

# Digital Learning in Postsecondary Education: A Point of View from the Field




July 19, 2017

INVESTMENT BANKING + STRATEGY CONSULTING

# Agenda

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- 01 Overview of Tyton Partners and our Work
- 02 What We Learned in 2015 about Courseware
- 03 Introducing the Courseware in Context (CWIC) Framework
- 04 Where We Are Today (with Digital Learning & Courseware)
- 05 Implications for Your Institution
- 06 Q&A

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# 01 Overview of Tyton Partners and our Work

# Who Is Tyton Partners?

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	<b>Evolved Advisory</b>	An evolved advisory platform serving clients across the global education, media and information markets
	<b>Strategy Consulting</b>	Strategy consulting built on a foundation of transactional experience and data-based market insight
	<b>Investment Banking</b>	Investment banking services built on a foundation of strategy development and operating experience
	<b>Unique Insights</b>	A dynamic firm that delivers insights, connectivity, and outcomes to a diverse range of companies, organizations and investors

# The Organizations We Serve...

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# ...And the Types of Opportunities for which They Engage Us

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## Institutions



Strategy development supporting:

- Revenue diversification and growth
- New program development
- Public / private partnership

Initiative planning and execution in pursuit of:

- Teaching / learning innovation
- Student success
- Workforce alignment and outcomes
- Administrative / operational efficiency

## Foundations



- Market assessment and development
- Theory of change enablement and network development
- Grant-making strategy development
- Grantee scaling technical assistance

## Commercial Providers



- Growth strategy and development
- Product strategy and portfolio assessment
- Go-to-market strategy development
- Customer segmentation and prioritization
- Partnership strategy and execution

## Investors



- Market segment evaluation
- Investment thesis evaluation
- Due diligence and acquisition support
- Post-close 90-day strategy audit

# A Brief Narrative Prelude...

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# Why We're Really Having this Discussion

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## THE IRON TRIANGLE: COLLEGE PRESIDENTS TALK ABOUT COSTS, ACCESS, AND QUALITY

October 2008

*A Report from*

*The National Center for Public Policy and Higher Education*

*and Public Agenda*



THE NATIONAL CENTER FOR  
PUBLIC POLICY AND  
HIGHER EDUCATION

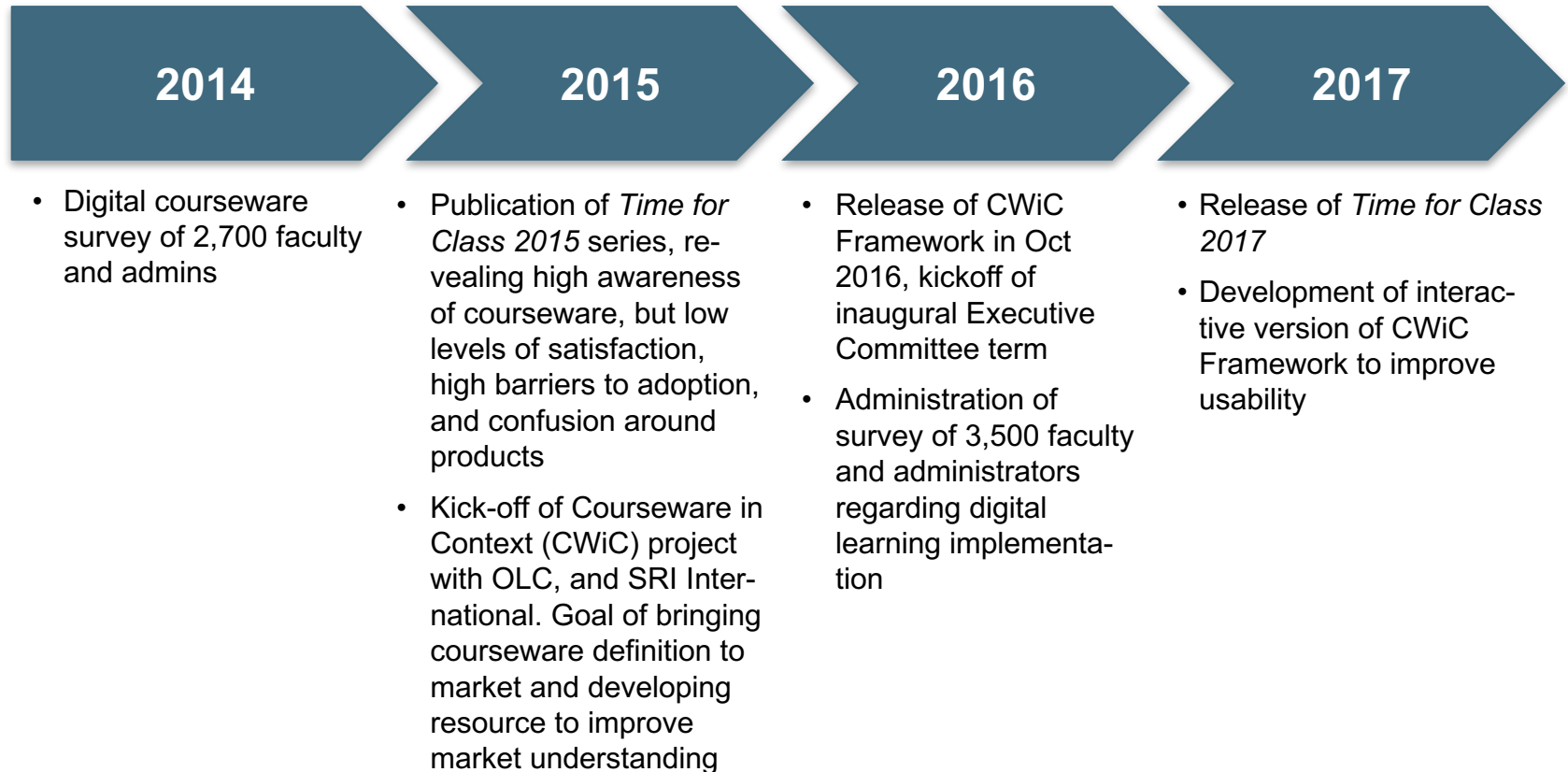


PUBLIC AGENDA



# Our Strand of Work Contributing to the Broader Discourse

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# Objectives for Today

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- Highlight selected insights and catalysts from foundational 2015 analysis
- Introduce the CWiC Framework as a decision-support resource
- Share digital learning current 2017 state and institutional implications
- Continue and extend the conversations started this week

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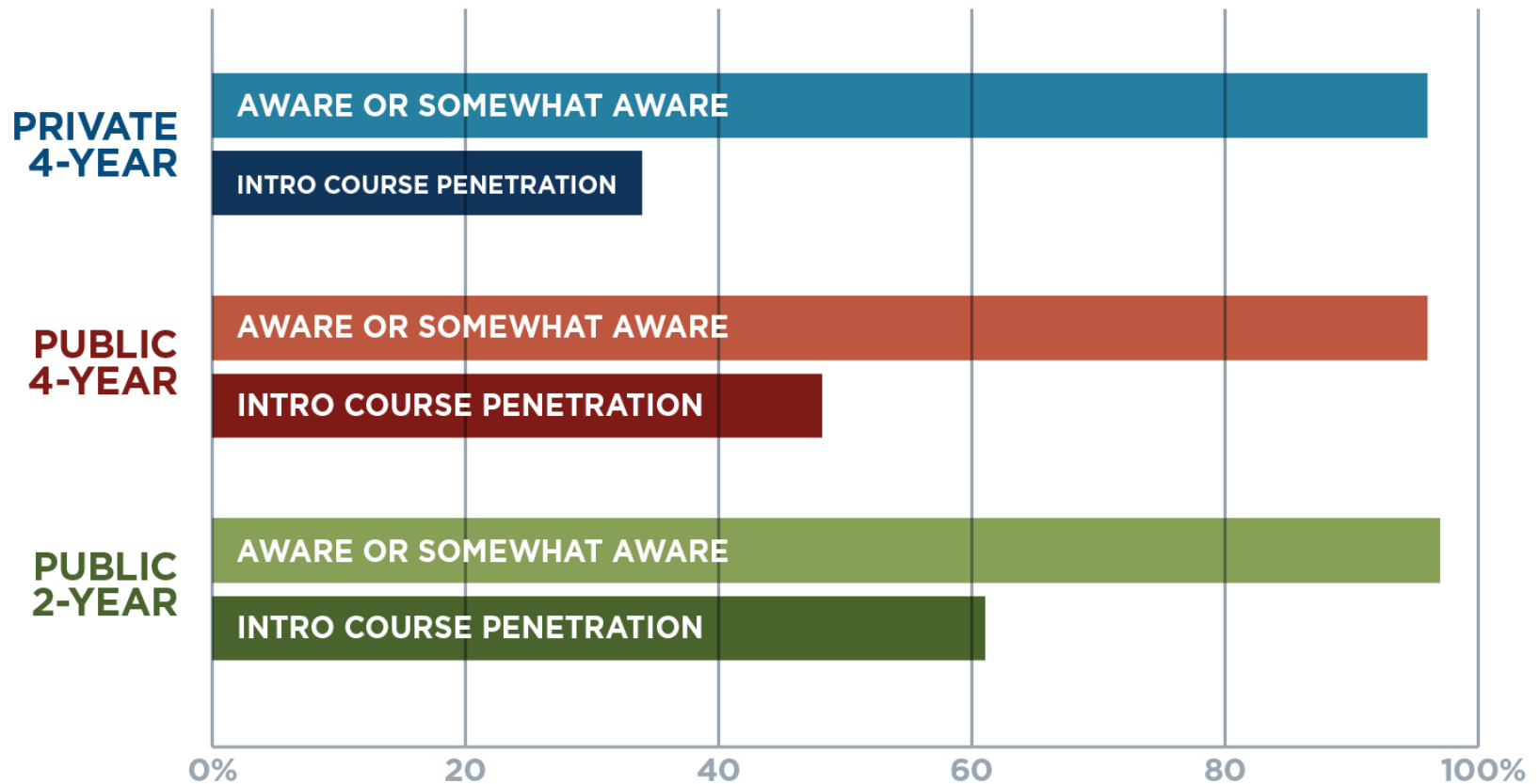
## **02** What We Learned in 2015 about Courseware

# Building a Foundational Understanding of the Issues

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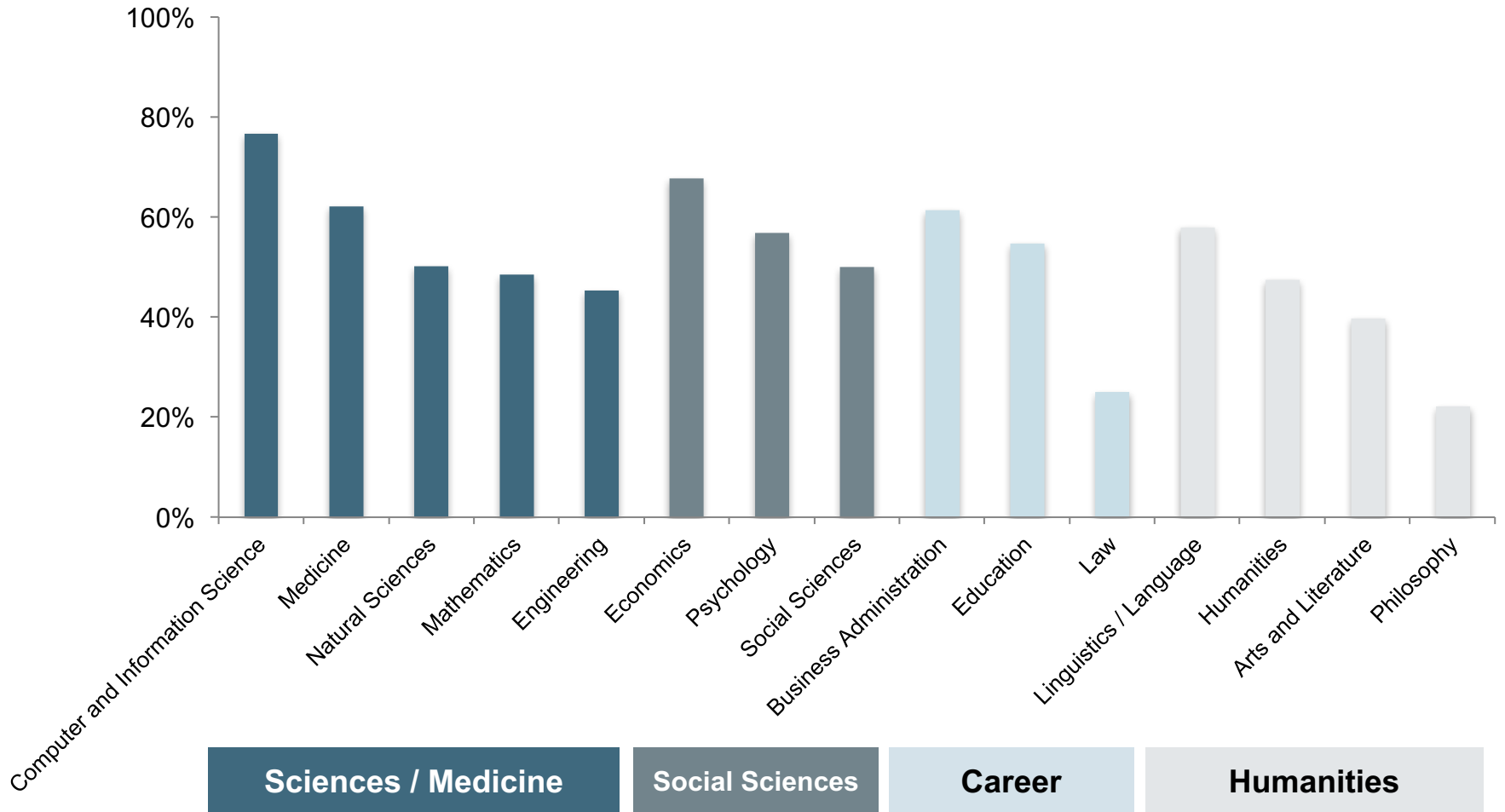
- Three key objectives vis-à-vis digital courseware in US postsecondary education:
  - Determine the level of adoption within US postsecondary education
  - Collect practitioner perspectives on courseware use and barriers to further adoption
  - Evaluate the state of the supply-side ecosystem
- Need to establish a key definition in an emerging landscape – “digital courseware” is curriculum delivered through purpose-built software to support teaching and learning.
- Conducted national survey in Summer 2014 – secured more than 2,700 responses from teaching faculty and administrators
- Released initial three-part “Time for Class” series in 2015

# Responses Revealed Higher than Expected Faculty Awareness and Use of Courseware in Intro-Level Courses...



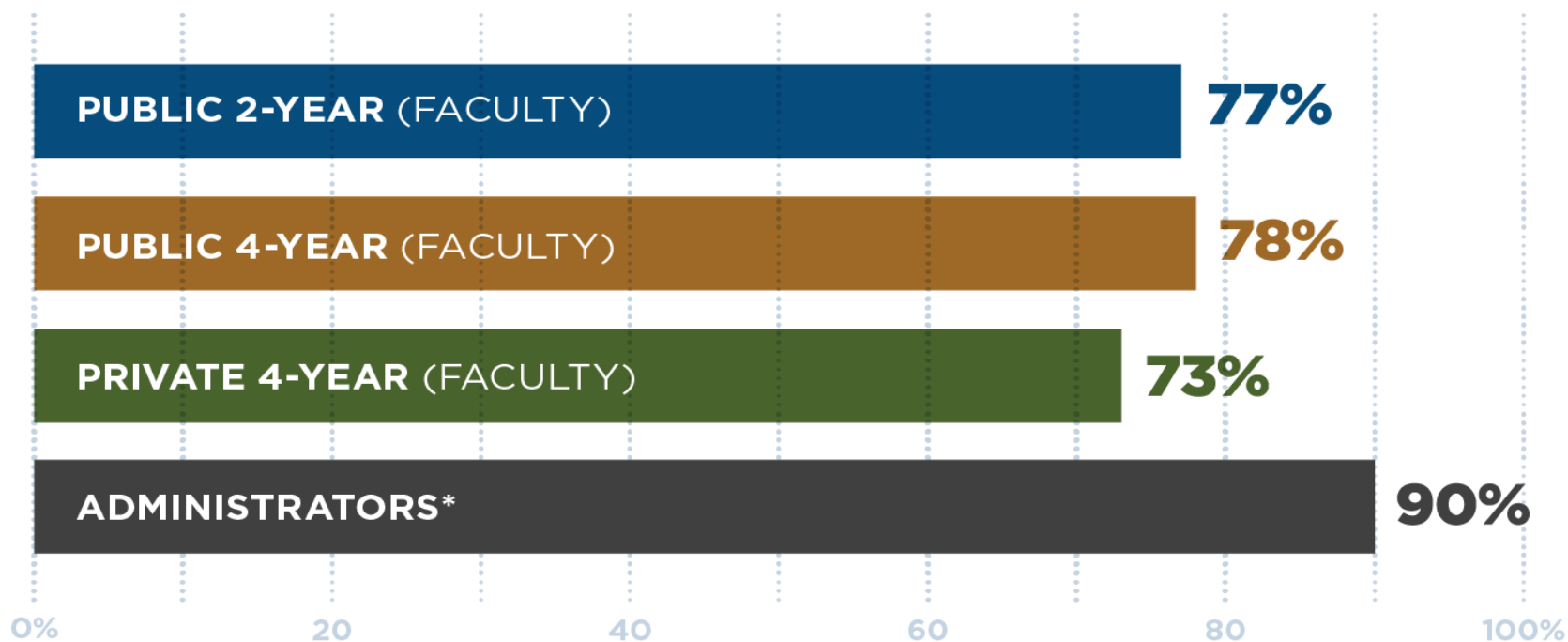
# ...With Courseware Penetration Varying by Academic Discipline

Introductory-Level Course Courseware Usage by Academic Discipline



# Faculty and Administrators Agreed that Courseware Use Would Grow Going Forward

How do you expect your use of digital courseware to change over the next three years?



*% of respondents stating that use will increase “more” or “much more”*

*\*Administrator responses reflect all institution types*

*Source: Tyton Partners Time for Class 2015*

# However, Articulated Adoption Barriers Threatened to Inhibit or Slow Growth of Courseware Use...

## TOP BARRIERS TO ADOPTION OF COURSEWARE BY INSTITUTION TYPE

	PRIVATE 4-YEAR	PUBLIC 4-YEAR	PUBLIC 2-YEAR
HIGHEST BARRIERS	1 ADDITIONAL TIME REQUIRED FOR FACULTY	ADDITIONAL TIME REQUIRED FOR FACULTY	ADDITIONAL COST TO STUDENTS
	2 EFFICACY OF DIGITAL COURSEWARE IN IMPROVING LEARNING OUTCOMES	EFFICACY OF DIGITAL COURSEWARE IN IMPROVING LEARNING OUTCOMES	ADDITIONAL TIME REQUIRED FOR FACULTY
	3 LACK OF ALIGNMENT WITH MY PHILOSOPHY OF INSTRUCTIONAL DESIGN	LACK OF ALIGNMENT WITH MY PHILOSOPHY OF INSTRUCTIONAL DESIGN	TECHNICAL INTEGRATION CHALLENGES
	4 REDUCED CONTROL OVER COURSE CONTENT AND STUDENT EXPERIENCE	TECHNICAL INTEGRATION CHALLENGES	RESISTANCE TO SHIFT IN INSTRUCTIONAL METHOD
	5 TECHNICAL INTEGRATION CHALLENGES	RESISTANCE TO SHIFT IN INSTRUCTIONAL METHOD	EFFICACY OF DIGITAL COURSEWARE IN IMPROVING LEARNING OUTCOMES

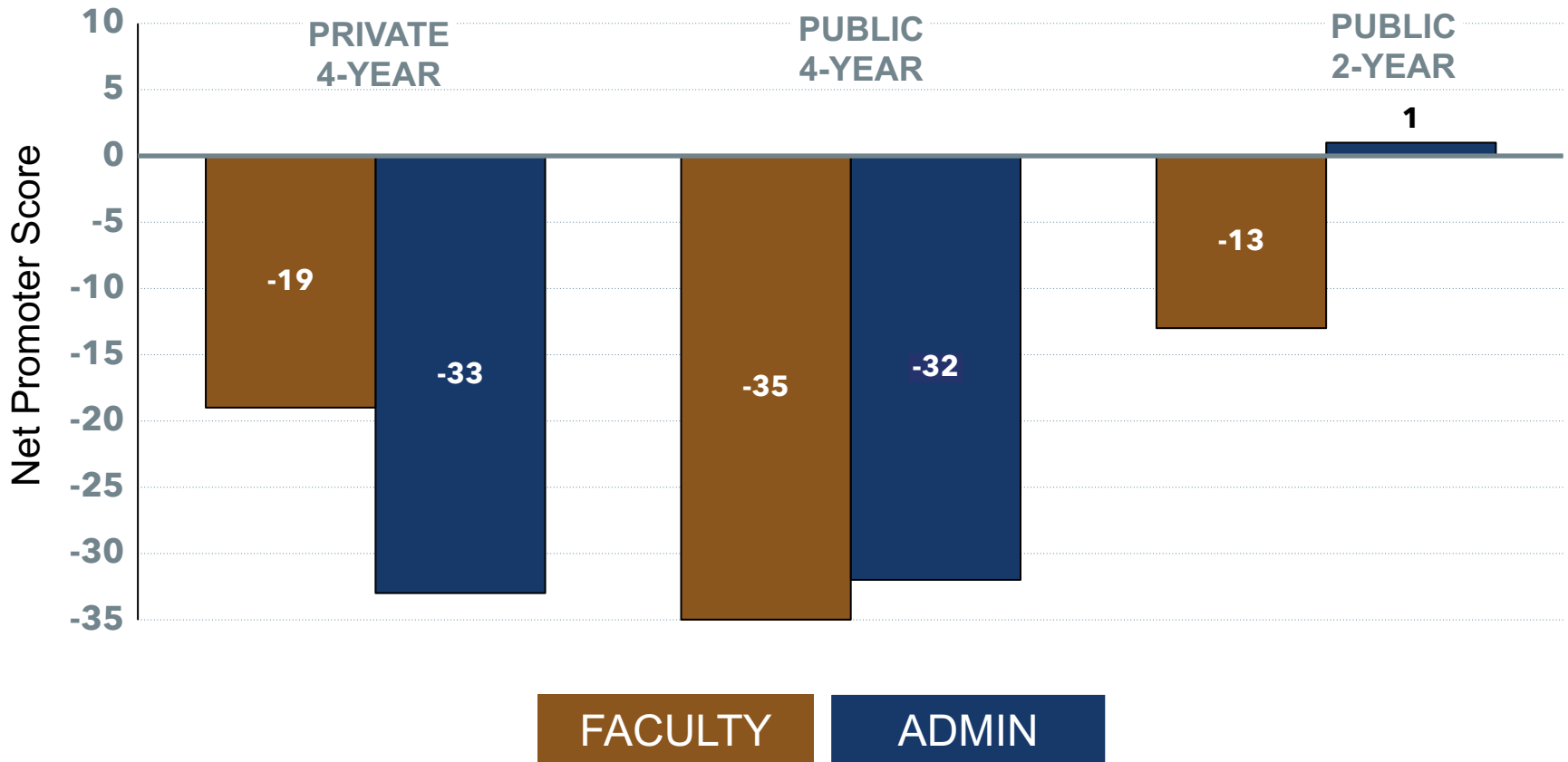
CLASSROOM-LEVEL BARRIERS

OTHER BARRIERS



## ...Along with Dissatisfaction with the Products in Use


Based on your experience, how likely are you to recommend digital courseware to a peer at another institution?



# Key Takeaways

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- Faculty struggle to distinguish courseware products from other “instructional” technologies, particularly the LMS
- Faculty are often encouraged to adopt courseware, but institutional conditions do not actively support their efforts
- Courseware adoption decisions often include at least two levels in an institution – faculty and institution
  - Communication between suppliers and customers can be challenging
  - May lead to misaligned expectations and / or low stakeholder buy-in
- Courseware market is complex and options are difficult to navigate and compare for institutional stakeholders

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## **03** Introducing the Courseware in Context (CWIC) Framework

# Understanding Current Practice

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**What is the extent of use of courseware at your institutions? How do you think about evaluating quality or fit for a course? How does that process compare to evaluating textbooks?**

# Responding to the Initial Findings

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## The Problem

Identified hurdles in expansion of digital courseware included:

- Inconsistent understanding of courseware and its potential impact
- Little faculty support to identify and implement quality courseware products
- Dissatisfaction from past experiences



## Developing a Solution

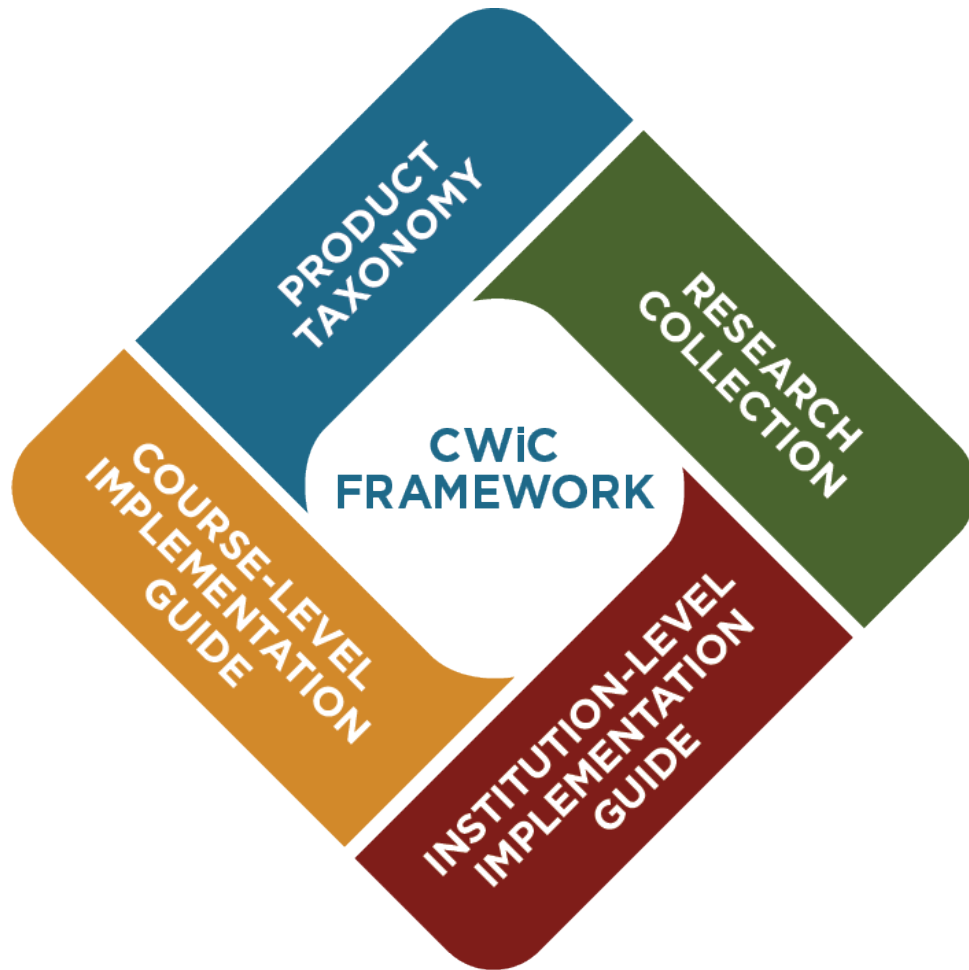
In Fall 2015 Tyton Partners, SRI international and OLC began a collaborative effort to:

- Establish a refined definition of “digital courseware” and resources to support courseware product differentiation
- Establish an **approach for evaluation of courseware “quality”** and develop resources to help faculty and other academic leaders with decision-making
- Refine these resources with perspectives of the market **and disseminate freely and broadly** through a diversity of channels starting in the Summer 2016

**The Courseware in Context (“CWIC”) Framework is the result of these efforts – this tool supports postsecondary decision-makers to navigate the market of courseware solutions**

# CWiC Framework Formally Launched October 2016

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## Solution

Provides a consistent definition of “digital courseware”

Establishes a common lexicon for courseware and its functionality

Builds transparency into the learning science behind courseware product design

Provides recommendations for priority product features to help meet goals


A field-owned resource, shared freely and broadly and regularly updated

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# Refined Definition of Courseware Encompasses a Range of Instructional Technology Products and Delivery Models

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Courseware is ***instructional content that is scoped and sequenced to support delivery of an entire course through purpose-built software***. It includes assessment to inform personalization of instruction and is equipped for adoption across a range of institutional types and learning environments.



Courseware can be delivered in a single product or by the thoughtful integration of different products that collectively deliver a complete course

## All-in-One Courseware

Course-complete content, assessment, data and analytics delivered through a single platform that integrates with an LMS for course administration functions only.

## Courseware via LMS

Courseware with structured and aligned course-complete content, assessment and analytics, that is hosted through an institution's LMS. Reliant on LMS for functionality like customization, collaboration, some analytics as well as course administration.

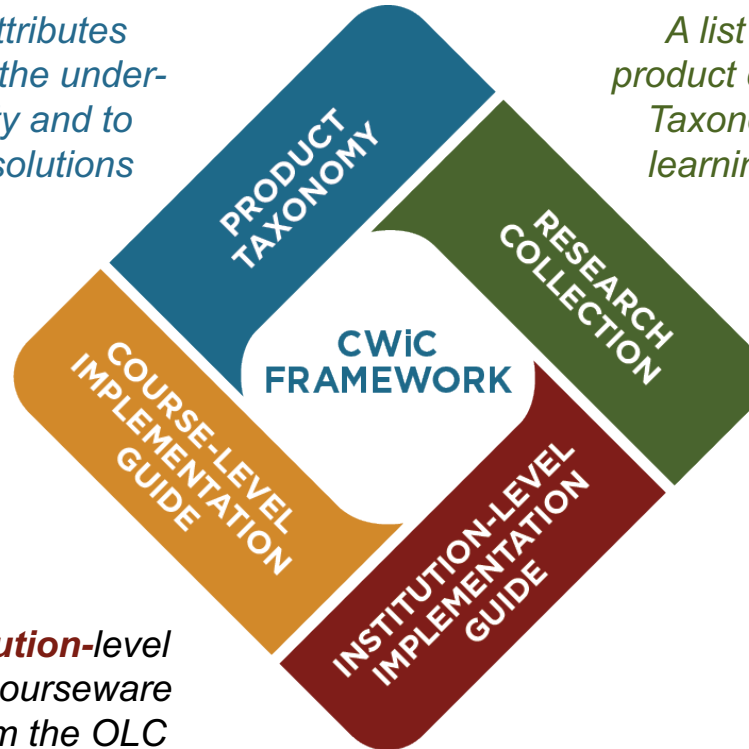
## Courseware as a Collection of Tools

An integrated experience that is delivered through the coordinated use of content (whether commercial, OER, or user-generated), commercially available assessments or interactive tools from different sources, utilizing a course delivery platform – often the LMS as a means for administration.

# Four Components of Framework Drive Product Understanding and Awareness of Implementation Best Practices

*A set of courseware product attributes selected and organized to aid in the understanding of product functionality and to support differentiation among solutions*

*A list of published research tagged to product capabilities identified in the Product Taxonomy. Builds transparency into the learning science behind product design*



*Selected **course-** and **institution-**level considerations for effective courseware implementation. Derived from the OLC Online and Blended Learning Scorecards*

**The Courseware in Context (CWiC) Framework supports postsecondary decision-makers to navigate the market of courseware solutions to find the solution that best fits their institutional goals and implement it effectively.**



# CWiC Product Taxonomy Identifies Key Differentiating Courseware Product Features, Organized into Capabilities

Teaching and Learning Focused

## FUNCTIONAL CAPABILITIES



## PROCUREMENT CAPABILITIES

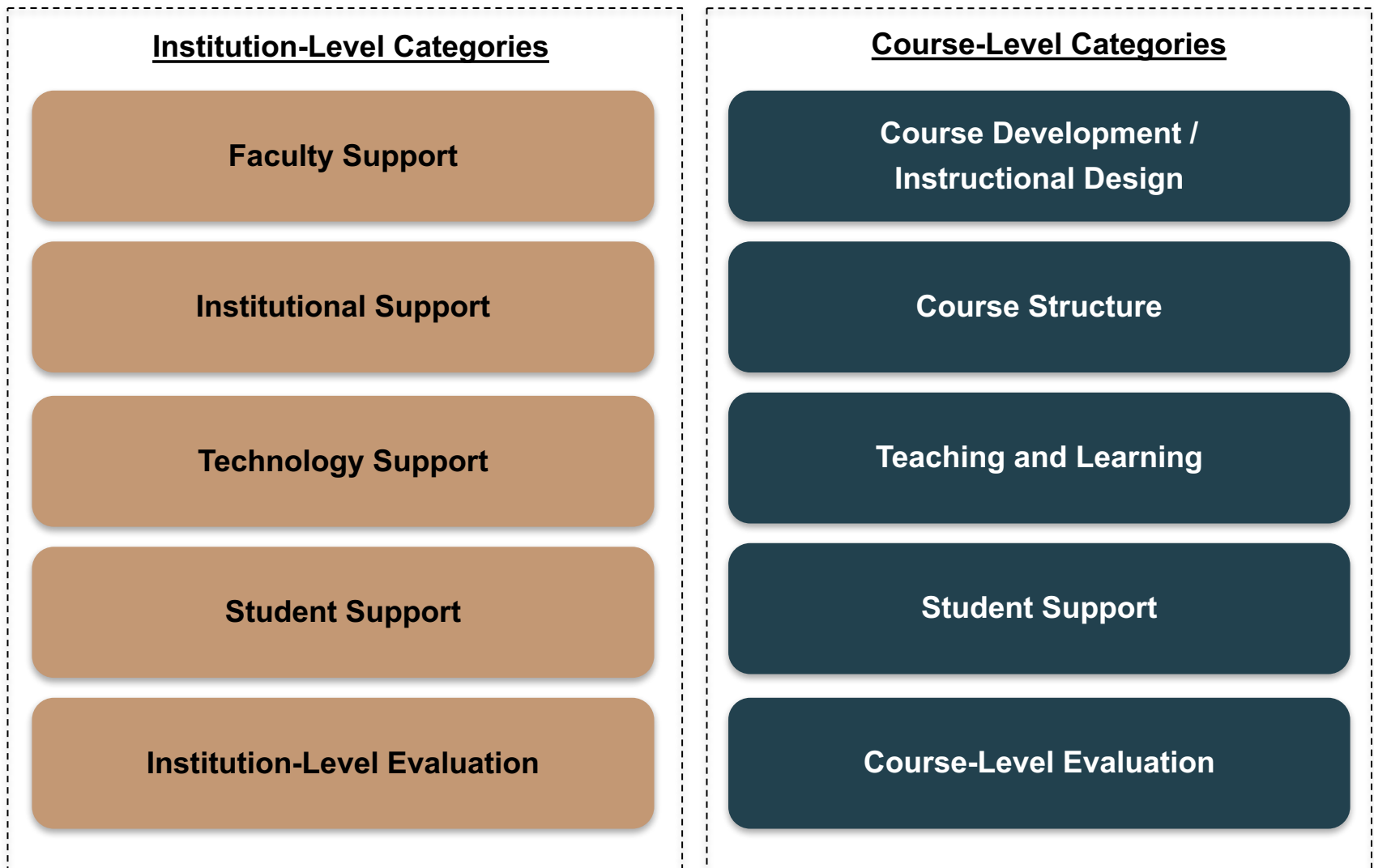


## DELIVERY PLATFORM CAPABILITIES



Technical / Course Management Focused

# Courseware Implementation is Evaluated at the Institution- and Course-Level, Derived from OLC Scorecards



# Three Instruments Are Available to Support Different Roles and Decision-Points in Courseware Implementation

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## THE CWiC PRODUCT PRIMER

- Abbreviated tool that helps users identify priority courseware capabilities during the product exploration and evaluation phase of selection
- Ideal for faculty just beginning to explore courseware products



## THE CWiC DESIGNER

- Designed to support deeper understanding of a courseware product and the learning science principles that underpin product features, among other factors
- Ideal for instructional designers completing a more thorough review of a courseware product and may be useful for informing future product selection; solely focused on product-related dynamics



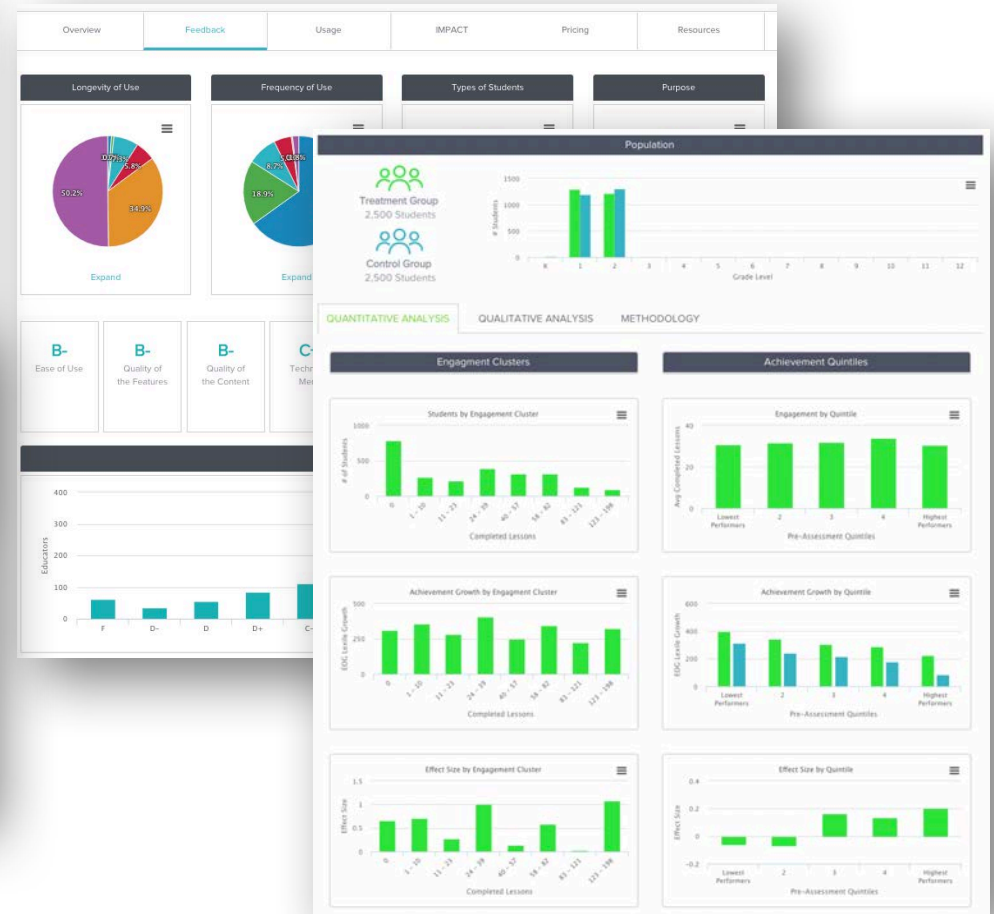
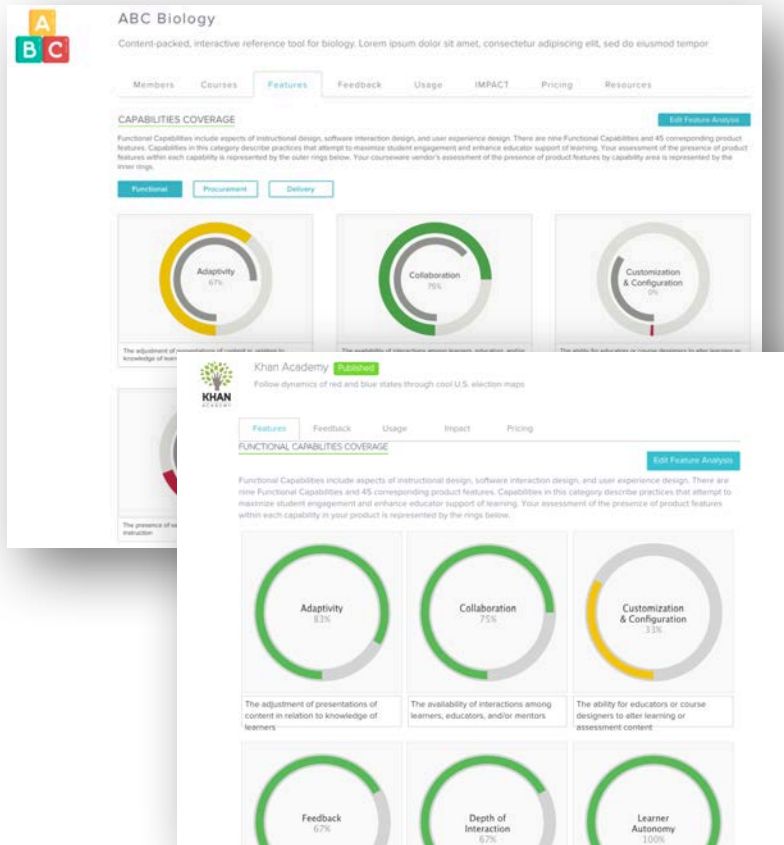
## THE CWiC FRAMEWORK

- Complete framework including the Product Taxonomy and Efficacy Research Index, plus Course- and Institution-Level Implementation Guides
- Ideal for administrators completing course reviews; focused on both product- and implementation-related dynamics

# Launched Interactive Version of CWiC Framework in April 2017 on LearnPlatform

Pilot

Analyze Implementation & Student Outcomes



# Discussion Questions

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**How could you envision using a resource like the CWiC Framework at your institution? What would make that resource more valuable to you and your stakeholders?**

# CWiC Framework Is Maintained in Accordance with Values of Openness, Flexibility, and Continuous Improvement



## Openness



## Flexibility



## Continuous Improvement

Description

- Freely available online
- Openly licensed and able to be used by institutions and vendors
- Includes resources to support adoption and use, and mechanisms to solicit user feedback

- Designed for application in various institutional contexts and instructional settings
- Maintained as three separate instruments designed for use among different audiences and based on need
- Able to be re-used, re-mixed, and modified
- Embedded or aligned with several evaluative tools/rubrics

- Includes mechanisms to solicit input to inform maintenance of the Framework over time
- Guided by governance structure made up of a selected group of practitioners and industry stakeholders serving in various supporting roles
- Updated on an annual basis

Benefits

Framework is “field-owned”

Framework may be used by the field based on need

Framework remains “organic” resource that evolves with the field

# Framework Is “Field-Owned” and Governance Is Led by Institutional Leaders Participating in an Executive Committee

## Governance Structure

### Executive Committee\*

*Oversee all aspects of governance; set priorities and agendas; approve changes and updates*



### Strategy Council

*Guide strategic direction and priorities; serve as counsel to Exec. Committee and Dissemination Partners*



### Dissemination Partners

*Drive awareness and adoption; work with media and new / potential partners; help develop and improve upon collateral and other public-facing materials*



# CWiC Framework Is Currently Being Applied to a Range of Institutional Use Cases

	Georgia State University	University 1	University 2	University 3
CWiC Application	Modified the CWiC Product Taxonomy to develop an RFI to collect information on adaptive learning providers as part of its APLU adaptive courseware grant	Applied the Interactive CWiC to compare the implementations of two courseware products in the same algebra course	Apply the Interactive CWiC Framework to support the evaluation of two courseware products to inform the selection of a new tool to be used in a math placement protocol	Evaluate the implementation of a courseware product using the Interactive CWiC Framework
Participants	<ul style="list-style-type: none"> <li>• Instructional Designers</li> <li>• Faculty</li> </ul>	<ul style="list-style-type: none"> <li>• Instructional Designers</li> <li>• Faculty</li> </ul>	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Faculty piloting courseware</li> </ul>	<ul style="list-style-type: none"> <li>• Administrators</li> <li>• Faculty using courseware</li> </ul>



# As CWiC Framework Enters Year 2, Emphasis on Accessibility and Vendor Engagement Will Expand

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Year 1  
2016-2017

## Goals:


- Build awareness of the CWiC Framework through conference sessions, publications, and pilots
- Develop interactive version of the CWiC Framework on the LearnPlatform
- Solidify governance structure



Year 2  
2017-2018

## Goals:

- Broaden adoption
- Explore partnerships with quality frameworks / evaluation tools to expand flexibility / value of CWiC
- Engage with vendor community
- Expand accessibility coverage and resources
- Identify and support transition of CWiC to new organizational home

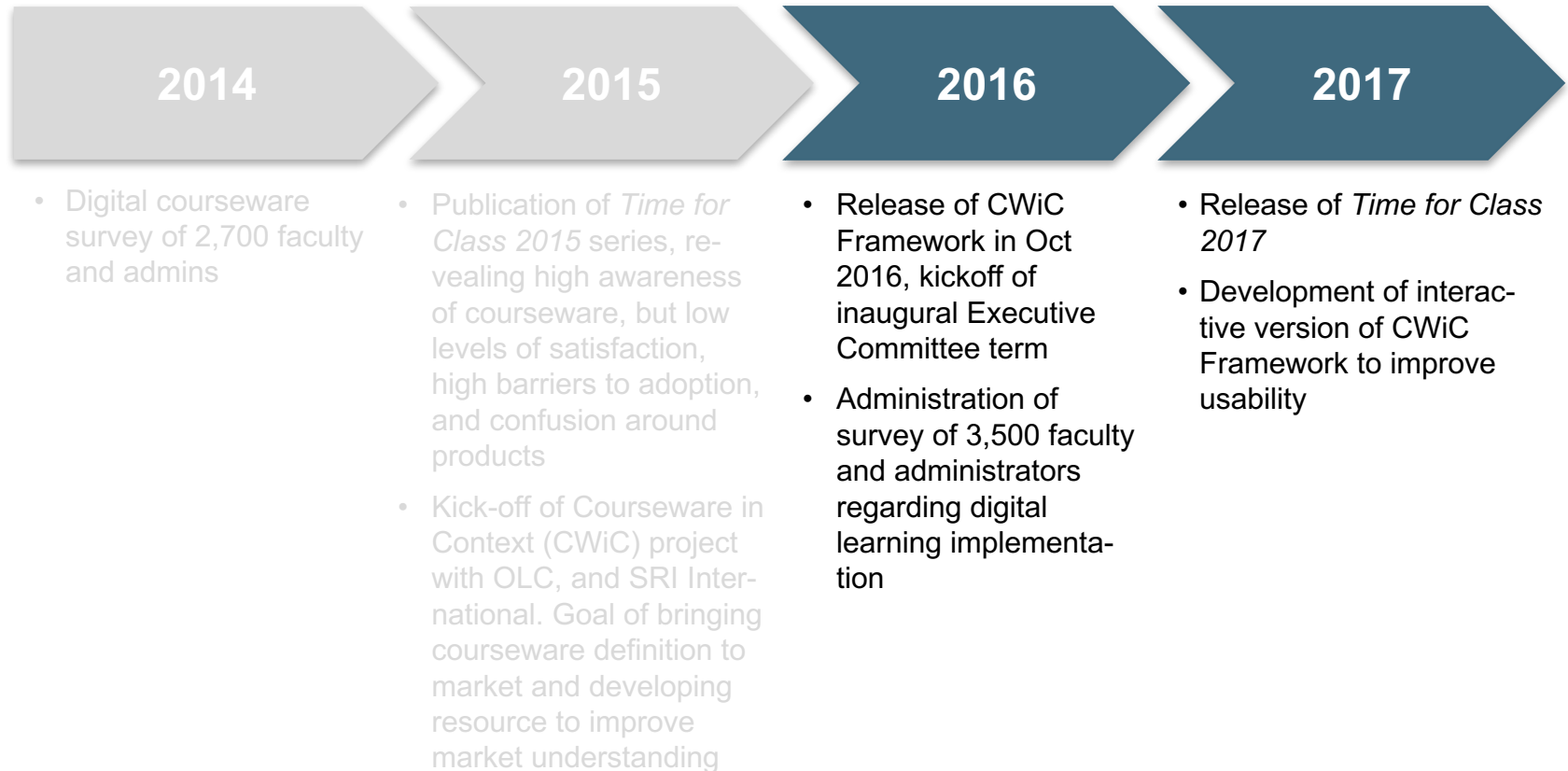
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# 04 Where We Are Today

(with Digital Learning & Courseware)

# Research Efforts in 2016 Were Informed by Two Years of Market Evolution and Data Collection

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# The 2016 Survey Administration Expanded to Address Postsecondary Digital Learning, Inclusive of Courseware

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- We had four key objectives in the current administration and market scan:
  - Understand the current degree of implementation of digital learning within US postsecondary institutions
  - Identify key organizational factors enabling digital learning implementation
  - Assess the extent to which courseware has been adopted as part of institutional digital learning strategies
  - Review and update the state of the supply-side ecosystem
- In addition to refining definition of “courseware”, we tested “digital learning” as the use of instructional technologies to support teaching and learning in face-to-face, online, and/or blended / hybrid environments
- Administered survey in Fall 2016 – secured more than 3,500 responses from teaching faculty and administrators
- Released “Time for Class: 2017 Update” in June

# Four Key Themes in Digital Learning Products and Implementation Emerged from Most Recent Administration

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- 1 The planning and execution of digital learning initiatives is falling short of “strategic” at many institutions
- 2 Faculty are a linchpin in digital learning success, yet are under-supported
- 3 Digital learning decision-making is decentralized
- 4 Low courseware product satisfaction inhibits larger-scale adoption

# Digital Learning Supports a Range of Strategic Priorities; Access, Faculty Innovation, and Revenues Are Paramount

Is the use of digital learning at your institution important to helping achieve any of the following strategic priorities? (Select all that apply)

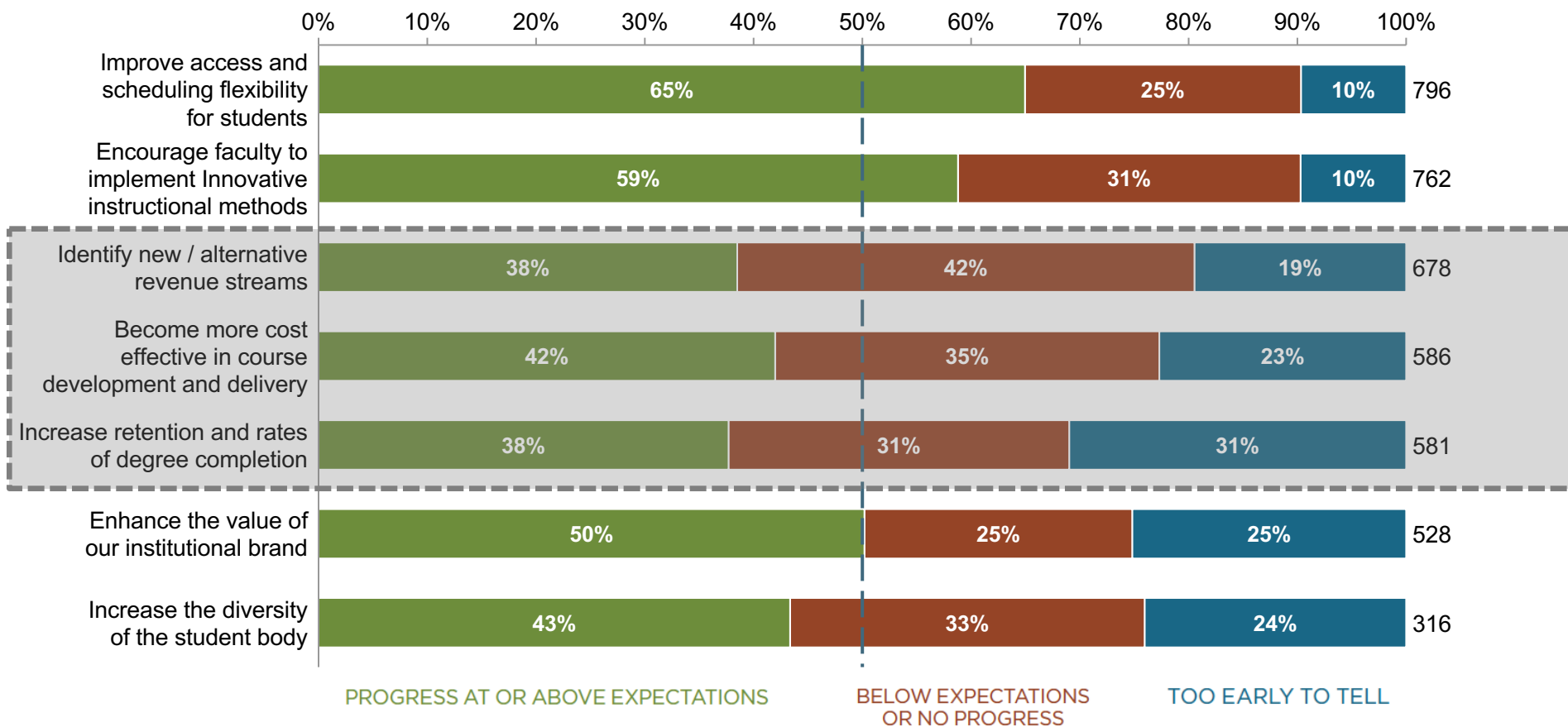
## Percent selecting each strategic priority

STRATEGIC PRIORITY	2-YEAR, LOW DISTANCE	2-YEAR, HIGH DISTANCE	PUBLIC 4-YEAR, LOW DISTANCE	PUBLIC 4-YEAR, HIGH DISTANCE	PRIVATE 4-YEAR, LOW DISTANCE	PRIVATE 4-YEAR, HIGH DISTANCE
Improve access and scheduling flexibility for students	78%	83%	71%	82%	59%	75%
Encourage faculty to implement innovative instructional methods	63%	70%	67%	71%	70%	61%
Increase retention and rates of degree completion	55%	68%	50%	64%	41%	52%
Identify new / alternative revenue streams	40%	51%	64%	71%	61%	76%
Become more cost effective in course development and delivery	50%	51%	56%	63%	44%	69%
Enhance the value of our institutional brand	42%	49%	39%	55%	44%	62%
Increase the diversity of the student body	22%	40%	24%	35%	23%	34%

Note: Response options include: Digital learning has been / is being implemented in pursuit of this strategic priority, Digital learning is not integral to this strategic priority, Not a Strategic Priority / NA; Table shows percent of administrators who indicated that "Digital learning has been / is being implemented in pursuit of this strategic priority"

# On Academic and Financial Goals, Perceived Impact of Digital Learning v. Expectations Are Mixed

## PROGRESS TOWARD GOALS AS A RESULT OF DIGITAL LEARNING IMPLEMENTATION (ADMIN.)



Note: Respondents for each strategic priority above include only those who indicated that digital learning has been / is being implemented in pursuit of this strategic priority in a prior question

Administrator survey question: has your institution demonstrated progress toward its goals in your strategic priority area as a result of implementing digital learning technology?

# Administrators across Institution Types Agree that Support for Faculty PD Is Critical to Digital Learning Success...

Understanding that there is variability, please select the top 3 most important factors that contribute to a successful implementation of digital learning?

Percent selecting each factor

STRATEGIC PRIORITY	2-YEAR, LOW DISTANCE	2-YEAR, HIGH DISTANCE	PUBLIC 4-YEAR, LOW DISTANCE	PUBLIC 4-YEAR, HIGH DISTANCE	PRIVATE 4-YEAR, LOW DISTANCE	PRIVATE 4-YEAR, HIGH DISTANCE
Support for faculty professional development	72%	75%	63%	69%	72%	59%
In-house IT / technical support	57%	58%	56%	58%	66%	61%
Incentives for faculty practice change / course redevelopment effort	36%	38%	52%	44%	50%	39%
Processes / resources for supporting course re-design	28%	30%	49%	43%	43%	50%
A Center for Teaching and Learning at your institution	25%	18%	21%	20%	22%	18%
Processes / resources for evaluating quality / effectiveness	28%	31%	20%	19%	15%	18%
Alignment of stakeholders in support of implementation	20%	18%	17%	18%	17%	32%
A Center for Online or Distance Education at your institution	30%	25%	14%	24%	8%	17%
Use of external partners / vendors	5%	4%	3%	2%	6%	2%

Note: Top 3 responses per segment are shaded



## ...But Faculty Time / Effort Remains by Far the Most Common Barrier to Digital Learning Implementation...

What do you perceive to be the most significant barriers to implementing digital learning at your institution?  
(Select up to 5)

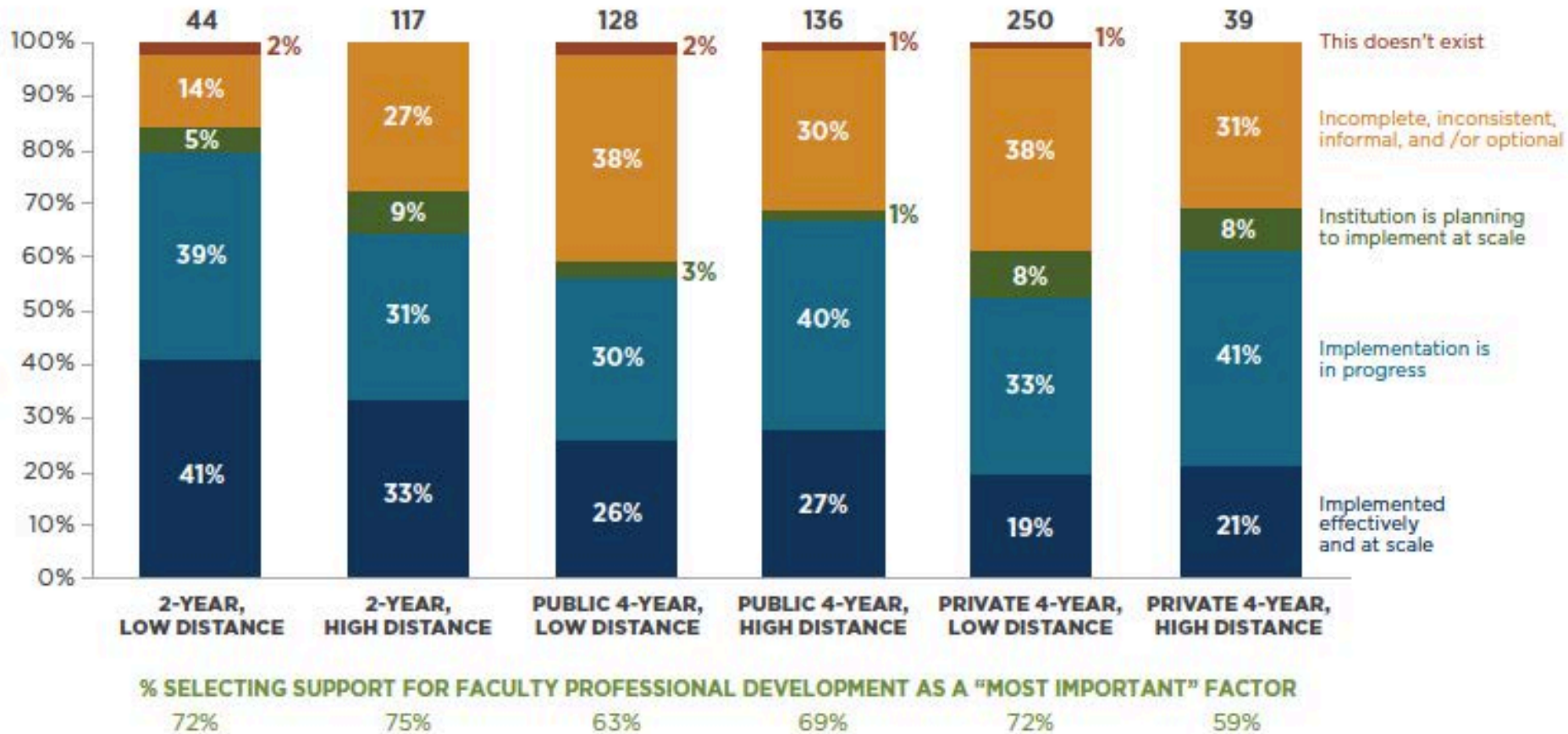
Percent selecting each barrier

STRATEGIC PRIORITY	2-YEAR, LOW DISTANCE	2-YEAR, HIGH DISTANCE	PUBLIC 4-YEAR, LOW DISTANCE	PUBLIC 4-YEAR, HIGH DISTANCE	PRIVATE 4-YEAR, LOW DISTANCE	PRIVATE 4-YEAR, HIGH DISTANCE
Faculty time/effort	65%	68%	81%	75%	72%	79%
Concern over efficacy	51%	38%	56%	48%	46%	49%
Competing priorities	56%	41%	44%	45%	41%	47%
Limited IT support	37%	45%	35%	36%	45%	51%
Faculty resistance	22%	39%	39%	46%	39%	39%
Institutional culture	27%	29%	34%	25%	43%	36%
Technical integration challenges	37%	38%	32%	31%	30%	34%
Cost to institution	37%	34%	22%	20%	28%	31%
Cost to students	16%	25%	9%	22%	7%	7%
Technology is not yet mature	6%	10%	13%	11%	15%	19%

Note: Top 3 responses per segment are shaded

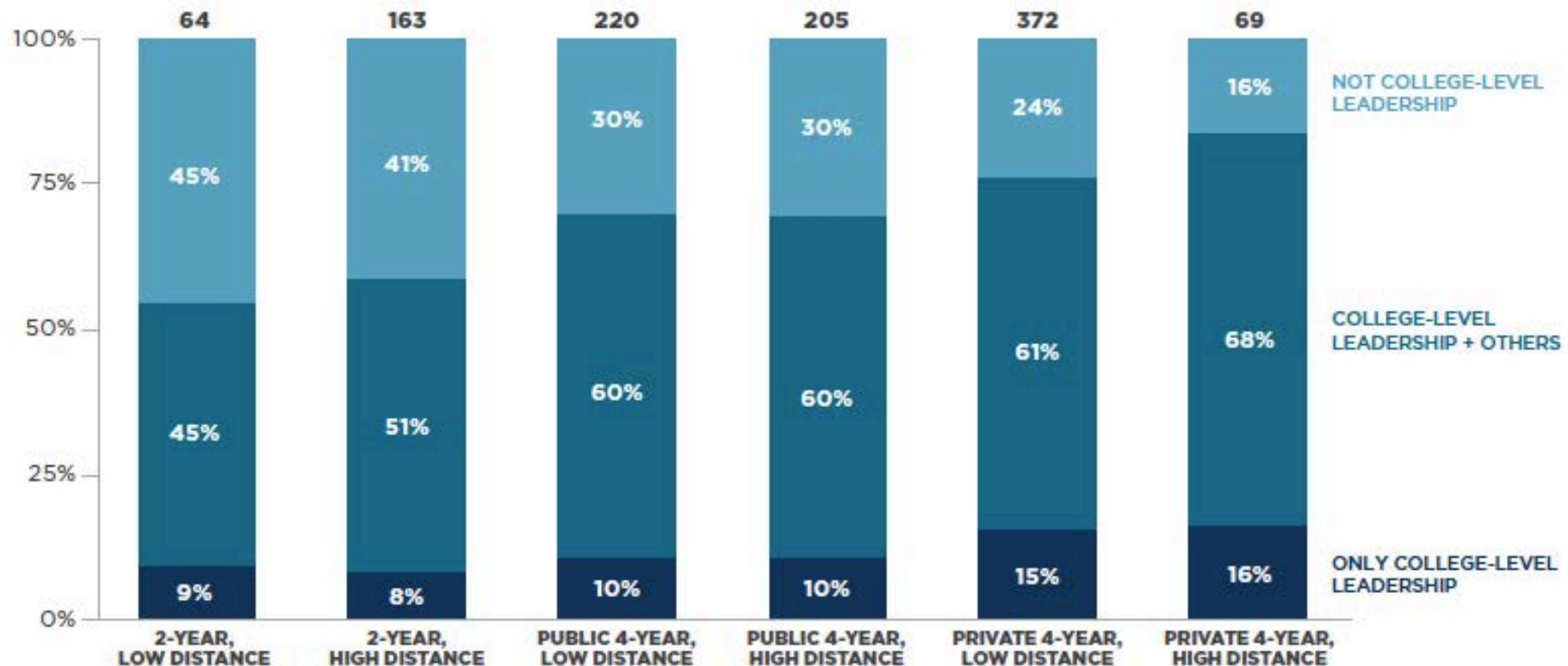
## ...And Despite its Importance, Faculty PD Is at Best a Work-in-Progress Effort at Most Institutions

### SCALE OF PROFESSIONAL DEVELOPMENT SUPPORT FOR DIGITAL LEARNING IMPLEMENTATION (ADMINISTRATOR)



## “Top-Down” Decision-making vis-à-vis Online Program Development Is Limited; Decisions Are Collaborative

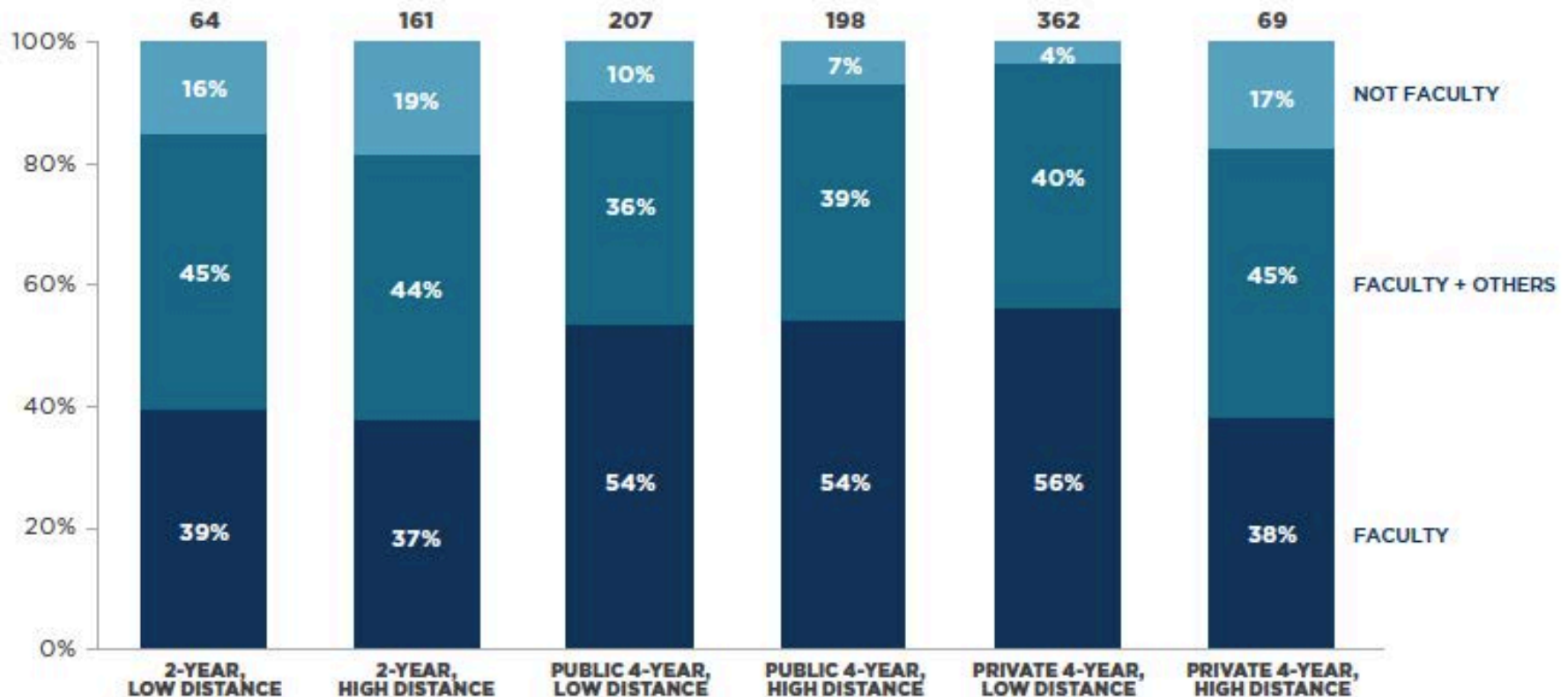
Who influences the decisions on the launch or development of new online / blended programs at your institution? (Select all that apply)



Note: Response options include: College / institutional level leadership; Individual faculty; Division / program level leadership; Department level leadership; Other

## Digital Material Selection Is Driven by Faculty, Both Alone or in Collaboration with Other Institutional Stakeholders

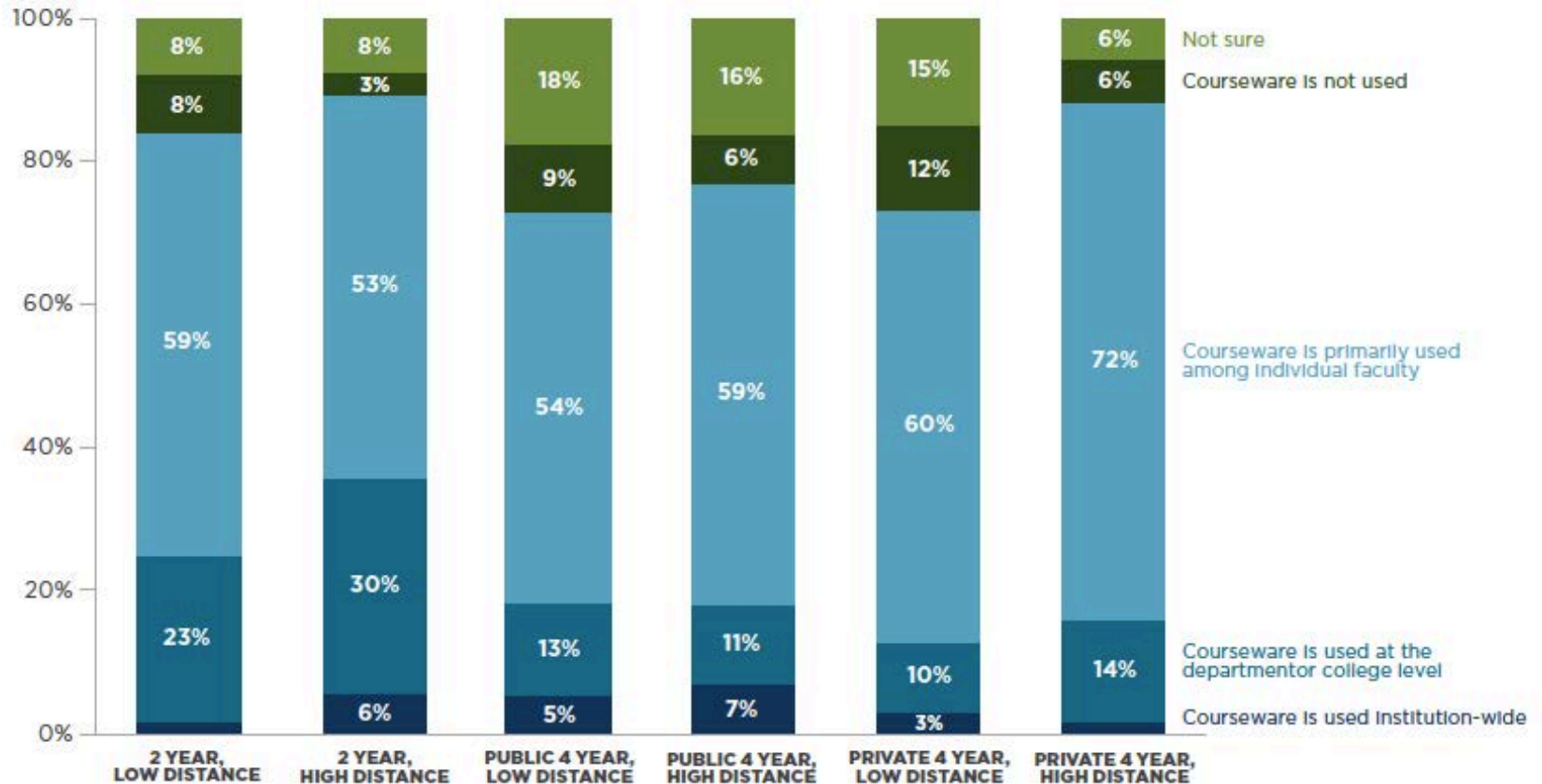
Who influences decisions on digital learning materials selection at your institution? (Select all that apply)



Note: Response options include: College / institutional level leadership; Individual faculty; Division / program level leadership, Department level leadership; Other

## While 2-Year Schools Report the Most Dept-Level Use, Courseware Remains Primarily an Individual Activity

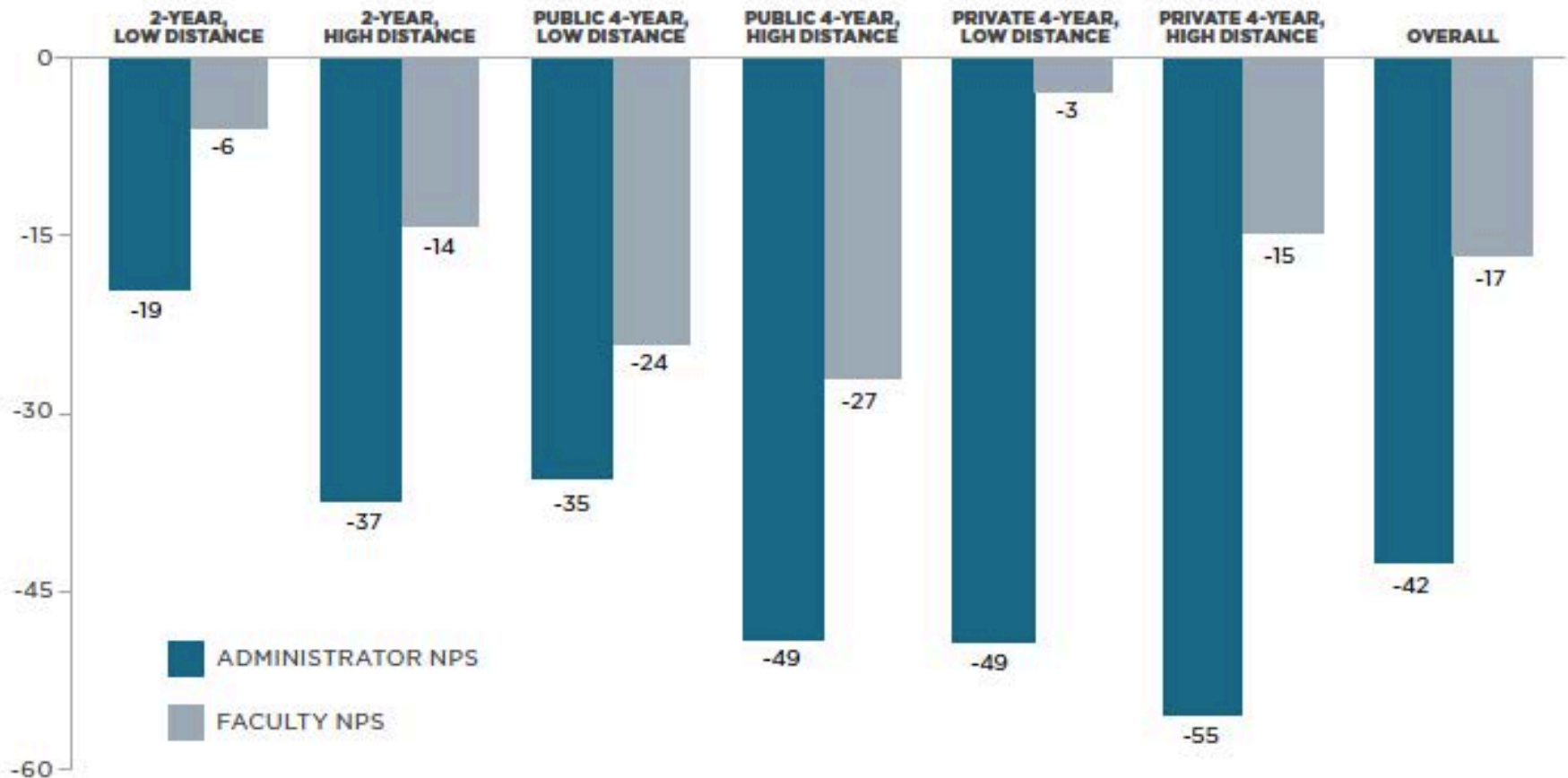
### EXTENT OF COURSEWARE USE (ADMINISTRATOR)



Administrator Survey Question: Which description below best describes the use of courseware at your institution?

# Administrators and Faculty Would (Still) Not Recommend their Courseware Products to Peers...

## COURSEWARE NET PROMOTER SCORE (ADMINISTRATOR & FACULTY)



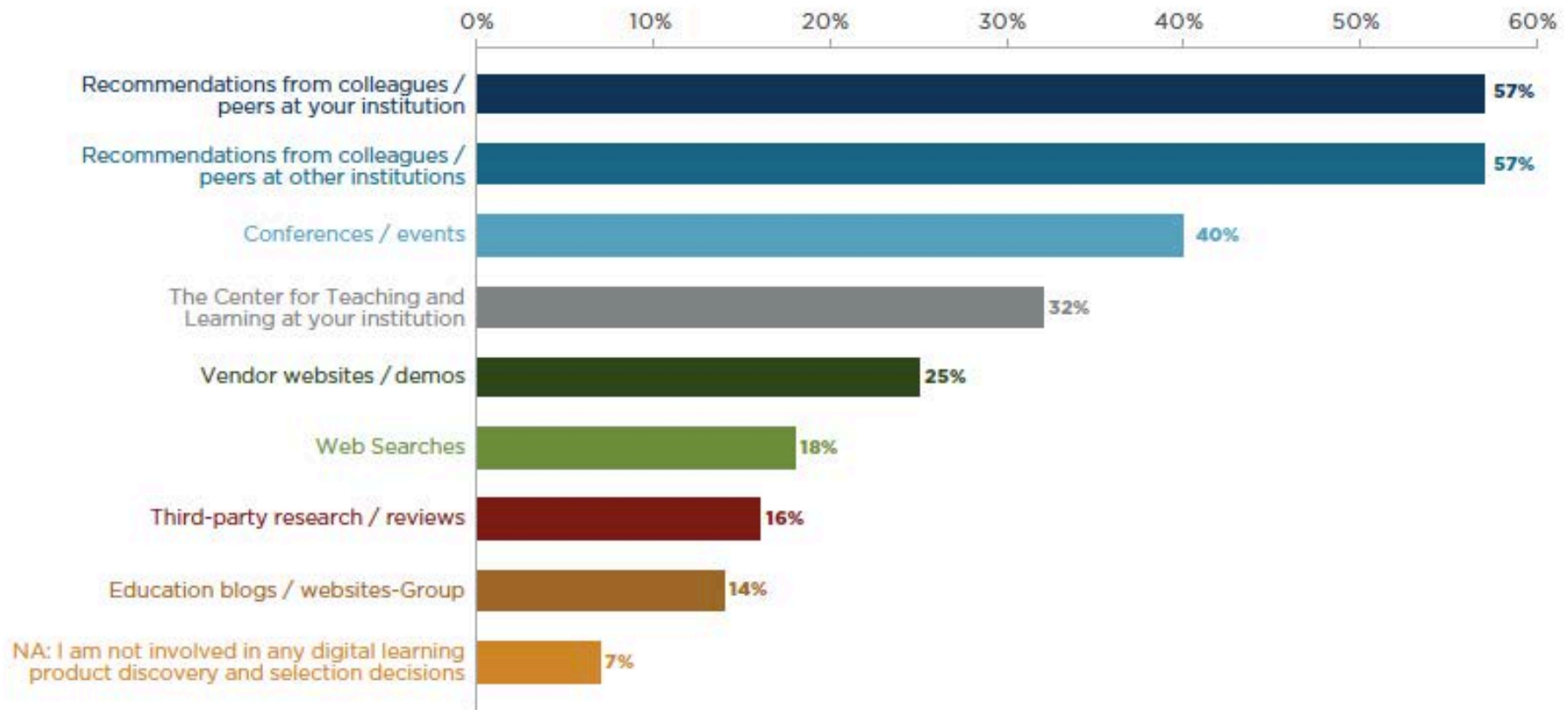
Note: A Net Promoter Score is evaluated by asking, "How likely are you to recommend this [product, service, or company] to a friend or colleague?" with 10 being "very likely" and 0 being "not at all likely." People responding 9 or 10 are considered to be promoters of the product, those who select 7 or 8 are neutral, and respondents indicating 6 or below are considered to be detractors. The NPS is calculated by subtracting the portion of respondents that are detractors from the portion that are promoters, and it is a metric used by companies across industries as an indication of customer satisfaction.

Source: Tyton Partners Time for Class 2017

# ...Presenting an Expansion Challenge When Recommendations Are Key to New Product Discovery and Selection

Which of the following resources are most valuable to inform your digital learning product discovery and selection? (Choose up to three)

## Percent selecting each resource



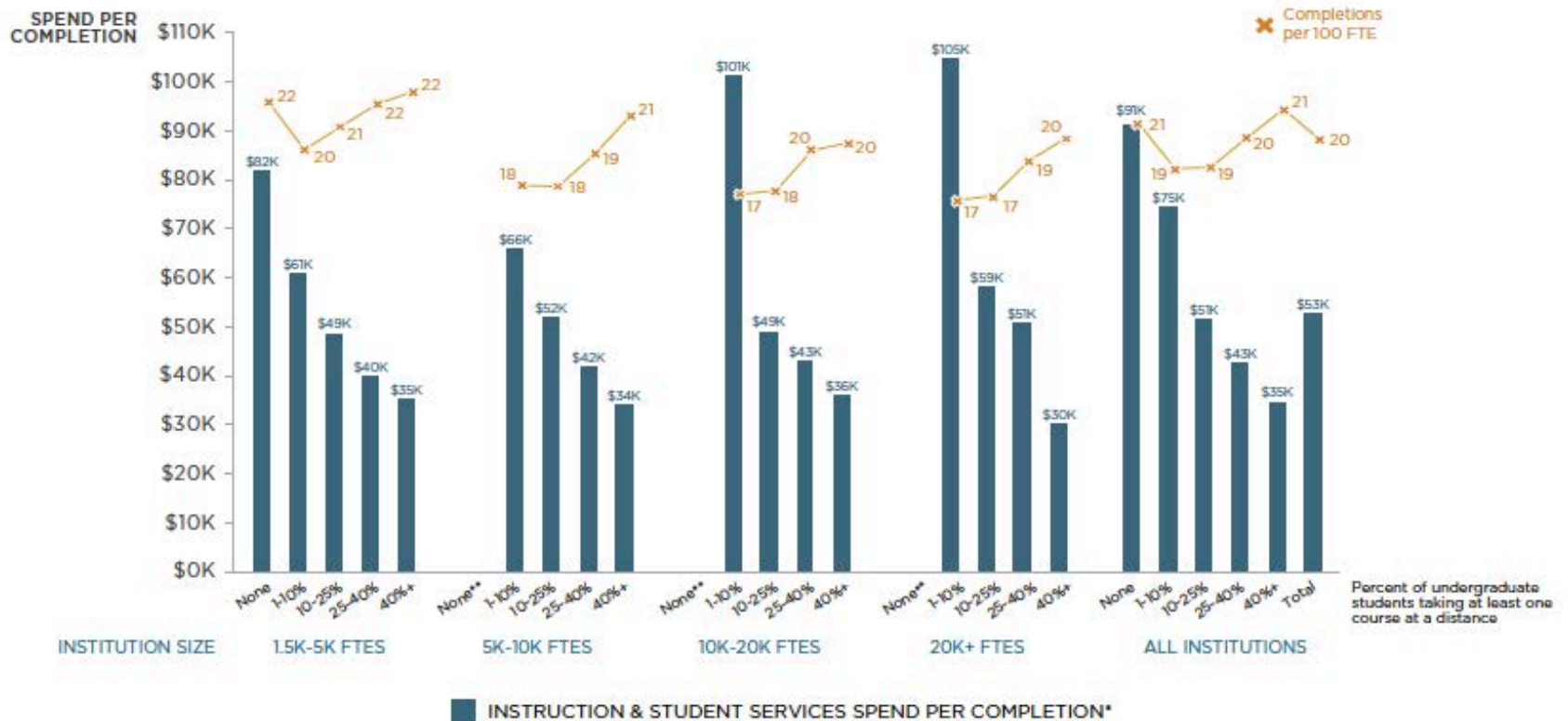
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# **05** Implications for Your Institution



# Scaled Digital Learning Is Changing the Cost, Quality and Access Equation in Higher Education

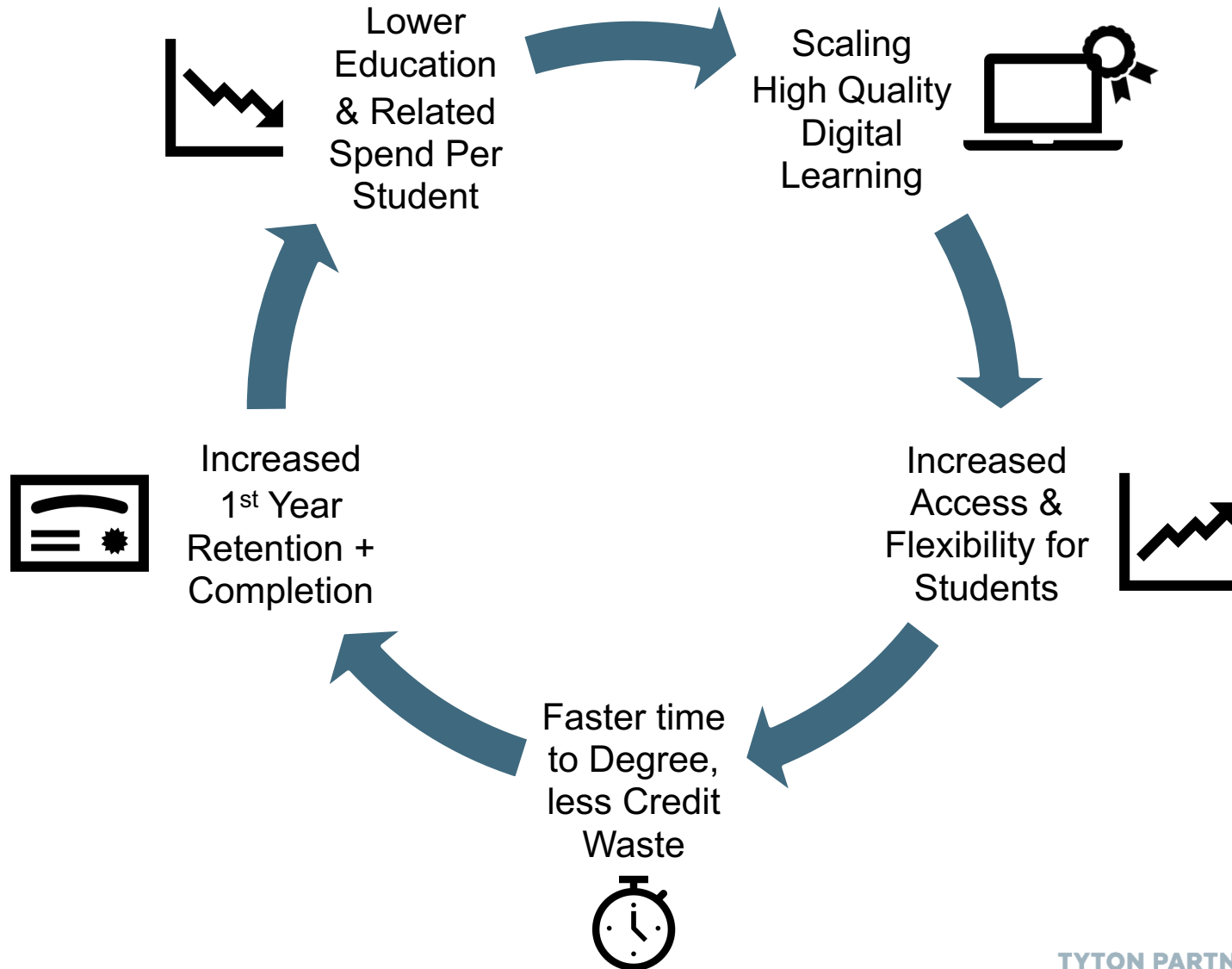
**AVERAGE INSTRUCTION AND STUDENT SERVICES SPENDING PER COMPLETION; AND AVERAGE COMPLETIONS PER 100 FTES, BY INSTITUTION SIZE AND PERCENT TAKING COURSES AT A DISTANCE (UNDERGRADUATE)**



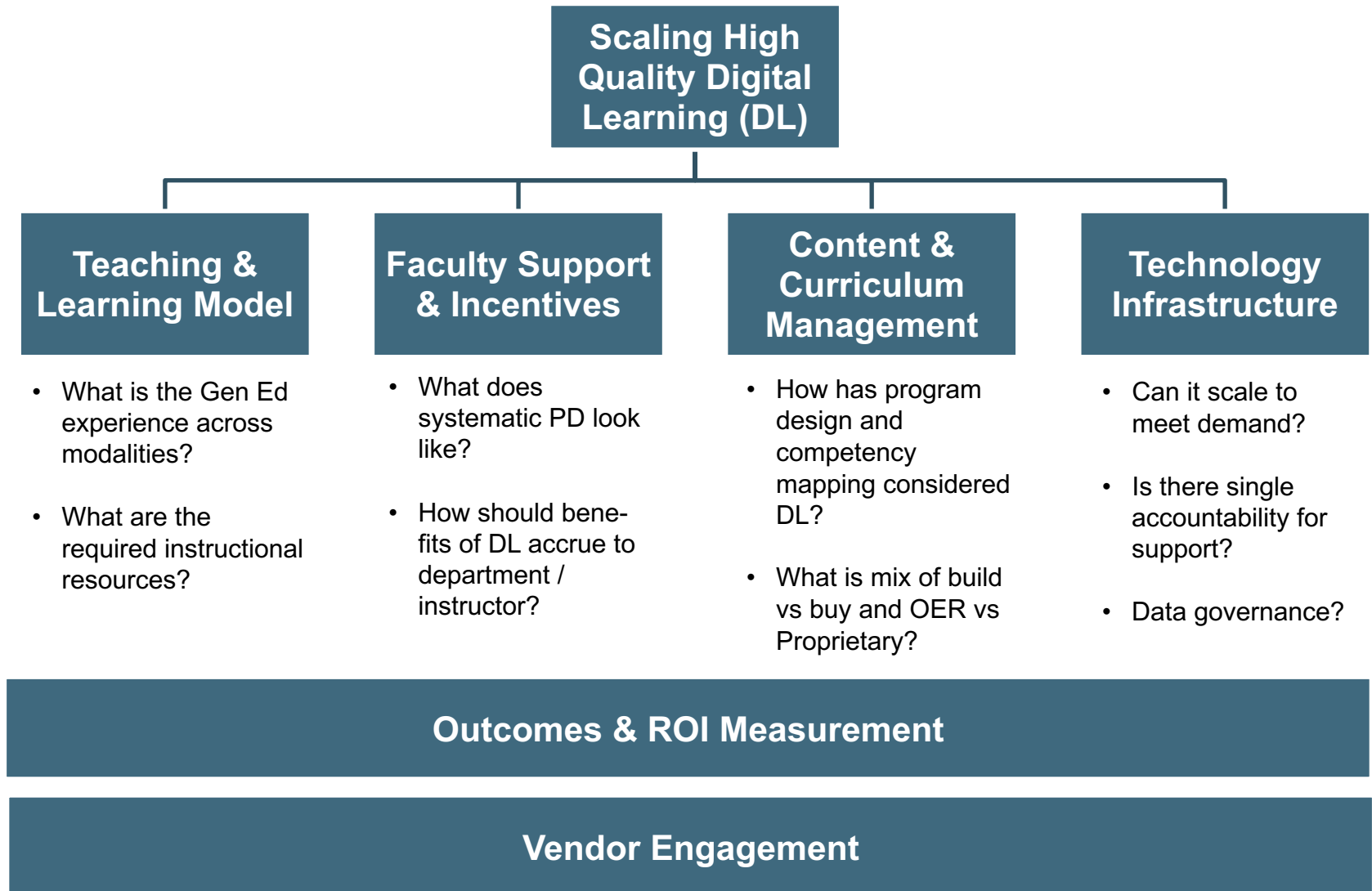
\* Completions included in analysis are associates degrees, bachelors degrees, and certificates of at least one year  
 \*\* Excluded, low n

Sources: Babson Survey Research Group, IPEDS, Tyton Partners analysis

# Can this Virtuous Cycle Break The Iron Triangle?



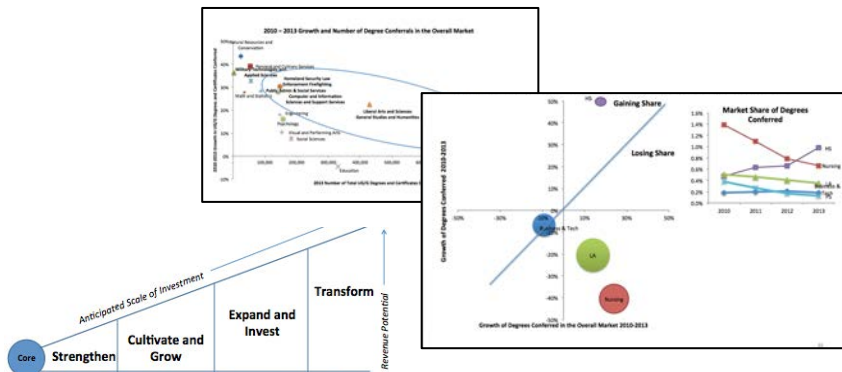
# Scaling High Quality Digital Learning Requires a Systematic, Sustained Approach to Answering Key Questions



# Answering these Questions Comes from A New Approach to Strategic Planning for Scaling Digital Learning...

## ① DL Alignment to Institution Strategy

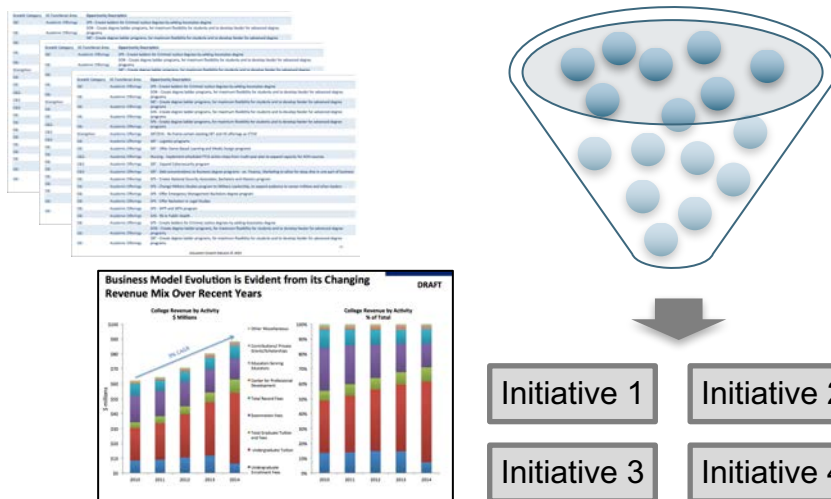
### Analysis to Evaluate DL Initiatives Alignment to Broader Strategy



### Why this is Different:

- DL is not just about new program creation and enrollment growth
- DL can be pursued for a variety of strategic objectives
- The alignment process is about right-sizing expectations and pragmatic prioritization across the institution

### Opportunities and Gaps versus New Benchmarks

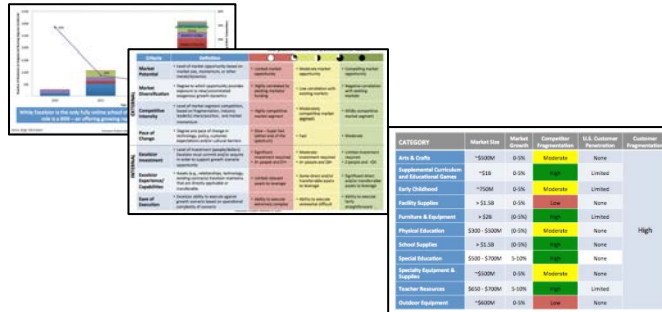


## ② Identify Opportunities and Gaps Based on Benchmarking

- Qualitative and quantitative interviews of key stakeholders on campus identify gaps
- Comparing opportunities and institutional capacity to peer and “near-peer” institutions, benchmarks are derived to quantify opportunities
- Opportunities can be organized into self-contained, discrete initiatives

# ...As Planning and Persuasive Rationale Leads Execution

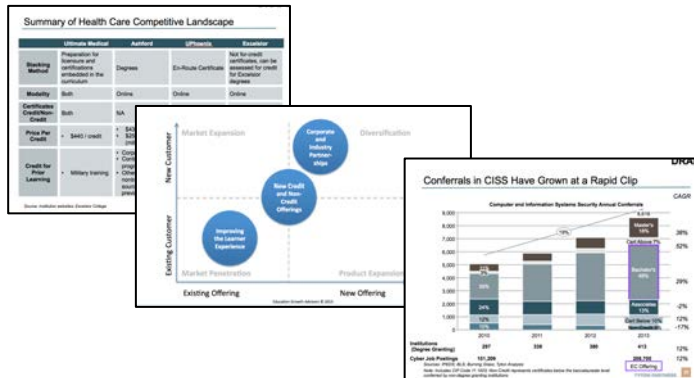
## Planning Beyond the Pilot



## Why This is Different:

- Perpetual piloting can kill the scaling process
- Measuring impact/efficacy must be large scale and rapid
- Resources for scaling are dramatically different from piloting

## Prioritized Initiatives and ROI Framework for Board approval



- Building an investment case for board approval with agreed upon measurement framework requires tight collaboration across IR/IE, Finance and Academic Affairs

③ Implementation Planning

④ Board Proposal and ROI Framework

A decorative graphic consisting of several concentric, slightly irregular circles in a light gray color, centered on the left side of the page. The circles are of varying radii and are not perfectly circular, giving them a hand-drawn or organic feel.

**06 Q&A**

## Selected Questions

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- How would you respond to the question “*How far along is your institution toward implementing digital learning in relation to its strategic plan?*” (0-100 scale)
- Do any of the themes presented in Section 04 resonate with you? How have those themes impacted your ability to implement digital learning at your institution?
- How have your partner organizations (vendors, associations, etc.) accelerated or slowed your implementation of digital learning?