology Systems</b><br><i>Banner, Canvas</i>                                            | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Submission planned</i> |                                                |

### COASTLINE COLLEGE Pace+ Direct Assessment Competency-Based Education

|                                                                                   |                                                                                                    |                                                              |                                                      |
|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|--------------------------------------------------------------|------------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Associate of Science, Management (Applied) degree</i> | <b>Launch Date</b><br><i>August 2025</i>                     | <b>Faculty &amp; Staff Model</b><br><i>Unbundled</i> |
|                                                                                   | <b>Academic Calendar</b><br><i>Subscription-based, 14-week standard terms</i>                      | <b>Regional Accreditation</b><br><i>Approved</i>             |                                                      |
|                                                                                   | <b>Key Technology Systems</b><br><i>Banner, Canvas, Slate, Regent, Mursion</i>                     | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Approved</i> |                                                      |

### EAST LOS ANGELES COLLEGE

|                                                                                     |                                                                |                                                                        |                                                |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------|------------------------------------------------------------------------|------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Biotechnology</i> | <b>Launch Date</b><br><i>Fall 2026</i>                                 | <b>Faculty &amp; Staff Model</b><br><i>TBD</i> |
|                                                                                     | <b>Academic Calendar</b><br><i>TBD</i>                         | <b>Regional Accreditation</b><br><i>TBD</i>                            |                                                |
|                                                                                     | <b>Key Technology Systems</b><br><i>Canvas</i>                 | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Submission planned</i> |                                                |

### MERCED COLLEGE

|                                                                                     |                                                                                                                  |                                                                        |                                                |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Early Childhood Education</i>                                       | <b>Launch Date</b><br><i>Fall 2026</i>                                 | <b>Faculty &amp; Staff Model</b><br><i>TBD</i> |
|                                                                                     | <b>Academic Calendar</b><br><i>Standard term, two designated entry points in term (i.e., sequential modules)</i> | <b>Regional Accreditation</b><br><i>TBD</i>                            |                                                |
|                                                                                     | <b>Key Technology Systems</b><br><i>Colleague, Canvas, Navigate</i>                                              | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Submission planned</i> |                                                |

## MT. SAN ANTONIO COLLEGE

|                                                                                   |                                                                                                                                                    |                                                              |                                                    |
|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|----------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Associate in Arts in Kinesiology, Transfer</i>                                                        | <b>Launch Date</b><br><i>Fall 2026</i>                       | <b>Faculty &amp; Staff Model</b><br><i>Bundled</i> |
|                                                                                   | <b>Academic Calendar</b><br><i>Nonstandard term, subscription based</i>                                                                            | <b>Regional Accreditation</b><br><i>Approved</i>             |                                                    |
|                                                                                   | <b>Key Technology Systems</b><br><i>Banner, Canvas, Navigate</i>                                                                                   | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Approved</i> |                                                    |
|                                                                                   | <b>Target Population:</b> <i>Students with prior knowledge and mastery of skills, as well as students who need a more flexible pacing schedule</i> |                                                              |                                                    |

## SHASTA COLLEGE

|                                                                                                            |                                                                                                                                                                                                                     |                                                              |                                                      |
|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|------------------------------------------------------|
| <br><b>Shasta College</b> | <b>Certificate or Degree Offerings</b><br><i>Certificate in Early Childhood Education</i>                                                                                                                           | <b>Launch Date</b><br><i>Fall 2025</i>                       | <b>Faculty &amp; Staff Model</b><br><i>Unbundled</i> |
|                                                                                                            | <b>Academic Calendar</b><br><i>Standard terms, entry points will be individualized</i>                                                                                                                              | <b>Regional Accreditation</b><br><i>Approved</i>             |                                                      |
|                                                                                                            | <b>Key Technology Systems</b><br><i>Colleague, Canvas, CRM Advise</i>                                                                                                                                               | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Approved</i> |                                                      |
|                                                                                                            | <b>Target Population:</b> <i>Individuals currently working in early childhood education settings who need to upskill for job advancement or multiple teaching credential holders wanting to teach TK-3rd grades</i> |                                                              |                                                      |
|                                                                                                            |                                                                                                                                                                                                                     |                                                              |                                                      |

## SOUTHWESTERN COLLEGE CBE Accelerate program

|                                                                                     |                                                                                                                                                                       |                                                               |                                                |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|------------------------------------------------|
|  | <b>Certificate or Degree Offerings</b><br><i>Certificate of Achievement in Automotive Brake and Suspension Systems, Associate in Science in Automotive Technology</i> | <b>Launch Date</b><br><i>Fall 2025</i>                        | <b>Faculty &amp; Staff Model</b><br><i>TBD</i> |
|                                                                                     | <b>Academic Calendar</b><br><i>Subscription-based calendar with three terms of varying length and instructional days</i>                                              | <b>Regional Accreditation</b><br><i>Approved</i>              |                                                |
|                                                                                     | <b>Key Technology Systems</b><br><i>Colleague, Canvas</i>                                                                                                             | <b>U.S. Dept of Ed. Title IV Approval</b><br><i>Submitted</i> |                                                |



# Coastline College: Pace+ Direct Assessment Competency-Based Education

## Program Overview

Coastline College launched their [Pace+ Direct Assessment Competency-Based Education program](#) with one degree — a 60-unit Management (Applied) Associate of Science in July 2025.

## Program Design

### Academic Calendar

The program operates on a subscription-based model with 14-week terms. Instead of paying per course or credit hour, students pay a flat fee per term, covering all learning materials, assessments, and faculty support. The program operates on a subscription-based model with 14-week terms, with monthly starts.

### Faculty and Staff Model

Coastline's unbundled faculty and staff model includes [four faculty roles](#) to ensure the faculty responsible for supporting learning are not the same faculty who grade assessments. This approach maximizes support for students and helps ensure a more objective assessment process.

- *Program design faculty.* Develop competency set and define program structure
- *Competency course design faculty.* Develop instructional content and assessments for competency courses
- *Teaching faculty.* Engage in regular and substantive interaction with students, grade formative assessments, monitor student progress and pacing in partnership with the student engagement coach
- *Assessor faculty.* Conduct summative assessments, must be a different faculty member than the assigned teaching faculty member
- *Student engagement coach.* Monitor student progress and pacing in partnership with teaching faculty

In 2025, Coastline negotiated a pilot agreement with faculty. Components of this agreement include renegotiation after pilot launch, stipends for professional development, and pay parity for program design and competency course design faculty regardless of full-time or part-time status.



“Why sit in a classroom for 16 weeks to learn how to give a presentation if you do that every day at work? Let's just let you demonstrate that you know how to do that and move on to the next class.”

— Erin Thomas, Professor of Business at Coastline and Program Coordinator for Pace+



## Curriculum

Coastline based their competencies on the [Organization Systems International \(OSI\) Polaris® Leadership Competencies Model](#). This model features over 40 in-demand skills identified by top corporations for workers in manager roles. To tailor this competency set for their degree level, Coastline obtained feedback from their advisory committee and performed surveys of local business to select selected 17 of the Polaris® competencies. Faculty were able to match about 75 percent of these competencies to existing courses and new course content was created as needed. The resulting direct assessment CBE program is different from the traditional degree and includes a strong emphasis on communication and computer information systems classes.

- [Learn more about how backward design altered course design and assessment planning at Coastline.](#)



“It would not have happened without a very dedicated faculty coordinator for direct assessment CBE as well as an academic senate that was willing to have very wild, exploratory conversations and see the importance of what we were doing.”

— Dr. Shelly Blair, Principal Consultant,  
Educated Guess Consulting

## Recruiting and Admitting Students

The first cohort of students began in August 2025 and was focused on students who needed more flexibility than that offered by traditional programs. Outreach also emphasized the benefits for students who could leverage their personal and professional experience to accelerate through the program.

## Reflections from Coastline

**It's hard being the first. It helps to have a great team with a strong vision.**

As the first direct assessment CBE program to launch in the California Community College system, Coastline had no blueprint to build from and no local examples to follow. The institution remained committed to a core vision centered on personalized learning, flexible pacing for students, and outcomes aligned with workforce needs. Strong institutional alignment and cross-functional collaboration between instruction, financial aid, enrollment services, and IT were key to navigating uncharted territory during design and into the pilot. Coastline was diligent about building internal buy-in and continues to lean into strategic communication to reinforce the vision and keep everyone on the same page with clear, consistent messaging.

**Leverage technology that supports your vision for student-centered programming.**

Coastline knew students faced barriers in traditional programs that were inflexible and did not accommodate work and life commitments. During the design phase, the college decided that a subscription-based financial aid model would provide the greatest flexibility for students, but realized that their existing financial aid management system could not support this approach. To solve this problem, Coastline adopted Regent Award, a cloud-based suite of financial aid management solutions. Regent supports direct assessment CBE programs using standard or nonstandard terms, subscription periods, and nonterm enrollment models.

- [Learn more about Regent on their website.](#)
- [Hear more from the Coastline team about their experience building Pace+ in this video.](#)



# Mt. San Antonio College: CBE Programs



## Program Overview

Mt. San Antonio College (Mt. SAC) will launch a 62-credit Associate in Arts in Kinesiology for Transfer degree in fall 2026.

## Program Design

### Academic Calendar

The program will operate on a nonstandard term and be subscription-based. Students will be able to enroll part-time or full-time and benefit from multiple start dates. Each term will be 15 weeks long, allowing for three terms per year. This structure offers eight starting tracks per year with start dates every six weeks. Learners can enroll in two consecutive terms to carry over any incomplete competencies into the second term.

## Faculty and Staff Model

Mt. SAC designed a bundled faculty model to facilitate deeper engagement and early buy-in across roles.

- *Designing faculty.* Designed the initial curriculum and will continue developing competencies, assessments, and the student learning journey
- *Instructing/Assessing faculty.* Engage in regular and substantive interaction with students, administer assessments, monitor student progress and pacing in partnership with coaches
- *Tutors.* Provide supplemental academic support
- *Coaches.* Support each learner by monitoring progress, connecting students to resources and support services (tutoring, counseling, tech help, and more), motivate students as they move through the program, may be professional experts or faculty assigned to this role

## Technology

Mt. SAC will launch using existing learning management and student information systems rather than adopting new platforms. While this approach requires some manual processes and workarounds during early implementation, it will allow the team to focus on instructional design and student experience rather than system integration. The team viewed this approach as a practical entry point, prioritizing manageable scale in the early stages while planning for future technology enhancements as the program grows.



Photo by Allison Shelley / Complete College Photo Library

## Recruiting and Admitting Students

Mt. SAC selected their 62-credit Associate in Arts in Kinesiology for Transfer degree due to strong labor market demand. In the 2021-2022 academic year, Mt. SAC had over 10,800 enrollments in Kinesiology courses, resulting in 505 transferrable associate degrees awarded in the field.

Kinesiology is one of the top degree-awarding programs at the college, behind Social Sciences and Business. The college anticipates that students with prior knowledge and mastery of skills, as well as those who need a more flexibly-paced schedule will be attracted to this modality.

### PROCESS INNOVATIONS THAT ACCELERATED CURRICULUM APPROVAL

Mt. SAC identified process efficiencies that helped streamline internal approvals. By using direct assessment CBE amendment forms tied to existing course outlines of record, rather than submitting full course revisions, the college was able to demonstrate how competencies and assessments aligned to existing curriculum requirements while minimizing unnecessary procedural steps. The amendment process was reviewed and approved through department review, academic senate, and curriculum committee channels, creating transparency and shared ownership.

Since stakeholders were already familiar with the direct assessment CBE model, approvals moved efficiently, and faculty were engaged in finalizing remaining course components. This approach proved especially helpful in maintaining forward progress while larger regulatory approvals were still pending.

## Reflections from Mt. SAC

### Timelines and sequences will evolve. Be flexible.

Mt. SAC's original goal was to launch in Spring 2026, but evolving external and internal program approval timelines and program dependencies required the college to postpone launch until Fall 2026. The college submitted their U.S. Department of Education application before submitting their direct assessment amendment, meaning progress on program launch depended on federal review timelines outside the institution's control. At the same time, internal curriculum and catalog requirements created additional dependencies. While awaiting final approvals, the team continued advancing other elements of implementation, including refining competencies, assessments, and student-facing learning materials. This approach allowed Mt. SAC to maintain momentum and ensure that once approvals were secured, the program would be ready to begin enrollment.

### Build a strong team of direct assessment CBE champions who commit to communicate, learn, and problem solve together.

Strong collaboration across academic, operational, and student services teams meant vice presidents, deans, faculty, financial aid staff, enrollment services, and support teams all contributed to implementation planning and troubleshooting. Leadership engagement remained critical as program scope, timelines, and requirements evolved. All team members invested significant time in learning about direct assessment CBE and how it differs from traditional delivery models. Over time, shared understanding grew, as did collective problem-solving capacity.

### Create a clear structure for managing change and bringing new team members into the work.

The team continued revisiting program goals, recalibrating milestones, and bringing new stakeholders into the work as responsibilities shifted. Having a designated point person coordinating across departments helped maintain continuity and accountability. At the same time, distributed leadership across faculty, deans, and operational staff ensured that implementation did not rely on any single individual.





# Shasta College: CBE Programs



## Program Overview

Shasta College currently offers a 24-unit [CBE certificate in Early Childhood Education \(ECE\)](#). This program was launched in fall 2025.

## Program Design

### Academic Calendar

Shasta decided not to adopt a different calendar for their direct assessment CBE program and instead utilized their regular calendar, which has fall and spring semesters and a summer term. However, they did create multiple entry points on the first and roughly 50 percent date of each semester or term (i.e., on the first day of a semester and about eight weeks into the semester). Students who do not finish a competency within a semester are advised to contact their instructor and follow the incomplete grade process (establishing conditions for submitting required work and having the incomplete removed and a final grade assigned).

### Financial Aid

While awaiting federal approval for Title IV, Shasta connected students to a variety of other grants such as the California College Promise Grant (CCPG), California Student Aid Commission (Cal Grant, Chafee Grant), the CCPG Application, the FAFSA, or the CADAA. They also utilized institutional funds for a direct assessment CBE Student Scholarship to provide alternative funds to those with financial need (i.e., students who would have qualified for the federal Pell Grant). The program has since been approved for federal financial aid, including Pell and other programs.

## Program Selection

In recent years, California established new education and credentialing requirements including a new PK-3 ECE Specialist Instruction Credential, updated requirements for TK-3rd grade teachers, and replacing Teaching Performance Expectations (TPEs) with Child Development Permit Performance Expectations. Shasta's early childhood education faculty knew there would be demand for upskilling pathways that met the needs of incumbent workers, paraprofessionals, classroom aides, and early educators seeking education and career advancement without stepping away from work. Due to these statewide shifts, the anticipated workforce demand, and faculty interest, Shasta elected to anchor their direct assessment CBE pilot in a 24-unit certificate aimed at working students and PK-3 credential seekers.



Once you get to know adult learners, there's no way you can't support CPL and direct assessment CBE."

— Buffy Tanner, Director of Innovation

## Recruiting and Admitting Learners

Shasta established a cap of 25 students for their first cohort, prioritizing adults working in Shasta, Tehama, and Trinity counties in ECE settings and PK-3 classrooms, and those who completed the enrollment steps first. The college worked to balance the number of new and current students (i.e., those that needed 24 units for the certificate with those that only needed the last 12 units).



One advantage to serving adults working in roles related to the direct assessment CBE program is that the skills they developed in the program are immediately relevant and can be applied on the job.

## Reflections from Shasta

**Connect direct assessment CBE to other college initiatives to build understanding quickly and secure early buy-in from faculty and staff.**

Even though direct assessment CBE remained relatively new to many faculty and staff at Shasta, early state-led webinars and regulatory guidance resonated with Shasta's established commitment to adult students developed through the design and launch of the Accelerated College Education (ACE) program, BOLD bachelor's transfer initiative, completion-focused Degrees When Due movement, and active Credit for Prior Learning (CPL) practices. ACE had trained the institution to think in compressed terms, streamlined pathways, and support persistence for students balancing work and family. BOLD built advising capacity for navigating complex online degree pathways with a transfer lens. Degrees When Due normalized practices that surface near-completers and remove barriers to credentialing. CPL made it credible to say, as Shasta often does, that learning outside the classroom counts when it is demonstrably college-level. Direct assessment CBE presented a straightforward path from these efforts by aligning competencies to authentic practice, delivering them in a format that respects work and family obligations, and building on the systems Shasta already runs well.

**Design for flexibility, but be prepared to invest time and resources into monitoring student pacing and nudging when needed.**

During the pilot, some students managed their time well, submitting formative assessments regularly and engaging with faculty, but others needed more support to stay on track with their academic goals. The Shasta team learned a lot about working with students to figure out how the college can help them keep moving forward in the direct assessment CBE program. Program leadership continues to build capacity to track, encourage, and nudge students and has recently hired a new staff member to provide direct support.

**Do what you must to foster student success even if the direct assessment CBE program isn't the right fit.**

ECE careers require workers to pass strict background checks and meet immunization and health and safety standards. In both traditional and direct assessment CBE programs, Shasta implemented additional preenrollment checks to communicate these requirements to students before they enroll. Catching students who are ineligible to work in the field before they begin coursework presents an opportunity to redirect them to programs better suited to their individual situations — even if those other options aren't direct assessment CBE.



# Southwestern College: CBE Accelerates



## Program Overview

Southwestern College launched [CBE Accelerate](#) in August 2025 with a Certificate of Achievement in Automotive Brake and Suspension Systems (ABS and Four-Wheel Alignment) and an Associate in Science in Automotive Technology.

## Program Design

### Academic Calendar

Southwestern opted for a subscription-based model with three terms that includes flexibility for students to accelerate mid-term. Students are charged a subscription fee at the beginning of each term based on part- or full-time status. This fee does not include student fees or materials. Under this model, students can enroll in more competencies up until the final two weeks of a direct assessment CBE term without incurring an additional subscription fee. An unintended drawback of the subscription model is that students cannot simultaneously participate in CBE Accelerate and traditional credit-bearing programs due to the process used for subscription billing and the limits of the billing approaches available in the current student information system.

## Program Selection

Upon being selected for the CA Direct Assessment CBE Collaborative, Southwestern faculty from multiple disciplines lined up to learn more. Administrative and faculty leaders worked with the district's academic senate to hold open space for transparent, internal conversations as the early work of discovery and design began. It was clear from these early discussions that direct assessment CBE offered the potential to broaden the district's strategies for instructional innovation and alternative methods of awarding college credit, like CPL and other efforts to accelerate time to award for adult students, especially those with military or work experience. Interest was so high from programs including cybersecurity, culinary arts, and automotive tech that the district required faculty to submit an application to be selected for the new direct assessment CBE program. Ultimately, Southwestern opted to focus on automotive technology due to evidence of labor market demand, competitive wages, and credential portability. The department had also recently begun construction of electric vehicle ready facilities ideal for on-site instruction and assessment, and enhancement of online offerings.



No idea is off the table. We're working more like a team with a shared vision than I've seen before."

— Randy Beach, Professor of English and Education,  
Southwestern College



## Defining Technical Competencies

For automotive faculty, the job of designing and defining competencies for the college's direct assessment CBE programs was fairly straightforward. After completing a 12-module Canvas-based training course, the faculty leveraged industry competencies and standards for curriculum and instruction established by its certifying body, the National Automotive Technicians Education Foundation (NAETF), the basis for Automotive Services Excellence (ASE) certification. Existing curriculum and course outlines were deconstructed and assessments and instructional content developed to support demonstration of mastery of competencies defined by the industry. The professional development experience was collaborative and strengthened the faculty's ability to build out competencies and develop related instructional materials, and to support topics such as automotive shop safety, brakes, suspension, electrical, engine performance, and HVAC systems.

## Structuring Competencies

Southwestern built each competency unit in their Student Information System (SIS) Ellucian Colleague as a separate course with a credit unit value less than three credit hours (e.g., 1.25; .3). When bundled together into groups these competencies typically map to one three-credit course. The competencies in a bundle are corequisites for one another so that students are enrolled in the full bundle worth three credits or more depending on the curriculum outlines approved by the district Curriculum Committee.

When all competencies in a bundle are completed at mastery level or higher, then students receive a transcript that includes the competency statement and their level of mastery achievement for each competency, as well as a separate transcript that documents a letter grade for the credit course. The letter grade is determined by the faculty based on a holistic review of the student's performance on all competencies in a bundle.



## Assessments and Grading

In the Canvas Learning Management System (LMS), bundled competencies are grouped in one Canvas course shell with each competency and its learning objectives, instructional content, and formative assessments organized into a single module. The module may also include a summative assessment to measure student performance of the competency; however, faculty often opted to use a single summative assessment to measure more than one competency. Faculty are required to manually enter mastery grades for each summative assessment in each competency in Colleague.

## Recruiting and Admitting Learners

Initial recruitment efforts targeted learners with prior experience, such as adult students with work experience or a history of military service. Southwestern also emphasized that highly organized students able to work independently and who had strong time management and computer literacy skills would be more likely to succeed in CBE Accelerate. Students interested in the program completed an online orientation and had a one-on-one meeting with a student success coach to ensure the program was a good fit.

- ▶ [Check out this recruitment video developed by the Southwestern team.](#)

## Reflections from Southwestern

### Take time building your team

Southwestern formed a cross-functional team of district leadership and subject matter experts to lead design and development over a period of 12 months. A smaller, core group of faculty and administrative leaders met biweekly to develop and execute the project plan created by the cross-functional team. This core team included automotive technology discipline faculty, the district's faculty curriculum chair, an administrative dean, and representatives from enrollment management, student affairs, and financial aid. The group continued to meet during the ongoing design and implementation of the program throughout its pilot year.

### Focus on continuous improvement — intentional iteration will make your program stronger

Initially, faculty generated approximately 500 competencies organized into 20 groups of related competencies with learning objectives and assessments. Technical limitations across multiple systems prompted the faculty to reorganize the competencies using subcompetencies, which reduced the number while maintaining the rigor of relevant industry standards that had informed the original competency set. Additionally, one proposed apportionment model previewed during the design phase encouraged the restructuring of competencies to be more flexible in light of potential funding mechanisms. At launch, Southwestern's direct assessment CBE Automotive Technology Program had 160 competencies including the general education competency set. Southwestern plans to continue to review the discipline and general education competencies to adjust the number and organization to maintain rigor and clarity for students and transfer institutions.

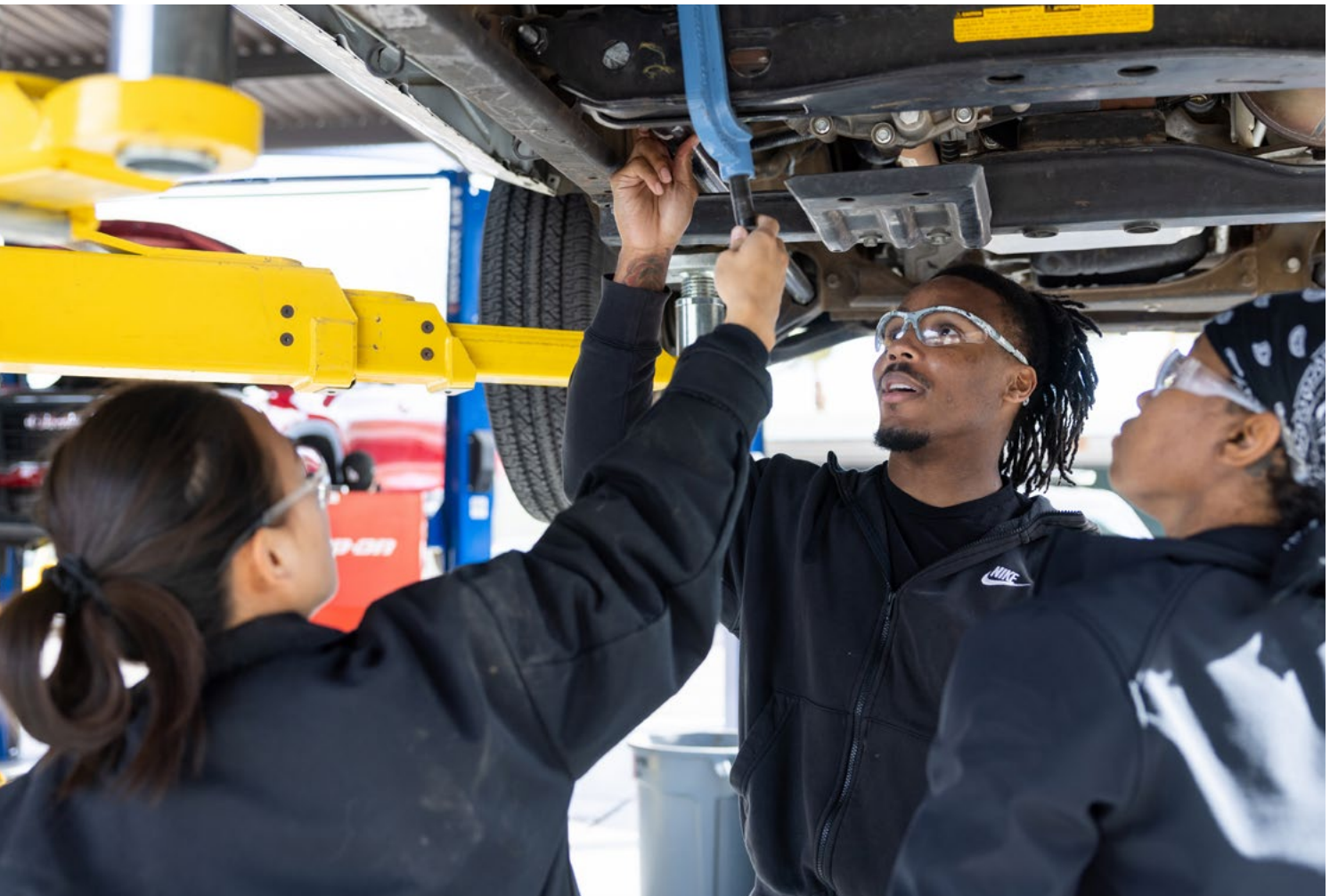


Photo by Allison Shelley / Complete College Photo Library



# Launch

## Decisions for the Leadership Team

The following section is intended for members of the Direct Assessment CBE Program Leadership Team launching a direct assessment CBE program.

The Leadership Team will need to address the following common decision points for implementing a direct assessment CBE program within the California Community College system. To ensure key perspectives are addressed, the Leadership Team will collaborate with the [Faculty](#) and [Student Support](#) workstreams in their decision-making.

As with previous phases, there is no right order in which to take on these design decisions. Review the entire section before determining where it might be best for your college's team to begin. This blueprint will help the Leadership Team work through the key decision points, identify dependencies, and discuss the implications of each decision.

Don't forget to review applicable federal, accrediting agency, and state requirements to ensure compliance. See [Develop ACCJC Application and Seek Approval](#), [Coordinate Chancellor's Office Approval Processes](#), and [Manage U.S. Department of Education Approval Process](#) for more information.

Use this direct assessment [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

### LAUNCH PHASE LEADERSHIP TEAM DECISIONS

**Guide Team Through Shifting Policies, Processes, and Procedures***Who is on the Launch team and how will they be prepared to support implementation?***Create Structure To Make Navigating Shifting Policies, Processes, and Procedures Easier***What tools will make it easier for students, faculty, and staff to navigate the program's policies, processes, and procedures as they are initially implemented and improved over time?***Update and Implement the Strategic Communications Plan***How will the college communicate with stakeholders during this phase to drive them to action?***Finalize and Implement Employer Engagement Plans***How will the college formalize employer partnerships?***Establish Coordinated Technology Infrastructure***How will the college ensure required technology tools are in place, tested, functional, and meeting program needs?***Finalize and Implement New Enrollment Model***How will the college monitor enrollment trends and respond proactively as challenges arise?*





# Guide Team Through Shifting Policies, Processes, and Procedures

Throughout the Design and Build phase, the Direct Assessment CBE Program Leadership, Faculty, and Student Support Teams made decisions related to college policies, processes, and procedures in several areas such as academic calendar, staffing, and prior learning assessment policy.

Local teams likely experienced the complexity of driving innovation within an interconnected system. Your college arrived at a solid plan for the program. Program decisions, timelines, tasks, and roles and responsibilities were all defined and clearly understood. Now the work shifts from planning into action.

## How Managing the Team is Different Before Launch

The months leading up to launch are complex but exciting as your institution begins implementing program decisions. Faculty, staff, and leaders prepare for iteration and experimentation as systems are brought online and prepped to welcome students. Timelines may shift and compromises may be required. The ability to stay flexible, communicate clearly, and adapt quickly is critical.

## How Managing the Team is Different During Launch

All members of the team are practicing new ways of working. This can introduce the need for rapid pivots, new workflows, and quick decision points to keep you on track to enroll students. While these changes may feel fast-paced, they're also a sign that the program is iterating and evolving in real time. It is important for everyone to remember that each improvement is about ensuring the program not only meets the needs of students but **exceeds** their expectations for what education and training can be.



### MAINTAINING FLEXIBILITY IN CONTRACTS

Mt. SAC primarily contracted with adjunct faculty to launch their direct assessment CBE program. Being flexible in negotiations, such as allowing faculty to engage in both direct assessment CBE and traditional models or using workload formulas supported smoother integration.

*Deciding how your college will guide the implementation team during this phase is a key decision that requires careful thought because:*

### Team Members Have Likely Changed

- The team that initially envisioned the potential for this direct assessment CBE program back in the Prepare phase is likely not the same team that is leading the college through the Design and Build or the Launch phases. Beyond the direct assessment CBE working groups, key institutional leaders may have transitioned as well. Expect to bring in new stakeholders who may not have been deeply involved during earlier phases but who are essential to the program's successful rollout. **Confirm who is and isn't on the college's core team and identify other key stakeholders who may play pivotal roles. This is also a good time to ground the new team in the why, what, and who of the program.**

### Institutional Context Has Likely Changed

- A lot of time will have passed between the initial decision to pursue direct assessment CBE and where the college is now. There may be other high-priority initiatives that impact your institution's capacity. Resources may have shifted from (or hopefully to!) the direct assessment CBE program. Consider using the [assessment of readiness for direct assessment CBE](#) to prepare for the launch of the program. Institutional context has a massive impact on capacity and buy-in at all levels. **It will be helpful to think about how institutional change impacts who is on the college's team and what they can accomplish during the Launch phase.**



## EQUITY IN ACTION

*For some institutions, the most challenging part of the Launch phase is making real-time adjustments. The decisions made during the Design and Build phase may have been reasonable and student-centered, and still not be perfect. Sometimes you will need to make changes with imperfect information, quickly, while students are watching.*

Shared principles or guidelines can make it easier to deal with change and ensure your college continues to center equity in these moments.

**Find a mantra.** A philosophy or set of guiding principles tied to your college's vision and reason for launching a direct assessment CBE program can give the team something to ground real-time adjustments. Believing "We don't need to fix everything today, but we can relieve the biggest barriers for students" can help the team focus and prioritize without being overwhelmed by the long list of to-dos. A reminder that "When we feel stretched, we can reach out to our internal partners" can remind everyone to refrain from operating in silos and instead find people in other areas who can be good thought partners.

### Establish a direct line to college leadership.

Consider creating a standard cadence of executive communication to keep the college's high-level advocates connected with successes and challenges. Support from leadership can clear bureaucratic hurdles, expedite time-sensitive approvals, and elevate the need for additional resources. Strive to keep leaders informed but not overwhelmed with details.

**Communicate, then overcommunicate.** This is a critical phase for leadership, faculty, and student services teams to work in sync to ensure a strong launch and sustained momentum. Don't rush through the process of creating a communications plan and keep this core document easy to access and up-to-date. The importance of communication cannot be overstated, so you will see it mentioned repeatedly throughout the Blueprint. See the [Create Structure To Make Navigating Shifting Policies, Processes, and Procedures Easier](#) and the [Implement the Strategic Communications Plan](#) sections in particular for tips. And don't forget to consider how you are communicating with internal and external stakeholders — especially current and prospective students.

## KEY DECISION



Who is on the Launch team and how will they be prepared to support implementation?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Deans (Operational Leaders)
- Faculty Workstream Team
- Enrollment Management Director/Dean and other Enrollment Leads
- Student Support Workstream Team
- Students
- Deans (Academic Leaders)

### IDENTIFYING IMPACTFUL PROFESSIONAL DEVELOPMENT TOPICS

California Direct Assessment CBE Collaborative Colleges had varying priorities for faculty and staff orientation and training.

Southwestern College prioritized counselor training to ensure that staff were fully equipped to navigate the direct assessment CBE model. The college overhauled its transcript system to better align with direct assessment CBE's unique needs and counselor training focused on understanding the specific experiences faced by direct assessment CBE students.

Merced College trained all financial aid staff on direct assessment CBE and assigned specific staff members to handle direct assessment CBE-specific processes such as withdrawals, enrollment changes, and Satisfactory Academic Progress (SAP) monitoring.



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- What staff and faculty will be part of the core team during the Launch phase?
  - ▶ Are there different individuals who are part of the team during the months leading up to launch compared to after launch (when students are active)?
  - ▶ Have internal stakeholders been oriented to the new program structure?
  - ▶ What information will be provided to the team members to support implementation (i.e., revised policies, processes, timelines)?
  - ▶ Do each of the team members have specific responsibilities (i.e., admissions, transcripts, counseling, etc.)?
  - ▶ Do the staff and faculty have a clear understanding of their roles and responsibilities?
- How will you sustain buy-in and energy?
  - ▶ What is the sentiment of internal and external audiences toward direct assessment CBE?
  - ▶ Does the program still have buy-in from leadership?
  - ▶ How will the college recognize, monitor, and address signs of change fatigue among faculty and staff?





## Example Activities

Here are some example activities and resources to help answer the key questions and supporting planning questions above.

### Reevaluate roles and responsibilities to accommodate personnel and institutional changes.

- Update the Team Charter to reflect new team members. Use the [Direct Assessment Competency-Based Education Implementation Team Charter template](#) to create a new charter if necessary.
- Update the college's communication plan to reflect new team members. Use this [Communication Plan template](#) to create a new plan if needed.

### Leverage external consultants strategically to increase local capacity. Identify external consultants who can support the college during Launch.

- Consider this strategy as the college implements new policies or processes such as dual transcript, or during other complex transitions (e.g., helping with a big marketing and recruitment push, providing project management for technology implementation).

### Develop or update onboarding materials to orient new team members.

- Create or update an orientation packet or digital resource hub with essential materials for communicating to new and existing stakeholders such as this [Team Member Orientation Checklist](#).
- Compile key documents outlining program decisions and justification such as the [year 1 workplan](#), [financial aid decision-making matrix](#), [academic calendar decision-making matrix](#), [OVIS chart](#), and [RACI chart](#).

### Ensure all team members, including those deeply involved in the design of the program and those newly engaged for the Launch phase, understand the why, what, and who of the program.

- Review the [Develop Faculty Orientation and Professional Development](#) section and [Faculty Training Topics resource](#) for ideas on orienting and training faculty. Review the [Develop Student Support Staff Orientation and Professional Development](#) section for ideas on orientating and training support staff.

- Ensure all team members understand the college's equity-centered vision and how the program aligns with [Vision 2030 Goals, Outcomes, and Metrics](#).
- Consider using the [Direct Assessment CBE Equity Framework](#) section of this Blueprint and other resources such as the [recent edition of the Vision 2030 report](#) to help structure a conversation about alignment with Vision 2030.
- Discuss the key decision decisions that shape the college's approach to direct assessment CBE.
  - ▶ *Identify those faculty and staff who will be involved in implementation who were not included in direct assessment CBE development teams or previous conversations, as they may need extra onboarding support (e.g., data analysts, academic counselors, student services, IT support, etc.).*
  - ▶ *Onboard faculty and staff to new policies, processes, and procedures so they understand how the program is designed and can effectively support students (i.e., what makes this offering different from others and how do those differences center students).*
  - ▶ *Consider how onboarding activities are aligned across functional areas to minimize repetition and create space for more area-specific conversations where needed.*

### Put staff transition contingency plans in place to avoid interruptions to Launch.

- Develop a list of potential substitute faculty and staff with the unique expertise needed to support direct assessment CBE.

## CHANGE MANAGEMENT

Use a change management framework to help think through how to guide your team through last-minute pivots, while anchoring them in the program's vision and equity goals. Many popular change management frameworks for the education sector include some variation of these [common change management principles](#).



## Create Structure to Make Navigating Shifting Policies, Processes, and Procedures Easier

As discussed in [Guide Team Through Shifting Policies, Processes, and Procedures](#), before and during the Launch phase, decisions are moving from plans to reality. Systems turn online, students begin enrolling, and real-time adjustments begin. Clear structures for coordination, documentation, and communication will ensure that your program operates smoothly and that refinements occur efficiently and transparently.



### Why Structure Matters Before and During Launch

Revising your processes and workflows during the Launch phase ensures the team is equipped with shared systems that make decisions visible and actionable. *There are additional benefits to creating an intentional and predictable structure, including:*

- Ensure that the program operates smoothly
- Encourage transparency by making it easier to share information
- Streamline troubleshooting processes
- Encourage sustainable resource management
- Mitigate and manage risk
- Support efficiency by reducing duplication of efforts
- Align cross-functional teams and other stakeholders, including students
- Create lasting institutional knowledge to scale beyond one program

During this phase, because the team has shifted and the focus is no longer on planning but on implementation, you must decide how to adapt existing college tools and the ones presented throughout this Blueprint to the your local context and create project management tools that align with the your institution's working culture and current challenges.

Consider the following elements to help ensure you have tools to enable clarity and coordination during the Launch phase.

| STRUCTURAL ELEMENT                              | PURPOSE                                                                                      |
|-------------------------------------------------|----------------------------------------------------------------------------------------------|
| Decision Trackers                               | Maintain consistent documentation of choices, rationales, and updates                        |
| Standardized Workflows and Process Steps        | Clarify steps, ownership, timing, and handoffs                                               |
| Shared Communications Plan                      | Ensure the right people receive updates at the right time                                    |
| Issue and Resolution Tracking                   | Capture feedback, surface patterns, and prioritize improvements                              |
| Establish Coordinated Technology Infrastructure | Ensure required technology tools are in place, tested, functional, and meeting program needs |
| Enrollment Tracking                             | Monitor enrollment trends and respond proactively as challenges arise                        |



## EQUITY IN ACTION

Every change to college policies, processes, and procedures made for a direct assessment CBE program should be designed to alleviate student burdens and increase equity in access and success. Strategic use of project management tools can help your college continue to center the experience of students as you roll out new ways of doing business.

**Create space for students to discover, learn about, question, and provide input on new policies and procedures to ensure they remain student-centered.** Seeking input and feedback from prospective, current, and former students during design, testing, and launch can help ensure decisions are grounded in what real students need and want. A tool like a feature request board or form can help you collect feedback in a structured way, and standardized documents like periodic program change newsletters and memos can help show students that their input is making a real difference in how the program is run.

**Be transparent about changes impacting all students vs. those impacting only direct assessment CBE students.** One of the most trusted sources of information for students is other students! While this can often be an advantage, direct assessment CBE students are going to experience the college in a way that most of their

peers won't — yet. An up-to-date [communication plan](#) is a critical tool for ensuring your institution has developed clear messaging about which policies and practices apply only to direct assessment CBE students. It also ensures that you have a plan for who to communicate with and when to minimize confusion. A shared calendar such as this [Launch Timeline Template](#) showing key dates and a timeline for program updates can also be a helpful tool for greater transparency.

**Align student grievances and appeals procedures with new policies.** Traditional grievance processes and timelines may not apply to direct assessment CBE programs. This is especially true in the college's first terms, as shifts are still being rolled out or when policies offer temporary flexibility. Consider ways to provide direct assessment CBE students with expedited review of concerns using existing feedback channels or create a new process such as offering this [direct assessment CBE Student Feedback Form](#).





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## KEY DECISION



What tools will make it easier for students, faculty, and staff to navigate the program's policies, processes, and procedures as they are initially implemented and improved over time?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Deans (Operational Leaders)
- Faculty Workstream Team
- Enrollment Management Director/Dean and other Enrollment Leads
- Student Support Workstream Team
- Students
- Deans (Academic Leaders)



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- What information needs to be communicated to which internal and external stakeholders and when in order to avoid unavailable or siloed information?
- Which existing systems can be adapted and which require new tools?
- What risk, organizational barriers, or capacity challenges may slow down implementation?
- What processes are in place for real-time troubleshooting? Where are those processes documented?
- Have risks been identified and documented using a tool like a risk matrix or risk register? Does the college have contingency plans and/or risk mitigation strategies in place?
- How will the college evaluate the effectiveness of the tools and strategies for students, faculty, and staff?



## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Review this [Tool Recommendation Chart](#) as the college begins to consider how to create structures that make navigating shifting policies, processes, and procedures easier.**

**Align with current local practices, existing reports, standing meetings, and well-used tools for managing the launching of programs to ensure clear communication with key stakeholders.**

- Use the same format for internal reports to reinforce expectations (i.e., ensure information is presented the same way throughout the launch so that stakeholders are not constantly adjusting to new report formats).
- Build processes so that reportable data is collected automatically or is a required manual step. Data collection should not be optional and it should not be done retroactively.

**Update decision trackers created during the Design and Build phase, such as the [Financial Aid Decision Matrix](#) and [Academic Calendar Decision Matrix](#) or leverage new tools to document decisions, such as this direct assessment [CBE Program Design Decision Matrix](#).**

- Review this [Coastline Decision Tracker Example](#).

**Ensure the college's [workplans](#) are comprehensive yet remain flexible enough to accommodate unexpected shifts and that they are structured enough to avoid unavailable or siloed information.**

- Build in periodic feedback cycles to capture input from students and other stakeholders, review findings, and make improvements. It may be helpful to align these with standing meetings or existing evaluation processes, provided they happen frequently enough to permit timely adjustments during the Launch phase.
- Add a recurring task for periodically reviewing risks and contingency planning. Consider using this [risk matrix or risk register template](#). (Note: Your institution likely has an overarching risk management plan that provides a shared approach to risk management across programs, but does not name the specific risks of this new direct assessment CBE program.)

**Complete this [Scenario Planning Exercise](#) with the college's team to inspire ideas for improving workflows through strategic use of tools.**

**Create checklists to provide staff with a clear way to ensure they complete all of the steps in critical processes, such as this [Pre-Launch Technology Go-Live Checklist](#).**

**Create systems for rapid issue resolution.**

- Use an [Issue Tracker](#) to document issues and help ensure timely resolution.
- Analyze reported issues periodically to determine if there are broader challenges with particular processes or systems (e.g., if 15 students report issues with the LMS, that might indicate a broader challenge).

**Set a bimonthly or quarterly cadence for budget review and begin to discuss transition to sustainability.**

- Remember budget and finance team members may need to know if the college makes changes to the design of the program that impact cash flow (e.g., changing enrollment dates, changing staffing structure, etc.). Even if the college has a generous budget for the launch, tracking the ups and downs that happen during this phase will help the college's team answer questions about what to expect in the future.

**Consider how technology can be used to make the college's project management more efficient.**

- Review this resource on [leveraging technology](#).



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# Update and Implement the Strategic Communications Plan

As discussed in the [Design and Build: Develop a Strategic Communications Plan section](#), strategic communications are vital for cultivating and maintaining strong relationships with both internal and external stakeholders. During development, the primary purpose of strategic communications is to build awareness and to foster a sense of unity, shared purpose, and increased engagement.

For external stakeholders like students, employer partners, and the general public, strategic communications help to build trust and credibility. They shape the perception of the program before enrollment even opens and allow the college to weave a consistent narrative about potential impacts.

## How Strategic Communications Are Different During the Months Leading Up to Launch

In the months leading up to launch, the purpose of strategic communications expands. Some communications continue to be about sharing the program goals, values, and potential value with internal and external audiences (building awareness). However, the main focus of shifts to strategies and messaging that move key audiences to act — namely moving prospective students to enroll.

## How Strategic Communications Are Different After Launch

*As you formally launch a direct assessment CBE program, communication that supports enrollment, impact, and partnership becomes even more central. The college needs:*

- Students to enroll, engage, meet their goals, and appreciate the experience so much that they return the next semester and recommend the program to others
- Direct assessment CBE faculty and staff to believe in the principles of the program design, leverage their expertise to provide quality service, and champion direct assessment CBE
- External partners to support the program through increasingly deeper levels of partnership
- College leadership to see a return on their initial investment, celebrate the launch, and support the sustainability and growth of direct assessment CBE programs at the college

More specific segmentation may be necessary for other groups of internal stakeholders (faculty, staff, college leadership) and external partners. Reference this [Audience Table](#) as the institution refines strategic communications.

As you define audiences, the team can lean into personas for clarity. (See the [Map Out Student Journey section](#). Personas are fictional characters based on the demographic data of a group (i.e., the college's typical student or the college's average employer partner). The college can create a persona for each subsegment to help shape communication plans. The [Empathy Map](#) tool in particular may help you uncover traits of each audience that can influence communications moving forward. This exercise is a great way to kick off deeper engagement with the marketing and communications team.





## EQUITY IN ACTION

*The work of strategic communications is only partly about the words used on paper. Where, who, and how you engage internal and external stakeholders are all part of a strong overall strategy and can bolster (or hinder) goals around equity in access and support.*

**Engage a diverse group of employers and community partners to support outreach and recruitment.** These external partners are critical players during design but can also be vital during early outreach and recruitment. Engage organizations and businesses from different areas of varying sizes to ensure you are reaching a broad pool of prospective students. Shasta is growing slowly, but is leaning on existing partnerships to support recruitment of their target population. See their [launch story](#) for more.

**Don't forget to contact partners not typically engaged in education and workforce conversations.** Try to expand the reach of communication to communities not typically included in outreach. This can be a strategy for building and diversifying partnerships and recruiting students from typically untapped markets.

**Decide how the college will position itself as an equity champion in broader conversations.** Sharing how the college has centered equity in

the design of the direct assessment CBE program can drive deeper conversations about centering students. Southwestern was able to weave their direct assessment CBE work into narratives they had built around serving adults and equitable credit for prior learning. See their [launch story](#) for more.

**Be strategically transparent about unknowns during the Launch phase.** As things shift during the launch, messaging may need to change to align with new information. You must communicate changes with external partners to prevent misunderstandings and improve coordination. Being transparent about what the college does and doesn't know can go a long way in preserving trust.

**Determine what implementation challenges are able to be solved in partnership with external stakeholders.** Partners enhance your capacity. Ensure communications create space for and support ongoing collaboration. For example, could the team send communications about low recruitment numbers to partners to help gain their support with outreach?



## KEY DECISION



**How will the college communicate with stakeholders during this phase to drive them to action?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- College Leadership (President and Cabinet)
- Director of Marketing and Public Relations
- Board of Trustees
- Deans (Academic Leaders)
- Deans (Operational Leaders)
- Enrollment Management Director/Dean and other Enrollment Leads
- Students



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.*

- What is the current sentiment of internal and external audiences to direct assessment CBE?
- Where is each audience in their relationship with the direct assessment CBE program and the college?
- What messages are most important to convey prior to launch and during launch?
- What messaging resonates with targeted audiences, especially prospective students?
- What types of content and communication channels might be most effective for reaching this audience? (e.g., how will the college provide talking points and comms resources to internal stakeholders, employers, education partners, others?)
- How will the college communicate with stakeholders as implementation challenges occur? Does the college have a means for pivoting or making revisions when needed?



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## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Orient marketing and communications team members who are unfamiliar with the direct assessment CBE program so that they can support updates to the college's communication plan.**

- Consider repurposing orientation materials from earlier conversations. See [Guiding Your Team Through Shifting Policies, Processes, and Procedures](#) for more ideas on orienting new team members.
- Discuss the logistics of immediate deliverables (e.g., setting up a webpage, developing flyers and one-pagers, etc.).
- Add key deliverables and related tasks to the college's workplan.



**Share relevant resources from the Design and Build phase to help orient team members.**

- See this example on how [Mt. San Antonio College presented an update on their ACCJC application to campus leaders](#).
- Use the [provided PowerPoint template for faculty-focused communications](#).
- Incorporate stories and narratives to showcase the impact of direct assessment CBE on students, staff, and faculty, leveraging [C-BEN's A Strategic Storytelling Toolkit](#). In particular, see the Audience Message Alignment Tool on page 10 to workshop what key messages need to be communicated to various internal and external stakeholders.

**Review the college's Communications Plan and materials developed during the Design and Build phase to ensure they are still accurate and complete.**

- Review these plans with marketing and communication team members after they are oriented to ensure they can participate effectively.
- Revisit the planning questions in [Develop a Strategic Communications Plan](#).
- Update plans for convening faculty, staff, and external partners to build awareness and support for the program. If the college has already held some meetings with internal groups, adjust the college's comms plan based on their feedback.
- Vet targeted messaging and value propositions with representatives of each stakeholder group, including students.
- Bias the plan toward over-communicating with everyone — faculty, staff, students, and partners who might be affected by shifting policies, processes, and procedures.
- Consider using a FAQ format to communicate critical information to stakeholders such as this [Coastline Program Introduction](#).
- Create a list of policies that have been adapted or adjusted as a reference. Consider including policies that have not changed on this list. The format of the ["Policies and Procedures Review: Competency-based Education"](#) report produced in 2025 may be a helpful format as you think about how to communicate through FAQ and other documents.



**Codesign messaging with key audiences such as current and prospective students to ensure the language used in communications is accessible, clear, and motivational.**

- Determine what messaging motivates prospective students to enroll in the program. Some direct assessment CBE Collaborative colleges found that messages about personal accomplishment and family responsibility motivated students more than information about potential financial gains.
- Conduct focus groups with prospective students and other stakeholders to refine messaging that connects with these intrinsic motivators.

**Develop a plan for addressing unexpected changes and implementation challenges directly with stakeholders to preserve trust and ensure speedy resolutions.**

- Create channels for communicating challenges to college leadership as well as relevant deans, directors, and managers to streamline solutioning.
- Build in a structure for regular communication on a weekly, biweekly, and/or monthly cadence with key stakeholders to ensure consistent access to information and transparency.

**Proactively collect stories from students, faculty, and staff so the college has content when needed.**

- Get written permission to use student stories as soon as possible. Be sure to get photos to go along with quotes and narrative. Students, especially those who are preparing to graduate, can be hard to reach.
- Repurpose stories for different audiences to get the most out of this valuable content.
- Check out these sample videos featuring students attending [Coastline College's Pace+ program](#) or [Western Governors University](#).
- Consider how an explainer video can weave stories and personal experiences into an explanation of the program model such as this video from [UMass Global](#).

## SHARE A DIRECT ASSESSMENT CBE JOURNEY

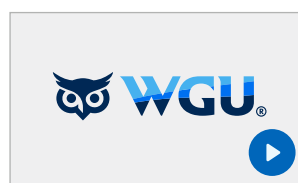
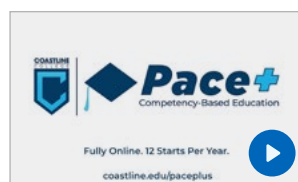
**Connecting with state and national conversations about direct assessment CBE provides a platform for the college to celebrate successes and elevate challenging experiences to key leaders.** These conversations can lead to additional support for the local implementation team (i.e., meeting peers at other organizations, learning about flexibility in rules and regulations from others, funding, etc.).

The visibility of new programs also contributes to broader conversations about the model, which can inspire other institutions and policymakers to create favorable conditions for direct assessment CBE.

**Not sure how to tell your institution's story?**

[C-BEN's A Strategic Storytelling Toolkit](#) provides a comprehensive guide for building a compelling story that appeals to various internal and external stakeholder groups.

## VIDEOS





## CELEBRATE ALONG THE WAY

*Celebrating successes and milestones throughout the Launch phase has multiple benefits.*

- Recognizing milestones, no matter how small, validates the hard work and effort of your team. Acknowledging their efforts can help prevent burnout and keep the team engaged.
- Sharing stories from the direct assessment CBE program builds a sense of community and belonging, boosting morale for everyone involved, from students to staff and external partners.
- Publicly celebrating achievements demonstrates confidence in the program's impact. When goals are met or a student achieves a personal breakthrough, these successes serve as tangible proof that the model works. This evidence is vital for securing continued funding, gaining institutional buy-in, and attracting students.

*Celebrating success is a strategic tool for managing a new program's complexities and setting it up for long-term sustainability.*

## Ways to Celebrate

### INTERNAL CELEBRATIONS



**Team Acknowledgments**



**Countdown to Launch Calendar**



**First Student Enrolled Milestone**

### EXTERNAL CELEBRATIONS



**Ribbon Cutting Ceremony**



**Program Launch Party**



**First Graduate Feature**



**Board/Trustee Recognition**



# Finalize and Implement Employer Engagement Plans

The Leadership Team first began exploring employer engagement in the Prepare phase with a focus on [Mapping External Partners](#).

Multiple sections of the Design and Build phase focused on ways that employers could serve in new and more integral roles, including:

- [Identifying assessments or validating ones developed by faculty](#)
- [Providing feedback on competencies, curriculum design, and programming](#)

## How Working With Employers Is Different During the Launch Phase

*During this phase, employers may be engaged in:*

- Recruiting and onboarding participants for incumbent worker training that leads to promotion for existing employees
- Supporting students directly, such as through an employee assistance program or additional career counseling
- Offering work-based learning experiences, including field work, paid internships, apprenticeships, or direct employment for recent graduates

These roles require more consistent engagement and longer-term commitments. When partners do not agree to a documented scope of work there can be confusion or delays down the line. For these reasons, it is recommended that colleges formalize employer partnerships in a letter of commitment, partnership agreements, memoranda of understanding, or similar document.



*Regardless of the format selected, this agreement should specify:*

- Shared goals
- Points of contact at the college and the employer
- Roles and responsibilities of each
- Principles or processes for engaging with students
- Timeframe of commitments
- Costs associated with the partnership, if any
- Conflict management procedures
- Job placement and employer hiring commitments

While all of these terms may be laid out in previous agreements, explore whether any of these factors differ, given the structure of the direct assessment CBE program.



## KEY DECISION



**How will the college formalize employer partnerships?**



## EQUITY IN ACTION

*Partnering with employers helps students. These partnerships strengthen program alignment with workforce needs and facilitate the creation of roles where students and graduates can gain experience, including work-based learning and employment. To ensure you can leverage employer partners to drive equity in access and success, consider the following tips for structuring employer agreements.*

**Don't be afraid to discuss the scope of commitments.** Negotiation plays a key role in partnerships between colleges and employers. Strong negotiations foster long-term collaborations that support sustainable workforce development.

**Choose the least restrictive form of agreement necessary to provide clarity and structure when possible.** Many employers, especially small and medium employers, lack staff dedicated to partnership management. They may not have staff equipped to review full contracts. Balance the college's need for risk management with the ultimate goals of developing partnerships; a [risk matrix or risk register](#) can help you initially map risks and discuss pros/cons of different partnership approaches. If your district has strict guidelines for the form of agreement necessary, this could be an opportunity to elevate the need for more flexibility or an exemption for the first term(s).



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Deans (Academic Leaders)
- District Leaders or Multi-Campus Leads
- Employer Partners
- Equal Opportunity and Diversity Office
- Professional or Licensing Bodies



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.*

- What will employers do to support implementation?
- Who needs to review and approve formal agreements?
- How will the partnership's performance and impact be measured and evaluated?
- How will the partnership be terminated or renewed?
- How will the college ensure that the partnerships are equitable and inclusive?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Revisit relevant resources from the Design and Build phase.

- Review C-BEN's [Employer Engagement Best Practices Toolkit \(2022\)](#) to develop targeted messaging and value propositions for employers and workforce needs.
- Review the [Employer Engagement in CBE deck](#) for additional ideas on engaging employer partners.

Consider using [this resource on Formalizing Employer Partnership Agreements](#) as a starting point if the college does not have a standard agreement format.

- [C-BEN's Employer Engagement Toolkit](#) includes several sample agreements that can also serve as inspiration.

**Review any existing templates or letters of commitment, partnership agreements, memoranda of understanding, contracts, and other similar documents between the college and external partners that impact the direct assessment CBE program.**

- Discuss different scenarios that could lead to changes in the structure of partnerships and these agreements. Ensure agreements protect against worst-case scenarios.
- Define reasons and processes for growing or terminating partnerships in every agreement.

### Build a close working relationship with each partner to build familiarity and strengthen collaboration.

- Work with each employer partner to identify a dedicated point of contact with whom a regular communication cadence can be established. Share how the college structures the direct assessment CBE program team, and encourage the point of contact to facilitate a parallel decision-making team at their company.
- Strive to understand the hierarchy and culture of employer partners so that the partnership can be aligned to maximize buy-in. Ask the partner about strengths, weaknesses, motivations, needs, and goals.
- Continuously evaluate the fit of the partnership to protect the institutions' interests. Track the relationship and use information about positive and negative interactions to make adjustments.

**Streamline communication across multiple employers by working through existing advisory committees, chambers of commerce, industry associations, and other groups where multiple employers are gathered.**

- Discuss the direct assessment CBE program vision and goals, key decisions, status (impact), and ideas for sustainability and growth. Employers can reflect on the program in these spaces or contribute to design and development brainstorming (e.g., if demand in the program is high and the college has opportunities to admit more students, discuss how the pipeline growth aligns with industry trends).
- Schedule fewer meetings by combining conversations across multiple groups when possible.
- Revisit [Update and Implement the Strategic Communications Plan](#) for more tips on communicating with employers.





# Establish Coordinated Technology Infrastructure

There are several aspects of technology decisions that are repeatedly reinforced throughout the Blueprint in [Determine Resources and Capacity](#), [Assess Technology Needs](#), [Determine Coordinated Technology Infrastructure](#), as well as embedded in other sections.

**Technology is a tool and should be used to solve operational challenges.** Technology should not determine approaches to teaching or supporting students.

**Technological infrastructure changes are some of the largest and most difficult to execute.** Due to the costs and extended timelines for implementation, decisions around technology solutions should be made early in the [Design and Build phase](#).

**It is critical to include IT team members in early decision-making processes.** IT team members can lead or support procurement of new systems, identify new processes using existing technology, secure significant buy-in from campus stakeholders, and begin the process of configuring different tools.

**Secure buy-in for technology from college leadership early on.** Leverage this support to secure funding.

## How Managing Technology Is Different In the Months Leading Up to Launch

Depending on what systems you are implementing, including applications and integration decisions, it can take up to nine months to finish **setup of key systems** and **prepare people** to use these tools.

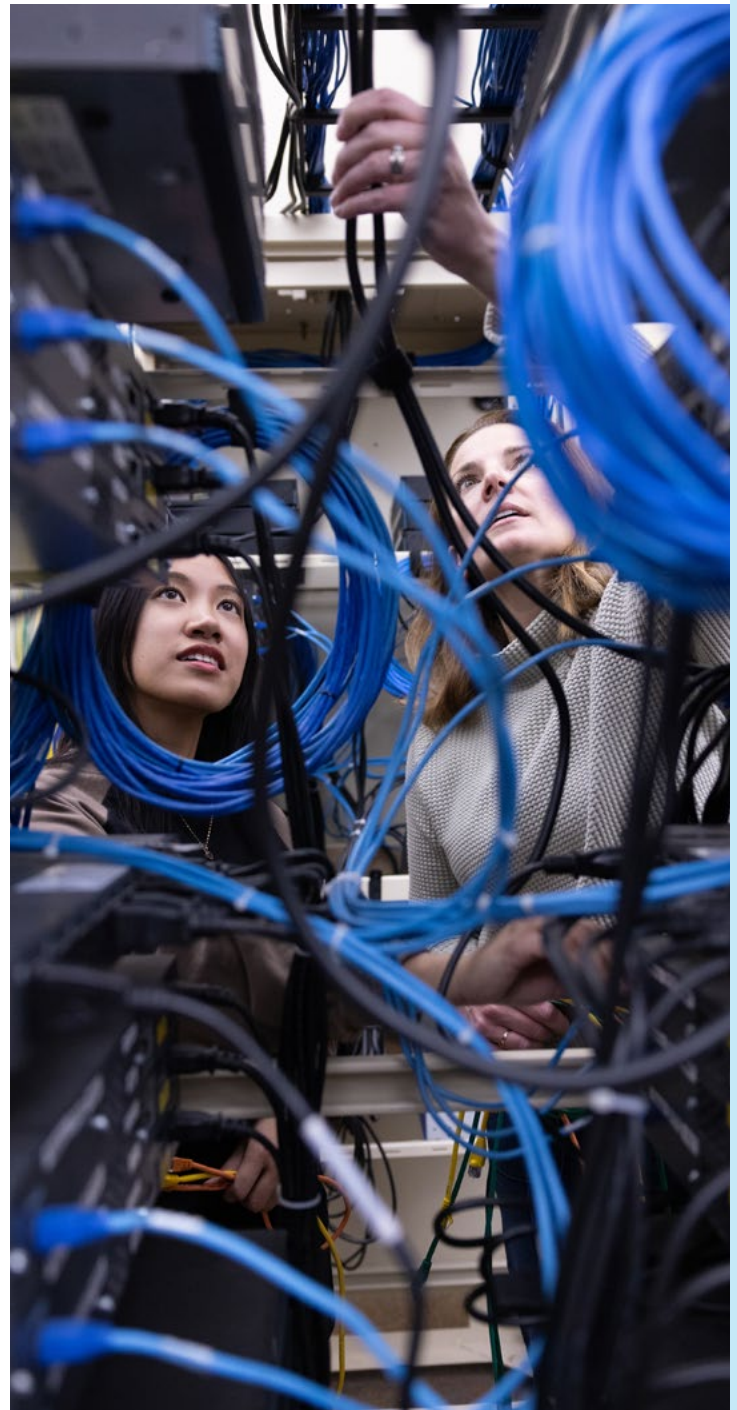


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Consider these tips for implementing new systems and/or new processes for existing systems as the college enters this phase:

**Document thoroughly before making changes.** Record current configurations, roles and permissions, access instructions, storage locations (including backups), and how data is currently managed. Ensure this documentation is accessible to anyone involved in the transition.

**Track key changes during setup.** As the college implements new systems, document changes to default settings, any customizations, and who holds admin, superuser, or poweruser permissions.

**Plan for training and support.** Ensure all users receive adequate training and consider budgeting for enhanced support during the first year or two. Time your training and support so relevant users are prepared to start on day one of the launch.

**Don't replicate processes that don't serve students.** Avoid simply copying and pasting existing processes into the new system. Use this opportunity to streamline and improve.

**Prioritize user experience.** Ask end users where friction exists and address those issues quickly.

**Stay grounded in the college's goals.** Revisit the college's original purpose for adopting the system and stay focused on it.

**Define success early.** Establish implementation success metrics such as user adoption, efficiency gains, and reduction in errors.



## EQUITY IN ACTION

*Technology can reduce barriers to education, creating greater access and deepening available supports. However, without careful implementation and attention to individuals' comfort and competence with technology, tools may become barriers rather than supports.*

**Conduct a final accessibility/inclusion check.** As discussed in [Determine Coordinated Technology Infrastructure](#), it is critical to validate that the technology ecosystem meets broad needs and does not create barriers. Changes to settings or permissions can impact the availability of accessibility features, so be sure to run a check before launch. This process can include tapping experts from IT as well as disability services and the Library to conduct a structured review. Of utmost importance for direct assessment CBE programs is the accessibility of any tools used for summative assessment as every student needs to be able to show what they know and can do.

**Include people outside of IT to test systems.** Working with different types of stakeholders like system administrators, program managers, staff support personnel, and student users, test systems can reveal common questions, challenges, and preferences. Use this information to adjust systems to align closer

with the way people work and to design support (e.g., trainings, recorded tutorials, written manuals and how-to guides, etc.). Be sure to engage some testers who fit the profile of the target student population; they may catch things that others might not.

**Support manual data entry.** While technology can ease and simplify many processes, the nuances of a given direct assessment CBE program design can create a situation where manual data entry is necessary (e.g., integrating competencies into transcripts can involve significant manual entry). Acknowledge the burden that staff are taking on and provide support so these tasks are easier for them to complete in a timely manner. And as part of continuous improvement processes, strive to reduce the amount of manual data entry. Don't forget to document any processes you create to ensure clarity and to help with future troubleshooting.

## KEY DECISION



How will the college ensure required technology tools are in place, tested, functional, and meeting program needs?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Student Support Workstream Team
- Chief Information Officer and other IT Leads
- Data Governance
- Deans (Academic Leaders)
- Deans (Operational Leaders)
- Enrollment Management Director/Dean and other Enrollment Leads
- Institutional Effectiveness, Data, and Research
- IT System Managers: LMS, SIS, Data, Fin Aid, CRM, Student Support, Transcripts, etc.
- Professional Development Office or Committee
- Students



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- Will the college implement any last-minute system checks, including interoperability checks to ensure new technology solutions interact effectively with existing systems? Do these checks require downtime?
- Is tech support lined up for students, faculty, and staff?
- Is the college prepared to onboard students, faculty, and staff to tech? (See [Design Enrollment Model](#); [Develop Faculty Orientation and Professional Development](#); and [Develop Student Support Staff Orientation and Professional Development](#)).
- What will user testing look like and how will feedback be captured?
- If systems don't operate, how will issues be documented? Who is responsible for determining solutions?
- How are cybersecurity and accessibility being handled?
- What guidance can your vendors provide around installation, implementation, testing, and training? Ask vendors how they can help with installation, implementation, testing, and training. Do your vendors charge extra for this support?



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## SPOTLIGHT: COASTLINE COLLEGE



## COASTLINE COLLEGE'S EXPERIENCE WITH REGENT

In many cases, you will need to adopt a new financial aid management system in order to meet the college's equity-related goals for direct assessment CBE. At Coastline College, the decision was made early on to prioritize subscription-based financial aid, which required a new financial aid management system. The system had to be integrated into Coastline's SIS (Student Information System), went through cybersecurity review, and needed to meet all of the college's requirements for financial aid processing as laid out in the Department of Education Application. Then, all staff had to be trained on the new system.



Faced with such a large project, Coastline brought on a dedicated project manager to work directly with the [Regent Education team](#). The project requires regular meetings of decision makers from Financial Aid, Enrollment Services, Information Technology, and Instruction and also takes significant staff time from Information Technology, Financial Aid, and Enrollment Services. Many decisions are made during this piece of the project that have cross impacts, and vice versa. During multiple points, work had to pause for decisions that

would have cross impacts. For example, a two-week pause occurred because of an unanticipated systems integration issue.

Coastline planned to schedule their courses in the SIS to remain "open" for a year. The open course decision was made so that student work could be retained in Canvas from one term to the next. This allows students to pick up where they left off and continue their work in the subsequent term, a key equity-based benefit of direct assessment CBE.

However, during implementation of Regent, it was discovered that leaving the courses open would result in inaccurate end dates for students when they completed a course, causing issues for financial aid administration and processing. During the pause, discussions were held with key stakeholders, cross impacts were identified, and Information Technology created a solution through custom programming to take the SIS output and add in the exact date the student completes the competency course.

Overcommunication, staff responsiveness, strong relationships both internally and externally, and flexible planning were all required to implement this system.





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Revisit relevant resources from the Design and Build phase.

- Use [C-BEN's Considerations for CBE Technical Architectures in Postsecondary Education](#) to identify national best practices.
- Review [Coastline College's online library management system](#) as a model for developing an effective online library resource.
- Review the [California Virtual Campus Analysis & Recommendations for CBE Technology 2023-2024](#).

## DIGITAL LITERACY IS KEY

**Basic computer literacy is essential for students, faculty, and staff, as it ensures everyone will be able to navigate key systems.**

This is especially important for fully online or hybrid programs. Without this foundational knowledge, the risk of technology-related challenges increases.

You can ensure students and personnel are prepared by building digital literacy into coursework and professional development experiences. For example, Merced College has a Technical Literacy competency that ensures students have basic computer skills (basic word processing, spreadsheet skills, internet usage, etc.). They also emphasize faculty training on Canvas capabilities to design direct assessment CBE-aligned courses, utilizing features like competency tracking and modular design.

### Review and refine processes and procedures for common activities to ensure the college is optimizing technology.

- Create opportunities for users and IT team members to discuss workflows and common tasks, so that the features and capabilities of the system can be explored and used to the fullest extent (e.g., setting up new users, changing permissions, troubleshooting outages, etc.).
- Test all systems and then test them again. Work through the student journey and test how each system interacts along the way.

### Prepare to provide general support and technical assistance on new systems.

- Update documentation on system configuration including details such as diagrams and justification for settings, as needed, to ensure IT staff understand the system's design.

### Conduct student and faculty/staff training to ensure they can use new systems.

- Plan to offer both cross-functional, large group training and targeted training by system or role (e.g., training financial aid staff on Regent). The goal should be to have sessions where faculty and staff are able to learn and discuss system processes together and opportunities for diving deeply into the nuances of a particular tool/workflow.
- Refer to the [CBE for Canvas Training Guide](#) developed by the California Direct Assessment CBE Collaborative for ideas on training users. This resource provides training for the use of Canvas for direct assessment CBE, and can serve as an example of one method to offer training — live Zoom sessions that are recorded for later use.
- Refine tech support knowledge bases and prepare support staff to provide support. Consider the use of a formal help desk system (e.g., Zendesk, Zoho desk) that can automate the delivery of assistance and documentation of reported problems.
- Test systems with small groups of current and potential users to ensure functionality and collect final recommendations for configuration.

**Prepare to address gaps in student, faculty, and staff digital literacy to ensure technology can be effectively utilized.**

- Develop an assessment for determining students' familiarity with your institution and to open the door to understanding their technology needs. Shasta College asks students:
  - ▶ *What is the name of the early childhood education setting where you work?*
  - ▶ *What county do you work in?*
  - ▶ *Have you previously or are you currently taking ECE coursework?*
  - ▶ *Are you a current Shasta College student?*
  - ▶ *Are you a former Shasta College student?*
- Ensure students, faculty, and staff have access to appropriate equipment. Some colleges offer “loaner” laptops to students who need them. The CCC Foundation offers a low cost Wi-Fi hotspot device through [California Connects](#).
- Use existing or identify free and low-cost digital literacy learning modules to support just-in-time learning.
  - ▶ <https://www.digitalliteracyassessment.org>
  - ▶ <https://applieddigitalskills.withgoogle.com/s/en/learn>
  - ▶ <https://meducationalalliance.org/global-digital-literacy>

**Develop a process for reviewing the functionality of technology with a test scheduled at least three months before the first day of class to prevent unexpected issues with access.**

- Review this list of [prelaunch considerations and tasks](#).

**Develop a continuous improvement process for your technology ecosystem that monitors use statistics and tickets to identify changes that will improve performance.**



## KEEPING UP WITH CHANGES IN FUNCTIONALITY

Technology changes rapidly — tools that the college has been using for years roll out new features, user interfaces may change, settings may move location. The pace of change has not slowed with the proliferation of artificial intelligence (AI)-driven tools.

For example, [IgniteAI](#) is a Canvas tool that brings all AI tools together in a single location, making it easier for faculty to find them. While some tools like Smart Search Improvements, Rubric generation, and grading assist are available now, others will be released over time. Check out this [Instructure press release](#) for more information. The California Virtual Campus will share recommendations with colleges about settings, new features, and opting in or out.

**Make sure that you periodically review technology to keep track of these changes and update training and support materials accordingly. Consider establishing a dedicated task force or team that meets on a regular basis (e.g., two times a month) to address tech changes and challenges.**



# Finalize and Implement Enrollment Model

In [Design Enrollment Model \(Recruitment, Admissions, and Orientation\)](#), you designed a model to match the unique features of direct assessment CBE, moving away from fixed terms and batch admissions to more flexible, student-driven entry points. In the Launch phase, this model now gets tested.

## Fine-tuning Recruitment

Before launch and early in the first term, the college will **implement and assess the success of the enrollment model** based on student interest, enrollment, and successful transitions to active learning.

If outreach and recruitment efforts are not yielding expected results or students are dropping out of the pipeline before enrolling, it will be necessary to make adjustments to your recruitment plans. Take the time to define success metrics such as the number of students who matriculate, number of days from initial inquiry to enrollment, or persistence in the program (i.e., three months, six months).

## Before Making Adjustments

Consider whether the direct assessment CBE program may have different peaks and valleys of enrollment due to the flexibility of start dates. If your first term start date aligns with a traditional fall/spring start date, then it may be necessary to wait two plus months to determine if students are finding the program outside of traditional peak enrollment windows. Sometimes it takes time to get the word out.

*If a change in strategy is deemed necessary following the assessment period, you can address recruitment challenges in several ways:*

- **Expand outreach to more markets** (i.e., recruiting more people from more places such as leveraging targeted advertisements in a specific geographic region)
- **Shift outreach to different markets** (i.e., recruiting different people from different places)
- **Increase the frequency of recruitment events and other promotional activities** (i.e., being more visible, offering college swag, etc.)
- **Change key messages** (i.e., talking about the value of the program differently)
- **Offer financial incentives** (e.g., scholarships, gift cards to the bookstore, etc.)
- **Leverage partners and alumni to recruit** (e.g., cultivate a pipeline from a particular partner, explore whether a different messenger shifts the behavior of prospective students)
- **Increase targeted and personalized outreach** (i.e., use direct, personal outreach to engage with the college's audience and understand what would motivate them to enroll, offer additional individual coaching sessions, etc.)
- **Improve the style, quality, or format of collateral** (e.g., more casual social media posts featuring students, more video-based content over print materials, etc.)



Each of these solutions comes with different costs, time commitments, and potential impacts. It may be helpful to limit the number of strategies attempted at one time to preserve funding and staff capacity. As you consider which strategies to employ, be sure to start with a thorough assessment of any data you have on student recruitment. Some strategies may be effective at solving recruitment challenges while others may not. It is important to avoid trying too many approaches at the same time. You can also seek internal partnerships to benefit from different approaches without shouldering the entire cost and workload (e.g., you can co-design a campaign with other related programs).

### Strengthening Orientation and Onboarding

When launching their programs, California Direct Assessment CBE Collaborative colleges tested different approaches to orientation and onboarding to familiarize students with college and direct assessment CBE program policies, processes, and procedures.

*Across all colleges, efforts were made to streamline orientation.*

- **Shasta College** consolidated financial aid, registration, and counseling within one office, minimizing barriers for adult students. This model streamlined support and embedded wraparound services into the onboarding experience, ensuring students were fully prepared for direct assessment CBE programs. Many universities have adopted this one-stop shop approach to make it easier for students to access services.
- **Merced College** integrated both technical orientation components (such as LMS navigation) and competency-specific preparation to set students up for success. This dual approach ensures students are not only familiar with the platform but also understand the academic expectations and requirements of their specific program.
- **Southwestern College's** onboarding addresses technology tools, student support services, and an overview of direct assessment CBE. With a strong universitywide team, including business office, counseling, and financial aid, students receive streamlined guidance. The addition of a student success coach ensures continuous engagement and support throughout the program. Onboarding is delivered through multiple modalities, including in-person sessions, videos, and online resources, while individualized plans honor students' unique needs and provide tailored support.

### GRASSROOTS MARKETING AT SOUTHWESTERN COLLEGE

Southwestern College has been focusing on grassroots efforts and traditional marketing methods to engage local students and industry partners before expanding to digital platforms. Southwestern's strategy includes working directly with local automotive industry associations and auto tech students, with plans to extend outreach to high schools starting in 2026, before fully adopting digital marketing tools like social media.

**Consider a phased approach to digital marketing and outreach to minimize costs.**



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**If students do not follow through with enrollment after orientation, consider changing orientation messaging and simplifying any steps between orientation and entry into their first competency. The following guiding questions can support institutional conversations about this topic.**

- What do students who express interest in the program but do not attend orientation say about their decision and the process of enrolling? Do prospective students view orientation as a barrier?
- What do students who attend orientation but do not complete enrollment say about their decision and the process of enrolling?
- Are the college's processes streamlined and easy for students to go through?
- Does the college's orientation give students the information they need quickly so they can start their classes and succeed in the direct assessment CBE program?
- Does the orientation make direct assessment CBE seem hard or confusing?
- Is required/requested paperwork time consuming or challenging?
- Are students aware that they may need to participate in different orientation sessions for the college and the program?
- Are wraparound supports clearly visible, accessible, and embedded from the start of the onboarding process?
- Can students begin their first competency right away after orientation or is there a lot of time for their interest to cool, etc.)?



## EQUITY IN ACTION

*To ensure equity in access, institutions must prioritize student-centered messaging, clear and engaging online resources, and unified statewide communication strategies.*

**Design and launch a well-structured direct assessment CBE landing page to engage prospective students.** The direct assessment CBE webpage is often the first source of information for prospective students. If it lacks clarity or does not answer key questions, students are unlikely to follow up. Visuals and learning journey diagrams are especially effective for explaining direct assessment CBE to students and internal stakeholders.

**Develop clear and consistent messaging to support student understanding of complex offerings like direct assessment CBE.** A clear, multi-faceted pitch should communicate the program's benefits (e.g., "You can work and study at your pace") rather than focusing on technical definitions. A two-minute pitch format can help staff effectively convey the value of direct assessment CBE programs to potential students and stakeholders.

**Align messaging statewide.** Be sure to reference the California Code of Regulations Title 5, ACCJC guidance, and your district's AP 4105 Distance Education policy when developing quality assurance plans, particularly as they relate to regular and substantive interaction and course approval processes.

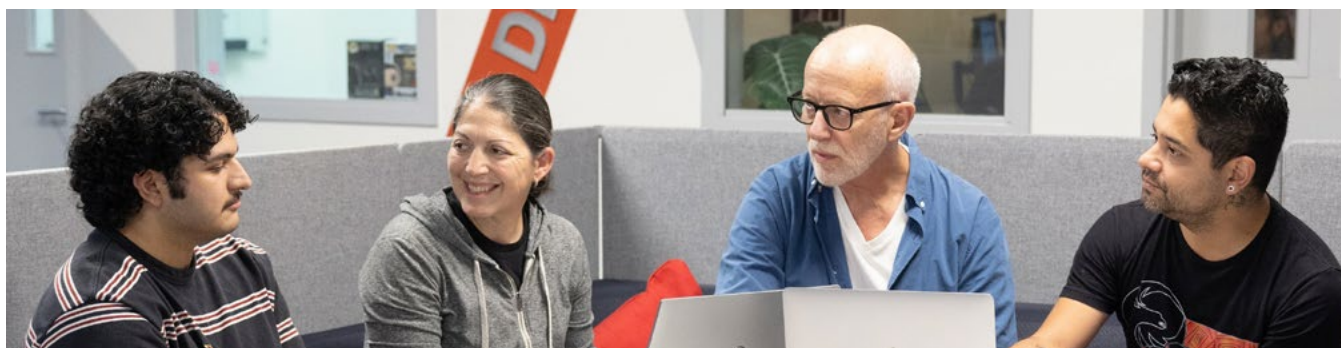


Photo by Allison Shelley / Complete College Photo Library

## KEY DECISION



How will the college monitor enrollment trends and respond proactively as challenges arise?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Student Support Workstream Team
- Admissions and Records (Registrar, etc.)
- Deans (Operational Leaders)
- Employer Partners
- Enrollment Management Director/Dean and other Enrollment Leads
- Financial Aid Director/Dean and other Financial Aid Leads



## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- How are we identifying and reaching prospective students who would benefit most from direct assessment CBE?
- What recruitment messages or materials need to shift to reflect the direct assessment CBE model?
- What application and admission steps need to be modified or clarified?
- What must orientation include to prepare students for the direct assessment CBE experience?
- Are materials and processes designed for adult students, students with records, working parents, or those returning after long gaps?
- Do policies unintentionally exclude students (e.g., requiring full-time enrollment, in-person orientation, or extensive documentation)?
- How do we center student dignity and agency in recruitment and admissions?
- Will the college offer both in-person and virtual orientation options? Will offerings and schedules be adjusted based on attendance?

### Ongoing enrollment models can enhance student access to direct assessment CBE programs.

Merced's first cohort in their AgTech program utilized an ongoing enrollment strategy, allowing students to start at any time, which proved effective for accommodating diverse students.

For example, in order to reach these prospective students, Merced built direct relationships through public relations and media rather than solely relying on traditional marketing to connect with prospects.





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Develop and implement a pre-enrollment survey to develop a better understanding of incoming students.

- Help direct assessment CBE students apply through the CCCApply process. If the college has customized their application by adding in local questions to gauge students' interest and suitability, ensure that staff are using the information collected to follow up with students directly.
- Review this [sample preenrollment survey from Coastline](#).
- Develop a more robust survey to determine the presence of key competencies that predict success (e.g., time management, experience with online courses, etc.). College staff can provide targeted support to students based on their survey results.

### Integrate relationship-building with prospective students into processes.

- Allocate sufficient time and energy to the personal process of converting leads into applicants for direct assessment CBE programs.
- Ensure frontline staff are equipped with timely, accurate information; can communicate program benefits to students; and understand their role in screening potential students. Consider using a FAQ format such as this [Coastline Program Introduction](#).

### Leverage employer partnerships to expand business-to-business marketing efforts.

- Complement direct-to-student marketing by engaging businesses to market to incumbent workers (i.e., upskill existing employees or recruit new talent). This approach can support industries while expanding student pipelines for direct assessment CBE programs.

### Refine direct assessment CBE onboarding and orientation processes so that they offer seamless access to services and programs and eliminate burdens for students.

- Align the college's orientation with the requirements of California Code of Regulations [Title 5 CCR § 55521. Orientation](#).
- Review this [student orientation resource](#) for ideas on topics and to view a sample orientation agenda.
- Schedule orientation so that any last-minute changes to policies, processes, and procedures are captured in orientation materials. The college doesn't want to give students the wrong information.
- Gather feedback from students about the orientation process and make adjustments based on their input.

### WILL THE COLLEGE USE CCCAPPLY FOR THE COLLEGE'S DIRECT ASSESSMENT CBE STUDENTS?

The application process is the beginning of student support and should be designed intentionally to meet the program's needs as well as its equity goals related to access. Many colleges leverage CCCApply for the application process. The benefit of this is that students will not be automatically assigned a federated student ID (AKA CCC-ID), the system is supported by the CCCC, and it does have limited customization options. A CRM, or Customer Relationship Manager, is an alternate system that some colleges leverage for the application process. A CRM allows for significant customization, targeted communication, and individual student tracking, but does require college staff to [create IDs manually](#) for students. It may also cost resources to purchase a CRM if the college does not already have one in use.



# Launch

## Decisions for **Faculty**

The following section is intended for members of the Faculty tasked with launching a direct assessment CBE program.



Go back to the prior phase, [Design and Build: Decisions for Faculty](#), if you are still designing the college's direct assessment CBE program.

Jump ahead to the next phase, [Sustain](#), if you are ready to start considering what scaling and sustainability could look like for your direct assessment CBE program.



Faculty will need to address the following program design decisions when launching a direct assessment CBE program. Common decision options for California community colleges and the implications of each decision are presented throughout this blueprint for your consideration and guidance in leading your team. As with all aspects of designing a direct assessment CBE program, there is no right order to take on these design decisions, but there are many dependencies and interconnections you'll discover along the way.

### LAUNCH PHASE FACULTY TEAM DECISIONS

#### **Establish Quality Assurance Mechanisms**

*How will the college design quality assurance processes tailored to direct assessment CBE while aligning with existing institutional effectiveness, program review, and equity efforts?*

Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.



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## **FINALIZE CURRICULUM AND PREPARE FACULTY**

*Steps to develop and finalize direct assessment CBE curriculum and prepare faculty are covered extensively in the Design and Build phase. Revisit these sections before proceeding:*

- [Develop Competency Set](#)
- [Create Formative and Summative Assessments](#)
- [Determine Learning Resources](#)
- [Outline Program and Learning Journey](#)
- [Develop Faculty Orientation and Professional Development](#)

As the program moves toward launch, the Faculty team is responsible for preparing faculty through orientation (including navigating the Learning Management System for direct assessment CBE) and formally establishing and assigning competencies to faculty. Operational expectations must be set, including roles and responsibilities and parameters for administering and grading assessments to ensure proper calibration, submitting grades, and providing feedback to students. Faculty must set office hours and have contact information for coaches, including their drop-in or office hours, along with links to academic and nonacademic resources that students can access asynchronously.



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# Establish Quality Assurance Mechanisms

Launching a direct assessment CBE program requires a thoughtful and adaptive approach to quality assurance. Your direct assessment CBE program will be integrated into existing institutional effectiveness and program review processes at the departmental, college, and/or district level.

However, where performance and effectiveness are often reviewed on an annual cycle, launch will need to be evaluated in real time while testing, evaluating, and evolving. This means quality assurance processes should be more frequent, iterative, and responsive in order to identify early signals of success or friction and to support continuous improvement throughout the Launch phase.

Since direct assessment CBE moves away from conventional structures, such as seat time, term-based calendars, and course-based progression, existing review mechanisms may need to be modified or expanded. For example, competencies may need to be reviewed more frequently based on student feedback, or assessment practices may require new rubrics and validation steps to meet accreditor expectations.

This phase is your opportunity to design a fit-for-purpose quality framework that integrates direct assessment CBE into institutional effectiveness, program review, and equity efforts, not just for compliance, but to ensure the program delivers real value for students and to collect data that supports sustaining and scaling the program beyond the Launch phase.

## Program Evaluation

A 12 – 18 month program evaluation conducted by the faculty reviews competencies, assessments, and the learning journey, in addition to student data on formative and summative assessments, completion time for each competency, progress, and retention. Faculty can note successes, challenges, suggested changes, and more in a [Program Evaluation Chart](#).

Following the review, a summary of changes/ revisions made should be documented. Changes may be in content and/or assessments. Revisions and changes should be made based on solid, robust evidence that will improve the student experience and success. Some examples of revisions have included rewriting summative assessments for clarity, changing formative assessments to better align to the summative assessment, providing additional resources and examples for students, and reformatting the competency to ease navigation.



## Program Review

The schedule of the direct assessment CBE program evaluation should align with the program review. For example, if program reviews occur every six years, the direct assessment CBE program evaluation could occur at years two and four. This information will be an essential component of the program review as results of changes and revisions can be assessed for their effectiveness.

As noted previously, institutional effectiveness and program review processes will also be conducted for direct assessment CBE. If the direct assessment CBE program is offered in other modalities (i.e., in-person, online) the review will need to include information from these programs as well. For example, if an Associate's degree in early childhood education in a direct assessment CBE is offered in both in-person and online delivery modalities, you will need to ensure that student learning and outcomes are consistent across the modalities. Other metrics of student success are also essential to compare across modalities. The [Program Review Chart Template](#) shows an example of a program review for a program offered in more than one modality.

## Focus on Assessments

During the Design and Build phase, many California Direct Assessment CBE Collaborative faculty sought out best practices for developing high-quality authentic assessments. It is recommended that colleges design quality assurance protocols to focus on this topic.

In collaboration with universities, colleges, and assessment experts, [C-BEN created Hallmark Practices in CBE Assessment \(2021\)](#). The aim of this work was to provide practical features and considerations for implementing quality direct assessment CBE assessment strategies. In addition to presenting steps for developing quality assessments, institutional examples are provided. The hallmark practices are an expansion of [C-BEN's Quality Framework for Competency Based-Education Programs](#) and include element 4: Credential-level Assessment Strategy with Robust Implementation.

There are 10 hallmark practices presented with key features and questions to ensure quality. Examples of hallmark practices include clear, scaffolded, and generalizable. This evaluation tool and guide is an excellent resource to incorporate in your quality review process both at the program evaluation and for the program review.



## EQUITY IN ACTION

*Investing time and resources in quality assurance is an equity strategy. Without intentional data tracking and review cycles, it's easy to overlook how different types of students are experiencing your direct assessment CBE program.*

**Build a process for disaggregation of student outcome data** by race/ethnicity, age, parenting status, and prior credit into quality assurance plans.

**Include feedback loops with students and employers**, especially from historically underserved communities, to revise competencies and support.

**Monitor data for equity gaps in progression, support access, and learning outcomes**, all of which are especially important given direct assessment CBE's flexibly-paced, asynchronous nature.

**Connect curriculum to credentials of value** to ensure alignment to workforce outcomes, transfer options, and lifelong learning, all critical to equitable economic advancement.



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## FEEDBACK LOOP STRATEGIES

Establishing strong feedback loops is essential to continuous improvement during launch. Here are some strategies to capture timely insights, respond to issues quickly, and improve the student experience in real time.

- **Regular student check-ins**
- **Faculty & support staff reflection huddles**
- **Data pulse reviews**
- **Feedback forms**

## KEY DECISION



How will the college design quality assurance processes tailored to direct assessment CBE while aligning with existing institutional effectiveness, program review, and equity efforts?



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Academic Senate
- Accreditation Liaison
- Curriculum Approval Committee
- Deans (Academic Leaders)
- Employer Partners
- General Education and Direct Assessment CBE Program Faculty
- Institutional Effectiveness, Data, and Research
- Instructional Designers
- Students



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- Which existing program review or institutional effectiveness committees need to be updated or included in the direct assessment CBE review process?
- What templates or processes need to be revised to include review of direct assessment CBE programs?
- How will decision-maker and student feedback be gathered and used to improve the program?
- How will the college establish regular review cycles that allow for refinement of competencies, support services, and program infrastructure?
- What additional training or capacity-building is needed for faculty and staff to engage in a direct assessment CBE-aligned quality review?





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Review relevant rules, regulations, and guidelines to ensure compliance with regular and substantive interaction requirements and alignment with accreditation and federal financial aid standards.**

- AP 4105 Distance Education, the policy that governs the implementation and quality standards for distance education courses in the district.
- [California Code of Regulations Title 5 § 55204 Instructor Contact](#) and [§ 55206 Separate Course Approval](#).
- Explore how direct assessment CBE program goals and metrics are reflected in other planning documents, such as the College Master Plan and Enrollment Management Plan.

**Review [C-BEN's Quality Framework for Competency Based-Education Programs](#) to find potential quality indicators for Direct Assessment CBE programs.**

- Review the Coherent Program and Curriculum Design, Intentionally Designed and Engaged Learner Experience, and Transparency of Student Learning sections to assess how the college's competency strategy aligns with quality indicators.

## CREATING A STRONG TEAM

It is essential that there be an avenue for cultivating a community for faculty teaching direct assessment CBE programs. Regular faculty meetings to discuss student progress, evaluation processes, and policies will help to build this community. These regular meetings will allow pivots and revisions to be enacted for just-in-time events as well as a means for documenting observations along the way. See [Launch Stories](#) for more about the importance of creating a strong team.

## STAYING COMPLIANT

Tracking student engagement in direct assessment CBE remains a challenge, especially in the context of federal reporting requirements. While traditional attendance models don't fully apply, colleges are collecting data on student participation in competencies to build a record for future students. Monitoring activity in online assignments, discussions, and progress through competencies is recommended as an interim solution.

**Decide which committees and/or workgroups need to be informed about the key metrics for direct assessment CBE students and operational processes.**

**Establish feedback loops for the launch to document faculty, staff, and student experiences.**

- Use a feedback form to capture faculty experiences in Canvas.
- Use a [Perpetual Quality Checklist](#) on a regular short-term schedule (i.e., once a month, every start of session, etc.) to support continuous improvement.
- Include faculty and additional staff such as instructional designers in using the checklist.
- Develop a ticket system that faculty, students, and support staff can submit for fixes such as grammatical errors, lack of clarity, broken links, trouble submitting assessments, etc. If a ticket system is initiated, it is important that there is a designated office/person who oversees this work and that fixes are documented. Only substantial changes in a competency should result in a new version of the competency.

**Consider how the program and its students are coded into the college's SIS and how those decisions will impact reporting and tracking that is needed to ensure success for students.**



# Launch

## Decisions for **Student Support**

The following section is intended for members of the Student Support Team tasked with launching a direct assessment CBE program.



Go back to the prior phase, [Design and Build: Decisions for Student Support](#), if you are still designing your direct assessment CBE program.

Jump ahead to the next phase, [Sustain](#), if you are ready to start considering what scaling and sustainability could look like for your direct assessment CBE program.



The Student Support Team will need to address the following program design decisions when launching a direct assessment CBE program. Common decision options for California community colleges and the implications of each decision are presented throughout this blueprint. As with all aspects of designing a direct assessment CBE program, there is no right order to take on these design decisions, but there are many dependencies and interconnections you'll discover along the way.

### LAUNCH PHASE STUDENT SUPPORT TEAM DECISIONS

#### [Revisiting the Student Journey](#)

*How will the college update the student journey during and after the pilot?*

Use this [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.



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# Revisiting the Student Journey

Direct assessment CBE programs call on institutions to rethink how students are supported throughout their journey, from first interest to credential completion.

Students progress at a flexible pace, may enter at different points in the year, and often balance significant responsibilities outside of school. For these reasons, it's especially important that student supports are integrated directly into the program experience, not just tacked on to traditional approaches.

During the [Design and Build phase](#), the Leadership team developed a student journey map and created personas to guide decisions about the college's direct assessment CBE model. [The Enrollment Model](#) was also defined.

During the Launch phase, your institution will implement and assess the success of the support model based on student satisfaction, retention, and progress to completion as well as staff satisfaction and workload. Use the Launch phase to learn what works, identify gaps, and begin building toward longer-term systems for equitable, scalable student support.



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## THE STUDENT JOURNEY

*A student journey map provides a visual of the entire student experience within the program, including:*



**MILESTONES:** The significant steps students take as they advance through the program like application, enrollment, and completing a competency.



**TOUCHPOINTS:** Planned direct interaction between students and institutional decision-makers, such as instructors, counselors, advisors, and support services.



**PAIN POINTS:** Anticipated barriers that could hinder student progress.



**SUCCESS POINTS:** Positive experiences of encounters that facilitate or accelerate student progress.

Refer to the [Map Out Student Journey](#) section for more context.



## Make Adjustments for Critical Omissions

There may need to be revisions and pivots from previous decisions made during the Design and Build phase as the program launches. Revisions may be made due to changing timelines, systems, staffing, and other unexpected changes at the institution or in the broader community.

It is possible that the student journey may be missing critical touchpoints or that new pain points have emerged since the initial design conversations.

- **Make sure students and staff have avenues for providing feedback.** This will make it easier for people to report issues as they occur. It is best to simplify the feedback channels such as having one email address that a lead staff will monitor and send to the appropriate party to address. This will prevent the “Who should I send the request to?” confusion and potential delays in response.
- **Strive to address gaps in touchpoints quickly.** Timely remedies ensure fewer students are impacted.
- **Communicate any changes to students, faculty, and staff** to ensure each stakeholder can do what they need to align with new expectations (e.g., if a required touchpoint has been added for financial aid reasons, students need to ensure they schedule and attend their appointments, staff need to update their availability and prep for these meetings, and faculty may need to communicate reminders and nudges).
- **Update documentation and include a justification for the changes to the student journey.**

## Document Ideas for Continuous Improvement

It will be challenging to make changes to support systems during the launch because there are so many moving parts, so it may not be advisable to make changes aside from the critical situations mentioned above. However, taking the time to document ideas for improvement while they are fresh will make future revisions much easier. Remember, it is not enough that support systems function without error. You should still work to provide an exceptional student experience — there is always room for improvement. Don’t forget to create avenues for students to contribute recommendations based on their experience.



## EQUITY IN ACTION

*The Launch phase is a critical moment to align the program’s approach to direct assessment CBE students’ journeys with equity in success. Students who are furthest from opportunity often face the steepest navigation barriers and integrated supports help level the playing field. Adopting principles to guide the design of the student journey can help ensure that the best interests of students are always centered.*

**Think of support as a system not a service center.** The student journey should systematize the way that students are connected to wraparound support regardless of where they are in the program. Support should be inevitable.

**Always seek opportunities to codesign with students.** Gather real-time feedback from diverse students to improve the journey before, during, and after the program launches.

**Use disaggregated data** to uncover where particular groups may be under-supported or overburdened.

**Build for dignity.** Support systems should respect students’ time, identities, and competing responsibilities (e.g., do online direct assessment CBE students need to come to campus for support? Are supports available for direct assessment CBE students during their peak learning times, whether that is during normal business hours, overnight, or weekends? Is mastery evaluated using authentic assessments and do students have autonomy in selecting assessments that align with their interests, abilities, and needs?)

## KEY DECISION



**How will the college update the student journey during and after the pilot?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream and Student Support Workstream Teams
- Student Support Services (Counselors, Advisors, etc.)
- Financial Aid Director/Dean and other Financial Aid Leads
- Enrollment Management Director/Dean and other Enrollment Leads
- Students
- IT System Managers: LMS, SIS, Data, Fin Aid, CRM, Student Support, Transcripts, etc.



### Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.*

- Can the college add or remove milestones, touchpoints, pain points, or success points to refine the journey?
- Does evidence support that any of the milestones, requirements, or touch points are barriers rather than student support? How will the college know if they are barriers?
- How is the student experience from onboarding through completion different in direct assessment CBE vs. traditional programs? Is the college leaning into direct assessment CBE principles enough?
- What moments of support matter most in a flexibly-paced model?
- Are we providing personalized support that is proactive or just-in-time?
- How do we incorporate student voice and feedback into refining the journey?
- Are our systems (CRM, case management tools, LMS) set up to flag student progress and engagement?



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## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Revisit resources from the Design and Build phase for a refresher on how to structure the student journey.**

- Review the [Coastline College case study](#) on developing a student journey.
- Facilitate the creation of personas using tools like the [learner profile worksheet and collaborative platforms such as a Miro board](#) to gather and visualize student information and experiences.
- Review the [Coastline Student Journey Example](#) for inspiration.
- Use the [Student Journey Template](#) to map your own student journey step-by-step. Or consider a more visual [template](#) like this one.
- Update student journey maps as the college adds or removes milestones, touchpoints, pain points, and success points to support continuous improvement beyond launch.

**Create avenues for students and staff to provide feedback to ensure issues are identified and resolved quickly.**

- Run a weekly “ask me anything” session or office hours to create space for troubleshooting and providing guidance.
- Create a [suggestion form](#) to track recommendations for improvement from students, staff, and others.

**Resolve unintentional barriers in the student journey quickly to mitigate impact on students.**

- Communicate any changes to students, faculty, and staff to ensure each stakeholder can do what they need to align with new expectations (e.g., if a required touchpoint has been added for financial aid reasons, students need to ensure they schedule and attend their appointments, staff need to update their availability and prep for these meetings, and faculty may need to communicate reminders and nudges).
- Update documentation and include a justification for any changes to the student journey.



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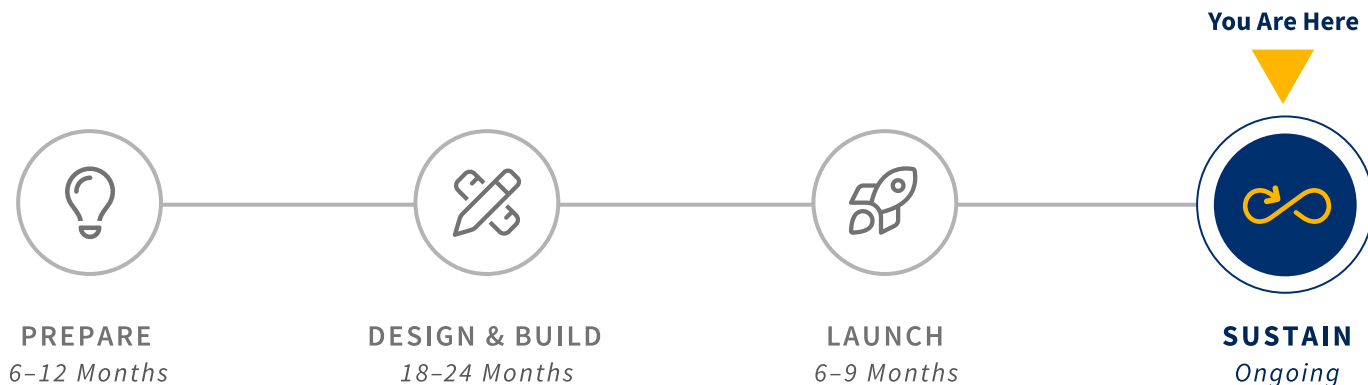


# Sustain

You did it — the direct assessment CBE program has launched! Take a moment to celebrate this major milestone. But remember, launch is just the beginning.

◀ Go back to the previous phase, [Launch](#), if you are ready to start marketing your program and enrolling students.

▶ Congratulations! You have reached the last phase of the blueprint!  
**Check out the full list of [Resources](#).**



Sustaining a direct assessment CBE program means committing to continuous improvement, staying connected to a learning network, and nurturing the conditions for long-term impact. In the Sustain phase, we explore strategies to help the college's leadership team deepen capacity, monitor progress, respond to evolving student needs, and scale what's working.

## HOW TO USE THIS SECTION

The Sustain phase will focus on providing resources to help institutional leaders continue to improve upon, grow, and sustain their program(s) over time.

Like the [Prepare phase](#), the Sustain phase only contains decisions that need to be made by the **Leadership Team**. (See [Establish a Direct Assessment CBE Program Leadership Team section](#)).

Use the [CBE Program Design Decision Matrix](#) to help keep track of key decisions made throughout this phase.

In addition to the key decisions outlined in this section, the Chancellor's Office has ongoing resources and support to help you with continuous program improvement and building institutional capacity to deliver high-quality direct assessment CBE programs.

**Vision Resource Center.** Be sure to visit the Vision Resource Center for learning modules aligned with content in this blueprint, previous system webinars, and other resources related to developing and sustaining your direct assessment CBE programs.

### [Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs.](#)

Refer to this guide for additional guidance and worksheets that can steer you towards using data to support sustainability conversations.

### **Chancellor's Office Direct Assessment CBE Email.**

Reach out to the Chancellor's Office at [cbe@ccc.co.edu](mailto:cbe@ccc.co.edu) for ongoing questions about the programs.



**Listsers.** Join the Chancellor's Office listserv to stay connected to this committed, growing community.

### **In what order should I make these decisions?**

There is no required order in which to make each decision, but many have dependencies and interconnections you'll discover along the way.

## SUSTAIN PHASE LEADERSHIP TEAM DECISIONS

|                                                                         |                                                                                                                                  |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <a href="#"><b>Scale Your Direct Assessment CBE Program</b></a>         | <i>How will the college scale the direct assessment CBE program to serve more students while maintaining quality and equity?</i> |
| <a href="#"><b>Fund for Sustainability and Resiliency</b></a>           | <i>How will the college ensure the program is financially and institutionally sustainable in the long term?</i>                  |
| <a href="#"><b>Embed Direct Assessment CBE Into the College DNA</b></a> | <i>How will the college embed and grow direct assessment CBE leadership, expertise, and innovation across the institution?</i>   |



# Scale Your Direct Assessment CBE Program

Launching a college's first direct assessment CBE program is a meaningful achievement that reflects years of dedication, collaboration, visioning, and commitment to meet students where they are. As the program moves beyond launch, you may ask *"What's next?"*

This section addresses scaling, not to be confused with sustaining the program. While sustainability focuses on maintaining operations over time, scaling is about expanding impact, whether through increasing enrollment, boosting student progression, or positioning your institution to deliver direct assessment CBE to more students with greater effectiveness. Strategic scaling maximizes the return on your initial investment, builds momentum, and supports more students in your community.

*Your institution may be looking to scale the program by:*

- Reaching more students who can benefit from direct assessment CBE
- Building additional direct assessment CBE certificate or degree programs
- Identifying new sources of funding for continued investment
- Applying lessons learned from the college's direct assessment CBE program to improve student experience and outcomes through policies or modifications to other programs
- Expanding geographic reach through online models that remove place-based barriers

With the first program launched — the hardest one — you are now ready to build on its early wins. Scaling is not just about doing more, it's about doing better, guided by what you've already learned and what students are saying they need.

## Increase Enrollments to Support Scaling

Increasing access and enrollment is often the first place that institutions start scaling. Consider these additional activities to reach more students.

Determining what strategies and approaches an institution should continue or revise is essential to growing enrollments. There may be some discoveries that are easy to change. For example, one institution discovered that prospective students were first interested in the program (i.e., business) and not the modality (i.e., direct assessment CBE). The "what" was first on a student's mind (the major) and the how (i.e., direct assessment CBE, online, in-person) came second. The call to action in this example is to reexamine marketing materials and which messages are being shared with students.



Photo by Allison Shelley / Complete College Photo Library



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Because direct assessment CBE is a new modality and we are still discovering the best way to communicate to prospective students, initial enrollment numbers may be below target. This occurs in many programs. For example, when University of Massachusetts Global launched their first direct assessment CBE program, the enrollment numbers were below target and student enrollment growth was slow. Success can take time you experiment with various strategies and messages to increase enrollments. Student stories are the most powerful tool, so be sure to engage students in sharing what it is like to be a student enrolled in a direct assessment CBE program. *Other considerations for the team are shown in the following table.*

| TOPIC                      | CURRENT PRACTICE (EXAMPLES)                                                                                                                                                                                                                                                                                                                    | CONSIDERATIONS                                                                                                                                                                                                                                                                                             |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Admissions Schedule</b> | <ul style="list-style-type: none"> <li>• Weekly</li> <li>• Monthly</li> <li>• Session (i.e., 8 weeks)</li> <li>• Semester</li> </ul>                                                                                                                                                                                                           | <p><i>Does the admissions schedule permit students to enter a program based on their needs? Are there too many opportunities for a student to enter a program?</i></p> <p><i>Based on personas, what is the best admissions schedule?</i></p>                                                              |
| <b>Coaching</b>            | <p><b>Contact students through</b></p> <ul style="list-style-type: none"> <li>• Text</li> <li>• Email</li> <li>• Phone Call</li> <li>• Social Media</li> </ul> <p><b>Frequency of Contact</b></p> <ul style="list-style-type: none"> <li>• 3 Times a Week</li> <li>• Twice a Week</li> <li>• Once a Week</li> <li>• Every Two Weeks</li> </ul> | <p><i>What is the best means of communication to reach students?</i></p> <p><i>How often should the college reach out to students?</i></p> <p><i>Are you providing a student agency in asking individual students the best means of communication and frequency?</i></p>                                   |
| <b>Outreach Strategies</b> | <ul style="list-style-type: none"> <li>• Career Fairs</li> <li>• Meetings with Employers</li> <li>• Advisory Boards</li> <li>• Synchronous In-person or Virtual Info Sessions</li> <li>• Website and Inquiry Form</li> <li>• Brochures</li> <li>• Television</li> <li>• Bulletin Posting in Community</li> </ul>                               | <p><i>Do you have a means for tracking which strategy is most effective for student enrollment?</i></p> <p><i>Are there targeted times of the year for different strategies?</i></p> <p><i>Thus far, what is the most effective outreach strategy for your targeted program and specific students?</i></p> |



## EQUITY IN ACTION

*The pause when deciding to scale the direct assessment CBE program provides an opportunity to consider the ways you are driving equity in access and success.*

**Assess whether the needs of the target population are being met.** Before entering the next term, audit processes and procedures to see if they increase access and support for target students. Adjust if gaps are found.

**Use data from the launch to identify underrepresented student populations who thrived in the program.** Create targeted marketing campaigns and outreach strategies to reach these students, focusing on the program's unique benefits that address their specific needs (e.g., flexibility, etc.).

**Diversify faculty.** If you are expanding the program within the same department or by adding new degree options, proactively recruit faculty from diverse backgrounds who can strengthen instructional design by bringing new perspectives.

**Audit all course materials, including assessments, as well as support materials and technology platforms to ensure they are accessible.** This includes providing transcripts for videos, using screen reader-friendly platforms, and offering alternative formats for course content.

**Ask students!** Collect input from current and prospective students, especially those from marginalized groups. Use this feedback to adjust the program design to ensure the program remains equitable and responsive to student needs.

## KEY DECISION



**How will the college scale the direct assessment CBE program to serve more students while maintaining quality and equity?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Student Support Workstream Team
- Academic Senate
- Board of Trustees
- Chief Information Officer and other IT Leads
- Classified Senates
- College Leadership (President and Cabinet)
- Students



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## Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- Is the program demonstrably achieving its intended outcomes and making a significant positive impact on the target population?
- Is the program financially sustainable? If scaled, are necessary resources available (e.g., financial, personnel, technological) to support quality and student outcomes?
- Can the core elements of the program (e.g., onboarding, student support) be effectively scaled across other programs or departments without compromising quality?
- Are we continuously identifying and removing barriers across the student journey, from interest to completion?
- Are we tracking and analyzing student behavior and institutional processes to drive improvement and responsiveness?
- Have faculty, staff, students, and other stakeholders provided feedback that supports iterative refinements?
- How are lessons learned informing broader institutional practices, policies, and student engagement strategies?

## STRENGTHENING CONTINUOUS IMPROVEMENT

Continuous improvement requires more than just reviewing outcomes, it's about intentionally using data and feedback loops to refine the program over time. As discussed in the [Design and Build phase of the blueprint](#), colleges integrate direct assessment CBE programs into existing program review processes and data collection practices with existing institutional and state reporting requirements. Much of the data collected for direct assessment CBE may be the same as traditional programs.

At Southwestern College, for example, the direct assessment CBE program is evaluated through existing institutional committees, with a focus on metrics like student satisfaction and retention. Institutional researchers are already developing a list of direct assessment CBE-specific metrics, and the

college plans to include these insights in its annual ACCJC report to ensure continuous improvement.

*Remember, the Launch phase is also an ideal time to focus on any data collection that is not mirrored in traditional programs as well as data collection that is performed in newly implemented systems such as:*

- **Competency pacing and completion rates**
- **Student satisfaction with personalized supports**
- **Faculty/staff touchpoint frequency**

*To support this process:*

- Refer to the [Using Data to Improve and Evaluate Direct Assessment Competency-based Education Programs](#) guide for additional guidance and worksheets that can steer you towards using data more intentionally.
- Use [C-BEN's Quality Framework for Competency Based-Education Programs](#) to understand overlap with existing required data collection and institutional Effectiveness processes.
- Review current program evaluation procedures to ensure the college adheres to established requirements.







## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Evaluate program impact and continuous improvement needs.

- Use this [resource](#) from RAND to structure a deep exploration of the program's impacts and financial viability.
- Review the program evaluation including enrollment, pacing, persistence, and completion data. See the [Strengthening Continuous Improvement](#) callout box for tips and tools.
- Explore existing processes that currently collect data and identify gaps. For example, is the college tracking the effects of key policies and innovations like CPL during the Launch phase (e.g., type of credit awarded, students receiving CPL, institutional costs, student costs, etc.). These insights can help build a broader culture of evidence and continuous improvements that benefits direct assessment CBE efforts as well.
- Determine if the program is ready to scale, or whether additional components should be improved prior to scaling.

### Validate the decisions across different operational areas to ensure policies and practices were effective and do not need to be refined.

- Review the following areas first as they have the greatest impact on the feasibility of scaling:
  - ▶ [Define Business Model, Budget, and Pricing Strategy](#)
  - ▶ [Evaluate and Refine the Faculty and Staff Model](#)

### Assess scalability options.

- Use this [Scaling CBE Decision Tree](#) to evaluate readiness for considerations on scaling that may be most feasible and desirable to the college.

### Refine enrollment and progression pathways to reach more students

- Review and streamline the enrollment funnel by mapping key steps (e.g., interest forms, admissions, registration). Identify friction points.
- Analyze why prospective students drop off using inquiry follow-ups or non-enroller surveys.
- Examine onboarding communications and ensure students understand both the program content and direct assessment CBE modality.
- Revisit marketing strategies to prioritize the “what” (e.g., the program/credential) before the “how” (e.g., direct assessment CBE format).
- Return to [Develop a Strategic Communications Plan](#) for additional ideas and institutional case studies.

### Streamline systems to scale personalized pacing and engagement

- Develop or update the college's pacing pathway templates (e.g., Slow, Medium, Fast) with milestone dates aligned to a standard number of competencies per term or month based on how students are experiencing the program. These become scalable tools for faculty and coaches as enrollment grows.
- Embed pacing check-ins into coaching or counseling protocols. Use templated outreach calendars that can scale with more students without compromising personalization.
- Create peer-to-peer structures, such as pacing partners or student cohorts, to reduce the staff burden and enhance community, particularly as the college grows enrollment.
- Build dashboards or progress trackers for students and staff to visualize pacing goals and flag disengagement early. These should integrate with Canvas and be scalable across programs.



# Fund for Sustainability and Resiliency

In [Define Business Model, Budget, and Pricing Strategy](#), you developed a business model and budget based on predictions about enrollment, personnel, technology, and more. Now it is time to convert that initial model into a sustainable funding plan to support long-term viability, continuous improvement, and impact.

When resources are consistently available and strategically managed, programs can reliably deliver services, build trust within the community, and plan for future growth. This is true for any program but especially direct assessment CBE programs, where revenue and costs are often unknown or in flux and sustainable funding models are still being tested by institutions across the country.

## Update Your Budget Forecasts

Many of the decisions made about policies, processes, and procedures during the [Design and Build phase](#) impact revenue and costs. For example:

- Calendaring and financial aid can have an impact on when tuition and fees are collected
- Generous credit for prior learning (CPL) policies can decrease enrollment by enabling students to accelerate beyond certain courses
- Subscription-based models can decrease the length of time to completion and decrease revenue from students who are able to accelerate
- Expanded support models that require hiring more faculty and/or staff increases costs

After launching the program, more will be known about revenue and costs. Reviewing them again in this phase ensures sustainability and growth goals can be achieved.



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## Diversify Funding

Diversifying funding — relying on a blend of different funding sources — will lower the pressure on each source (i.e., more funding sources means lower amounts of funding from each). Diversification also creates a more stable foundation for the program if a funding source is decreased or eliminated in the future.

| TYPE                    | DESCRIPTION                                                                                                                                                                                                                                                                                                                                | EXAMPLE                                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Gifts</b>            | Monetary or in-kind support from private individuals or entities (including employer partners). Gifts may have stipulations on use (restricted) or may be given without restrictions (unrestricted).                                                                                                                                       | Restricted gift: A donation made where 100% of the donation must be used to support nursing student scholarships                                                  |
| <b>Grants</b>           | Grants are contributions given to support a specific body of work. There is an expectation that the recipient will provide something of value in return for the grant. Grants may be given by private or public entities. Each year the California Community Colleges releases a <a href="#">Compendium of Allocations and Resources</a> . | Carl D. Perkins Career and Technical Education Act (Perkins V) is a public grant program that funds career and technical education (CTE).                         |
| <b>Tuition and Fees</b> | Revenue gained from tuition and fees. There are limits set through the California Education Code on the types and amount of tuition and fees collected.                                                                                                                                                                                    | <a href="#">Education Code sections 76355, 76360, and 76361</a> authorize...health, parking services, and transportation services fees...                         |
| <b>Endowments</b>       | An endowment is a pool of gifts and other assets that is invested to generate revenue. The principal is generally not spent, but reinvested, while the interest earned through investment is spent.                                                                                                                                        | The Delta Dental Endowed Scholarship for Opportunity was launched with an initial gift of \$325k and provides support for Shasta College Dental Hygiene students. |

## Align with Funder Interests and Priorities

Direct assessment CBE redesign involves many shifts to policy and practice that enhance the student experience and help your institution produce graduates more aligned with industry needs. Different funders will be interested in different aspects of this reform. Some may be more interested in the workforce alignment benefits, while others may appreciate the benefits to students. Take the time to research any potential funding opportunities to identify funder interest and priorities. Then elevate the aspects of direct assessment CBE that most align with their wants and needs. [Making the Case That Your H RTP Is Aligned With a Funder's Priorities](#) (JFF, 2025) provides helpful tips for making the case that a program is aligned with funder interests and priorities.

## Braided vs. Blending Funding

As the college's funding model becomes more complex, it is important to understand when the college can braid vs. blend funding. Braided funding occurs when different sources collectively support a program, but each stream is tracked and reported upon separately (i.e., visible like the individual strands of a braided rope). For example, a direct assessment CBE program that received a private grant for scholarships and a public grant for faculty professional development would keep these two budgets separate, showing how each supported only the line items they were awarded to support. Blended funding occurs when separate funding sources do not have restrictions on use and can be mixed to support a single program (e.g., two donors provide unrestricted gifts of \$500 each, so the project has a blended budget of \$1000). Remember to keep internal stakeholders involved with project management, budget management, reporting, and compliance apprised of the funding model as different models have different requirements.





## EQUITY IN ACTION

Some of the first colleges in California to launch direct assessment CBE programs quickly discovered an important insight: *sustainability often requires scale*. To maintain operations and justify the ongoing investment in infrastructure, staffing, and student support, several institutions determined they would need to launch a second program or certificate in the direct assessment CBE modality. This approach helps to distribute fixed costs and deepen the institution's capacity in direct assessment CBE over time.

Institutions that plan for growth early are better positioned to sustain and scale their programs once initial startup funding tapers off. Expanding program offerings not only strengthens financial sustainability, it also increases options for students and deepens alignment with workforce needs.

## KEY DECISION



**How will the college ensure the program is financially and institutionally sustainable in the long term?**



### Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- Faculty Workstream Team
- Student Support Workstream Team
- Academic Senate
- Board of Trustees
- Chief Information Officer and other IT Leads
- Classified Senates
- College Leadership (President and Cabinet)
- Students



### Planning Questions

Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.

- What major costs are associated with sustaining the direct assessment CBE program and how will they impact affordability and accessibility for students?
- Did decisions about the college's faculty and staff model create unexpected costs (e.g., differences in load, additional counselors or advisors, etc.)?
- Do sustainability or scaling plans involve strategies to increase revenue?
- If revenue is insufficient to cover expenses, how will the program be sustained?
- Will the college need external funding (e.g., grants, gifts, etc.)?
- What is the institution's risk tolerance and fiscal viability in operating the program for multiple years before breaking even?



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## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

**Develop a two- or three-year project budget to outline expected costs, revenue, and funding for the program.**

- Take this moment to update the [three-year project budget developed by the Leadership Team](#). Consider using a two-year budget format if it offers more flexibility at this point in the project's lifecycle.
- Determine if revisions to the program budget are substantial enough to require resubmission to ACCJC or the Chancellor's Office.

**Identify and apply for external funding to support operational costs.**

- Research federal and state funding opportunities, including grants for sectors experiencing labor shortages.

### BRAIDED FUNDING

Developing a direct assessment CBE degree uses significant resources. Ensure the initiative is a priority of the college by leveraging the current budget request process. Additionally, look for grant opportunities that overlap with the mission of direct assessment CBE. For example, Coastline College was able to leverage guided pathways and career technical education funding to augment the specific state grant for direct assessment CBE. This type of alignment not only enables adequate funding, it draws more people into the direct assessment CBE work itself as the “why” of direct assessment CBE is illuminated.



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# Embed Direct Assessment CBE Into the College DNA

The first direct assessment CBE program that an institution builds and launches is often the hardest. You have learned and shared a new model of teaching and learning that is student-focused, giving students agency. And you have built a workforce-ready program that will benefit graduates.

The challenge now is how to build a culture where direct assessment CBE is not a “program,” but an institutional mindset. Consider what has helped faculty and staff successfully adopt new initiatives in the past: communication channels, champions, and leadership engagement, and apply similar strategies to sustain direct assessment CBE over time.

To sustain and embed this approach, focus on building cross-unit ownership, creating structures that persist beyond individual champions, and embedding the principles of direct assessment CBE into institutional processes, policies, and communication.



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*Here are some other ways to advance a lasting direct assessment CBE culture across your college.*

- Join existing institutional meetings (e.g., department, curriculum, deans, student support, faculty committees) and share information about the direct assessment CBE program and updates.
- Share direct assessment CBE student stories with college staff, faculty, administrators and students. There is no stronger message than a student story.
- Hold a “Meet the direct assessment CBE faculty” meeting to talk about what it is like to teach in this modality.
- Collect evidence of student progress and successes. Share this information with the direct assessment CBE team both for celebrations and as means for continuous improvement.
- Provide the President talking points and updates on the direct assessment CBE program, especially for upcoming presentations, board meetings, and community gatherings.
- Highlight direct assessment CBE in the institutional news on a regular basis.
- Encourage faculty and staff to present their role and engagement with direct assessment CBE at local, state, and national convenings.
- Identify components of the college’s direct assessment CBE program design that can be scaled to other programs and areas, including traditional programs.
- Name and share lessons learned from the direct assessment CBE launch to inform how the institution as a whole designs flexible programs for adults and other target populations.





## EQUITY IN ACTION

*A sustained direct assessment CBE culture doesn't just normalize new instructional models, it reinforces a commitment to equitable access, flexibility, and success for all students. Continue centering equity as direct assessment CBE is brought into your college's culture.*

**Codesign structures with diverse students** including working adults, caregivers, and veterans, so that culture building is informed by lived experiences.

**Ensure student stories reflect a diverse range of identities**, not just early enrollers who need less support.

**Invite cross-unit leaders who serve high-need students** into workgroups and planning, not just academic units.

**Use disaggregated data to guide adoption** including enrollment patterns, time to completion, pacing, persistence, and assessment outcomes.

## KEY DECISION



**How will the college embed and grow direct assessment CBE leadership, expertise, and innovation across the institution?**



## Key Decision-Makers

(See [OVIS chart](#) for additional stakeholders to consider):

- Direct Assessment CBE Program Leadership Team
- General Education and Direct Assessment CBE Program Faculty
- Faculty Workstream Team
- Instructional Designers
- Student Support Workstream Team
- Professional Development Office or Committee



## Planning Questions

*Here are additional planning questions for consideration to inform the key design decision. Select those that are most relevant for your college and explore them through the activities below.*

- Who needs to be involved for direct assessment CBE to succeed long term?
- How will we cultivate shared ownership across roles and units?
- What structures (e.g., working groups, governance bodies, committees) are needed now?
- What professional learning or capacity building is needed to broaden participation?



Photo by Allison Shelley / Complete College Photo Library





## Example Activities

Here are some example activities and resources to help answer the key question and supporting planning questions above.

### Launch or evolve a direct assessment CBE workgroup.

- Establish a shared purpose statement to align institutional goals and student outcomes and brainstorm ways the workgroup could contribute.
- Recommend shifts in practices and policies to have direct or near-term impact on current direct assessment CBE students
- Prototype data-informed, student-centered solutions and support continuous improvement
- Scaffold the evolution or transformation of organizations or systems to align with direct assessment CBE
- Build awareness, knowledge, and community (including through peer learning and support)
- Advocate for direct assessment CBE to promote student success (at national, state, and institutional levels)



Photo by Allison Shelley / Complete College Photo Library

### Identify workgroup leaders to ensure the group has capacity to operate.

- Select individuals who are passionate about the direct assessment CBE program's principles, possess strong facilitation and communication skills, and demonstrate a commitment to collaborative learning and continuous improvement. Group leadership can be a good growth opportunity for faculty or staff who have not had highly visible leadership roles.

### Ensure all group meetings have a stated purpose (high-level aim), articulated outcomes (goals), and a good process for execution (agenda).

- Use a [Meeting Facilitation Template](#) to ensure these elements are considered.
- Start each meeting with an ice-breaker or interactive activity to ground participants in the purpose of the meeting and the group. These activities can also be used to elevate aspects of the direct assessment CBE program that require more careful consideration (e.g., a scavenger hunt on the direct assessment CBE program's landing page can help kick off a conversation about marketing and talking with students about program benefits).
- Utilize breakouts to encourage conversations in smaller groups. Groups can be organized by functional area (e.g., a general education faculty breakout, etc.).

### Utilize technology to foster better communication, asynchronous engagement, and higher participant satisfaction.

- Identify the workgroup's engagement needs before acquiring technology or tools (e.g., does the group want structured vs. unstructured engagement, asynchronous vs. synchronous communication, meeting documentation, AI integrations, chat and other discussion features, etc.).

### Build internal community, capacity, and expertise of direct assessment across teams and roles.

- Present at existing meetings (e.g., curriculum, faculty senate).
- Host sessions led by faculty around experiences teaching in direct assessment CBE and the student experience.
- Share student stories and learning artifacts.
- Train all new staff and faculty during onboarding on direct assessment CBE.

### Increase visibility and leadership alignment.

- Highlight direct assessment CBE in campus news, board meetings, and community outreach.
- Support and encourage faculty and staff to present at statewide and national conferences.

## LAUNCHING A WORKGROUP

*A workgroup can directly support equity in success by fostering collaborative problem-solving and sharing effective teaching/coaching strategies.*

- Use the group to engage students.** The group can be a forum for students to share their positive and negative feedback directly with faculty and staff. Beginning a meeting with a student speaker can be an energizing way to start a conversation about continuous improvement. This approach can also help make feedback loops shorter, leading to more timely changes in practice and policy.
- Form the group when participants have capacity and interest.** Without capacity, participants won't be able to attend meetings regularly or may not have time to implement learnings. Without interest, faculty and staff will not focus on leveraging the group to improve their individual practices or contribute to continuous improvement of the program as a whole. The need for information can motivate personnel to engage with the group, so consider ways that this workgroup becomes a conduit for internal messaging.
- Foster community between faculty and staff.** A cross-departmental workgroup might provide a rare opportunity for engagement between faculty and staff. Test out a community format that enables cross-functional collaboration and dedicated time for specific groups to engage peers.



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## CONCLUSION

Direct assessment CBE offers a strategic, scalable model for colleges to deliver on their mission to build inclusive, workforce-ready institutions that honor today's students by meeting them where they are and setting them up for success.

As a practical guide to support the development of direct assessment CBE programs, this Blueprint details what is possible when institutions center flexibility, learning, and regional needs. While featured colleges took different paths, they shared a common commitment: building a system where more students achieve their goals — whether earning credentials, transferring, or entering the workforce — on timelines that work for them.

We hope you explore the early implementation lessons reflected in the Blueprint to learn about and refine how direct assessment CBE can come to life on your campus. In turn, we hope to empower the California Community College system and beyond to support direct assessment CBE pathways, empower cross-functional implementation teams to design, launch, and sustain programs, and innovate on strategies that will benefit all students.

While the Blueprint lays a foundation for action, the work of building flexibly-paced, competency-based pathways continues. By championing direct assessment CBE, you can drive institutional transformation that makes higher education more inclusive, responsive, and workforce-ready.



Together, we can position California as a national leader in innovation — building the most student-centered, future-focused higher education system in the country.





# Resources

Congratulations! You have reached the end of the blueprint! This section includes a full list of resources referenced throughout the blueprint.

Be sure to revisit previous sections to review the context for these resources. This review can be a helpful exercise when looking to evaluate or refine your policies and practices.

**Prepare**, if you are still exploring what direct assessment CBE is and whether it would be a good fit for your institution.

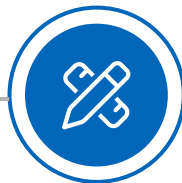
**Design & Build**, to dive into designing your program.

**Launch**, for guidance around marketing your program and enrolling students.

**Sustain**, focused on continuous improvement efforts that build on the program launch.



**PREPARE**  
6–12 Months



**DESIGN & BUILD**  
18–24 Months



**LAUNCH**  
6–9 Months



**SUSTAIN**  
Ongoing

# Resources

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## ACADEMIC CALENDAR AND FINANCIAL AID

[Blue Icon Policies and Procedures Review](#)

[Academic Calendar Checklist](#)

[Academic Calendar Decision Making Matrix](#)

[Financial Aid Decision-Making Matrix](#)

[Financial Aid Technology Comparison Template](#)

## CURRICULUM

[Activities for Developing Competencies](#)

[Using Raw Data to Develop Competencies](#)

[Competency Review Process](#)

[Drafting Competency Statements](#)

[M5 Evaluated Formative Report Rubric](#)

[Sample Assignment | Financial Acumen II \(M1\)](#)

[Sample Assignment | Financial Acumen II \(M3\)](#)

[Sample Assignment | Financial Acumen II \(M8\)](#)

[Sample Assignment | Financial Acumen II \(M9\)](#)

[Sample Syllabus | Financial Acumen II](#)

[Syllabus Template](#)

## EVALUATION

[RAND Using Data to Improve and Evaluate Direct Assessment CBE Programs](#)

[Questions to Consider When Looking at Existing Program Outcomes](#)

[Equity Data Audit](#)

[DA CBE Program Evaluation](#)

[CBE Student Feedback Form](#)

[Perpetual Quality Checklist](#)

## EXAMPLES FROM THE CA CBE COLLABORATIVE

### COASTLINE

[Coastline Program Overview 2025](#)

[Coastline Decision Tracker](#)

[Coastline Program Introduction](#)

[Coastline Student Journey Template](#)

[Coastline Student Journey Example](#)

[Coastline Introduction for Faculty](#)

[Coastline Community College Faculty and Staff Model](#)

### SHASTA

[Shasta College Faculty-Staff Model](#)

[Shasta Learning Journey Map](#)

### SOUTHWESTERN

[Southwestern Academic Calendar Example](#)

[Southwestern Data and Evaluation Plan](#)

### BAKERSFIELD

[Bakersfield College CBE Redirection Policy](#)

### MERCED

[Merced Academic Senate Presentation 2024](#)

[Merced Program Map](#)

[Merced CBE Transcript Example](#)

### MT SAC

[Mt SAC Competency Set Example](#)

[Mt SAC Substantive Change Application](#)

[Mt SAC Sample Implementation Team Charter](#)

## FACULTY AND STAFF

[Comparison of Faculty Roles Between CBE and Traditional Programs](#)

[Faculty Model Checklist](#)

[General Education Competencies](#)

[Examples of National Faculty Models](#)

[UW Flexible Option - Position Description Examples](#)

[Faculty Training Topics](#)

[Faculty Reflection Questions](#)

## MARKETING AND COMMUNICATIONS

[Cultivating CBE Champions: Communication Plan](#)

[C-BEN Storytelling Toolkit](#)

[CBE Campus Stakeholder Template PPT](#)

[Audience Table](#)

## EMPLOYER AND PARTNER ENGAGEMENT

[Direct Assessment CBE External Partnerships Self-Assessment](#)

[C-BEN Employer Engagement Toolkit](#)

[C-BEN Quality Framework for CBE Programs: Engagement with External Partners](#)

[Formalizing Employer Partnership Agreements](#)

[Employer Engagement](#)

## OTHER

[Designing with Equity Toolkit for CBE](#)

[Lumina How CBE May Reduce Inequities](#)

[C-BEN CBE Equity Action Plan](#)

[Proposed Framework for Transfer to Traditional Options](#)

[C-BEN Quality Framework for CBE Programs: Demonstrated Commitment for CBE](#)

## PROGRAM APPROVAL AND COMPLIANCE

[Direct Assessment CBE Program Approval Comparison Chart](#)

[Program Review Chart Template](#)

[ACCJC Substantive Change Application Template](#)

[Workplan Template for Navigating the Chancellor's Office Approval](#)

[U.S. Dept of Edu Application Requirements](#)

[U.S. Dept of Edu Application Template](#)

[Questions Received from the U.S. Dept of Education](#)

[Direct Assessment CBE Faculty Model Progress Submission Template](#)

[UMASS Global Program Approval Process](#)

## PROJECT MANAGEMENT

[Tool Recommendation Chart](#)

[Year 1 Workplan Template](#)

[RACI Worksheet](#)

[OVIS Chart Template](#)

[CBE Program Design Decision Matrix](#)

[Common Change Management Steps](#)

[Risk Matrix and Risk Register](#)

[Scaling CBE Decision Tree](#)

[Launch Timeline Template](#)

[Issue Tracker](#)

[Meeting Facilitation Template](#)

[Launch Phase Workload Awareness Chart](#)

[Assessing Readiness for direct assessment CBE](#)

[Implementation Team Charter Template](#)

[Benefits of a Project Manager](#)

[Sample Cost-Sharing Conversation Protocol](#)

[Indicators of a Potentially Good Fit for DA CBE](#)

[Team Member Orientation Checklist](#)

[Direct Assessment CBE Program Leadership Team Considerations](#)

[Establishing a Leadership Team - Planning Questions](#)

[Leveraging Technology to Make Project Management Easier](#)



## LEARNER EXPERIENCE AND STUDENT SUPPORT

[Learner Personas and Journey Map](#)

[Creating Learner Personas: Step 1, Data Audit](#)

[Student Supports Audit](#)

[Scenario Planning](#)

[Guild Target Learners Whitepaper](#)

[C-BEN Quality Framework for CBE Programs:  
Learner Experience](#)

[Student Orientation](#)

[Student Journey Template](#)

[Learner Success Exploration Worksheet](#)

[Pre-Enrollment Survey Template](#)

## TECHNOLOGY

[Direct Assessment CBE Technology Planning Guide](#)

[Pre-Launch Technology Considerations and  
Sample Checklist](#)

[Technology Inventory Questions](#)

[Template for CBE Technology Plan](#)



California  
Community  
Colleges