

## COLLEGE READING AND LEARNING ASSOCIATION

### BOARD CONFERENCE CALL

Thursday, April 4, 1996

### SUMMARY OF MINUTES

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**Members on-line:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*; Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.

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The meeting was called to order at 11:10 a.m. EST.

1.     **Agenda approved**  
The agenda was approved.
2.     **Minutes approved**  
The minutes of the February 8, 1996 conference call were approved as amended.
3.     **Election Results**  
Kathy Carpenter will be the new President-Elect.  
Sylvia Mioduski will be the new Treasurer.
4.     **Spring 1996 Canadian Symposium**  
Sandra gave the most recent registration figures. The number of rooms booked at the Lodge may affect whether we pay for meeting rooms.
5.     **Fall 1996 Albuquerque Conference**  
Letters of acceptance have been sent to those who submitted proposals. There is a World Wide Web page for the conference. Everyone is encouraged to visit the site and pass the address to others.  
<http://www.mscd.edu/~crla>
6.     **New Tutor Certification Chair**  
Gladys Shaw will replace Karan Hancock as the Coordinator of the International Tutor Certification Program. Submissions for program certification should now go to Gladys.
7.     **Kellogg Scholarship Recipient**  
Joe Millsap, an instructor in the Academic Achievement Center at Ozark Technical Community College in Springfield, Missouri, is this year's recipient of the Kellogg Scholarship. Congratulations, Joe!
8.     **Executive Editor Position for the Journal of College Reading & Learning**  
This position will be discussed in detail during the meetings in Kananaskis as will the position of Editor. At this point, Jim Bell of British Columbia and Bonnie Sonnek of Texas have expressed interest in working with the journal.
9.     **Burnison, Martello & Associates' Proposal for management services**  
Judith Burnison joined the conference call for 45 minutes. She gave some background of her firm and answered Board members' questions about the services her company could offer CRLA and their cost.

Management services will be discussed in depth during the Kananaskis meetings. Meanwhile, proposals from other firms will be sought.

10. **National Tutoring Association (NTA) Liaison**

A draft liaison agreement with the NTA was submitted. The Board supports this liaison, particularly in light of our strong Tutoring Certification Program. **It was moved that the liaison agreement with the National Tutoring Association be accepted with amendments.**

11. **Copyright Clearance Center (CCC)**

Forms to keep our contract with the CCC current were signed. Vince's school's address will be used as the CRLA mailing address for now.

12. **1998 Annual Conference: Salt Lake City, Utah**

**It was moved that Salt Lake City, Utah be approved as the site for the 1998 CRLA conference.** Tentative dates are November 4-8, or the last week in October.

13. **Open Positions**

In general, open positions in CRLA are advertised in the Newsletter. Currently, the following positions are or will be soon open: Site Selection Chair (open to past Board members; Pat will send a letter to them); SIG coordinator (open to SIG leaders, new person to begin in October); Awards and Scholarship Committee Chair (to be filled immediately).

The minutes were approved April 15, 1996.

# COLLEGE READING AND LEARNING ASSOCIATION

## BOARD CONFERENCE CALL

Thursday, April 4, 1996

### MINUTES

---

**Members on-line:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*; Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.

---

**The meeting was called to order at 11:10 a.m. EST.**

**1. Approval of Agenda (Attachment A)**

**Vince moved that the agenda with additions be adopted. Seconded by Sandra. PASSED.**

**2. Approval of Minutes**

**Sandra moved that the minutes of the February 8, 1996 conference call be approved as amended. Seconded by Vince. PASSED.**

**3. Proposal from Burnison, Martello & Associates**

This was postponed until Judith Burnison could join the conference call.

**4. Updates**

**a) Elections**

Dr. Kathy Carpenter will be the new President-Elect.  
Sylvia Mioduski will be the new Treasurer.  
Pat M-E has sent them each a letter confirming their positions on the Board.

**b) Spring 1996 Canadian Symposium**

Sandra gave the latest registration figures for the Symposium.

The Lodge has given three prices for meeting rooms based on the number of guest rooms booked. At this point, the number already booked bring us very close to the lowest price. We will investigate ways of achieving this lowest rate as the dates of the Symposium draw nearer.

*c) Fall 1996 Albuquerque Conference*

Vince reported that letters of acceptance and rejection for the institutes and sessions have been sent. He re-visited the hotel when he was in New Mexico for their state conference and reports that it will be very good for our conference.

Vince has set up a World Wide Web page for the conference. It looks great! Visit it at <http://www.mscd.edu/~crla>

*d) Tutoring Certification*

Gladys Shaw will be the new leader for this program. Gladys, rather than Karan Hancock, is now accepting submissions for tutor program certification.

Master prints of the certificates used in this program are being re-printed so they will reproduce more clearly.

*e) Kellogg Scholarship Recipient*

Joe Millsap is the recipient of this year's Kellogg Scholarship. He is an instructor in the Academic Achievement Center at Ozark Technical Community College in Springfield, Missouri. The Board supports this scholarship winner. Congratulations, Joe!

Board members are to contemplate an appropriate recipient for the Robert Griffin Long and Outstanding Service Award. A full report from Rosanne Cook, chair of the Scholarship and Awards Committee will be brought forward at Kananaskis.

*f) JCRL Executive Editor position*

This will be discussed at length and in detail during the Kananaskis Board meetings. Areas of discussion will include the position of Editor, the Executive Editor position, the role of the Advisory Board, and the Executive Board's need to stay in closer touch with this publication.



3. *Proposal from Burnison, Martello & Associates for membership/leadership services (Attachment B)*

Helen Baril will be unable to apply to work with the journal.

Jim Bell of British Columbia is still interested in working for the journal. He will be in Kananaskis.

Bonnie Sonnek of Texas has also expressed interest in working for the journal.

Judith Burnison, president of Burnison, Martello & Associates of Illinois, Inc. (BMAI) joined the conference call at 11:43 am EST.

After giving a brief history and description of her organization, she answered specific questions from Board members. Questions centred about additional costs not covered in her \$10 000 proposal, banking procedures with members' cheques, auditing procedures, accessibility of membership information, and other organizations serviced by the firm.

She left the conference call at 12:30 pm EST.

There was a short discussion regarding the suitability of this firm for our needs. This will be discussed in greater detail in Kananaskis. We need to seek out proposals from other firms.

5. *New Business*

a) *National Tutoring Association Liaison (Attachment C)*

On behalf of Gladys Shaw, Pat M-E brought forward a draft liaison agreement with the National Tutoring Association (NTA). The Board supports this liaison, particularly in light of our strong Tutor Certification Program. After discussion, it was decided that the agreement will specify one set of mailing labels, rather than three, be provided to NTA. It will also state that labels for only those members who have consented to be on an external mailing list will be provided.

<p><b>Sandra moved that the Board accept the liaison agreement with the National Tutoring Association with the changes specified above. Seconded by Vince. PASSED</b></p>
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Vince cautioned that the Board keep on top of the various liaison agreements we are making, since each one has resource ramifications.

*b) Copyright Clearance Center*

In completing the forms required to keep our contract with the Copyright Clearance Center current, an organizational address is required. It was decided that Vince's school address be used as the CRLA mailing address until October 1997.

*c) Site for the 1998 Annual Conference: Salt Lake City*

Tentative dates for the 1998 conference are Nov. 4-8, or the last week in October. We will consider the dates of other conferences, religious holidays and other events in order to avoid scheduling conflicts.

<b>Sandra moved that Salt Lake City, Utah be approved as the site for CRLA's 1998 Annual Conference. Seconded by Rosalind. PASSED</b>
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Susan Deese-Roberts is negotiating with the Hilton Hotel in Salt Lake City. Pat will fax each Board member a copy of the draft contract she receives from Susan for input before she signs it.

*d) Opening Positions*

The Board discussed how best to advertise open positions in the organization. Ads will be placed in the Newsletter, and there will be personal follow-up by Board members with those we know to be interested and possessing the required skills.

*i) Site Selection Chair*

The Board decided that this position is open to past Board members. Pat will send a letter soliciting them for this opening.

*ii) SIG Coordinator*

This position is open to SIG leaders. A new coordinator will be required beginning in October.

*iii) Scholarship Chair*

This position is required to be filled immediately. No one currently on the Awards and Scholarship Committee is willing to be chair.

We will seek candidates in Kananaskis.

*6. Future Board Meetings*

Board members will consider additional agenda items for the Kananaskis meetings.

Tentative plans are to have conference calls in June and August before the meetings in Albuquerque.

**Vince moved adjournment of the meeting at 1:00 pm EST.**

These minutes were approved April 15, 1996

CRLA Board Conference Call  
Thursday, April 4, 1996  
List of Attachments

- A. Tentative Agenda
- B. Proposal from Burnison, Martello & Associates for membership services
- C. National Tutoring Association Draft Liaison Agreement

**TENTATIVE AGENDA FOR THE CRLA CONFERENCE CALL  
THURSDAY, APRIL 4, 1996**

1. Approval of the Agenda
2. Approval of the Minutes (February 8, 1996)
3. Discussion of the Proposal from Burnison, Martello & Associates
  - a) Proposal Presentation: Judith Burnison will represent the company and answer questions about the membership services and proposal.
  - b) Board Discussion
4. Updates
  - a) Elections (Pat/JoAnn Mullen)
  - b) Canadian Symposium (Board)
  - c) Albuquerque Conference (Vince)
  - d) Tutoring Certification (Pat/Gladys Shaw)
5. New Business
  - a) National Tutoring Association Liaison (Pat/Gladys Shaw)
  - b) Copyright Clearance Center (Pat/Rosalind)
  - c) Site of the 1998 Annual Conference: Salt Lake City (Pat/Susan Deese-Roberts)
  - d) Opening Positions (Pat)
    - 1) Site Selection Chair
    - 2) SIG Coordinator
6. Reminders  
Canadian Symposium Board Meetings & Agenda Items

3/24/96



rtello & Associates of Illinois, Inc.  
agement  
an Avenue • Suite 300  
ubur-3821  
X 312-541-1271

CRLA Board Meeting  
Conference Call  
APRIL 4, 1996  
Attachment B  
2 page 5

March 21, 1996

Patricia Mulcahy-Ernt  
College Reading and Learning Association  
FAX Number: 203-264-1280 \*51

Dear Ms. Mulcahy-Ernt:

Thank you for your favorable response to our proposal to provide support services to the College Reading and Learning Association (CRLA). For an annual fee of \$10,000, BMAI will:

#### HEADQUARTERS

\$ 1,000.00

- maintain an office address and telephone for CRLA
- answer all telephone calls "association headquarters"
- answer all calls pertaining to membership and conference information
- refer all other calls to the appropriate Board member

#### MEMBERSHIP

\$ 3,000.00

- ✓ maintain a membership database and files on all members
  - ✓ maintain a conference database
  - ✓ send out dues notices and renewals
  - ✓ send out new member and returning member kits
  - ✓ send out three dues renewal notices per year
- The dues is very important to the association.*

#### CONFERENCE

\$ 3,000.00

- X handle all registration activities for annual conference, including credit card payments
- X provide name badges for annual conference
- X maintain and update registration lists for conference
- X prepare all labels for conference

#### ACCOUNTING

\$ 3,000.00

- open lock box at the bank so that all membership and conference monies go directly to the lock box for tracking by the treasurer
  - provide monthly accounting reports that cross-walk with all deposits.
- John Rec.*

750 - 10.00  
750 - 10.00  
1500 - 20.00 ~ 30.00 + postage

Patricia Mulcahy-Ernt

March 21, 1996

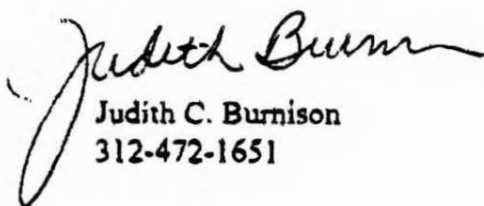
Page 2

## MISCELLANEOUS

- provide mailing labels, each run \$ 80.00
- provide membership report, each run \$ 50.00

We hope this information is helpful to you. If you should have any questions, please feel free to contact one of us tonight at our home telephone numbers.

Sincerely yours,

  
Judith C. Burnison  
312-472-1651

  
Ira J Chasnoff  
847-328-3625



ADING • LEARNING ASSISTANCE • DEVELOPMENTAL EDUCATION • TUTORIAL SERVICES

**LIAISON AGREEMENT  
COLLEGE READING AND LEARNING ASSOCIATION**

Because associations which share mutual concerns and strive toward similar goals can achieve greater gains through cooperation, the College Reading and Learning Association (CRLA) and the National Tutoring Association agree to coordinate their efforts in the following ways.

CHECK ALL ITEMS THAT APPLY.

- ☒ Designating a liaison.
- ☒ Exchanging one fee waiver (less any additional costs for meals, workshops, etc.) for the annual national conference.
- ☒ Providing a display table free of charge at the annual national conference.
- ☒ Reserving one session at the annual national conference for a professional development presentation.
- ☒ Providing space in the newsletter for an annual message.
- ☒ Arranging contact, via the liaison, between appropriate committee chairs and/or association members when political concerns arise.
- ☒ Arranging contact, via the liaison, between appropriate committee chairs and/or association members to work on joint projects.
- ☒ Provide to each other up to three sets of mailing labels annually at no cost for conference-related mailing.
- ☒ Provide space in the respective conference programs to place a call to conference at no charge.
- ☒ Other: this agreement begins July 1, 1996

THIS AGREEMENT WILL REMAIN IN FORCE UNTIL EITHER ASSOCIATION CHOOSES TO ALTER IT.

Shirley K. Shaw 7/8/96  
(CRLA Liaison) (Date)

(CRLA President) (Date)

Address

Phone ( )

Jack Truschel 1/22/96  
(NTA Liaison) (Date)

Cathy Wuse 1/22/96  
(NTA President) (Date)

Address

Phone (717) 422 3658

After signing this agreement, each association president should retain 2 copies, one for the association president's file and one for the liaison's file and forward the original to the president of the other association.



CRLA Board Conference Call  
Thursday, April 4, 1996  
List of Attachments

- A. Tentative Agenda
- B. Proposal from Burnison, Martello & Associates for membership services
- C. National Tutoring Association Draft Liaison Agreement

Date: Wed, 06 Mar 1996 16:03:35 -0700 (MST)  
From: "Kathy MacDonald, Learning Skills Centre, 284-7050"  
<kathy.macdonald@sait.ab.ca>  
To: PFRANKLIN@mtroyal.ab.ca, SROBERTSON@mtroyal.ab.ca,  
GRAYD@admin.gmcc.ab.ca, aftrg@orion.alaska.edu,  
LAMBERT@a1.lethbridge.ab.ca, DTheunissen@avc.calgary.ab.ca,  
marvint@NAIT.ab.ca, bbiggeman@LRC.oldscollege.ab.ca,  
karl.olsen@sait.ab.ca, kathy.macdonald@sait.ab.ca  
Cc: rosalind@Kwantlen.BC.CA, kathy.macdonald@sait.ab.ca  
Subject: Feb. 9 mtg. UPDATE

Here is an update to items discussed at our meeting Feb. 9/96.

3.3.1 78 registrants as at Mar. 6/96 per Sandra Evans. Many more to be received (see 6.1.9 at the end of this message).

3.2.4 As at Feb. 21/96 Dorothy reports 15 chairs procured.

3.3.3 On talking to Tom Gier this morning, it was decided I will make banquet tickets to include in the registration packets/envelope.

3.9.2 There will be ribbons (3 different colours) for Symposium Planning Committee members, CRLA Executive members, and Presenters. The colours will be a surprise.

4.1.2 Marvin has spoken with Dean MacNeil at THE LODGE and confirmed that Marvin can bring in his own hooch. He's looking for some good Canadian RED and WHITE wines. Send him your thoughts, he's open to suggestions.

4.1.5 Tom talked to Karl yesterday about this and it will happen like this...  
- about 20 minutes or 1/2 hour into the meal (Tom will read the situation--in view of the fact that it is a buffet), Tom will open with some introductions and an announcement of the events planned for the evening.  
- He will then introduce Pat Mulcahy-Ernt, CRLA President, who will welcome everyone on behalf of the CRLA.  
- Perry will introduce (and thank?) John Ballheim  
- Karl will introduce Miss Molly and the Tumbleweeds.  
- Vince Orlando will not speak about Albuquerque at this time.

4.4.5 Because some registrations are being paid by the registrant's college (and that's usually slow), the date they are received by Sandra will determine whether the receipt can be mailed or whether it will have to be put in the registrant's registration packet/envelope.

6.1.9 On March 6th, Dean MacNeil of THE LODGE advised Tom that 96 rooms had been reserved by symposiasts. (Considering there's probably more than 1 in some rooms, it's not looking too bad!)

Cheers, it getting warmer!  
k

Kathy MacDonald  
Learning Skills Centre

kathy.macdonald@sait.ab.ca  
voice: (403) 284-7050

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Southern Alberta Institute of Technology  
1301 - 16 Avenue N.W.  
Calgary, Alberta, Canada T2M 0L4

fax: (403) 284-8062



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To: Tom Gier  
Vince Orlando  
Rosalind Lee ✓  
Sandra Evans

From: Pat Mulcahy-Ernt *PM*

Date: March 24, 1996

Re: CRLA Conference Call on April 4, 1996 (11:00 EST)

This semester is quickly going by; it's already time for our next conference call. Since the Board will be meeting face to face in Canada in just a few weeks, I've saved the longer list of Board updates until then.

On April 4 we will be joined by Judith Burnison, who is the President of Burnison, Martello, and Associates. She has sent me a more detailed proposal that describes the membership, conference, and accounting services. My recommendation is that we have ready for her specific questions regarding each of these areas. It will also be helpful to have information ready for her regarding our specific organization's needs, since this proposal is only at the preliminary stage. From my discussions with her she is interested in customizing the services in light of our needs. At this point in time I am recommending that we look at the proposal, discuss it with her, and when we meet in Canada, look at it, as well as any other we would like to consider, in consideration of our long-range plans.

There are also a few announcements for our conference call meeting. In addition, Gladys Shaw would like us to look at the liaison agreement with the National Tutoring Association. Any updates that we need to mention regarding the conferences are also included.

Talk to you soon!

## COLLEGE READING AND LEARNING ASSOCIATION

### BOARD MEETING Monday, April 15, 1996 Kananaskis, Alberta, Canada SUMMARY OF MINUTES

Kananaskis Lodge

Pocaterra Room

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**Members present:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*; Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.

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The meeting was called to order at 9:20 a.m. MDT.

Tom Gier submitted a request for a proxy vote. Unfortunately, it was not allowed under *Robert's Rules of Order*.

1.     **Agenda Approved**  
The agenda was approved.
2.     **Minutes Approved**  
The minutes of the April 4, 1996 conference call were approved as amended.
3.     **Spring 1996 Canadian Symposium**  
The planning for the Symposium has been excellent. It is significant that CRLA is expanding into Canada. The format of longer sessions will be a model for the future. Registrations to date number 140.
4.     **State/Region/Chapter Update**  
Tom G. will provide a report in June.
5.     **SIG's**  
Recent SIG newsletters were distributed. SIGs have been asked to submit session proposals for the Albuquerque conference.
6.     **Professional Activity**  
Pat co-presented at NADE with Georgine Materniak. Pat attended the American College Personnel Ass'n conference.  
Vince attended the New Mexico state conference and gave the luncheon speech. The conference drew approximately 120 attendees.  
Jim Gulledege, South Carolina, will represent CRLA at the Second National Conference on Research in Developmental Education. Donna Wood, By-laws chair, and Martha Maxwell may also attend.
7.     **Other Associations**  
The CRLA-NADE liaison agreement will be updated.  
The new American Council of Developmental Education Associations (ACDEA) met during the NADE conference to discuss common issues. They will meet again June 7 and during the CRLA Albuquerque conference.
8.     **1996 Albuquerque Conference**  
Vince has set up a home page on the Internet for the conference. It has the conference schedule and various links. It can be linked to the general CRLA site too.

The keynote speaker will be Arnold Mitchem. The luncheon speaker will be Rosa Guerrero. The computer labs have not been booked yet. There will be a vegetarian option at the banquet. The on-site committee is working hard.

**9. Membership Report**

As of April 10, there were 617 current members and 493 memberships which expired in 1995. A renewal reminder will be sent.

Sales of the *Tutor Training Handbook* are steady.

A request for an estimate for database maintenance has been sent to Security Mail Services of Washington.

**10. Awards & Scholarship Committee**

Rosanne Cook, chair, submitted report. She tendered her resignation as well. The Board moved into executive session to discuss the awards and potential recipients.

**11. Communications Task Force**

The committee is 2 years old. Its mandate will be revisited.

**12. Display board**

Three more CRLA display boards have been produced, bringing the total to five.

**13. *Journal of College Reading and Learning***

Two applications to be the next editor of the journal have been received. They are from Jim Bell of the University of Northern British Columbia and from Barbara Lyman and Emily Payne of Southwest Texas State University. The board will decide on the new editor after further information regarding printing budgets are received.

The meeting adjourned at 11:50 p.m.

From 1:00 p.m. – 4:30 p.m. the board took part in a goal-setting workshop. Roz Bethke, Newsletter Editor, joined them.

These minutes were approved June 14, 1996.

# COLLEGE READING AND LEARNING ASSOCIATION

## BOARD MEETING Monday, April 15, 1996 Kananaskis, Alberta, Canada MINUTES

Kananaskis Lodge

Pocaterra Room

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**Members present:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*; Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.  
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**The meeting was called to order at 9:20 a.m. MDT.**

Tom Gier submitted a request for a proxy vote. Unfortunately, under *Robert's Rules of Orders*, a proxy is not permitted.

1. *Approval of Agenda (Attachment A)*      **Vince moved that the agenda be adopted. Seconded by Sandra. PASSED.**

2. *Approval of Minutes*      **Vince moved that the minutes of the April 4, 1996 conference call be approved as amended. Seconded by Sandra. PASSED.**

3. *Updates*

a) *Spring 1996 Canadian Symposium*      The planning committee has done an outstanding job organizing the Symposium. The program looks very good; it covers a wide assortment of topics. It is significant that CRLA is expanding its boundaries into Canada. The Symposium format with longer sessions is one to pursue when planning future events. Sandra reported 140 registrations to date. It is difficult to project the profit/loss until the final count of registrants, banquet tickets, and room bookings are in, but we may accrue a \$3000 loss from the symposium.

b) *State/Region/Chapter*

A report will be coming from Tom G. in June.

c) *SIG's*

Samples of SIG newsletters were distributed and discussed. They are an excellent resource for our members. SIG newsletters are targeted to be published twice yearly. SIG's have been asked to submit session proposals for the Albuquerque conference.

d) *Professional Activity of Board Members*  
*NADE*  
*(Attachment B)*

Pat gave a presentation with Georgine Materniak on the CAS standards at the NADE conference. The presentation was well-attended; there was interest in the work of CRLA's Standards Task Force. Pat was invited to a NADE Board meeting during the conference. One of the concerns was whether the scheduling of national and/or local conferences conflicted between the organizations.

Pat will update the CRLA - NADE liaison agreement with David Arendale, NADE's new President.

*American Council of  
Developmental Education  
Associations*

There was a meeting of this council at the NADE conference. Its purpose was to discuss common issues. This council may prove to be an important voice in the political arena in the future. The next meeting will be June 7.

A council meeting is anticipated during the Albuquerque conference.

<p><b>Vince moved that Pat attend the June 7, 1996 meeting of the American Council of Developmental Education Associations in Washington, D.C. Seconded by Sandra. PASSED.</b></p>
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*American College Personnel  
Association (ACPA Commission  
XVI)*

Pat attended this conference. The sessions on learning assistance were sparsely attended.



*New Mexico State Conference*

Vince attended this state conference where he gave a luncheon speech.

Approximately 120 people were at the conference.

Vince was able to do more planning for the Albuquerque conference while in New Mexico.

*International Reading Association*

Pat will attend this conference in New Orleans with several other CRLA members. She will be participating in a session with Kathy Carpenter, Roz Bethke, Elaine Batenhorst, and Nancy Krause.

e) *Albuquerque Conference  
WWW home page*

Vince is setting up a home page on the Internet for the conference. It includes the conference schedule and links with Albuquerque and the University of New Mexico. A registration page and the list of sessions will be added. The site can be linked with the general www site that Lucy Macdonald is generating and with NADE's home page.

*Program*

The institutes are lined up. Arnold Mitchem, the keynoter, has been influential in garnering support during tough fiscal times and he should be a good drawing card for the conference. Flyers advertising the conference will be sent to a mailing list of TRIO programs.

The luncheon speaker will be Rosa Guerrero. She will add a Southwestern cultural flavour to the conference.

There are still problems acquiring labs at the University of New Mexico for the computer institutes.

*Food*

There was discussion regarding the choice of banquet entrees and their cost. There will be a vegetarian option; this can be identified by the registrant via the "special needs" box on the registration form.

*Other*

There will be a day trip to Santa Fe on the Tuesday before the conference.

The leadership workshop and the pre-conference institutes will be on the Wednesday. Dave Caverly will present a morning and an afternoon institute.

There will be a resource room with job postings, summaries of the sessions, extra handouts, a photocopier, etc. There will be a message board near the registration desk for extra food tickets, etc.

The hospitality room is beautiful. All meeting rooms will be on one floor.

The New Mexico group is well-organized and lots of people are working on the arrangements.

*Registration and Membership*

The Board discussed how conference registration would affect membership renewals.

f) *Membership Report*

As of April 10, 1996 there were 617 current members and 493 memberships which expired in 1995. Rosalind recommended sending a renewal reminder to the 493.

*Tutor Training Handbook*

Sales are steady. Prepayment is preferred because institutions who use a purchase order only don't always pay after an invoice is issued.

*Management Services  
(Attachment C)*

Rosalind distributed copies of a letter sent to Security Mail Services of Washington requesting a cost estimate for some of the functions of the membership coordinator including maintaining a database, generating labels, and providing a permanent mailing address for CRLA.

g) *Scholarship Committee  
(Attachment D)*

Rosanne Cook, Chair of the Scholarship and Awards Committee, submitted a report on the activities of the committee. She tendered her resignation as chair in this report.

<p>Rosalind moved that the Board go into executive session to discuss awards. Seconded by Sandra. PASSED.</p>
---

The Board was in executive session for 20 minutes.

h) *Communications Task Force*

This committee is two years old and was originally created to look at different facets of intra-organizational communication. It is time to revisit the mandate.

Karen Smith has had 3 additional CRLA display boards produced. These are a good marketing tool. Now there are 5 boards which can travel across the continent for CRLA leaders' use.

Karen has asked for \$250 in her budget to cover this.

4. *Old Business*

a) *Second National Conference on  
Research in Developmental  
Education*

Jim Gullledge from South Carolina will represent CRLA at this conference. Donna Wood, By-Laws Chair, and Martha Maxwell may also attend.

b) *Journal of College Reading and  
Learning*

Pat has received a draft copy of the upcoming issue of the JCRL.

*Applications for Editor  
(Attachments E, F)*

We have received two applications for the editorship of the journal. One is from Jim Bell of the University of Northern British Columbia. The other is from Barbara Lyman and Emily Payne of Southwest Texas State University.

The Board reviewed both submissions. The applicants will be asked to submit further information regarding printing budgets. These are to be received by the Board before the next conference call and a decision on who will be the new journal editor will be made during that meeting.

**This portion of the meeting adjourned at 11:50 a.m.**

**1:00 p.m. - 4:30 p.m.**

Roz Bethke joined the Board meeting in the afternoon. The afternoon session was devoted to a goal-setting workshop.

These minutes were approved June 14, 1996.

## COLLEGE READING AND LEARNING ASSOCIATION

### BOARD MEETING Tuesday, April 16, 1996 Kananaskis, Alberta, Canada SUMMARY OF MINUTES

Kananaskis Lodge

Pocatererra Room

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**Members present:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*; Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.

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The meeting was called to order at 9:15 a.m. MDT.

**1. CRLA Representation at Other Professional Conferences**

There will be a member of the board at the conferences of the Midwest College Learning Centres Association (MCLCA), the National Association of Developmental Educators (NADE), the Second National Conference on Research in Developmental Education, the Winter Institute for Learning Assistance Professionals, and probably the conference of the National Tutoring Association (NTA).

A top priority for the board is to support the states and regions. This will be accomplished by sending a board member to attend local conferences and to fulfil their requests for budget and special items.

**2. 1996-1997 Operating Budget**

The board went over the budget. It was noted that clerical duties consumed a large portion of each member's time. Applicable portions will be sent to each leader.

After making a cost comparison between Excel Telecommunications and AT&T, it was moved that further information regarding a business package from Excel be pursued.

The members adjourned for lunch from 12:00 p.m. – 1:00 p.m.

**3. Marketing & Membership**

Renewal letters will be sent to those whose membership expired in 1995.

CRLA currently market the organization and conference through listserves, a www page, ads in the Journal of Reading and the Journal of Developmental Education, ads in other conference programs and through our State Presidents and regional leaders.

**4. JCRL Editor Applications**

The board discussed these.

**5. Council for the Advancement of Standards in Higher Education (CAS)**

Georgine Materniak will attend on behalf of CRLA. CRLA pays \$200 to be a member of CAS. It was moved that all CRLA publications show we are a member of CAS. The proposed draft of the CAS standards and Guidelines for learning assistance was submitted.

**6. Proposals for Management Services**

The board discussed the need for an external firm to provide management services and what those services would entail, e.g. clerical, check-handling, etc. The top priority was to have a single address for the organization. Having a lockbox was another option discussed. It was moved that a lockbox for CRLA be investigated.

**7. Miscellaneous**

The president will begin to organize future conference calls. The board went into executive session to discuss who should be CRLA's auditor. some dates in the by-laws need to be adjusted to coincide with the move of the conference dates from spring to autumn.

**8. Next Conference Calls**

These will be Friday, June 14, 1996 at 11:00 a.m. EDT and Thursday, August 29, 1996 at 1:00 a.m.

**The meeting adjourned at :37 p.m. MDT.**

These minutes were approved June 14, 1996.

# COLLEGE READING AND LEARNING ASSOCIATION

## BOARD MEETING

Tuesday, April 16, 1996  
Kananaskis, Alberta, Canada  
MINUTES

Kananaskis Lodge

Pocaterra Room

-----  
**Members present:** Pat Mulcahy-Ernt, *President*; Vince Orlando, *President-Elect*;  
Sandra Evans, *Treasurer*; Rosalind Lee, *Secretary*.

**Member absent:** Tom Gier, *Past-President*.  
-----

The meeting was called to order at 9:15 a.m. MDT.

1. *New Business*

a) *Board Travel for 1996-1997*

The Board discussed representation at national conferences and state meetings in light of the 1996-1997 budget.

*Midwest College Learning Centers Association (MCLCA)*  
(Attachment G)

Rosalind will attend this conference in Indianapolis on Oct 2-4, 1996.

*National Association of Developmental Education (NADE)*  
*2nd National Conference on Research in Developmental Education (NCRDE)*  
(Attachment H)

Vince will attend this conference in Denver in the spring of 1997.

See April 15 minutes, Item 4a.

*American College Personnel Association (ACPA)*

It was recommended that no CRLA representative attend this conference.

*National Tutoring Association (NTA)*

We are working toward a liaison agreement with the NTA. No one has yet been named to attend this conference.

*Winter Institute for Learning  
Assistance Professionals*

Sylvia Mioduski, incoming Treasurer, will be asked to represent CRLA at the Winter Institute.

*State and Region Meetings*

A top priority for the Board is to support the states and regions. This includes fulfilling their requests for a Board member to attend local conferences and for other special items.

*Preconference Board meetings in  
Sacramento, CA*

This is to be included in the budget.

2. *1996-1997 Operating Budget*

Sandra explained the various items in the Financial Report, the Transaction Report, the Income Statement, and the Operating Budget Worksheet. The Board discussed various line items. The telephone expenses for the Secretary will be moved to the Membership Coordinator's account. It was noted clerical duties consumed a large part of each Board member's time. One opinion was to have clerical assistance mandatory. Insurance was another item of discussion. The question was raised regarding the necessity of carrying Directors' and Officers' liability insurance.

Sandra presented the latest telephone bill from AT &T. She then presented a cost projection from Excel Telecommunications, Inc. for the same calls. The difference was over \$300.

<p>Vince moved that Sandra pursue Excel Telecommunications, Inc. for more information regarding their business package to reduce CRLA telephone and fax costs. Seconded by Rosalind. PASSED.</p>
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Applicable portions of the budget will be sent to the CRLA leaders for their recommendations. The Board will revisit the budget later in the year.

3. *Future Board conference calls*

Conference calls were scheduled for Friday, June 14, 1996 at 11:00 a.m. EDT and for Thursday, August 29, 1996 at 11:00 a.m. EDT.

**This portion of the meeting adjourned at 12:00 p.m.**

**The meeting reconvened at 1:00 p.m.**

4. *Marketing & Membership*

A renewal letter will be sent to individuals whose memberships expired in 1995. Sandra will send these from her college.

We listed the various channels through which we do and can advertise CRLA and the conference: listserves (e.g. LRNASST, tutoring, first year experience); Vince's world wide web page (the www site address could appear on all CRLA leaders' correspondence); ads in the *Journal of Reading* and the *Journal of Developmental Education*; ads in other conference programs (e.g. MCLCA, NADE); universities and colleges through our State Presidents and Regional leaders (graduate students, adjunct faculty, learning skills centres).

5. *JCRL Editor Applications*

The Board went into executive session for 32 minutes.

6. *Council for the Advancement of  
Standards in Higher Education  
(CAS) Standards  
(Attachment I)*

Georgine Materniak will be attending the meeting of this group. CRLA has paid \$200 to be a member of CAS. Martha Maxwell has suggested that we include on all our publications that we are a member of CAS. The Board agreed this would be a good idea.

The proposed draft of the CAS Standards and Guidelines for learning assistance programs was submitted.

Sandra moved that CRLA publications show we are a member of CAS. Seconded by Rosalind. PASSED.
--

7. *Management Services Proposals  
(Attachments J, K)*

Before looking at the proposals, the Board discussed some of the issues regarding membership and conference advertising to clarify what we were looking for an outside firm to provide.

Having a single CRLA address was the top priority.

Pros and cons of having the membership database in-house vs being handled by someone outside the organization were discussed. Since Rosalind has been handling the membership the advantage has been having information accessible to Board members. Sandra suggested the membership coordinator could be someone working with the Treasurer.

It was decided to keep the membership coordinator role within CRLA for now. There will be clerical assistance funds included in the budget for this.

The board discussed the possibility of maintaining a lockbox for CRLA. A lockbox is an exclusive mailing address handled by an agent (e.g. a bank or management company) who opens all mail delivered to the box, deposits any checks into a bank account, provides verification for the client (us), and forwards other correspondence as directed.

The advantages of a lockbox are having a single address, and reducing some of the time spent by the Treasurer in clerical duties. The disadvantages are the risk of having non-CRLA personnel handling checks, and not being able to specify what payment is for, e.g. one handbook, 4 SIG's, scholarship, etc.

However, being able to provide a single address for CRLA is important, and we will look carefully at the security measures offered by lockbox agents.

<p>Sandra moved that Sylvia Mioduski, the incoming Treasurer, begin investigating establishing a lockbox for CRLA's operating fund only under Sandra's guidance. Seconded by Vince. PASSED.</p>
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Sandra strongly recommended that future CRLA publications use the lockbox address for all remittances.

8. *Miscellaneous duties*

Some of the miscellaneous duties over the past year have fallen to the Treasurer and need to be redistributed. The President will now organize future conference calls. Investigating insurance coverage will also be handled by a different person.

9. *CRLA Auditor*

The Board went into executive session for 80 minutes.

10. *By-Laws*

Some dates in the by-laws need to be adjusted to coincide with the meetings which occur during the conference since the conference has been moved from spring to autumn.

**Vince adjourned the meeting at 5:37 p.m. MDT.**

These minutes were approved June 14, 1996.

## CRLA BOARD MEETINGS

April 15 and 16, 1996

Kananaskis, AB

### List of Attachments

- A. Tentative Agenda
- B. National Association for Developmental Association (NADE) Call for Proposals for 1997 Conference
- C. Letter from Secretary to Security Mail Services
- D. Report from the Awards and Scholarships Committee
- E. Submission from Jim Bell for Editor, JCRL
- F. Submission from Barbara Lyman and Emily Payne for Editor, JCRL
- G. Midwest College Learning Center Association (MCLCA) brochure
- H. Brochure advertising the 2nd National Conference on Research in Developmental Education
- I. Proposed Draft of CAS *Standards and Guidelines for Learning Assistance Programs*
- J. Proposal from Security Mail Processing Center
- K. Proposal from Texas Commerce Treasury Management

**TENTATIVE AGENDA FOR THE CRLA BOARD MEETINGS**  
**APRIL 15-16, 1996**  
**Lake Kananaskis, Alberta, Canada**

**MONDAY, APRIL 15**  
**Pocaterra Room\***  
**9:00 am - 11:30 am**

CRLA Board Meeting  
Kananaskis, AB  
April 15, 1996  
ATTACHMENT A  
2 page(s)

1. Approval of the Agenda
2. Approval of the Minutes (April 4, 1996)
3. Updates
  - a) Spring 1996 Canadian Symposium (Tom/Sandra/Rosalind)
    - (a) Registrations
    - (b) Budget
    - (c) Conference Program
  - b) State/Region/Chapter Update (Tom)
  - c) SIG Update (Pat)
  - d) Professional Activity of Board Members (Board)
    - 1) Current Activity
      - (a) NADE Conference (Pat)
      - (b) ACPA Commission XVI (Pat)
      - (c) New Mexico (Vince)
    - 2) Future Activity
  - e) Fall 1996 Albuquerque Conference (Vince)
  - f) Membership (Rosalind)
  - g) Scholarship Committee (Pat/Rosanne Cook)
  - h) Communications Task Force (Pat/Karen Smith)
4. Old Business
  - a) 2nd National Conference on Research in Developmental Education (Pat)
  - b) American Council of Developmental Education Associations (Pat)
  - c) JCRL (Board/JoAnn Carter-Wells)
    - 1) Draft copy of the next edition of JCRL
    - 2) Executive Editor and Editor Applications
      - (a) Jim Bell
      - (b) Barbara Lyman & Emily Miller Payne → *prop of Bonnie Cook*
  - d) CAS Standards (Note attached.) (Pat/Martha Maxwell)
  - e) Management Services Proposal: Burnison, Martello, & Associates (Pat)
  - f) CRLA Auditor
5. New Business
  - a) CRLA Leadership Positions (Pat)
  - b) CRLA By-laws
  - c) CRLA Job Description Updates (with Timelines) (Board)

\*The room will be open to Board Members from 8:30 am to 5:00 pm.



**TENTATIVE AGENDA FOR THE CRLA BOARD MEETINGS**  
**APRIL 15-16, 1996**  
**Lake Kananaskis, Alberta, Canada**

**MONDAY, APRIL 15**

**Pocaterra Room**

**1:30 pm - 4:30 pm**

5. New Business (continued)

d) CRLA Goals (Goal-setting Workshop) (Board)

(Note: Please bring copies of the 1994/1995 JCRL's article about CRLA's Strategic Planning, by Becky Johnen.)

**TUESDAY, APRIL 16**

**Pocaterra Room**

**9:00 am - 11:30 am; 1:30 pm - 4:30 pm**

5. New Business (continued)

e) Board Travel for 1996-97 (Board)

1) Representation at National Conferences

a) MCLCA

b) NADE

c) 2nd NCRDE

d) ACPA

e) NTA

f) Winter Institute

2) States and Regions

3) Preconference Board Meeting in Sacramento, CA

? (e) 1996-97 CRLA Operating Budget

f) Marketing & Membership

JCRL

6. Additions

7. Board Meetings

a) Tentative Schedule of the Board Conference Calls

1) May 30, 1996 11:00 am EDT

June 19 (F)

2) August 1, 1996 11:00 am EDT

R, Aug 29.

b) Board Meetings in Albuquerque, NM

1) Preconference

a) Monday, October 28, 1996, 9:00 am - 5:00 pm

b) Tuesday, October 29, 1996, 9:00 am - 5:00 pm

2) Conference

a) Friday, November 1, 1996, 3:00 pm - 5:00 pm

a) Sunday, November 3, 1996, 10:00 am - 12:00 noon

4/12/96





21st Annual Conference  
February 26 - March 2, 1997  
Denver, Colorado



**CALL FOR PROPOSALS**

**NATIONAL ASSOCIATION FOR  
DEVELOPMENTAL EDUCATION**

Proposals Due June 15, 1996





# NATIONAL ASSOCIATION FOR DEVELOPMENTAL EDUCATION

## 21st Annual Conference Call for Proposals

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### Developmental Education, Climbing to Greater Heights

*You are called to submit proposals for NADE's 21st Annual Conference in Denver, the Mile High City. With the sharing of ideas and expertise, Developmental Education will Climb to Greater Heights in meeting the challenges of today.*

### PROPOSALS FOR THE 1997 CONFERENCE

The National Association for Developmental Education (NADE) supports those involved in the task of meeting the academic and nonacademic needs of underprepared, at-risk, and nontraditional students who aspire to make a change in their lives through postsecondary education.

The Program Committee for the 1997 NADE Conference invites presentations that share expertise and insights into the very important and complex undertaking of providing access and support for these students.

We welcome proposals from faculty, researchers, program administrators, materials and curriculum developers, and other professional educators with interests in such areas as cognition, reading, writing, math, the sciences, English as a second language, learning disabilities, assessment, learning/study strategies, counseling, computers, and legislative issues.

NADE is also seeking presenters for Pre- and Postconference Institutes. Those interested should contact:

Dr. Phyllis Brown  
Trinidad State Junior College  
600 Prospect Street  
Trinidad, CO 81082

### FACTORS AFFECTING PROPOSAL SELECTION

Proposals will be selected on the basis of appropriateness and significance of topic as well as indications that the presentation will be organized and well-prepared. The Program Committee will also consider balance in the range of topics, level of expertise, the interests covered, and the professional and geographic distribution of the program presenters.

### STEPS IN SUBMITTING A PROPOSAL

1. Complete both sides of the 1997 NADE Conference Proposal Submission Form, using either the form or a photocopy.
2. Send four copies of both the front and back of the Proposal Submission Form.
3. Prepare four copies of the 250-word abstract of the session. Include the names, titles, and institutional affiliations of the presenters on a detachable page.
4. Mail the completed proposal package to:  
  
**Karen Bowen**  
**Pikes Peak Community College**  
**5675 S. Academy Blvd.**  
**Colorado Springs, CO 80906-5422**
5. Postmark submissions by June 15, 1996.

### To enhance your proposal

- ▶ submit readable material, typed copy
- ▶ state topic and point of view clearly
- ▶ select an appropriate format for topic
- ▶ outline the subtopics in the abstract
- ▶ include important details and examples
- ▶ fit the material to a one- or two-hour time frame
- ▶ show knowledge of current practices and research
- ▶ use a title that reflects the content
- ▶ edit and proofread the abstract carefully

## FORMAT OF SESSIONS

The following types of concurrent sessions are generally 60 minutes in length.

**PAPER** - A paper is presented most effectively as an oral summary of research or innovative practice, with occasional reference to notes or a text. The presenter often distributes handouts and may use audio-visuals. The abstract should include a summarized version of the paper: the central idea, supporting evidence, and a conclusion.

**DEMONSTRATION** - In a demonstration, the presenter shows--rather than tells--a particular technique. Presentation of theory underlying the technique should take no more than a few minutes while the remainder of the time should be used for modeling. The presenter usually distributes handouts and may also use audio-visual aids. The abstract should include a brief statement of purpose and a description of the presentation.

**WORKSHOP** - A workshop consists of very little lecture. The emphasis is on carefully structured activities for the participants. The leader works with a group, helping participants solve problems or develop specific teaching or research techniques. The abstract should include a statement of the goal, a brief explanation of the theoretical framework, and a precise description of the tasks to be performed during the workshop.

**COLLOQUIUM** - A colloquium provides both formal presentation and participant discussion. It is a forum for scholars to discuss current issues and for open discussion among all attendees. Presenters should exchange papers in advance and make formal responses to each other's positions. The organizer of the colloquium is responsible for securing the participation of people representing various viewpoints on the issue before submitting the proposal. The abstract should include a description of the topic and the specific contribution of each participant. The Proposal Submission Form should include the name and institutional affiliation of each participant.

## RESPONSIBILITIES OF PRESENTERS

1. All presenters must register for the conference and pay fees. NADE is unable to reimburse program participants for expenses.
2. When two or more people are presenting, the Contact Presenter is responsible for notifying all co-presenters about the status of the proposal.
3. No session selected for the conference should have its content significantly changed once accepted.
4. Presenters are responsible for providing session handouts.

Following the guidelines below will enhance proposal submission:

**TITLE** - The title is important for attracting participants to your session. Only the title, the name of the presenter(s), and institutional affiliation(s) will appear in the Daily Schedule section of the program booklet. Choose a title that will be clear to the intended audience, and limit it to **nine** words. Lengthy titles will be edited.

**ABSTRACT** - The abstract is the only part of the proposal seen by the proposal reviewers. It must show clarity of purpose, succinctness, appropriateness and significance for the intended audience, indications that the presentation will be well-prepared, and (if relevant) quality of research. Carefully read the instructions concerning proposals for a paper, demonstration, workshop, and colloquium. The abstract should be limited to 250 words and one page.

**SUMMARY** - Summaries appear in the conference program booklet to help conference participants decide which presentations are most appropriate to their interests. They should be written in the third person future tense (e.g., "The presenter will begin with....") and avoid references to published works. The summary should be limited to 50 words.

## CONFERENCE SITE

### Hotel

Adam's Mark Denver  
1550 Court Place  
Denver, CO 80202  
303-893-3333 FAX 303-623-0303

### Chapter Host

Colorado Association for Development Education



### The Mile High City Offers:

U.S. Mint  
State Capitol  
Denver Art Museum  
Performing Arts Museum  
Union Station  
Larimer Square  
Molly Brown House  
Denver Zoo  
Botanical Gardens  
Coors Brewery  
Central City: Gold Mining Town/  
Limited Stakes Gambling  
United States Air Force Academy  
and is close to Boulder, Colorado

National Association for Developmental Education  
Post Office Box 5922  
Carol Stream, IL 60917-5922

Non Profit Org.  
U.S. Postage  
PAID  
Colo Spgs Co 80906  
Permit # 951

**NADE 1997**  
21st Annual Conference  
Call for Proposals



# NADE '97 Conference Proposal Submission Form

NOTE: This form must be filled out by the Contact Presenter, who will be responsible for keeping co-presenters informed about the status of the proposal. The Contact Presenter must supply both institutional and summer addresses. This person must also inform the Program Chair of any address changes or other variances related to the proposal.

## 1. Contact Presenter (Please Type)

Name: \_\_\_\_\_

Institution: \_\_\_\_\_

Office Address:

Summer Address (very important):

\_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

E-mail: \_\_\_\_\_

FAX: \_\_\_\_\_

FAX: \_\_\_\_\_

Presenter(s): (Include Contact Presenter and list in the order in which names should appear in the printed program)

Name

Institution

Phone/E-mail

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## 3. Type of Session (Check only ONE)

\_\_\_\_ Paper \_\_\_\_ Demonstration \_\_\_\_ Workshop \_\_\_\_ Colloquium Time: 1 hr. \_\_\_\_ 2 hr. \_\_\_\_

## 4. Title of the Proposal (Nine word maximum)

\_\_\_\_\_

## 5. Intended Audience (Check all that apply)

\_\_\_\_ New Professionals \_\_\_\_ Administrators \_\_\_\_ Counselors  
\_\_\_\_ Seasoned Professionals \_\_\_\_ Teachers \_\_\_\_ Tutors \_\_\_\_ Other \_\_\_\_\_

## 6. Topic (Check all that apply)

\_\_\_\_ Administration \_\_\_\_ Learning Centers \_\_\_\_ Program Evaluation  
\_\_\_\_ Assessment \_\_\_\_ Learning Disabilities \_\_\_\_ Reading  
\_\_\_\_ Cognition \_\_\_\_ Learning/Study Strategies \_\_\_\_ Science  
\_\_\_\_ Computers \_\_\_\_ Legislative Issues \_\_\_\_ Tutoring  
\_\_\_\_ Counseling \_\_\_\_ Literacy \_\_\_\_ Writing  
\_\_\_\_ English as a Second Language \_\_\_\_ Mathematics \_\_\_\_ Other \_\_\_\_\_

## 7. Audio-Visual Needs

\_\_\_\_ Chalkboard or Marker Board

\_\_\_\_ Overhead Projector

\_\_\_\_ Flipchart

\_\_\_\_ Videotape Player & Monitor

\_\_\_\_ Other \_\_\_\_\_

## 8. Summary

Type a 50-word (maximum) summary on this form. If your proposal is accepted, this summary will appear in the conference program.

## 9. Abstract

(Please type on a separate page. Include a detachable page with the title(s) and name(s) of the presenter(s).)

Describe the objectives and content of your presentation in a 250-word (maximum) abstract. Include your assumptions, the rationale for your program, techniques, or ideas; a summary of evaluation procedures and results; and any research relevant to your presentation, which may be in the form of a brief bibliography.

**Submit four typed copies of this form and four copies of the abstract to:**

**Karen Bowen  
Pikes Peak Community College  
5675 S. Academy Blvd.  
Colorado Springs, CO 80906-5422**

Is this a SPIN-sponsored presentation? \_\_\_\_\_ Yes \_\_\_\_\_ No

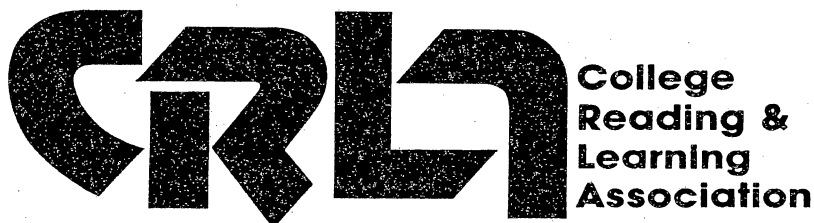
If yes, which SPIN? \_\_\_\_\_

Is this a committee-sponsored presentation? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, which committee? \_\_\_\_\_

-----  
*NADE is seeking presenters for Pre- and Postconference Institutes. If you are interested in conducting an institute of three or four hours, contact:*

*Dr. Phyllis Brown  
Trinidad State Junior College  
600 Prospect Street  
Trinidad, CO 81082*



READING • LEARNING ASSISTANCE • DEVELOPMENTAL EDUCATION • TUTORIAL SERVICES

Tuesday, April 09, 1996

Dave Freeman  
Security Mail Services  
250 H Street  
Blaine, WA 98230  
USA

Dear Dave,

Thank you for the explanations of the range of your services which you gave me today.

The College Reading and Learning Association is an organization of approximately 1000 members, 97% of whom are in the US. The other 3% are primarily in Canada with some members in other countries overseas. For the general membership, we provide 3 Newsletters per year (8.5 x 11 in, each issue 12-16 pages) and one to two issues of an academic journal (5.5 x 8.5 in, soft cover, about 90 pages). We also send various notices throughout the year such as calls to conferences and renewals.

The membership database is currently being run on Filemaker Pro 2.1 for the MAC. I am enclosing a list of the fields currently used. As you will note, most of it is very common. I am also enclosing a membership application form so you will see what information we ask for. The Special Interest Groups (SIG) are optional, and a member may, for an additional price, join none or all 18.

We need:

**Mailing:**

To mail to individual members the Newsletters and the Journals as they are published.  
To mail various publications we sell on individual request.

**Labels:**

To supply various leaders in the organization with pertinent labels on request. This would include state directors and SIG leaders. We have approximately 40 leaders, in addition to the Executive Board. The requests are sporadic. The more active leaders request labels monthly, the less active, once per year.

We also have requests for labels for the entire membership. If this request comes from a Board member, then the full database is required. The Board member chooses which dates of expiry to use for a cutoff. (We keep on the database members who are not current.) If the request is to fulfill an external query, then only those members who are current and who have given approval can be used.

**Database Management:**

This would include sending out renewal notices, keeping the database current, and archiving but NOT trashing, expired memberships. Sometimes there is investigative work involved, such as

whether membership has been duplicated or whether we actually have two members with the same name, or whether someone has in fact moved.

One address:

Due to the changeover of our Board members and the current state where different Board members receive mail depending on the functions they perform, we do not have one central CRLA address. Please explain the PO Box you would provide in this regard and how you would handle the mail.

The Board is discussing which aspects of the above we wish to contract out: all, some or none. We meet in Kananaskis, Alberta on Monday, April 15. If you can fax me a cost estimate before noon on April 11 (Thursday) at 604-599-2716, I will take this to the Board meeting..

Thank you.



Rosalind Lee  
Secretary, CRLA

ph: 604-599-2706  
fax: 604-599-2716



**CRLA ROBERT GRIFFIN  
LONG AND OUTSTANDING SERVICE AWARD - 1996  
Nomination Form**

**Name of Nominee:** \_\_\_\_\_

**Title/Position:** \_\_\_\_\_

**Institution:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Day Telephone:** \_\_\_\_\_

**Nominator:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Day Telephone:** \_\_\_\_\_

**INFORMATION ABOUT NOMINEE**

**I. Background Information**

**II. CRLA National Level Contributions**



### **III. CRLA State Level Contributions**

### **IV. CRLA Local Level Contributions**

**DEADLINE: August 15, 1996**



**Board Report  
Awards and Scholarships Committee  
March 27, 1996**

1. The Awards and Scholarships Committee received and approved one application for the CRLA Kellogg Institute Scholarship. With the CRLA President's approval, the scholarship was awarded to Joe Millsap, an instructor in the Academic Achievement Center at Ozark Technical Community College in Springfield, Missouri. The \$500 scholarship will be awarded as a discount by the National Center for Developmental Studies.

The Committee also recommended revising deadlines for most awards in view of the new dates of the annual conference. The deadline for the Kellogg Institute Scholarship remains in the spring (March 15); all other applications are due by August 15.

To date, other than the application for the Kellogg Institute Scholarship, the Committee has received one nomination for the Distinguished Research Award. We have received one request for information about the Scholarship Award.

2. The following promotion of the CRLA Awards and Scholarships has been completed or is underway:
  - a. Newsletter articles in the Fall and Winter newsletters. An article has been submitted for the Spring newsletter.
  - b. A letter and flyer with information about the awards program was sent to all CRLA SIG leaders and State/Region Directors and Chapter Presidents on February 9, 1996.
  - c. Karl Olsen, Symposium co-chair, has been contacted about making information about CRLA awards available at the Calgary Symposium.
3. In the near future, the CRLA Board should nominate recipients of the CRLA Robert Griffin Long and Outstanding Service Award. Last year, two people received this award: Dr. Becky Patterson and Dr. Susan Deese-Roberts. The recipients of this award receive a CRLA Special Recognition plaque at the annual conference. The guidelines for this award are enclosed.
4. Finally, I wish to submit my resignation as Awards and Scholarships Chair to the Board and ask that it be accepted as soon as possible. I have discussed this matter with Patricia Mulcahy-Ernt and have agreed to sustain the Committee's work until a new chair can be

appointed. For the time being, Ms. Mulcahy-Ernt requested that my name remain as the contact person for Awards and Scholarships until a new chair is identified.

I will promote the awards in the next newsletter and at the Calgary Symposium, but request that the new chair identify someone to coordinate the Scholarship Raffle at the annual conference.

When a new chair is appointed, I can work with them to effect as smooth a transition as possible. I have a ring-binder notebook with application forms and all correspondence related to Awards and Scholarships for the last two years. A list of current committee members is enclosed.

Rosanne G. Cook  
St. Ambrose University  
Davenport, Iowa

enclosures

## **CRLA SCHOLARSHIPS AND AWARDS COMMITTEE**

Rosanne Cook, Chair  
Associate Vice President of Academic Support Services  
St. Ambrose University  
518 West Locust Street  
Davenport, IA 52803  
319-383-8704  
319-383-8791 (FAX)

Ms. Carol R. Lyon  
Director of Reading and Study Skills  
St. Ambrose University  
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Davenport, IA 52803  
319-383-8864  
319-383-8791 (FAX)

Ms. Ann Faulkner  
English/Reading  
Brookhaven College  
3939 Valley View Lane  
Farmers' Branch, TX 75244  
214-620-4770  
214-620-4675 (FAX)

Dr. Barbara Smukler  
Director of Academic Resources  
College of Mount St. Vincent  
6301 Riverdale Avenue  
Riverdale, NY 10471  
718-405-3266 (Work Phone)  
718-601-6392 (FAX)



**CRLA ROBERT GRIFFIN  
LONG AND OUTSTANDING SERVICE AWARD - 1996  
Nomination Form**

**Name of Nominee:** \_\_\_\_\_

**Title/Position:** \_\_\_\_\_

**Institution:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Day Telephone:** \_\_\_\_\_

**Nominator:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Day Telephone:** \_\_\_\_\_

**INFORMATION ABOUT NOMINEE**

**I. Background Information**

**II. CRLA National Level Contributions**

### **III. CRLA State Level Contributions**

### **IV. CRLA Local Level Contributions**

**DEADLINE: August 15, 1996**



**Board Report**  
**Awards and Scholarships Committee**  
**March 27, 1996**

1. The Awards and Scholarships Committee received and approved one application for the CRLA Kellogg Institute Scholarship. With the CRLA President's approval, the scholarship was awarded to Joe Millsap, an instructor in the Academic Achievement Center at Ozark Technical Community College in Springfield, Missouri. The \$500 scholarship will be awarded as a discount by the National Center for Developmental Studies.

The Committee also recommended revising deadlines for most awards in view of the new dates of the annual conference. The deadline for the Kellogg Institute Scholarship remains in the spring (March 15); all other applications are due by August 15.

To date, other than the application for the Kellogg Institute Scholarship, the Committee has received one nomination for the Distinguished Research Award. We have received one request for information about the Scholarship Award.

2. The following promotion of the CRLA Awards and Scholarships has been completed or is underway:
  - a. Newsletter articles in the Fall and Winter newsletters. An article has been submitted for the Spring newsletter.
  - b. A letter and flyer with information about the awards program was sent to all CRLA SIG leaders and State/Region Directors and Chapter Presidents on February 9, 1996.
  - c. Karl Olsen, Symposium co-chair, has been contacted about making information about CRLA awards available at the Calgary Symposium.
3. In the near future, the CRLA Board should nominate recipients of the CRLA Robert Griffin Long and Outstanding Service Award. Last year, two people received this award: Dr. Becky Patterson and Dr. Susan Deese-Roberts. The recipients of this award receive a CRLA Special Recognition plaque at the annual conference. The guidelines for this award are enclosed.
4. Finally, I wish to submit my resignation as Awards and Scholarships Chair to the Board and ask that it be accepted as soon as possible. I have discussed this matter with Patricia Mulcahy-Ernt and have agreed to sustain the Committee's work until a new chair can be

appointed. For the time being, Ms. Mulcahy-Ernt requested that my name remain as the contact person for Awards and Scholarships until a new chair is identified.

I will promote the awards in the next newsletter and at the Calgary Symposium, but request that the new chair identify someone to coordinate the Scholarship Raffle at the annual conference.

When a new chair is appointed, I can work with them to effect as smooth a transition as possible. I have a ring-binder notebook with application forms and all correspondence related to Awards and Scholarships for the last two years. A list of current committee members is enclosed.

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CRLA Board Meeting  
Kananaskis, AB  
April 15, 1996  
ATTACHMENT E  
\_\_\_\_ page(s)

April 9, 1996

Dear CRLA Executive Board:

I am applying for the position of Editor, *Journal of College Reading and Learning*.

I have a broad background (see attached resume) covering many of the areas that CRLA's members are interested in. I have taught reading, study skills, and critical thinking; specialized in basic writing; taught and published in the ESL field; worked in adult literacy; completed doctoral courses in adult education theory and research. Currently, I am Coordinator of the Learning Skills Centre at the University of Northern British Columbia where I am the Learning Disabilities contact person, tutor trainer, and manager of a dozen people. This year, as last, I am also conducting a research and evaluation study with the help of a graduate student.

My Ph.D. from the University of Texas at Austin is in teaching writing to adults, and my knowledge of rhetoric and composition would be useful as Editor. It and my knowledge of desktop publishing certainly helped when I transformed the newsletter of the Alberta Association for Adult Literacy from photocopied clippings to a two-color, desktopped newsletter similar to CRLA's. My composition training has also helped me write effectively, from practitioner pieces (see attached "Using Peer Response Groups") to more formal research articles (see attached "Effect of Lowering the Reading Level").

I am organized, conscientious, and eager to do the editing job. What do people get from joining CRLA? What does the lone member in Beria, Ohio, actually get that will help her in her day-to-day work? The journal stands out. That is why I recently joined the Editorial Advisory Board for JCRL and why I am interested in producing a periodical that appears reliably and full of articles people are anxious to read.

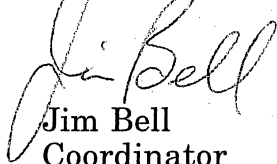
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Based on advise from Alex Michalos and the VP Academic (who edits three journals), I request that if I am chosen as Editor, the change over from the current editor be clean and decisive, that I have some say in choosing an Executive Editor, and that the CRLA Executive Board advise me in developing and implementing a promotional campaign to solicit appropriate manuscripts.

I look forward to hearing from you.

Sincerely,

A handwritten signature in cursive script that reads "Jim Bell". The signature is written in dark ink and is positioned above the printed name and title.

Jim Bell  
Coordinator  
Learning Skills Centre

## Curriculum Vitae

### **JAMES H. BELL**

1209 Eaglet Crescent, Prince George, BC V2M 4H6  
604-563-3810 (r) 604-960-6365 (w)

#### **FORMAL EDUCATION**

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Thesis: W. O. Mitchell's Craft of Fiction.

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3333 University Way  
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Curriculum Vitae**JAMES H. BELL**

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**Instructor (1979-1981)**

Keyano College, Fort McMurray, Alberta.

Designed and instructed four English upgrading courses; designed and taught the first-year university course English 284 Canadian Literature in Process, approved by the

University of Alberta; helped establish distance education programs for Natives at Fort Chipewyan and Janvier. Also edited *Portage*, northeastern Alberta's literary magazine of the arts.

Teacher, Grade 5 (1976)  
Tofield Elementary School, Tofield, Alberta  
Taught all subjects.

Senior Library Officer (1974-75)  
School Libraries Branch, Adelaide, South Australia  
Reviewed educational texts for the public school teachers of South Australia.

Teacher, First to Fourth Years (1971-1973)  
Birdwood High School, Birdwood, South Australia  
Taught Junior and Senior High School English, Social Studies, and Film Study.

## CURRENT PROFESSIONAL ASSOCIATIONS

National Council of Teachers of English  
— Conference on College Composition and Communication  
Canadian Association for the Study of Language and Learning  
The Movement for Canadian Literacy  
National Writing Center Association  
College Reading and Learning Association

## PUBLICATIONS

Needs assessment for a provincial literacy hotline service. (1994). (ERIC ED 369 982)

Tutors' conceptions of literacy. (1993). Ottawa, ON: Movement for Canadian Literacy. (with M. Norton)

Effect of lowering the reading level of a health education pamphlet on increasing comprehension by ESL adults. (1992). *TESL Canada Journal* 10(1), 9-26.

Literacy awareness and literacy hotlines. (1992). Calgary, AB: Calgary Adult Literacy Awareness Project. (ERIC ED 351 893)

Literacy audit for social agencies. (1992). Calgary, AB: Calgary Adult Literacy Awareness Project. (with A. Trussler) (ERIC ED 347 319)

Rural literacy issues in Alberta. (1991, May). Paper presented at the Literacy Issues in Rural Canada conference, Ottawa, ON. (ERIC ED 335 184)

Using peer response groups in ESL writing classes. (1991). *TESL Canada Journal*, 8(2), 65-71.

Using peer response groups in ESL writing classes [conference version]. (1991). In A. G. Konrad (Ed.), *Everyone's challenge: Proceedings of The Literacy Conference*. Edmonton, AB: University of Alberta.

What do readability formulas tell the ESL professional? (November 1991). Paper presented at the Alberta Teachers of English as a Second Language annual conference, Calgary, AB. (ERIC ED 352 854)

What are we talking about? A content analysis of Writing Lab Newsletter April 1985 to October 1988. (1989) *Writing Lab Newsletter*, 13(7), 1-5.

Reviews in *Literacy/Alphabétisation* of the following: *Leded Hi Test* (1985), *Reclaiming the classroom: Teacher research as an agency for change* (1987), *Teaching one-to-one: The writing conference* (1987), *Plain language: Clear and simple* (1992), and *Clear lines: How to compose and design clear language documents for the workplace* (1992).

Involved in researching and selecting material for the following textbooks: *Action English 4* (Toronto: Gage Educational, 1973), *Experiences* (Toronto: Wiley, 1975), *Explorations* (Toronto: Wiley, 1975), and *Literary Glimpses of the Commonwealth* (Toronto: Wiley, 1977).

For whom it may concern: The novels of Paula Fox. *Review*, 3(1), 19-20 (March 1975). Also, numerous reviews in *Review* (1974-1975).

## PRESENTATIONS

Writing in the Disciplines Workshops: A Worthwhile WAC Activity? March, 1996, Conference on College Composition and Communication annual meeting, Milwaukee, WI.

Marketing the Writing Center, September, 1995, National Writing Centers Association annual conference, St. Louis, MO.

Students' Perceptions of the Writing Centre, May, 1995, Canadian Association for the Study of Language and Learning annual conference, Kananaskis, AB.

Reflection on Practice: A Study in Resistance and Change, April, 1995, College Reading and Learning Association annual conference, Tempe, AZ.

Recent writing workshops for Alberta Teachers of English as a Second Language, Literacy Coordinators of Alberta, Alberta Vocational College-Calgary, The Learning Centre, and Newfoundland Literacy.

An Adult Secondary Writer: A Case for Discussion, November, 1993, Alberta Association for Adult Literacy annual conference, Edmonton, AB.

Writing, June 1993, Learning Assistance Centres of Alberta annual conference, Calgary, AB.

Writing Textbooks Used in ABE Classes, May 1992, Canadian Association for the Study of Writing and Reading annual conference, Banff, AB.

Writing Assessment, March 1992, Literacy Coordinators of Alberta annual conference, Edmonton, AB.

A Literacy Audit for Community Agencies, November 1991, Alberta Association for Adult Literacy annual conference, Lethbridge, AB.

What do Readability Formulas Tell the ESL Professional? November, 1991, Alberta Teachers of English as a Second Language annual conference, Calgary, AB.

Rural Literacy Issues in Alberta, May, 1991, Literacy Issues in Rural Canada Conference, Ottawa, ON.

Needs Assessment for Advanced ESL, October, 1990, The Literacy Conference, Edmonton, AB. Also November 1990, TESL Association of Ontario, Toronto, ON.

Using Peer Response Groups in the Writing Classroom, October, 1990, The Literacy Conference, Edmonton, AB. Also November 1990, TESL Association of Ontario, Toronto, ON.

Types of Conferences Conducted in a Writing Centre: Implications for Tutor Training, June, 1990, Learning Assistance Centres of Alberta, Olds, AB.

Tutoring in a Writing Center, April, 1989, The Research Network, Conference on College Composition and Communication, Seattle, WA.

A Field Guide to Adult Education for Writing Instructors, April, 1989, Conference on College Composition and Communication, Seattle, WA.

What are We Talking About? Needed Writing Center Research, October, 1988, Conference on Peer Tutoring in Writing, Saratoga Springs, NY.

Adult Basic Education Needs Assessment, February, 1983, Saskatchewan Adult Basic Education Association Conference, Saskatoon, SK.

THE UNIVERSITY OF NORTHERN BRITISH COLUMBIA

3333 University Way  
Prince George, B.C.  
Canada V2N 4Z9  
Tel.: (604) 960-5555  
Fax: (604) 960-5794



April 9, 1996

Dear CRLA Executive Board:

I am applying for the position of Editor, *Journal of College Reading and Learning*.

I have a broad background (see attached resume) covering many of the areas that CRLA's members are interested in. I have taught reading, study skills, and critical thinking; specialized in basic writing; taught and published in the ESL field; worked in adult literacy; completed doctoral courses in adult education theory and research. Currently, I am Coordinator of the Learning Skills Centre at the University of Northern British Columbia where I am the Learning Disabilities contact person, tutor trainer, and manager of a dozen people. This year, as last, I am also conducting a research and evaluation study with the help of a graduate student.

My Ph.D. from the University of Texas at Austin is in teaching writing to adults, and my knowledge of rhetoric and composition would be useful as Editor. It and my knowledge of desktop publishing certainly helped when I transformed the newsletter of the Alberta Association for Adult Literacy from photocopied clippings to a two-color, desktopped newsletter similar to CRLA's. My composition training has also helped me write effectively, from practitioner pieces (see attached "Using Peer Response Groups") to more formal research articles (see attached "Effect of Lowering the Reading Level").

I am organized, conscientious, and eager to do the editing job. What do people get from joining CRLA? What does the lone member in Beria, Ohio, actually get that will help her in her day-to-day work? The journal stands out. That is why I recently joined the Editorial Advisory Board for JCRL and why I am interested in producing a periodical that appears reliably and full of articles people are anxious to read.

I have arranged for one of our university's senior scholars to act as my mentor in the event I become Editor. Alex Michalos currently edits two major journals. I have included copies.

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04/11/96  
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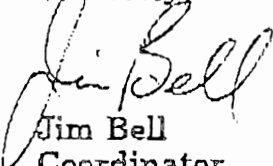
KWANTLEN COLLEGE  
UNBC REGISTRAR

003/003

Based on advise from Alex Michalos and the VP Academic (who edits three journals), I request that if I am chosen as Editor, the change over from the current editor be clean and decisive, that I have some say in choosing an Executive Editor, and that the CRLA Executive Board advise me in developing and implementing a promotional campaign to solicit appropriate manuscripts.

I look forward to hearing from you.

Sincerely,



Jim Bell  
Coordinator  
Learning Skills Centre

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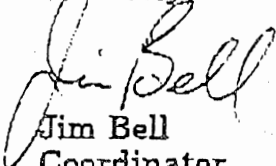
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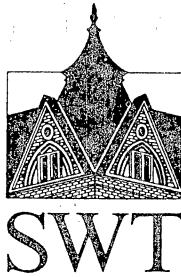
I look forward to hearing from you.

Sincerely,



Jim Bell  
Coordinator  
Learning Skills Centre





Department of Educational Administration  
and Psychological Services

April 10, 1996

Dr. Patricia Mulcahey-Ernt, President  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

Dear Pat,

The prospect of co-editing the *Journal of College Reading and Learning* for the next three years presents a wonderful and exciting professional challenge and responsibility to my colleague Emily Payne and me. We would welcome the charge to edit one of the premier national journals in Developmental Education. Our track record in the field thus far speaks to our commitment to the growth and development of the profession. Our successful efforts to build the Southwest Texas State University Graduate Program in Developmental Education, the rigor we work to uphold in supervising the theses required of all our majors, and our expanding publication experience which includes editing the NADE (National Association for Developmental Education) Conference Proceedings for two years, all testify to our continuing contributions to the field.

Our enclosed proposal package includes the following:

- 1) JCRL Editor Proposal, including rationale and goals;
- 2) our vitae;
- 3) sample publications: a recent article we co-authored, an in press article first presented as a policy paper by Barbara Lyman, and the two issues of the NADE Proceedings which we co-edited; and
- 4) letters of support from institutional representatives (Some of these may have to be sent later under separate cover or faxed due to our short turn around time for getting this proposal to you).

**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4616

Telephone: 512-245-2575 Fax: 512-245-8345

SWT is a member of the Texas State University System.

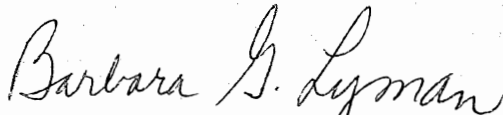
Should you or Executive or Editorial Board members have questions or need further information, please contact us at the following addresses:

Barbara Lyman, Coordinator  
Graduate Program in Developmental Education  
Department of Educational Administration and  
Psychological Services  
Southwest Texas State University  
601 University Drive  
San Marcos, TX 78666-4616  
**512-225-2650 Office**  
**512-282-4843 Home**  
**BL01@a1.swt.edu**

Emily Miller Payne  
Graduate Program in Developmental Education  
Department of Educational Administration and  
Psychological Services  
Southwest Texas State University  
601 University Drive  
San Marcos, TX 78666-4616  
**512-245-2302 Office**  
**512-328-4501 Home**  
**EP02@a1.swt.edu**

We look forward to the response of the Executive Board of the College Reading and Learning Association in the near future.

Sincerely yours,



Barbara G. Lyman, Ph.D.  
Associate Professor



Emily Miller Payne, Ed.D.,  
Assistant Professor

*Journal Of College Reading and Learning*  
Editor Proposal

Please accept this proposal from Emily Miller Payne and Barbara G. Lyman of the graduate program in developmental education at Southwest Texas State University as a formal request for editorship of the *Journal of College Reading and Learning*. We believe that we have the experience and institutional support to succeed in such an endeavor.

**Rationale:**

Southwest Texas State University has one of four graduate programs in developmental education in the nation. Our students may take a Master of Arts in Developmental Education, a Master of Arts in Teaching in English with a minor in Developmental Education, a Master of Education in Mathematics with a minor in Developmental Education, a Master of Education in Reading with a minor in Developmental Education, and masters programs in other areas such as special education.. Our master of arts degree candidates must complete scholarly research leading to a thesis in such areas as instruction or program administration in reading, writing, mathematics, study skills, adult literacy, workplace literacy, or other appropriate content. As graduate thesis advisors we have experience in evaluating qualitative and quantitative research projects.

We (Drs. Lyman and Payne) edited the National Association for Developmental Education Conference Proceedings in 1992 and 1993. Through that endeavor we gained the experience of requesting manuscripts, arranging peer reviews for a juried publication, and organizing and executing the publication and distribution process. We negotiated a printing and binding contract with our campus printer for a lower cost and higher quality than were available through commercial presses; we would certainly attempt to use those on-campus services again if we were the CRLA Board's choice as editors.

We have both been members of CRLA for a number of years and have presented papers at CRLA annual conferences. At the 1994 annual conference in San Diego, Dr. Lyman presented an Institute. In 1992, Southwest Texas State University offered a graduate credit course for CRLA conference participants. In addition, we and our graduate students have presented routinely at our state-level Conference on

Academic Support Programs, sponsored jointly by CRLA and TADE.

We have requested and received institutional support for this journal proposal from our department, our school, and our academic affairs office. Dr. Sue McCullough, the chairperson of our Department Educational Administration and Psychological Services, has written a letter of support as has Dr. John Beck, Dean of the School of Education, and Dr. Robert Gratz, Vice President for Academic Affairs. Southwest Texas State University would be proud to be the new home of the *Journal of College Reading and Learning*.

In general, we believe that our program represents the convergence of educators who are trained in and teach in the academic disciplines of reading, English, and math with those practitioners whose training is in counseling, developmental education, and adult education. In addition to teaching in developmental reading, writing and math departments in community and four-year colleges, the graduates from our program go on to work in learning assistance centers, academic athletic counseling centers, Upward Bound and TRIO programs, supplemental instruction programs, English-as-a-second language programs, and adult literacy and workplace literacy centers. We have experience in working with and allegiance to the people and institutions that are represented in CRLA's own diverse membership.

### **Goals:**

In general, our goals would be to continue to publish a quality journal. In order to accomplish that goal, we would continue the CRLA tradition of selecting reviewers who are committed to sound scholarship linked to practice.

We would continue the practice of including articles based on instruction and administration in community colleges, four-year colleges and universities, learning centers, and other appropriate alternative educational settings. The diversity in author voices writing about multicultural student populations is particularly important if a journal is to have an impact on promoting quality education for all students.

We would continue Joanne Carter-Wells' successful work to get university libraries to invest in subscriptions to the *Journal of College Reading and*

*Learning*. And, in general, we would work to continue to increase interest in the Journal in fields outside of developmental education (adult education, workplace literacy, etc.).

We would be interested in polling CRLA members and *Journal of College Reading and Learning* subscribers to determine what topics interest them; we could, in order to solicit manuscripts on those topics, suggest those topics in announcing our request for manuscripts.

We would encourage graduate students and new professionals in developmental education to submit manuscripts because it is important to encourage active association participation and professionalism in the teachers, administrators, and researchers who will inherit the field.

### **Summary:**

We believe that we have the experience, the academic and institutional resources, and the commitment to the field to do a superb job as editors of the *Journal of College Reading and Learning*. And, because we are in the business of educating new professionals for our field, we have a particularly strong commitment to publishing a journal that will facilitate the future delivery of quality education through research and teaching.



Department of Educational Administration  
and Psychological Services

April 11, 1996

Dr. Patricia Mulcahy-Ernt, President  
College Reading & Learning Association

FAX: 203-264-1288

Dear Dr. Mulcahy-Ernt:

The following are types of institutional support that Southwest Texas State University has verbally agreed to provide Barbara Lyman and me if we are selected to edit the *Journal of College Reading and Learning*: a graduate assistant (typically funded at 10 hours per week), additional office and work space, clerical assistance, and upgrades in our existing technology as needed.

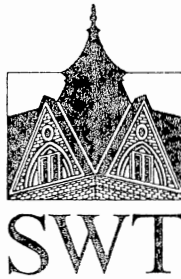
In addition, our department chairperson has initiated discussion with our offices of development and research and sponsored projects for other funds to facilitate the project. At present, we have not identified our needs for this, but we will do so as soon as we receive further printed information from you on the journal budget.

Sincerely,

Emily Miller Payne, EdD  
Assistant Professor

**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4616  
Telephone: 512-245-2575 Fax: 512-245-8345  
SWT is a member of the Texas State University System.



Department of Educational Administration  
and Psychological Services

April 10, 1996

Dr. Patricia Mulcahy-Ernt, President  
Executive Board  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

To President Mulcahy-Ernt and the CRLA Executive Board:

I wish to convey my support for Dr. Barbara Lyman and Dr. Emily Payne to become the co-editors of the national Journal of the College Reading and Learning Association.

I have talked with them about their plans for the journal and know that your association and the journal will both benefit from their ideas, energy and expertise. I will be supporting their efforts to accomplish this important endeavor. Our students will also benefit from this project.

Dr. Lyman and Dr. Payne bring outstanding skills in teaching, research and service to this position. They are members of state task forces on reading and adult literacy. They have two active grants which are focused on developmental and adult education and on building a coalition of providers in both public and private agencies. Their teaching skills are rated as outstanding by their students. In addition, the Developmental Education program is the fastest growing program in our department and also, the most diverse with 40% African-American and 20% Hispanic enrollees.

Dr. Lyman and Dr. Payne bring a devotion, a vision and such energy to the field of Developmental and Adult Education that it inspires others to follow their lead. I know they will bring these same leadership skills to the production of the CRLA journal.

Thank you for your consideration of Dr. Lyman and Dr. Payne for the position of editor.

Sincerely,

C. Sue McCullough, Ed.D., Chairperson  
Associate Professor

Southwest Texas State University

601 University Drive San Marcos, Texas 78666-4616  
Telephone: 512-245-2575 Fax: 512-245-8345  
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Vice President for  
Academic Affairs

April 11, 1996

Dr. Patricia Mulcahy-Ernt, President  
Executive Board  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

Dear Dr. Mulcahy-Ernt and Executive Board,

I wish to support Dr. Barbara Lyman and Dr. Emily Payne to be co-editors of the national Journal of the College Reading and Learning Association.

Drs. Lyman and Payne bring extraordinary skills to the job of editing a national journal. They have a solid record of grant support, research, and service to the local, regional and state communities in development and adult education. They have attracted a diverse student body into the rapidly growing a Developmental Education Program at SWT, with 40% African-American and 20% Hispanic representation. Their teaching evaluations are outstanding.

Dr. Lyman and Dr. Payne will work with their chairperson, Dr. McCullough, to develop the details of the support that SWT will provide for their term as co-editors.

I commend Dr. Lyman and Dr. Payne to you to share the position of editor of the CRLA journal.

Sincerely,

Robert D. Gratz  
Vice President for Academic Affairs

RDG:dc

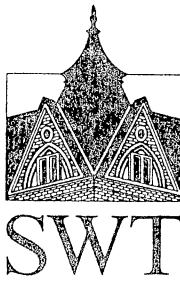
**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4615

Telephone: 512-245-2205 Fax: 512-245-8346

SWT is a member of the Texas State University System.





Department of Educational Administration  
and Psychological Services

April 10, 1996

Dr. Patricia Mulcahey-Ernt, President  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

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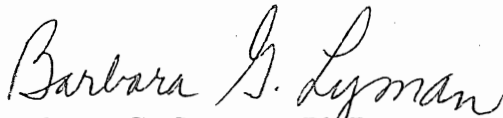
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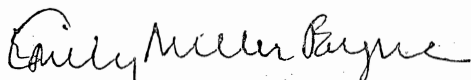
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Associate Professor



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Assistant Professor

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Department of Educational Administration  
and Psychological Services

April 11, 1996

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College Reading & Learning Association

FAX: 203-264-1288

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Sincerely,

Emily Miller Payne, EdD  
Assistant Professor

**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4616

Telephone: 512-245-2575 Fax: 512-245-8345

SWT is a member of the Texas State University System.



Department of Educational Administration  
and Psychological Services

April 10, 1996

Dr. Patricia Mulcahy-Ernt, President  
Executive Board  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

To President Mulcahy-Ernt and the CRLA Executive Board:

I wish to convey my support for Dr. Barbara Lyman and Dr. Emily Payne to become the co-editors of the national Journal of the College Reading and Learning Association.

I have talked with them about their plans for the journal and know that your association and the journal will both benefit from their ideas, energy and expertise. I will be supporting their efforts to accomplish this important endeavor. Our students will also benefit from this project.

Dr. Lyman and Dr. Payne bring outstanding skills in teaching, research and service to this position. They are members of state task forces on reading and adult literacy. They have two active grants which are focused on developmental and adult education and on building a coalition of providers in both public and private agencies. Their teaching skills are rated as outstanding by their students. In addition, the Developmental Education program is the fastest growing program in our department and also, the most diverse with 40% African-American and 20% Hispanic enrollees.

Dr. Lyman and Dr. Payne bring a devotion, a vision and such energy to the field of Developmental and Adult Education that it inspires others to follow their lead. I know they will bring these same leadership skills to the production of the CRLA journal.

Thank you for your consideration of Dr. Lyman and Dr. Payne for the position of editor.

Sincerely,

C. Sue McCullough, Ed.D., Chairperson  
Associate Professor

**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4616

Telephone: 512-245-2575 Fax: 512-245-8345

SWT is a member of the Texas State University System.



Vice President for  
Academic Affairs

April 11, 1996

Dr. Patricia Mulcahy-Ernt, President  
Executive Board  
College Reading and Learning Association  
220 West Flat Hill Road  
Southbury, CT 06488

Dear Dr. Mulcahy-Ernt and Executive Board,

I wish to support Dr. Barbara Lyman and Dr. Emily Payne to be co-editors of the national Journal of the College Reading and Learning Association.

Drs. Lyman and Payne bring extraordinary skills to the job of editing a national journal. They have a solid record of grant support, research, and service to the local, regional and state communities in development and adult education. They have attracted a diverse student body into the rapidly growing a Developmental Education Program at SWT, with 40% African-American and 20% Hispanic representation. Their teaching evaluations are outstanding.

Dr. Lyman and Dr. Payne will work with their chairperson, Dr. McCullough, to develop the details of the support that SWT will provide for their term as co-editors.

I commend Dr. Lyman and Dr. Payne to you to share the position of editor of the CRLA journal.

Sincerely,

Robert D. Gratz  
Vice President for Academic Affairs

RDG:dc

**Southwest Texas State University**

601 University Drive San Marcos, Texas 78666-4615

Telephone: 512-245-2205 Fax: 512-245-8346

SWT is a member of the Texas State University System.



CRLA Board Meeting  
Kananaskis, AB  
April 16, 1996  
ATTACHMENT 6  
1 page(s)

**MIDWEST COLLEGE  
LEARNING CENTER  
ASSOCIATION**



**MIDWEST COLLEGE LEARNING CENTER ASSOCIATION**

**LEARNING CENTER  
PROFESSIONALS:  
CHALLENGING STUDENTS  
TO ACHIEVE**

## WHAT IS MCLCA?

The Midwest College Learning Center Association (MCLCA) is a regional organization dedicated to promoting excellence among learning center personnel in twelve midwestern states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin. The MCLCA defines a learning center as a place where all students, from entering freshmen to graduate and professional school students, can be taught to become more efficient and effective learners.

## WHAT DOES MCLCA DO?

The MCLCA Constitution identifies the following objectives for the organization:

- To promote professional standards for learning centers through education, curriculum design, research, and evaluation.
- To promote support for learning centers by acting on issues affecting learning assistance programs.
- To assist in the development of new learning centers.



MIDWEST COLLEGE LEARNING CENTER ASSOCIATION

- To assist in the professional development of personnel in learning assistance programs by providing opportunities for sharing professional methods, techniques, and strategies.
- To provide an annual conference for the exchange of ideas, methods, and expertise in learning assistance programs.
- To publish educational information and research in the field.
- To develop and expand a communications network among learning assistance professionals.
- To coordinate our efforts with similar professional groups.

## HOW CAN I PARTICIPATE?

The MCLCA Executive Board is anxious to involve as many learning center professionals as possible in achieving its objectives and meeting our mutual needs. Therefore, we invite you to become a member of the Midwest College Learning Center Association. The membership year extends from October 1 through September 30, and annual dues are \$25.00. Membership includes the MCLCA Newsletter, discounted registration for the annual MCLCA Conference, workshops, in-service events, and announcements regarding upcoming MCLCA activities. We look forward to having you as an active member of our growing organization.

## MEMBERSHIP APPLICATION

Name \_\_\_\_\_  
Institution \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone ( ) \_\_\_\_\_ Fax ( ) \_\_\_\_\_ E-mail address \_\_\_\_\_

*Send application form and dues to*

Susan Witkowski, MCLCA Membership Secretary, Alverno College, P.O. Box 343922, Milwaukee, WI 53234-3922

**Appalachian**  
STATE UNIVERSITY

BOONE, NORTH CAROLINA 28608

National Center for Developmental Education

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Non-Profit Org.  
Boone, N.C.

# The Second National Conference on Research in Developmental Education

October 23 to 26, 1996

Adam's Mark Hotel  
Charlotte, North Carolina

*Presented by* the National Center for Developmental Education  
*and co-sponsored by* the National Association for Developmental  
Education, College Reading & Learning Association, and  
North Carolina Developmental Studies Association



*"Revitalizing the Profession through Research"*

CRLA Board Meeting  
Kananaskis, AB  
April 16, 1996  
ATTACHMENT H  
1 page(s)

*Developmental education is one of the largest growth areas in contemporary higher education.*

*There are more than 2,500 developmental and learning assistance programs in American colleges and universities serving over two million students. Fortunately, there is a growing body of research on how to best serve these students. The Second National Conference on Research in Developmental Education brings this research together to "Revitalize the Profession through Research."*



*The purpose of this conference is to bring research to bear on improving the practice of developmental education and learning assistance.*

*Particular emphasis is placed on theories, models, and techniques that improve the performance of underprepared college students. The conference features more than 90 research-based presentations on student assessment and placement, instructional techniques, tutoring, staff training, classroom assessment, program evaluation, and the application of technology to developmental education and learning assistance. It also features the most recent findings from the National Study of Developmental Education funded by the Exxon Education Foundation, the Alfred P. Sloan Foundation, and the National Association for Developmental Education.*

*30,000 copies of this public document were printed at a cost of \$1,128.67, or \$.04 per copy.*

## Conference Highlights

The conference is highlighted by major addresses from:

**ALFREDO de los SANTOS**, Vice Chancellor, Maricopa Community Colleges

**JAMES ANDERSON**, Dean of Undergraduate Studies, North Carolina State University

**HUNTER BOYLAN**, Director, National Center for Developmental Education

*The conference also features invited presentations by:*

Ansley Abraham	David Arendale
Leonard Bliss	Barbara Bonham
Barbara Calderwood	Martha Casazza
Chuck Claxton	Gene Kerstiens
Ross MacDonald	Martha Maxwell
Curtis Miles	Ed Morante
Pat Smittle	Bunk Spann

*Additional features include:*

- a preconference institute on doing research within your own developmental or learning assistance program,
- a preconference institute on minority retention research,
- a preconference institute on tutor training,
- a special panel session to present and review standards for developmental education and learning assistance centers,
- a participant brainstorming session to identify future research issues for the field,
- sessions on qualifying for CRLA certification of tutoring programs, and
- a postconference planning seminar for the future.

### Special Events

- The National Center for Developmental Education's 20th Birthday Celebration.
- Trips to some of the South's leading outlet malls.
- Brainstorming Brunch to generate ideas for new research.
- Nightly hospitality hosted by the staff of the National Center for Developmental Education.
- An evening at CJ's nightclub.

### THE CONFERENCE SITE

Charlotte, North Carolina is the epitome of a New South city. Its uptown section is one of the nation's most attractive business centers combining modern office towers designed by some of the world's leading architects and renovated historical buildings with parks, fountains, and plazas. Charlotte is the third largest financial center in the country, and it is rated as one of the nation's ten best places to live by *NEWSWEEK* Magazine. It is also the home of two of country's newest sports franchises—the Carolina Panthers of the NFL and the Charlotte Hornets of the NBA.

Charlotte's uptown area abounds with cultural, recreational, and entertainment centers ranging from the Mint Museum of Art to the "Discovery Place" Science and Technology Museum to the Afro-American Cultural Center to the North Carolina Center for the Performing Arts. Charlotte is also the major regional shopping center featuring specialty shops, galleries, antique markets, malls, and discount outlets.

### THE CONFERENCE HOTEL

The Adam's Mark Hotel is Charlotte's top ranked convention center. It is located across from Marshall Park featuring fountains, pools, and walking trails and the Charlotte Aquatic Center, a swimming and recreational facility. One of Charlotte's largest outlet malls is only three blocks from the Adam's Mark.

The hotel's conference facilities include two grand ballrooms and a variety of modern presentation rooms. The Adam's Mark also offers a full-size indoor swimming pool, jacuzzi, and a complete physical fitness center including racquet ball and wallyball courts.

A special room rate of \$87/single, \$97/double is provided for this conference. Reservations must be made by September 23, 1996 to receive this rate. Call (704) 372-4100 for reservations.

### TRAVEL

USAir is the official airline for the conference. Discounts ranging from 5% to 10% will be available. Call 1-800-334-8644; refer to GOLD FILE NO. 95250103. Queens limo/shuttle is available for transportation from the airport to the Adam's Mark Hotel.

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Institution & Title: \_\_\_\_\_

Telephone #: \_\_\_\_\_ E-Mail: \_\_\_\_\_

- ☐ **Registration Fee Enclosed:** (by September 1, 1996) ..... \$140 \$ \_\_\_\_\_  
 (after September 1) ..... \$160 \$ \_\_\_\_\_
- ☐ **Ticket to Research Brainstorming Brunch** (Oct. 26, 10:45-12:30) ..... (\$15) \$ \_\_\_\_\_
- ☐ **Preconference Institute** (Oct. 23, 9 am-12 pm) ..... (\$30) \$ \_\_\_\_\_  
 "Research-Based Approaches to Enhancing Minority Retention,"  
 By James A. Anderson
- ☐ **Preconference Institute** (Oct. 23, 1-4 pm) ..... (\$30) \$ \_\_\_\_\_  
 "Research it Yourself - Using Your Own Program as a Source of Research Data,"  
 By Hunter R. Boylan, Barbara S. Bonham, and Leonard B. Bliss
- ☐ **Preconference Institute** (Oct. 23, 9 am-4 pm) ..... (\$40) \$ \_\_\_\_\_  
 "New Research-Based Processes and Materials for Training  
 and Evaluating Peer Tutors," By Ross B. MacDonald
- ☐ **Planning Seminar for the Future** (Oct. 26, 1-4 pm) ..... (\$30) \$ \_\_\_\_\_  
 "Developmental Education's Quandry: Getting Better at the Wrong Thing?"  
 By Curtis Miles
- ☐ If paying by credit card, please add \$5 ..... (\$5) \$ \_\_\_\_\_  
 Credit card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Total \$ \_\_\_\_\_
- ☐ MasterCard ☐ VISA Signature \_\_\_\_\_

## Registration Form

Please mail this  
registration form and  
appropriate payment to:

Conference Registrar  
National Center for  
Developmental Education  
Appalachian State University  
Boone, NC 28608

\*\*\*\*\*

FOR INFORMATION:

Call: (704) 262-3057

FAX: (704) 262-2128

**PROPOSED DRAFT TO BE DISTRIBUTED FOR DISCUSSION ONLY**

**COUNCIL FOR THE ADVANCEMENT OF STANDARDS  
IN HIGHER EDUCATION (CAS)**

**STANDARDS AND GUIDELINES FOR  
LEARNING ASSISTANCE PROGRAMS**

Georgine Materniak  
University of Pittsburgh  
Learning Skills Center  
311 William Pitt Union  
Pittsburgh, PA 15260  
(412)648-7920

Martha Maxwell  
MM Associates  
Box 2857 White Flint  
Kensington, MD 20891

This is a draft of the revised Standards and Guidelines for Learning Assistance Programs. It is the first revision since the original document was published by the Council for the Advancement of Standards (CAS) in 1986.

Bold print statements are CAS General Standards that are required to be incorporated into the standards document of each specialty area, in this case, learning assistance programs. General Standards cannot be changed or eliminated. The proposed standards and guidelines for learning assistance programs are in regular print. Standards are "must" statements and guidelines are "should" statements.

# **COUNCIL FOR THE ADVANCEMENT OF STANDARDS IN HIGHER EDUCATION (CAS)**

## **STANDARDS AND GUIDELINES FOR LEARNING ASSISTANCE PROGRAMS**

### **I. MISSION**

The mission of a learning assistance program must be to assist students in developing the skills and strategies to become confident, independent, and active learners. The learning assistance program and services must enable students to meet the challenge of the institution's academic standards, guide students in their adjustment to the college learning environment, and prepare students for a lifetime of self-sufficient learning. The learning assistance program and the faculty, staff, and administrators of the institution must be collaborative partners in formulating an integrated and effective response to the learning needs of the student population.

Models of learning assistance programs vary significantly because the structure and function of a program must be designed to specifically address the unique characteristics of its parent institution. These characteristics include the mission and goals of the institution, the role and purpose of the learning assistance program within the institution, the administrative or academic division under which the program is organized, and the demographics of the student population. Although there are many models and forms of learning assistance programs, collectively, learning assistance programs should share the following common goals which are:

1. to regard learners as the central focus of the learning assistance program;
2. to assist any member of the campus community who strives to achieve the maximum personal potential for learning;
3. to provide instruction and services that promote cognitive, affective, and socio-cultural learning and, thus, address the needs of the whole student;
4. to introduce students to the learning expectations and culture of higher education;
5. to develop in students a positive attitude towards learning and confidence in their ability to learn;
6. to foster personal accountability for learning and teach students to plan, monitor, and evaluate their own learning;
7. to provide a variety of instructional approaches that are appropriate for the level of skills and learning styles of the student population served by the program;
8. to assist students in transferring the skills and strategies they are developing to their academic work across the curriculum;



9. to provide services and resources to faculty, staff, and administrators that enhance and support classroom instruction and professional development activities; and

10. to support the academic standards and requirements of the parent institution.

**The learning assistance program must develop, record, disseminate, implement and regularly review its mission and goals. The learning assistance mission statement must be consistent with the mission and goals of the institution and with the standards of this document.** The mission statement must also state the purpose of the program, explain its relationship to the institutional mission and goals, specify the population it is intended to serve, describe its instructional programs and services, and outline the goals the program is to accomplish. The mission statement may also make comparisons of the learning assistance program to programs at similar types of institutions.

## **II. PROGRAM**

**The formal education of students is purposeful, holistic, and consists of the curriculum and co-curriculum.**

**Learning assistance programs and services must be (a) intentional; (b) coherent; (c) based on theories and knowledge of learning and human development; (d) reflective of developmental and demographic profiles of the student population; and (e) responsive to the special needs of individuals.**

**Learning assistance programs and services must promote learning and development in students** by advancing the cognitive and affective skills, strategies, and processes necessary for achieving academic proficiency and success and for achieving personal learning goals.

Learning assistance programs and services must assess the cognitive and affective skills, strategies, and processes of students.

Formal and informal diagnostic procedures should be conducted to identify skills, strategies and processes which the student should further develop to meet the levels prescribed or required by the institution or which are known to be necessary for college learning.

Assessment results are shared with the student to formulate an appropriate and clear plan of instruction and recommendations that will meet the needs of the student.

The instruction and services of the learning assistance program must encourage students to become independent, successful and confident learners.

The scope of the learning assistance program's instruction and services is determined by its mission and goals which are based on the needs and demographics of its student population and on the institutional role and purpose of the program. Some programs offer basic skills courses for credit; others do not give credit. Some offer voluntary classes; others require basic skills classes.

Some assist specific student populations; others serve the entire student population at all academic and developmental levels.

In general, learning assistance programs should provide instruction and services for the development of reading, mathematics and quantitative reasoning, writing, critical thinking, problem solving, and study skills. Subject matter tutoring, adjunct instructional programs and Supplemental Instruction groups, time management programs, freshman seminars, and preparation for graduate and professional school admissions tests and for relevant professional certification tests may also be offered. Math, reading, writing and computer laboratories can also be part of the instructional and support services of the learning assistance program.

**Learning assistance programs and services must encourage outcomes such as intellectual growth, ability to communicate effectively, realistic self-appraisal, enhanced self-esteem, metacognitive and learning style awareness, self-monitoring strategies, and the ability to work independently and collaboratively.**

The program must address, either directly or by referral to appropriate campus resources, the affective needs that influence learning.

Affective needs often include: stress management, test anxiety reduction, assertiveness training, concentration improvement, motivation improvement, **clarification of values, appropriate career choices, leadership development, physical fitness, meaningful interpersonal relations, social responsibility, satisfying and productive lifestyles, appreciation of aesthetic and cultural diversity, achievement of personal goals** and other topics that have a positive effect on a student's confidence, self-concept, and ability to achieve academically.

The learning assistance program must also modify instruction and services to accommodate the learning needs of students with physical and learning disabilities.

Support for students with disabilities should be provided in collaboration with other programs and services of the institution that are specifically responsible for general accommodations for students with disabilities.

The learning assistance programs and services must promote the transfer of appropriate cognitive and affective skills, strategies, and processes to the student's formal academic learning environment. Systematic feedback must be given to students concerning their progress in reaching cognitive and affective goals.

The feedback system should also encourage students to use self-feedback methods which apply the metacognitive and self-monitoring strategies students are developing. Students should be assisted in practicing the transfer and application of the skills that are learned in the program to academic learning tasks across the curriculum.

The learning assistance program and services must refer students to appropriate campus and community offices for support with personal problems, learning disabilities, financial difficulties and other areas of need outside the purview of the learning assistance program.

Learning assistance programs and services must promote an understanding of the learning needs of the student population and the program's role in supporting the academic

mission of the institution. Staff must share knowledge of how to help students develop appropriate learning skills, attitudes, and behaviors with faculty, staff, and administrators.

The program should be a resource to other members of the campus community who are interested in knowing and learning about the skills needs of students and how to help students achieve their learning goals. Some of the ways in which learning centers promote this understanding include:

- establishing advisory boards consisting of members from key segments of the campus community;
- holding periodic informational meetings with staff, faculty, and administrators;
- extending consultation services to staff, faculty, and administrators concerning the recognition of, understanding of, and response to the learning needs of their students;
- participating in staff and faculty development and in-service training programs on curriculum and instructional approaches that address the development of learning skills, behaviors, and attitudes;
- encouraging the use of learning assistance program resources, materials, instruction and services as integral or adjunct classroom activities;
- conducting in-class workshops that demonstrate the application of learning strategies to the course content;
- training and supervising paraprofessionals and preprofessionals to work in such capacities as tutors, peer mentors, and advisors;
- providing jobs, practica, courses, internships, and assistantships for graduate students professionally interested learning assistance and related careers; and
- disseminating information that describes the programs and services, hours of operation, procedures for enrolling or scheduling appointments through college publications (e.g., catalogs, student handbooks, and brochures); through informational presentations to students, staff and faculty members; and through campus and local media announcements.

### **III. LEADERSHIP**

**Effective and ethical leadership is essential to the success of learning assistance programs and services. Institutions must appoint, position and empower learning assistance program administrators within the administrative structure to accomplish stated missions.**

The learning assistance program administrator should have a significant position in the institutional administrative hierarchy to participate in policy, procedural, planning and fiscal decisions of the institution that affect the unit and that affect learning support for students in both academic and student affairs.

**The learning assistance program administrator must be selected on the basis of formal education and training, relevant work experience, personal attributes and other professional credentials. Institutions must determine expectations of accountability for learning assistance program administrators and fairly assess their performance.**

The administrator of the learning assistance program should be a well-qualified educator who is experienced in the field of learning assistance and who is informed and knowledgeable about the learning needs of students in higher education and how to address those needs. The administrator should demonstrate strong management skills such as the ability to plan, implement, and evaluate a program; to lead and supervise personnel; and to manage fiscal resources.

The learning assistance program administrator should demonstrate leadership in the field through such activities as research, publication, presentations, consultation, and involvement in professional organizations.

**Administrators of learning assistance programs and services must exercise authority over resources for which they are responsible to achieve their respective missions.**

The administrator should control the programs, services, policies, procedures and fiscal resources of the learning assistance program.

**Learning assistance program administrators must articulate a vision for their organization; set goals and objectives; prescribe and practice ethical behavior; recruit, select, supervise and develop others in the learning assistance program; manage, plan, budget and evaluate; communicate effectively; and marshal cooperative action from colleagues, employees, other institutional constituencies, and persons outside the organization. Learning assistance program administrators must address individual, organizational, or environmental conditions that inhibit goal achievement. Learning assistance program administrators must improve programs and services continuously in response to changing needs of students and institutional priorities.**

The learning assistance program administrator is responsible for:

- establishing, and revising as necessary, the learning assistance program mission, goals, and objectives based on knowledge of student needs and demographics and the needs of the institution;
- being informed of issues, trends, theories, and methodologies that enable the learning assistance programs and services to respond dynamically and proactively to student needs and changes in institutional and instructional priorities, policies, and procedures;
- modeling, articulating, and enforcing appropriate ethical behavior expected of program staff and clients;
- recruiting, selecting, hiring, training, supervising, evaluating and, if necessary, terminating staff in accordance with institutional policies and procedures;
- managing program planning, implementation and evaluation;

- facilitating communication with academic and support units to generate collaborative and integrated institutional approaches to fostering the academic success of students;
- representing and articulating the needs and interests of the learning assistance program and its clients on institutional committees; and
- establishing and maintaining effective communication with professional constituents of the learning assistance field and other related professions.

#### **IV. ORGANIZATION AND MANAGEMENT**

**Learning assistance programs and services must be structured purposefully and managed effectively to achieve stated goals.**

Learning assistance programs should be a separate and independent unit within the division to which it reports. The administrator of the learning assistance program should report directly to the chief administrator of its division.

The mission and goals of the learning assistance program, the needs and demographics of its clients, and its institutional role should determine where the unit is located in the organizational structure of the institution. Learning assistance programs are frequently organized as units in the academic affairs or the student affairs division. Regardless of where the learning assistance program is organized, the functions of learning assistance programs require that it interact and communicate effectively with key units in both divisions to assure coordination of related programs, services, policies, procedures, and to expedite client referrals.

To promote effective communication, productive interaction and collaboration across key units of divisions, the learning assistance program should have representation on committees that address topics relevant to the implementation of the mission and goals of the program. Some examples include committees examining retention, orientation, basic skills, learning communities, freshmen seminars, probation review, academic standards and requirements, curriculum design, assessment and placement, and faculty development. The learning assistance program can also promote communication, interaction, and collaboration through a broadly constituted advisory board or by creating a network of consultants or contact persons with key units of the institution.

**Evidence of appropriate learning assistance program structure must include current and accessible policies and procedures, written performance expectations for all employees, functional work flow graphics or organizational charts, and service delivery expectations.**

The learning assistance program provides written policies and procedures for staff and clients; written job descriptions and expected performance outcomes for all members of the staff including student staff; written goals and objectives for staff development and student employee training components; and written goals, objectives, and anticipated outcomes for each program and service.

Procedures for collecting, processing, and reporting student assessment and program evaluation data are written and distributed to appropriate staff.

**Evidence of effective learning assistance program management must include clear sources and channels of authority, effective communication practices, decision-making and conflict resolution procedures, responsiveness to changing conditions, accountability systems and recognition and reward processes.**

Regularly scheduled staff meetings are held to share information; to coordinate the planning, scheduling, and delivery of programs and services; to identify and discuss potential and actual problems and concerns; and to collaborate on decisions and solving problems.

The learning assistance program administrator meets with individual staff members on a periodic basis to exchange ideas, formulate plans, provide feedback, and discuss concerns. The administrator conducts annual performance appraisals according to institutional policies and procedures.

**Learning assistance programs and services must provide channels within the organization for regular review of administrative policies and procedures.**

The learning assistance program conducts a periodic review and revision of all policies and procedures, job descriptions, program and services objectives, goals, and outcomes. It also identifies the need for further training and additional staff development.

## **V. HUMAN RESOURCES**

**Each learning assistance program must be staffed adequately by individuals qualified to accomplish its mission and goals.** The size, scope, and role of the staff are determined by the mission of the learning assistance program and the student population it serves. Staff-to-student ratios, therefore, must be based on factors such as:

- the types and extent of programs and services offered;
- the range and level of learning needs of the student population served;
- institutional commitment to special populations of students, such as culturally and ethnically diverse students, international and English-as-a Second language students, student athletes, returning students, and students with physical and learning disabilities;
- institutional priorities and academic requirements for specific disciplines; and
- the number of contact and instructional hours necessary to properly assist students.

**Learning assistance programs and services must establish procedures for staff selection, training, and evaluation; set expectations for supervision, and provide appropriate professional development opportunities.** If joint appointments are employed to supplement staff, the individuals must be committed to the mission, philosophy, goals, and priorities of the learning assistance program and must possess the necessary expertise for assigned responsibilities.

Adequate time and financial support should be allocated for professional development activities. Staff should be encouraged to conduct research and to publish professional papers that will contribute to the knowledge and practice of the profession. Staff should be encouraged to attend and to present at local, regional, and national conferences, and to participate in work of committees, task forces, and special interest groups.

**Professional staff members must hold an earned graduate degree in a field relevant to the learning assistance position description or must possess an appropriate combination of education and experience.**

The director should have an earned graduate degree in a relevant discipline and professional experience in learning assistance program design, instruction, evaluation and administration.

Professional staff should have earned degrees from relevant disciplines such as reading, English, mathematics, student personnel and student development, guidance and counseling, psychology, or education. Learning assistance professionals must possess knowledge and expertise in learning theory and in teaching and assessing the particular strategies and content for which they are responsible. In addition, they must be aware of the unique characteristics and needs of the various populations they assist. Learning assistance program professional staff should also be capable of varying and adjusting pedagogical approaches according to the learning needs and styles of their students, to the nature of the learning task, and to content of academic disciplines across the curriculum.

The functions and roles of learning assistance program professional staff are multi-disciplinary and combine the expertise and practices of various fields. Learning assistance professionals should be knowledgeable and appreciative of learning assistance practices beyond their own personal area of specialization.

Courses of study and internship experiences applicable to this multi-disciplinary profession include but are not limited to:

- content-specific coursework that includes theories, strategies, and assessment of reading, writing, and mathematics
- application of learning strategies across the curriculum
- learning disabilities and special education
- design and implementation of workshops in areas such as time management, stress management, and anxiety reduction
- English as a second language
- adult development and adult learning
- history and philosophy of learning assistance
- developmental, cognitive, affective, and socio-cultural theories of learning
- cognitive psychology including cognitive processes, memory, critical thinking and problem solving
- testing, measurement, and evaluation
- research methodology
- organization, administration, and management in higher education
- instructional technology and computer-assisted instruction
- instructional design, development, methodologies
- curriculum design and development
- counseling, guidance, and advising

- group leadership, dynamics, and processes
- human relations training
- state and federal regulations applicable to programs, services, and clients of learning assistance programs.

Learning assistance program professional staff should be competent and experienced in:

- written and oral communication skills;
- working with college and adult learners, faculty, and administrators;
- working in a culturally and academically diverse setting
- collaborating with academic and student affairs units;
- teaching at the college level;
- designing and implementing instructional strategies including collaborative learning, cooperative learning, and reciprocal teaching; and
- training, supervising, and mentoring paraprofessionals and preprofessionals; and
- identifying and establishing lines of communication for student referral to other institutional units.

Other abilities and expertise that are valuable in the execution of the duties of professional staff include: counseling and advising techniques to respond appropriately and holistically to the needs students report; experience in training, supervising, and mentoring paraprofessionals and preprofessionals; and consultation and negotiation skills for interacting and collaborating with colleagues throughout the campus community.

**Degree or credential seeking interns or others in training must be qualified by enrollment in an appropriate field of study and relevant experience. These individuals must be trained and supervised adequately by professional staff members.**

The learning assistance program should be informed of the policies and procedures to be followed for internships and practica as required by the students' academic departments. The roles and responsibilities of the learning assistance program and those of the academic department are clearly defined and understood by participating staff, faculty, and students.

**Learning assistance program student employees and volunteers must be carefully selected, trained, supervised, and evaluated. When their knowledge and skills are not adequate for particular situations, they must refer students and others in need of assistance to qualified professional staff.**

Learning assistance program paraprofessional staff can be undergraduate or graduate students. Adequate training and supervision are essential and required. Paraprofessional staff or graduate students may perform professional duties if properly trained and supervised by professional staff.

Professional organizations are valuable resources of information for creating and implementing successful paraprofessional programs within learning assistance programs. The National Association for Developmental Education (NADE) Self-Evaluation Guides can serve as a framework for developing all components of a tutorial program. The tutor training criteria recommended in the Tutor Certification Program Guidelines of the College Reading and Learning



Association (CRLA) is a comprehensive list of training topics and agendas that should be addressed.

**The learning assistance program must have secretarial and technical staff adequate to accomplish its mission. Such staff must be technologically proficient to perform activities including reception duties, office equipment operation, records maintenance, and mail handling. The secretarial and technical staff of learning assistance programs must be knowledgeable of and sensitive to the concerns, needs, and characteristics of the program's clients.**

Secretarial and technical staff should be updated on changes in programs, services, policies and procedures in order to expedite smooth and efficient assistance to clients. Staff development workshops in assertiveness, effective communication, conflict resolution, and handling confidential information should be available.

**Appropriate salary levels and fringe benefits for all staff members must be commensurate with those for comparable positions within the institution, in similar institutions, and in the relevant geographic area.**

**To reflect the diversity of the student population, to ensure the existence of readily identifiable role models for students and to enrich the campus community, the learning assistance program must intentionally employ a diverse staff.**

**Affirmative action must occur in hiring and promotion practices as required to ensure diverse staffing profiles.**

## **VI. FINANCIAL RESOURCES**

**The learning assistance program must have adequate funding to accomplish its mission and goals. Priorities, whether set periodically or as a result of extraordinary conditions, must be determined within the context of the stated mission, goals, and resources.**

Adequate budget allocations should be provided from regular institutional funds for:

- professional and clerical staff salaries, and where applicable, paraprofessional and preprofessional staff salaries which are commensurate with salaries of equal positions across the institution;
- data management and program evaluation processes;
- purchase and maintenance of office and instructional furnishings, supplies, materials, and equipment including computers and copiers;
- printing and media expenses;
- phone and postage costs;
- institutional memberships in professional organizations;

- subscriptions to professional publications;
- attendance at conferences, workshops, and other activities that contribute to the professional development of learning assistance program staff;
- library of professional materials for staff and tutors;
- on-campus technical support for computer hardware and software maintenance, trouble-shooting, and repair;
- on-site training of learning assistance program personnel in the use and operation of all existing and new equipment, computer hardware and software;
- training to meet newly mandated requirements for services;

When substantial changes occur in the mission, goals, and programs of the learning assistance program resulting in program and service expansion or substantial changes, budget adjustments must occur in the salary and operational financial resources to sustain the program growth or alterations.

Prior to implementing new program additions or expansion, a financial analysis should be performed to determine the amount and availability of financial resources required to support the addition or expansion.

If a program is successful in obtaining non-institutional funding, these funds should not replace regular institutional funding to support salaries and operational budgets of existing core programs and services.

If institutional financial support is decreased resulting in diminished salary and operational budgets, the mission and goals of the learning assistance program must be revised to reflect resulting program alterations.

Decisions on program and service reductions should reflect an analysis of actions that will have the least detrimental impact on altering the mission and goals of the learning assistance program.

## **VII. FACILITIES AND EQUIPMENT**

**A learning assistance program must have adequate, suitably located facilities and equipment to support its mission and goals. Facilities for the learning assistance program must occupy a central location that is convenient and accessible to students, faculty, and other clients. The facilities and equipment must support the nature of programs and services that are provided and also the means by which these programs and services are delivered. As changes in the learning assistance program's missions and goals necessitate alterations in programs and services, funds and space must be available for necessary facilities and equipment.**

Facilities and equipment should include:

- flexible and adaptable space with the capacity to adjust to changes in the delivery of programs, service, and instruction;
- space design that allows for simultaneous activities without confusion, disorder, discomfort, or loss of confidentiality;
- classrooms, labs, resource rooms, media and computer centers; small group and one-to-one tutorial space;
- private, sound-proofed areas for testing, counseling, and other activities that require confidentiality or intense concentration;
- interview and meeting space;
- adequate office space for professional, preprofessional, paraprofessional, and clerical staff;
- a prominent reception and general information area with comfortable seating;
- appropriate and comfortable acoustics, lighting, ventilation, heating and air-conditioning with easy access to the controls of these systems;
- adequate resource center to house and circulate instructional materials including textbooks, workbooks, filmstrips, audio and video tapes, and computer software;
- adequate technical services and support space to house instructional equipment including audio and video tape players and monitors, projection equipment; calculators; and computers and printers;
- permanent and portable chalk boards, bulletin boards, and projection screens;
- office supplies and equipment for word processing, database management and other forms of computing; duplication and printing; voice and electronic communication;
- furnishings that are attractive, durable, comfortable, and adaptable to support the office, personnel, instructional, and service functions of the program;
- adequate and secure storage for equipment, supplies, instructional and testing materials, office correspondence and confidential records; and
- climate control and sufficient electrical conduits, circuits, wiring, and outlets to support current and future technology.

Sufficient funds should be available to properly maintain facilities and equipment including maintenance agreements and periodic replacement or repair of furniture, equipment, flooring, window covering, and wall surfaces.

**Facilities and equipment must be in compliance with relevant federal, state, provincial, and local requirements to provide for access, health, and safety.**

The learning assistance program facilities are accessible to physically challenged students. Furnishings, instructional materials and media can be adapted to accommodate physically challenged students and students with learning

disabilities as required by the Americans with Disabilities Act (ADA) and other federal regulations.

## **VIII. LEGAL RESPONSIBILITIES**

Learning assistance program staff members must be knowledgeable about and responsive to law and regulations that relate to their respective program or service. Sources for legal obligations and limitations are: constitutional, federal, and statutory, regulatory, and case law, mandatory laws and orders emanating from federal, state, provincial and local governments and the institution through its policies.

Learning assistance program staff members, including student staff, must use reasonable and informed practices to limit the liability exposure of the institution, its officers, employees, and agents. Learning assistance program policies must be reviewed for potential liability to the program, its staff and its institution and altered accordingly if necessary. Staff members must be informed about institutional policies regarding personal liability and related insurance coverage options. Policies and emergency procedures for crises management must be available and reviewed. Staff members must have institutional access to legal advice relevant to their duties and responsibilities.

The institution must inform learning assistance program staff and students, in a timely and systematic fashion, about extraordinary or changing legal obligations and potential liabilities. The institution must provide staff development programs to educate learning assistance program staff of these changes.

## **IX. EQUAL OPPORTUNITY, ACCESS AND AFFIRMATIVE ACTION**

Learning assistance program staff members must ensure that services and programs are provided on a fair and equitable basis. Each facility, course, program and service must be accessible to all populations included in the mission and goals of the learning assistance program. Hours of operation must be responsive to the needs of all students. Learning assistance programs and services are modified periodically according to results of assessments and evaluations and to institutional changes in student demographics.

Each learning assistance program and service must adhere to the spirit and intent of equal opportunity laws. Individual differences in the learning strengths, needs, and styles of students must be acknowledged and addressed by the learning assistance program.

Learning assistance programs and services must not be discriminatory on the basis of age, color, disability, gender, national origin, race, religious creed, sexual orientation and/or veteran status. Exceptions are appropriate only where provided by relevant law and institutional policy.

**Consistent with their mission and goals, learning assistance programs and services must take affirmative action to remedy significant imbalances in student participation and staffing patterns.**

## **X. CAMPUS AND COMMUNITY RELATIONS**

**Learning assistance programs and services must establish, maintain, and promote effective relations with relevant campus offices and external agencies.**

The learning assistance program should:

- be integrated into the academic offerings of the institution;
- establish communication with all key academic and student services units
  - to encourage the exchange of ideas, knowledge, and expertise;
  - to provide mutual consultation, as needed, on student cases;
  - to expedite student referrals to and from the learning assistance program; and
  - to collaborate on programs and services that most efficiently and effectively address the needs of students;
- comply with pertinent academic and other institutional policies and procedures;
- disseminate timely information about current learning assistance programs and services and explain how these programs and services can meet specific needs of students;
- provide information about the unique characteristics and special needs of the learning assistance programs' clientele to the campus and community;
- encourage academic and student service units to work together and share their knowledge and expertise about the needs of students and how to assist them;
- establish a relationship with the local community in order to facilitate the development of learning assistance resources such as volunteers for tutoring and technical support; and
- provide training and consultation to community-based organizations, e.g., literacy associations, corporate training, and school district-based tutorial services.

## **XI. DIVERSITY**

**Within the context of each institution's unique mission, multi-dimensional diversity enriches the community and enhances the college experience for all; therefore, learning assistance programs and services must nurture environments where similarities and differences among people are recognized and honored.**

**Learning assistance programs and services must promote cultural educational experiences that are characterized by open and continuous communication, that**

**deepen understanding of one's own culture and heritage, and that respect and educate about similarities, differences and histories of cultures.**

The instructional content and materials of learning assistance programs should provide opportunities to increase awareness and appreciation of the individual and cultural differences of students. Each student should be encouraged and given the opportunity to participate in the instructional and activities conducted by the learning assistance program. The learning assistance program should also be a conduit for assisting students in understanding and participating in the higher education culture.

**Learning assistance programs and services must address the characteristics and needs of a diverse population when establishing and implementing policies and procedures.** Learning assistance programs and services must be responsive to the individual learning strengths, needs, and styles of its student population.

## **XII. ETHICS**

**All persons involved in the delivery of learning assistance programs and services to students must adhere to the highest standards of ethical behavior.** Learning assistance programs and services must develop or adopt and implement statements of ethical practice addressing the issues unique to each program and service. Learning assistance programs and services must publish these statements and insure their periodic review by all concerned.

**All learning assistance program staff members must ensure that confidentiality is maintained with respect to all communications and records considered confidential unless exempted by law.** All staff must receive training in what constitutes confidential information and how properly to obtain, process and record confidential information that is necessary for their specific role within the learning assistance program.

**Information disclosed in individual learning assistance sessions must remain confidential unless written permission to disclose the information is given by the student.** However, all learning assistance program staff members must divulge to the appropriate authorities information judged to be of an emergency nature, especially where the safety of the individual or others is involved. Information contained in students' educational records must not be disclosed to non-institutional third parties without appropriate consent, unless classified as "directory" information or when the information is subpoenaed by law.

With the prevalence of student paraprofessional and tutorial staff within learning assistance programs, specific attention should be given to properly orienting and advising student staff about matters of confidentiality. Clear statements should be distributed and reviewed with student staff as to what information is and is not appropriate for student staff to access or to communicate.

**Learning assistance programs and services must apply a similar dedication to privacy and confidentiality to research data concerning individuals.** All learning assistance program staff members must be aware of and comply with the provisions contained in the institution's human subjects research policy and in other relevant institutional policies addressing ethical practices.

The central learning assistance goal, meeting the needs of students, is paramount and evident in research projects. Learning assistance program research should be for the purpose of advancing knowledge of how to best develop and foster active, confident and independent learners. In addition, the privacy, protection, and interest of the student should supersede that which is important, significant and beneficial for research purposes.

**All learning assistance program staff members must recognize and avoid personal conflict of interest or the appearance thereof in their transactions with students and others.** All staff members, including student staff, must receive information and training about institutional policies and learning assistance program policies regarding conflict of interest.

Because all learning assistance program staff work with students' academic coursework in providing programs and services, they should be knowledgeable of policies related to academic integrity, plagiarism, student code of conduct and other similar policies. All staff should be cognizant of the implication of these policies for their specific work with students to avoid circumstances that could be construed as contributing to or participating in violations of these policies.

**Learning assistance program staff members must strive to insure the fair, objective and impartial treatment of all persons with whom they deal.** All staff act to advance the status and prestige of the profession and to foster and maintain open communication with all professionals involved in learning assistance. Programs and services must address the individual student's level of development if it is within the parameters of the learning assistance program's mission and goals. Statements or claims made about outcomes that can be achieved from participating in learning assistance programs and services must be truthful and realistic.

Various means of assessment should be conducted for the purpose of identifying the learning needs of the students and guiding them to appropriate programs and services. Assessment results should be communicated confidentially, honestly, and with sensitivity to the student. Students should be advised into appropriate, alternative educational opportunities when there is reasonable cause to believe that students will not be able to meet required guidelines for academic success or when the students' level of need exceeds the purpose and function of the learning assistance program.

**Learning assistance program staff members must not participate in any form of harassment that demeans persons or creates an intimidating, hostile or offensive campus environment.** All people with whom learning assistance program staff interact must be treated with dignity and respect.

**All learning assistance program staff members must perform their duties within the limits of their training, expertise, and competence.** All tutorial and student paraprofessional staff must receive training to recognize appropriate limits of their role and how to proceed in handling situations which exceed their role. **When these limits are exceeded, individuals in need of further assistance must be referred to persons possessing appropriate qualifications.**

**All learning assistance program staff members must use suitable means to confront and otherwise hold accountable other staff members who exhibit unethical behavior.**

When handling institutional funds, all learning assistance program staff members must ensure that such funds are managed in accordance with established and responsible accounting procedures. Learning assistance program funds acquired through grants and other non-institutional resources are managed according to the regulations and guidelines of the funding source.

### **XIII. ASSESSMENT AND EVALUATION**

**Learning assistance programs and services must undergo regular and systematic qualitative and quantitative evaluations to determine to what degree the stated mission and goals are being met.** The learning assistance program must have the ability to collect and analyze data through its own resources and through access to appropriate data generated by the institutional research unit or other relevant campus units.

**Although methods of assessment vary, the learning assistance program must employ a sufficient range of qualitative and quantitative measures to insure objectivity and comprehensiveness.**

Qualitative methods may include standard evaluation forms, questionnaires, interviews, observations, or case studies.

Quantitative measurements range from an individual student's performance to the impact on the campus' retention rate. Quantitative methods may include follow-up studies on students' grades in mainstream courses, GPA's, graduation, re-enrollment and retention figures. Comparative data of learning assistance program participants and non-participants is also a measure of program effectiveness. Quantitative measures can include data on the size of the user population, numbers utilizing particular services, number of contact hours, the sources of student referrals to the program, numbers of students who are on the waiting list or who have requested services not provided by the learning assistance program. Quantitative data should be collected within specific time periods and longitudinally to reveal trends.

The learning assistance program utilizes self-study and certification processes endorsed by professional organizations and nationally-recognized standards documents to conduct periodic self-assessment.

Periodic evaluations of the learning assistance program and services should be performed by on-campus experts and outside consultants and disseminated to appropriate administrators.

**Data collected must include responses from students, staff, faculty, and administrators or any other affected constituencies. Results of these evaluations must be used in revising and improving programs and services and in recognizing performance of the learning assistance program and its staff.**

The learning assistance program should periodically review and revise its goals and services based on evaluation outcomes and based on changes in institutional goals, priorities, and plans. Data identifying changes in student demographics, characteristics and needs, and data indicating evolving trends are also required for learning assistance program short- and long-term planning.



## Security Mail Processing Center

1300 Boblett St. Unit C  
Blaine, WA 98230  
(360) 332-2500  
(360) 332-1510 - FAX

APRIL 11, 1996

KWANTLEN UNIVERSITY COLLEGE  
P.O. Box 9030  
Surrey B.C. V3W 2M8  
CANADA

Attn: Ms. Rosalind Lee  
RE: Quote C.L.R.A./U.S. Mail&Data

Dear Ms. Lee,

Thank you for the opportunity to provide your Association a quote for your unique mailing and data management needs. As per our conversation, I have done my best to address the issues and aspects surrounding this ongoing project. The following information gives definition and costing. Should I have neglected any aspect and/or you require further clarification, please contact me.

Statement of Service - "Providing accurate, efficient and professional mailing services for the unique needs of Canadian businesses and individuals who correspond to the U.S."

Company Profile - "Created in 1981 as a result of increasing need of companies in Canada requesting mailing and shipping services in the U.S. , yet local and personal. From a small mailbox and shipping company, we have taken specific and calculated steps to provide services in freight transfer, product distribution, U.S. addresses, comprehensive mailing services, courier transfer, data management and U.S. postal expertise."

Focus - " Mail automation, barcoding and addressing by means of data conversion and matching against the U.S. national data base. Attaining all possible postal discounts and providing the most accurate delivery of correspondence possible. Management of data is the critical link for accuracy and success of mailing. "

"Integrity is the foundation of our past, the future combines technology and innovation to this solid resolve."

- Dave Freeman  
owner/operator

## Security Freight Services

1300 Boblett St. Unit B  
Blaine, WA 98230  
(360) 332-0938  
(360) 332-1510 - FAX

CRLA Board Meeting  
Kananaskis, AB  
April 16, 1996  
ATTACHMENT J  
\_\_\_ page(s)

Phone - 599-2706  
Fax - 599-2716

## Security Mail Processing Center

1300 Boblett St. Unit C  
Blaine, WA 98230  
(360) 332-2500  
(360) 332-1510 - FAX

## Security Freight Services

1300 Boblett St. Unit B  
Blaine, WA 98230  
(360) 332-0938  
(360) 332-1510 - FAX

KWANTLEN UNIVERSITY COLLEGE  
Attn: Ms. Rosalind Lee

Page 2

### DEFINITION AND COSTS

1. Mailing - Processing of newsletters and journals. 1000 per mailing ( 3 newsletters per year, 2 journals).
  - A. Envelope - insert, seal, label, meter and send via 3rd class bulk. = \$125.00 fee plus postage.
  - B. Self mailer - no envelope, print peel and stick labels affix, sort and mail ( permit imprint required ) = \$95.00 plus postage.
  - C. Individual request mailings - sending issues on a "on-call" bases = 50¢ per envelope, minimum of \$5.00.
2. Labels - Generation and sending of labels to members whom request lists, based on specific criteria.
  - A. Pull criteria, sort, print to peel and stick, send to member via 1st class mail = \$20.00 per printing, plus \$12.50 per thousand labels + Postage.
  - B. Labels are 4 1/2 X 1 7/16 in dim, zip code order.
3. DataBase Management - Updates, corrections, merge/purge, standardization, addition/subtraction, field and data manipulation = \$50.00 per hour, minimum of 1/2 hour per exercise.
4. U.S. Address - Both Physical and Postal U.S. return address for correspondence.
  - A. Address - \$8.00 per month / \$88.00 per year.
  - B. Forwarding - \$3.25 per shipment, via 1st class mail + postage. 1 to 5 times per week, or any frequency you require.
  - C. Parcels - Receiving via U.P.S. / Fed Ex or other couriers are assessed at \$1.50 per parcel.
5. Terms - All costs are in U.S. funds and are taxable at 7.8%. All mailings as per item #1, must be paid at the time of mailing. All other fees are net 30 to invoice date.

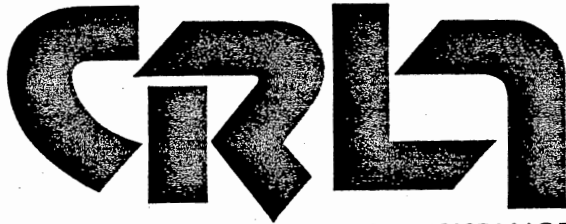
Thank You

**Security Mail Services**

250 H Street  
Blaine, WA 98230  
(206) 332-4228  
(206) 332-8473 - FAX

**FILE COPY**REFERENCES OF SECURITY MAIL SERVICES OF BLAINE WA

1. TRINITY WESTERN UNIVERSITY - MR. ABE HIEBERT 888-7511
2. MAIL O MATIC SERVICES - MR. FRANK FERRUCCI 439-9668
3. COAST MAIL SERVICES - MR. BILL MACDONNELL 682-8222
4. NORTHWEST LIFE ASSURANCE CO - MR. NORM PENDLEBURY 689  
-1211
5. SPECTRUM SIGNAL PROCESSING - MS. KAREN BORN 421-5422
6. GARAVANTA OF CANADA - MS. CATHY COLPITTS 594-0422
7. CANACCORD CAPITAL - MS. DEBORAH SEYMOUR 643-7303
8. CAM NET COMMUNICATIONS - MR. KEN DAVIES 681-5343
9. MCDERMID ST.LAWRENCE - MR. RON SINGH 654-1200
10. U.S. POSTAL SERVICE - POSTMASTER MARK STOPPLEWORTH  
206-332-5281



**College  
Reading &  
Learning  
Association**

**READING • LEARNING ASSISTANCE • DEVELOPMENTAL EDUCATION • TUTORIAL SERVICES**

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**Tuesday, April 09, 1996**

**Dave Freeman  
Security Mail Services  
250 H Street  
Blaine, WA 98230  
USA**

**Dear Dave,**

**Thank you for the explanations of the range of your services which you gave me today.**

**The College Reading and Learning Association is an organization of approximately 1000 members, 97% of whom are in the US. The other 3% are primarily in Canada with some members in other countries overseas. For the general membership, we provide 3 Newsletters per year (8.5 x 11 in, each issue 12-16 pages) and one to two issues of an academic journal (5.5 x 8.5 in, soft cover, about 90 pages). We also send various notices throughout the year such as calls to conferences and renewals.**

**The membership database is currently being run on Filemaker Pro 2.1 for the MAC. I am enclosing a list of the fields currently used. As you will note, most of it is very common. I am also enclosing a membership application form so you will see what information we ask for. The Special Interest Groups (SIG) are optional, and a member may, for an additional price, join none or all 18.**

**We need:**

**Mailing:**

**To mail to individual members the Newsletters and the Journals as they are published.  
To mail various publications we sell on individual request.**

**Labels:**

**To supply various leaders in the organization with pertinent labels on request. This would include state directors and SIG leaders. We have approximately 40 leaders, in addition to the Executive Board. The requests are sporadic. The more active leaders request labels monthly, the less active, once per year.**

**We also have requests for labels for the entire membership. If this request comes from a Board member, then the full database is required. The Board member chooses which dates of expiry to use for a cutoff. (We keep on the database members who are not current.) If the request is to fulfill an external query, then only those members who are current and who have given approval can be used.**

**Database Management:**

**This would include sending out renewal notices, keeping the database current, and archiving but NOT trashing, expired memberships. Sometimes there is investigative work involved, such as**

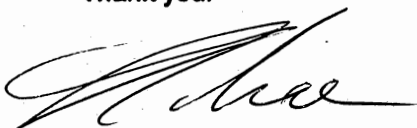
whether membership has been duplicated or whether we actually have two members with the same name, or whether someone has in fact moved.

One address:

Due to the changeover of our Board members and the current state where different Board members receive mail depending on the functions they perform, we do not have one central CRLA address. Please explain the PO Box you would provide in this regard and how you would handle the mail.

The Board is discussing which aspects of the above we wish to contract out: all, some or none. We meet in Kananaskis, Alberta on Monday, April 15. If you can fax me a cost estimate before noon on April 11 (Thursday) at 604-599-2716, I will take this to the Board meeting..

Thank you.



Rosalind Lee  
Secretary, CRLA

ph: 604-599-2706  
fax: 604-599-2716

MONDAY, APRIL 15, 1996

## GUIDING PRINCIPLES

- remember volunteerism
- professionals? people?
- timeliness of publications
- reflecting concerns of general membership
- money limitations
- commitment/enthusiasm needs to be carried throughout year
- cleaner processes
- watch out for becoming insular (keep track of other organizations, political actions)
- follow through on volunteerism
- maintain a strong fiscal base
- keeping dues affordable

## BOARD GOALS

CRLA is committed to expanding its membership base by seeking new members, including those from ethnic and cultural minorities, all regions of the US, international groups, adjunct faculty and graduate students.

The CRLA Board will provide the membership with services which include:

- a reliable membership database
- a centralized mailing address (input from members) and mailing services (output to members)
- punctual CRLA communications including membership status, newsletters, journals, etc.
- ongoing regional and national dialogue about membership concerns and needs

CRLA is committed to using technology to enhance student learning, and to improve communication through the use of e-mail and the world wide web.

CRLA is committed to improving its process of internal communication by the following:

- having more members involved in major decision-making
- by improving the process of communication from the top level of officers to those in middle leadership positions and to the general memberships
- by defining the expectations and processes for information for those in middle level leadership roles
- by improving the processes of communication from those in leadership positions and the general membership to the members of the executive board
- by improving the ideas and quality of printed communications
- by investigating the best process for timely communication, such as using a mailing service
- by involving the general membership in decision-making in a timely process
- by improving publications so that joining the national association is more attractive to members in local organizations
- by insuring that communications among members happens in a timely manner
- to investigate the work load in leadership positions in order to have cleaner, clearer processes

To strengthen CRLA through its leadership by

- having clear definitions of its leadership roles (jobs) and concise lengths of duties
- encouraging all members to participate as leaders
- supporting the leaders with a reasonable workload, each leader taking on only one responsibility

The Board's goal is to continue its collaboration with other professional organizations in order to promote dialogue and

professional development within the fields of reading, developmental education, learning assistance, and tutorial services.

CRLA is committed to manage its fiscal resources responsibly.



# TEXAS COMMERCE TREASURY MANAGEMENT



TREASURY SOLUTIONS  
THAT LEAD TO SUCCESS

**TEXAS COMMERCE BANK  
TREASURY MANAGEMENT PROPOSAL**

**FOR**

**COLLEGE OF THE MAINLAND**

**Claude E. Conrad  
Vice President  
April 1996**

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## **WHOLESALE LOCKBOX SERVICE**

# WHOLESALE LOCKBOX SERVICE

## PRODUCT OVERVIEW

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Texas Commerce Bank's Wholesale Lockbox Service in Dallas and Houston streamlines the collection of a company's remittances, providing College of the Mainland expedited availability of funds for maximum investment potential. Wholesale Lockbox eliminates many of the administrative tasks associated with the receipt and deposit of remittances, enhancing the company's accounts receivable process to operate more efficiently at additional cost savings through reduced mail and collection float.

Texas Commerce offers state-of-the-art technology in the collection and processing of wholesale remittances in a fully-automated environment using an innovative image processing system. College of the Mainland will enjoy the following advantages by selecting a Texas Commerce Wholesale Lockbox Service:

- As one of the largest check processors in Dallas and Houston, Texas Commerce Bank offers efficient and competitive check collection patterns. Extensive direct send programs, correspondent bank relationships, and participation in all local clearing houses enhance Texas Commerce's ability to provide optimum funds availability to its lockbox customers.
- A unique zip code exclusively assigned to all Texas Commerce lockbox mail eliminates several sorting processes at the main post office to expedite delivery of remittances to Texas Commerce's lockbox mail room.
- In-house Bell and Howell automated mail sorting equipment with 48 pocket sort capabilities and a wide area bar code reader further accelerates the sorting process in Dallas.
- An ambitious processing schedule provides around-the-clock processing on weekdays with shifts on Saturday and Sunday. Processing is also accomplished on holidays.
- Each company's processing instructions are stored in the image processing system database for easy retrieval by bank personnel to ensure accurate processing.
- A dedicated lockbox research staff provides prompt response to a company's lockbox-related inquiries. Supervisory personnel ensure the quality of processing through daily monitoring of each lockbox account. Daily, weekly and monthly reports indicate the types of issues that are raised and by whom, allowing early detection of situations that may require corrective action.

- Current-day lockbox deposit, float and check/invoice detail are accessible via data terminal, personal computer or microcomputer through ChemLink, Texas Commerce's information reporting system.

## OPERATIONAL OVERVIEW

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Texas Commerce Bank receives timely delivery of a company's remittances through the use of a unique zip code for all lockbox mail. College of the Mainland's customers would be assigned an exclusive post office box number to which its customers mail remittances. The main post office performs only the initial sort of Texas Commerce's lockbox mail by zip code. Consequently, remittances are available for pickup by Texas Commerce couriers on a 24-hour-per-day basis. The couriers deliver the remittances directly to Texas Commerce's lockbox mail room where the envelopes are sorted according to the assigned box number, then slit open.

Texas Commerce utilizes a combination of the individual and assembly line approaches to accomplish automated wholesale lockbox processing. This enables the company to benefit from the efficiencies associated with operating in a fully-automated, image processing environment and the specialized attention afforded to the company's specific handling requirements. All processing functions are directly controlled by the respective lockbox production managers, one on the day shift and one on the night shift. Exhibit 1 depicts the normal processing flow of a Wholesale Lockbox account as described below:

- A. Pick up mail from the post office and deliver to the Lockbox mail room.
- B. Top slit mail and sort by individual post office box number.
- C. Access individual lockbox instructions via terminal.<sup>1</sup> Extract/screen checks for negotiability. Verify acceptable payees.<sup>1</sup> Separate invoices, envelopes and correspondence. Arrange invoices, envelopes and other correspondence for subsequent data entry and reassembly.
- D. Batch checks with a system generated deposit advice.<sup>1</sup> Forward batches to the scanner area for scanning.

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<sup>1</sup>These are a few of Texas Commerce's quality control measures.

- E. Scan checks for Magnetic Ink Character Recognition (MICR) line and image capture. Print a detail audit trail on the back of each check. MICR line data is stored on disc for subsequent processing, and check images are transmitted to key entry stations for processing.
- F. Key enter the numeric dollar amounts from the check image. Key verify the written dollar amounts from the actual checks.<sup>1</sup> For items that differ, rekey the dollar amount in reverse sequence, in order to ensure accuracy.<sup>1</sup>
- G. Automatically MICR encode and endorse checks on power encoders, balance and batch checks<sup>1</sup>, and forward checks to the Check Processing Department for microfilming and outsourcing to meet direct send, clearing house and Federal Reserve deadlines.
- H. Print check copies, deposit advices and check listings for each lockbox. Distribute these documents to the assembly group for reassociation with invoices and other related material.
- I. Forward check copies, credit advice, check listing and related materials to customers. Options for receiving remittance detail are:
- U. S. First Class Mail
  - Overnight Express Courier
  - Company/Bank Courier
  - U. S. First Class Mail
  - United Parcel Service (UPS)
- J. Notify customers of their lockbox deposit totals.

## REPORTING

Texas Commerce offers its lockbox customers same-day deposit and availability information by 7:00 a.m. CT and 1:30 p.m. CT through:

- A. **Data Transmission** - An accounts receivable update feature available to Texas Commerce Wholesale Lockbox customers via several modes of transmission--pc to pc, pc to mainframe, pc to van, and tape or disk. With data transmission, lockbox information is available on a same day basis to supplement the receipt of physical remittance detail and facilitate immediate posting of receivables.
- B. **ChemLink Lockbox Totals Report Module** - With this report, College of the Mainland can summarize total funds received by bank, account and lockbox (Figure 1).

CHEMLINK SERVICES  
LOCKBOX TOTALS REPORT  
REPORTING AT 16:34 N.Y. TIME 11/30/YY  
College of the Mainland

--UNITED STATES--  
TEXAS COMMERCE BANK--FOR BUSINESS DAYS 11/23/YY-11/27/YY  
--US DOLLAR--

ACCOUNT NUMBER: 00106543219  
ACCOUNT NAME: OPERATING

BOX: 200123

	DATE	TOTAL DEPOSIT	TOTAL AVAILABLE	% AVAILABLE
	11/23/YY	1,000.00	700.00	70%
	11/24/YY	2,000.00	1,200.00	60%
	11/25/YY	3,000.00	2,500.00	85%
	11/26/YY	4,000.00	3,400.00	85%
	11/27/YY	<u>20,000.00</u>	<u>17,658.00</u>	88%
200123	TOTAL	30,000.00	25,458.00	85%
200123	AVG	6,000.00	5,091.60	

Figure 1. Chemlink Lockbox Total Report.



The Lockbox Totals Report allows the customer to:

- Review available funds and the percentage of available funds to total deposits;
- Evaluate current and historical deposit patterns for future cash projections;
- Analyze averages of total deposits and available funds;
- Access information by Selective Account Groupings, which helps to organize report data to match requirements;
- Select by bank, account or lockbox for focussed data retrieval to meet the company's needs;
- Display information for all reporting banks;
- Review up to 63 calendar days of posted lockbox data.

C. **Chemlink Lockbox Detail Report Module** - This report provides a company with their remittance information. The report format is customized to meet customer specified requirements (Figure 2).

CHEMLINK SERVICES LOCKBOX DETAIL REPORT REPORTING AT 10:25 NY TIME 11/30/YY College of the Mainland						
--UNITED STATES-- TEXAS COMMERCE BANK---FOR BUSINESS DAY 11/30/YY LOCKBOXES REPORTED ARE FOR INFORMATIONAL PURPOSES ONLY INTRADAY INFORMATION --US DOLLAR--						
ACCOUNT NUMBER : 00106543219 LAST UPDATE: 10:20 NY TIME 11/30/YY						
-----HOUSTON AM 200123-----						
HDLBAM						
<u>Check Amount</u>	<u>Check #</u>	<u>Invoice Amt</u>	<u>Inv #</u>	<u>FLT</u>	<u>%</u>	<u>Remitter</u>
59,851.55	4852	32,851.17	94961			ABC Co.
		27,000.38	94988			
2,249.79	10543	301.92		94510		ACME Co.
		1,947.87	94478			
33,985.05	7635	16,799.75	94878			National
		17,185.30	94789			
TOTAL AM DEPOSIT:		\$ 96,086.39	6 Items			
BOX 200123	Total	\$ 96,086.39	6 Items			
Float: IMMED	0.00	1-Day 0.00	2-Day 0.00			
ACCOUNT NUMBER : 08805551234 LAST UPDATE: 10:20 NY TIME 11/30/YY						
-----DALLAS AM 900123-----						
DDLBAM						
<u>Check Amount</u>	<u>Check #</u>	<u>Invoice Amt</u>	<u>Inv #</u>	<u>FLT</u>	<u>%</u>	<u>Remitter</u>
11,547.62	403918	7,968.54		013007		XTZ Limited
		3,579.08		013020		
TOTAL AM DEPOSIT:		\$11,547.62	2 Items			
BOX 900123	Total	\$11,547.62	2 Items			
Float: IMMED	0.00	1-Day 0.00	2-Day 0.00			
TEXAS COMMERCE BANK---FOR BUSINESS DAY 11/30/YY						
TOTAL DEPOSIT:		\$107,634.01	ITEMS: 8			
TOTAL AVAILABLE:		0.00				
1 DAY FLOAT:		0.00				
2 + DAY FLOAT:		0.00				

Figure 2. Chemlink Lockbox Detail Report Module

The Lockbox Detail Report allows the customer to:

- Facilitate account reconciliation with comprehensive detail (based on company requirements) for each lockbox deposit;
- Access up to 63 calendar days of lockbox detail data;
- Select by account, site or lockbox for focussed information retrieval;
- Export lockbox detail data to PC for use with spreadsheets and account packages.

- D. Texas Commerce Bank also provides automated balance reporting through MicroLink™, our information delivery product based on the BankLink system. Balance information including ledger, collected, one-day and two-to-five day float, and total debit/credit date is provided and may be accessed using a personal computer equipped with communication capabilities.
- E. Lockbox Buddy, a detailed remittance information reporting product, also serves to facilitate the automated updating of a customers' accounts receivable system. A direct transmission of remittance data to a mainframe or personal computer, in customer specified format utilizing spreadsheet and accounts receivable system interface, is provided to afford the option of fully maximizing cash opportunities.

## **BENEFITS**

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- Texas Commerce's Wholesale Lockbox Service will streamline a company's accounts receivable process by reducing the amount of time and expense associated with manual collection, posting and depositing of remittances.
- Texas Commerce's Wholesale Lockbox Service will significantly accelerate the collection of remittances to increase a company's control of usable funds.
- Texas Commerce's Wholesale Lockbox Service will improve a company's audit control by separating the accounts receivable deposit function from the posting function.
- Texas Commerce's Wholesale Lockbox Service will eliminate the worry associated with ensuring timely deposits.

## QUALITY CONTROL

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Texas Commerce employs a series of verifications to ensure quality lockbox processing. Measures are taken at each level of processing to ensure that lockbox personnel are adhering to a company's requirements and that quality standards are being met. These measures include, but are not limited to, the following:

- Thoroughly reviewing each remittance received to ensure that the proper accounts are being credited, all payees are acceptable and negotiability instructions are followed.
- Key verifying dollar amounts not just once, but twice, for accurate crediting of each item.
- Matching the original deposit advice against the consolidated listing of deposits at the assembly station. (This routine ensures that all deposits were completed and reported accurately.)

In addition to these and other control procedures, an important quality control measure takes place via the monitoring of our overall error rate/processing accuracy which is based on issues reported by customers and bank personnel. All inquiries are logged and maintained by the research area to ensure error resolution is expedited in a timely fashion and customers are properly notified of the resolutions. Reports that identify the inquiries by type, customer, assigned employee, and the shift on which the processing occurred are generated daily, weekly, and monthly by our Research and Quality Control groups. These items are reviewed daily to alleviate recurrences, to maintain employee awareness of the importance of customer satisfaction, and to provide information necessary for proper training. Management also reviews all inquiries to combat against any trends that may be formulating and/or issues that may be systemic in nature.

It is also Texas Commerce's policy to monitor the processing of all new accounts for volume. After an account begins receiving volume, the back-up is inspected for a two-week period. New accounts are then reviewed to determine if processing requirements are being fulfilled. The company is subsequently contacted to verify that its Texas Commerce lockbox needs are being met. Quality Assurance again reviews the account before releasing it from inspection.

Texas Commerce maintains an experienced customer service staff within the Lockbox Department that is responsible for addressing all lockbox inquiries. The majority of inquiries are resolved within 24 hours. However, if microfilm records are needed, research may require additional time. Any inquiries related to lockbox accounts should be addressed by contacting the Lockbox Research Group or the company's customer services representative in Treasury Management.

In accordance with Federal regulations, Texas Commerce Bank maintains a Corporate Contingency Planning Service and Disaster Recovery Plan to protect its corporate information assets. The objectives of this plan are to provide for the reestablishment of critical computer systems within 24 hours of a declared disaster and to provide corporate direction, contingency planning coordination, and plan development assistance for the reestablishment of operations and non-operations areas, alike. Texas Commerce Bank utilizes a PC image based system in its lockbox operations. This system operates on file servers which mirror both hardware and software. Since our Houston and Dallas operations are connected via a Wide Area Network (WAN), in the event of an emergency situation, they act as contingency sites for each other. This contingency process is regularly tested.

## **IMPLEMENTATION**

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Establishing a Texas Commerce Wholesale Lockbox Service for College of the Mainland is a relatively easy process. The Treasury Management Service Agreement applies to all Treasury Management Services at Texas Commerce. If you have not received an Agreement previously, please request that an Agreement be sent to you. The following documentation is required to implement the service:

- A completed and executed Lockbox Implementation and Processing Instructions Form

Upon receipt of the documentation, the company is assigned a post office box number and accompanying nine-digit zip code which needs to be provided to the company's customers.

The Wholesale Lockbox Service will be ready to receive remittances five business days after receiving all documentation.

## WHOLESALE LOCKBOX BUDDY

Wholesale Lockbox Buddy is a detailed remittance information reporting product, which can also automatically update your accounts receivable system. Lockbox Buddy transmits remittance data directly to a personal computer or mainframe in a customer specified format using a spreadsheet and accounts receivable system interface.

### CHARACTERISTICS

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- Directly communicates with Wholesale Remittance Banking through microcomputer technology.
- Allows receipt of remittance detail on same-day basis
  - Operates 8:00 a.m. to 5:00 p.m. CT (Monday through Friday)
  - Multiple reporting deadlines for deposits
- Historical data for five days available
- Detail remittance information reporting
  - Sorts by remitter name, dollar amount and deposit (ascending or descending sort order)
  - Subtotals by multiple subsidiaries or lockboxes within same lockbox
  - Compares invoice amounts to check amounts and notes discrepancies
  - Offers report printing by batch for actual deposit times
  - Unlimited number of invoices per check

### BENEFITS

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- Allows you to fully maximize cash positions
- Automated file creation updates accounts receivable system
  - Reduces margin for errors
  - Improves productivity
- Provides spreadsheet interface offering report flexibility

### NECESSARY EQUIPMENT

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- IBM Compatible Microcomputer
  - DOS 2.1 or greater
  - 1.5 Megabytes of hard disk space, 640K memory
- 100% Hayes compatible modem (up to 9600 baud)
  - (PROCOMM/PROCOMM+ Software)

## PRICING

# Texas Commerce Bank

National Association

## Wholesale Lockbox Pricing

Effective January 1, 1996

<u>SERVICE</u>		<u>PRICE</u>
Maintenance	\$	105.00/box/month
Standard Item	\$	.35/item
Monthly Minimum	\$	50.00/box/month
Encoding	\$	.03/item
Deposits	\$	1.00/deposit (over two/day)
Additional Photocopy *	\$	.12/item
Additional Deposit Advice	\$	30.00/box/month
Additional Copy Assembly *	\$	.20/item
Invoice/Envelope Copy *	\$	.18/item
Alphabetize Items *	\$	.25/item
Circle or Write Number/Amount *	\$	.25/item
Balance Checks/Invoice *	\$	.35/item
Research Photocopy **	\$	10.00/copy
Post Office Rental Fee		No charge
<b>ChemLink Reporting</b>		
Lockbox Module	\$	30.00/box/month
Special Report Module	\$	50.00/customer/month + .05/line + data capture
<b>MicroLink Reporting</b>		
TCB & Chemical Banks		
(First 5 Accounts)	\$	25.00/account/month
(Next 6 - 75 Accounts)	\$	15.00/account/month
(Next 76+ Accounts)	\$	10.00/account/month
Current Day Reporting ***	\$	10.00/account/month
Current Day Items	\$	.20/item
Terminal Reporting	\$	100.00/box/month
Standard Telephone Call	\$	200.00/box/month
Detail Telephone Call	\$	200.00/box/month + .60/item
Wire Transfer Initiation	\$	150.00/box/month
<b>Lockbox Buddy</b>		
Maintenance	\$	50.00/customer/month + data capture
Set-up Fee	\$	200.00/installation
Software License Fee	\$	100.00/installation
<b>Data Capture</b>		
Check Information	\$	.20/item
Remittance Information	\$	.007/keystroke

\* Price is in addition to the standard item price.

\*\* Research requested 15 days or more after deposit date.

\*\*\* Charge for Current Day Reporting is in addition to the account charge.

<u>SERVICE</u>		<u>PRICE</u>
Data Transmission	\$	50.00/month
Data Consolidation	\$	35.00/mo./incoming trans.
	\$	50.00/mo./outgoing trans.
FaxLink	\$	75.00/box/month + data capture
No Check Mail	\$	.20/item
First Class Mail		Cost + handling
Courier/Express Mail Charge		Cost + handling
Courier/Express Mail Preparation	\$	25.00/month
Multi Address Mail	\$	25.00/box/month/address
Walk in Deposits *	\$	1.50/item
Cash Deposits	\$	10.00/deposit
Account Balancing	\$	100.00/month
Foreign Items	\$	10.00/item
Unprocessable Items **	\$	3.00/item
Special Reports	\$	50.00/box/month
Programming	\$	50.00/hour
Special Instructions	\$	.10/item
Special Instruction Changes	\$	25.00/request
Local Mail Collection (From Other Banks)	\$	5.00/day

\* Remittance delivered to Lockbox for "immediate deposit", after the 10:00 a.m. and before the 3:00 p.m. (Houston) and 2:00 p.m. (Dallas) cutoff.

\*\* Refers to unprocessed items returned to a customer, pursuant to their instructions i.e., items with restrictive endorsements, stale-dated items, post-dated items, etc.



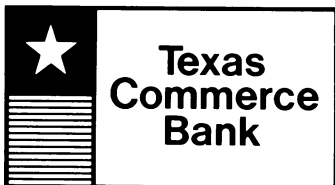


# **Commercial Account**

## **SERVICE CHARGE SCHEDULE**

Houston Region  
Dallas - Fort Worth Metroplex

Effective January 1, 1996



**COMMERCIAL ACCOUNTS**

The following lists the most widely used Texas Commerce Banking Services. Information regarding specialized services not included here is available from your Texas Commerce Banker.

<b><u>Applicable Locations</u></b>	
Houston Region	Dallas - Fort Worth Metroplex

<b><u>MONEYPLUS<sup>1</sup></u></b>	
<b><u>Minimum Balance<sup>2</sup></u></b>	<b><u>Monthly Maintenance Fee<sup>3</sup></u></b>
\$2,000 and Over	None
\$ 0 - \$1,999	\$12.00
\$5,000 Average Balance	None
\$1,000 Minimum Opening Deposit	

<b><u>MONEY MARKET ACCOUNT</u></b>	
<b><u>Minimum Balance<sup>2</sup></u></b>	<b><u>Monthly Maintenance Fee<sup>3</sup></u></b>
\$2,500 and Over	None
\$ 0 - \$2,499	\$12.00
\$5,000 Average Balance	None
\$1,000 Minimum Opening Deposit	
Transfers in Excess of Maximum <sup>4</sup>	\$10.00

<b><u>SAVINGS ACCOUNT</u></b>	
<b><u>Minimum Balance<sup>2</sup></u></b>	<b><u>Quarterly Maintenance Fee<sup>3</sup></u></b>
\$500 and Over	None
\$ 0 - \$499	\$9.00 Per Quarter
\$300 Minimum Opening Deposit	
3 Withdrawals Per Quarter	No Charge
Each Additional Withdrawal	\$1.00
Transfers in Excess of Maximum <sup>4</sup>	\$10.00

<b><u>CHECKING ACCOUNT</u></b>	
Monthly Maintenance Fee	\$20.00
\$300 Minimum Opening Deposit	

**INTEREST ON LAWYER TRUST ACCOUNTS (IOLTA)**

For information and pricing regarding this product, please contact your Texas Commerce Banker.

**SMALL BUSINESS CHECKING**

For information and pricing regarding this product, please contact your Texas Commerce Banker.

<sup>1</sup> Eligibility restricted by Federal regulation as disclosed in the Terms and Conditions of Deposit Accounts.  
<sup>2</sup> Minimum Balance: Minimum Daily Ledger Balance  
Average Balance: Average Daily Collected Balance  
<sup>3</sup> Stated maintenance fees apply to accounts charged through the

Service Charge Routine. All accounts charged through Account Analysis are subject to a \$20.00/month maintenance fee.  
<sup>4</sup> The number of withdrawals is restricted by Federal regulation. These restrictions are disclosed in the Terms and Conditions of Deposit Accounts. Your Texas Commerce Bank will assess the indicated charge on each debit transaction which exceeds the federally mandated maximum number of debit transactions for these accounts.

<b><u>DEPOSITORY SERVICES</u></b>	
These depository service charges apply to all Commercial Accounts, and to any account which is subject to ACCOUNT ANALYSIS.	
• Debits Posted	\$ .12/debit
• Credits Posted	\$ .60/credit
• Checks Deposited	
Local City	\$ .03/item
Local RCPC	\$ .05/item
Texas Cities	\$ .055/item
Other Texas	\$ .06/item
Other Transit	\$ .08/item
• Encoding	\$ .03/item
• Return Items	
Returns	\$3.00/return item
Reclears	\$2.50/reclear item
Returns - Special Handling	\$4.00/return item-spc handling

• Stop Payments	\$20.00/request
• Insufficient Funds (NSF)	\$20.00/item
• Incoming / Outgoing Collection Items	\$8.50/item
• Outgoing Coupons	\$5.00/coupon
• Payable Through Drafts	\$ .20/draft
• Automatic Dollar (Zero Balance) Transfers	\$25.00/sub-acct/mo
• Balance Inquiry (Operator assisted)	\$3.00/call
• Research	\$20.00/hour + \$2.00/copy
• Special Statements	\$7.50/statement
• Signature Restrictions <sup>5</sup>	\$10.00/acct/mo + \$ .25/check

<sup>5</sup>For Small Business Checking accounts, the monthly fee is \$5.00/acct plus \$.25 per check > 5/acct/mo.

<b><u>ELECTRONIC BANKING SERVICES</u></b>	
• ACH Maintenance	\$35.00/customer tax ID/mo
• ACH Originated Items	
One Day Debit/Credit	\$ .15/item
Two Day Debit/Credit	\$ .10/item
Addendum Originated	\$ .01/addendum record
• Preauthorized ACH Transfer	\$1.00/item

• ACH Incoming Transmission	\$10.00/transmission/customer tax ID
• ACH Tape	\$35.00/file/customer tax ID
• ACH Electronic Payment Authorization (EPA)	\$5.00/acct/mo
• ACH Return Item	\$2.50/item
• ACH Return Item-Special Handling	\$5.00/item
• ACH Correction/Reversal	\$15.00/item
• ACH Notification of Change	\$1.00/item
• Electronic Data Interchange (EDI)	
ACH Received Credit/Debit	\$ .10/item
ACH Outgoing Data Transmission	\$10.00/transmission/customer tax ID
ACH Received Addendum	\$ .01/addendum record
• Consolidated Payables Maintenance	\$100.00/acct/mo
• Consolidated Payables Transmission	\$10.00/transmission/customer tax ID
• Consolidated Payables Check Issuance	\$ .75/item
• Funds Transfer Account Maintenance	\$5.00/acct/mo
• Incoming Domestic Funds Transfers	
AUTOPOST	\$4.50/transfer
NON-AUTOPOST	\$5.50/transfer
Temporary Address FT Credit	\$10.00/transfer
• Incoming International Funds Transfers	\$10.00/transfer

	Automated	Telephone Operator
• Internal Funds Transfer	\$3.00	\$7.00
• Outgoing Repetitive Funds Transfer	\$6.00	\$10.00
• Outgoing Non-Repetitive Funds Transfer	\$8.00	\$12.00
• International Outgoing Funds Transfer	\$35.00	\$43.00
• Account Balance Report	\$50.00/mo	
• Special Instructions	\$3.00/transfer	
• Manual Wire Transfers (Initiated without PIN authorization)	\$65.00/transaction surcharge	
• Funds Transfer Notification		
Printed Advice	\$2.50/page	
Telephone Call	\$5.50/call	
Fax Notification	\$4.00/transfer	
Direct Access/Funds Transfer	No Charge	
EXPRESS		
Wire Activity Report	\$10.00/day/acct	
Transmission		

<b><u>COMMERCIAL RECEIVING</u></b>	
• Commercial Vault Deposit Processing (Standard) <sup>6</sup>	\$1.35/deposit + \$.011/note
Coins Deposited-Full Bag	\$1.95/bag
Coins Deposited-Partial Bag	\$3.75/bag

Outgoing Shipment-Rolled Coin	\$ .05/roll
Outgoing Shipment-Strapped Currency	\$ .20/strap
Full Straps/Rolls Processed	\$1.55/order
Partial Straps/Rolls Processed	\$2.20/order
Special Handling	\$ .50/minute
Adjustments and Corrections	\$6.25/item
<sup>6</sup> Pricing per \$1,000 deposited is available	
• Branch Deposit Processing <sup>7</sup>	\$1.45/deposit + \$.02/bill
Per Bill > 2,000/acct/mo	
Branch Change Orders	
Coin Roll	\$ .05/roll
Straps	\$ .20/strap
Orders Processed	\$2.20/order

<sup>7</sup> Customers who deposit 2,000 bills, or less, per month will not be charged. Customers who deposit 2,001 bills, or greater, per month will incur the stated fees beginning with the first bill and deposit.

<b><u>INFORMATION REPORTING</u></b>	
ChemLink	
• Previous Day Reports	
Balance Report	\$35.00/acct
Incoming Data Exchange	\$40.00/acct/module
Debit/Credit Report	\$10.00/acct/module
Items	\$ .22/item
Paid Check Detail Report	\$ .22/item
Collections Report	\$50.00/user
• Current Day Reports	
Debit/Credit Report	\$35.00/acct
Items > 75/mo	\$ .25/item
Lockbox Deposit Summary	\$30.00/box
Lockbox Detail Report	\$50.00/user + \$.05/line charge
• EDI Module	
Notification-CCD+, CTX, CTP	\$15.00/user
Addendum Records	\$ .35/addendum record
Transactions	\$ .35/transaction
• Outgoing Data Exchange	\$50.00/acct/module
MicroLink	
• Software Set-up Fee	\$325.00/customer
• Bank Account Reporting Maintenance	\$35.00/customer/mo
• Bank Account Reporting	\$25.00/acct/mo
• Transaction Reporting	
Previous Day Items	\$ .15/item
Current Day Items	\$ .20/item
• Automated Payments & Collections (APC) Maintenance	\$25.00/customer/mo
• APC Maintenance w/o Bank Account Reporting	\$45.00/customer/mo
• APC Transactions	\$ .30/transaction
• Depository Transfer Service (DTS) Maintenance	\$25.00/customer/mo
• DTS Maintenance w/o Bank Account Reporting	\$45.00/customer/mo

• DTS Transactions	
Corporate Input	\$ .70/transaction
Voice or Touch-tone Input	\$ .85/transaction

LOCKBOX SERVICES-WHOLESALE

• Monthly Maintenance	\$105.00/lockbox
• Monthly Minimum	\$50.00/lockbox
• Per item w/Photocopy	\$.35/item
• Data Transmission	\$50.00/mo + \$.20/item + \$.007/keystroke

ACCOUNT RECONCILIATION

• Paid List Reconciliation		
Positive Pay	\$.04/item	No minimum
Non-Positive Pay	\$.05/item	\$50.00 minimum
• Full Reconciliation		
Positive Pay	\$.05/item	No minimum
Non-Positive Pay	\$.06/item	\$50.00 minimum
• Deposit Reconciliation	\$.05/item	\$50.00 minimum
• Serial Sort	\$.035/item	\$50.00 minimum
• Transmissions	\$10.00/transmission	
• Input Tape	\$35.00/tape	
• Output Tape	\$35.00/tape	
• Input or Output Diskette	\$35.00/diskette	

CHECK SAFEKEEPING

• CD ROM	\$60.00/CD ROM/mo \$.025/item
• Indexed Microfilm	\$.015/item \$50.00 minimum
• Indexed Microfiche	\$.025/item
• Basic Safekeeping (no output)	\$.007/item

CONTROLLED DISBURSEMENT

• Controlled Disbursement Fee	\$75.00/customer
• Account Maintenance Fee	\$15.00/acct
• Funding Transfer Fee	\$20.00/acct
• Credits Posted	\$.60/item
• Debits Posted	\$.08- .14/item <sup>8</sup>

<sup>8</sup> Rates vary based on volume of debits posted.

ACCOUNT ANALYSIS

• Account Analysis Invoice Billing	\$10.00/relationship per month
Additional Statement Copies	\$10.00/set

METHOD OF COMPUTING SERVICE CHARGE  
FOR COMMERCIAL CHECKING ACCOUNTS

Your service charge will vary monthly based upon a number of factors including the standard fees in effect, account activity, earnings on collected balances which vary with market factors, and negotiated transactions, all as determined by Texas Commerce Bank (the "Bank"). Your account will be debited for the amount of the service charge, which will be calculated either through the SERVICE CHARGE ROUTINE or ACCOUNT ANALYSIS, at the option of the Bank. The SERVICE CHARGE ROUTINE is explained below, while ACCOUNT ANALYSIS is explained in the separate Customer Account Analysis brochure which you will also receive.

SERVICE CHARGE ROUTINE

Using SERVICE CHARGE ROUTINE, your service charge is equal to the difference between the EARNINGS on your collected balances and the COST of servicing your account which is based on activity reported during the service charge cycle including the monthly maintenance fee. If the EARNINGS equal or exceed the total COST, there is no service charge assessed for that period.

EARNINGS is the product of the MONTHLY EARNINGS CREDIT RATE (a variable rate which is subject to change without notice to you) and the AVERAGE DAILY COLLECTED BALANCE for the period. Currently the MONTHLY EARNINGS CREDIT RATE is calculated by adding the weekly Auction Rate on 91-Day Treasury Bills for the month and dividing by the number of Auctions in the month. That sum is then divided by 12, to re-state as a monthly rate. If your account bears interest, the service charge will equal the COST for the period. Please note, should the AVERAGE DAILY COLLECTED BALANCE be negative, the product of the AVERAGE DAILY COLLECTED BALANCE and the MONTHLY EARNINGS CREDIT RATE (EARNINGS) will also be negative and result in a service charge in excess of COST.

In determining COST, the Bank calculates a fee for each activity (PRICE x VOLUME). These fees are summed and an equivalency factor of 11.11% is added to the sum. The equivalency factor is also applied to the maintenance charge. The two products are added to determine COST. The equivalency factor is subject to change.

In summary, Service Charge = COST - EARNINGS calculated as follows:

SUM OF (PRICE x VOLUME) x 1.1111 (for each activity) + (MAINTENANCE x 1.1111)  
- (AVG. DAILY COLLECTED BALANCE x MONTHLY EARNINGS CREDIT RATE)

To further understand the SERVICE CHARGE ROUTINE, please refer to the following example:

Assume that your account had a quarter end ledger balance of \$2,500 for the previous quarter and an average collected balance of \$2,000 for the month, and that you wrote 120 checks and made 10 deposits during the month - 25 checks per deposit. Your service charge would be calculated as follows:

EARNINGS	SERVICE CHARGE ROUTINE
Average Daily Collected Balance	\$2,000.00
EARNINGS (using for example, 91-Day T-Bill Rate 5.30% divided by 12)	\$ 8.83

COST

	PRICE	x	VOLUME	=	FEE
Deposits Posted	.60		10		\$ 6.00
Checks Paid	.12		120		14.40
Local RCPC Items	.05		250		12.50
Encoding	.03		250		7.50
SUBTOTAL					\$40.40

Equivalency Factor: 11.11% of sum of all fees for the month	4.49
ACTIVITY TOTAL	\$44.89

Maintenance	\$20.00
Equivalency Factor: 11.11% of maintenance	2.22
MAINTENANCE TOTAL	\$22.22

COST	\$67.11
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Service Charge	\$58.28
The COST in the example (\$67.11) exceeds the EARNINGS (\$8.83); thus, the service charge is \$58.28.	

Member: FDIC