Agenda

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
01 Overview of Tyton Partners and our Work
# Who Is Tyton Partners?

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

- Growth Companies
- Market Leaders
- Investors
- Non-Profits
- Institutions
- Foundations
- Strategy Consulting
- Investment Banking
...And the Types of Opportunities for which They Engage Us

**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**
- 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

**Commercial Providers**
- Growth strategy and development
- Product strategy and portfolio assessment
- Go-to-market strategy development
- Customer segmentation and prioritization
- Partnership strategy and execution
- Market segment evaluation
- Investment thesis evaluation
- Due diligence and acquisition support
- Post-close 90-day strategy audit

**Investors**
- Market segment evaluation
- Investment thesis evaluation
- Due diligence and acquisition support
- Post-close 90-day strategy audit
A Brief Narrative Prelude…
Why We’re Really Having this Discussion

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
Our Strand of Work Contributing to the Broader Discourse

2014

- Digital courseware survey of 2,700 faculty and admins

2015

- Publication of *Time for Class 2015* series, revealing high awareness of courseware, but low levels of satisfaction, high barriers to adoption, and confusion around products
- Kick-off of Courseware in Context (CWiC) project with OLC, and SRI International. Goal of bringing courseware definition to market and developing resource to improve market understanding

2016

- Release of CWiC Framework in Oct 2016, kickoff of inaugural Executive Committee term
- Administration of survey of 3,500 faculty and administrators regarding digital learning implementation

2017

- Release of *Time for Class 2017*
- Development of interactive version of CWiC Framework to improve usability
Objectives for Today

• 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
02 What We Learned in 2015 about Courseware
Building a Foundational Understanding of the Issues

- 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...

Source: Tyton Partners Time for Class 2015
…With Courseware Penetration Varying by Academic Discipline

Introductory-Level Course Courseware Usage by Academic Discipline

Source: Tyton Partners Time for Class 2015
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?

- **Public 2-Year (Faculty)**: 77%
- **Public 4-Year (Faculty)**: 78%
- **Private 4-Year (Faculty)**: 73%
- **Administrators***: 90%

* % 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

<table>
<thead>
<tr>
<th>Highest Barriers</th>
<th>Private 4-Year</th>
<th>Public 4-Year</th>
<th>Public 2-Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Additional Time Required for Faculty</td>
<td>Additional Time Required for Faculty</td>
<td>Additional Cost to Students</td>
</tr>
<tr>
<td>2.</td>
<td>Efficacy of Digital Courseware in Improving Learning Outcomes</td>
<td>Efficacy of Digital Courseware in Improving Learning Outcomes</td>
<td>Additional Time Required for Faculty</td>
</tr>
<tr>
<td>3.</td>
<td>Lack of Alignment with My Philosophy of Instructional Design</td>
<td>Lack of Alignment with My Philosophy of Instructional Design</td>
<td>Technical Integration Challenges</td>
</tr>
<tr>
<td>4.</td>
<td>Reduced Control over Course Content and Student Experience</td>
<td>Technical Integration Challenges</td>
<td>Resistance to Shift in Instructional Method</td>
</tr>
<tr>
<td>5.</td>
<td>Technical Integration Challenges</td>
<td>Resistance to Shift in Instructional Method</td>
<td>Efficacy of Digital Courseware in Improving Learning Outcomes</td>
</tr>
</tbody>
</table>

**Classroom-Level Barriers**

**Other Barriers**

Source: Tyton Partners Time for Class 2015
Based on your experience, how likely are you to recommend digital courseware to a peer at another institution?

...Along with Dissatisfaction with the Products in Use

Net Promoter Score

PUBLIC 4-YEAR
PUBLIC 2-YEAR
PRIVATE 4-YEAR

Source: Tyton Partners Time for Class 2015
Key Takeaways

• 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
03 Introducing the Courseware in Context (CWiC) Framework
Understanding Current Practice

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

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

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

CWiC Framework

- Product Taxonomy
- Research Collection
- Course-Level Implementation Guide
- Institution-Level Implementation Guide

COURSEWARE IN CONTEXT

www.coursewareincontext.org
Refined Definition of Courseware Encompasses a Range of Instructional Technology Products and Delivery Models

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.

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**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

**FUNCTIONAL CAPABILITIES**

- **Depth of Interaction**: The presence of variety and higher-order learning skills in instruction.
- **Measurement & Structure**: The presence of academic structures and the capacity to assess learning in relation to them.
- **Scaffolding**: Support structures to help learners achieve and grow beyond their current proficiencies.
- **Adaptivity**: The adjustment of presentations of content in relation to knowledge of learners.
- **Feedback**: The deployment of reports, notifications, or visualizations to learners or educators.
- **Learner Autonomy**: The ability for learners to impact or augment instruction based on their choices.
- **Collaboration**: Collaboration is a requirement or opportunity for learners to engage with other people in the context of learning: peers, mentors, or educators.
- **Customization Configuration**: The ability for educators or course designers to alter learning or assessment content.
- **Usability**: Features of software and user-centered design that support sustained engagement.

**PROCUREMENT CAPABILITIES**

- **Accessibility**:
- **Browser / OS Compatibility**:
- **Interoperability**:
- **Privacy & Security**:
- **Scalability**:

**DELIVERY PLATFORM CAPABILITIES**

- **Content Management**
- **Course Administration**
- **Reporting**

Teaching and Learning Focused

Technical / Course Management Focused
Courseware Implementation is Evaluated at the Institution- and Course-Level, Derived from OLC Scorecards

**Institution-Level Categories**
- Faculty Support
- Institutional Support
- Technology Support
- Student Support
- Institution-Level Evaluation

**Course-Level Categories**
- Course Development / Instructional Design
- Course Structure
- Teaching and Learning
- Student Support
- Course-Level Evaluation

Source: Categories derived from the OLC Online and Blended Learning Scorecards
Three Instruments Are Available to Support Different Roles and Decision-Points in Courseware Implementation

**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

www.coursewareincontext.org
Launched Interactive Version of CWiC Framework in April 2017 on LearnPlatform

Pilot

Analyze Implementation & Student Outcomes
Discussion Questions

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Openness</th>
<th>Flexibility</th>
<th>Continuous Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Freely available online</td>
<td>Designed for application in various institutional contexts and instructional settings</td>
<td>Includes mechanisms to solicit input to inform maintenance of the Framework over time</td>
</tr>
<tr>
<td></td>
<td>Openly licensed and able to be used by institutions and vendors</td>
<td>Maintained as three separate instruments designed for use among different audiences and based on need</td>
<td>Guided by governance structure made up of a selected group of practitioners and industry stakeholders serving in various supporting roles</td>
</tr>
<tr>
<td></td>
<td>Includes resources to support adoption and use, and mechanisms to solicit user feedback</td>
<td>Able to be re-used, re-mixed, and modified</td>
<td>Updated on an annual basis</td>
</tr>
<tr>
<td>Benefits</td>
<td>Framework is “field-owned”</td>
<td>Framework may be used by the field based on need</td>
<td>Framework remains “organic” resource that evolves with the field</td>
</tr>
</tbody>
</table>

www.coursewareincontext.org
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

*Note: The executive committee includes members from these institutions/organizations.
## CWiC Framework Is Currently Being Applied to a Range of Institutional Use Cases

<table>
<thead>
<tr>
<th>CWiC Application</th>
<th>Georgia State University</th>
<th>University 1</th>
<th>University 2</th>
<th>University 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Modified the CWiC Product Taxonomy to develop an RFI to collect information on adaptive learning providers as part of its APLU adaptive courseware grant</td>
<td>Applied the Interactive CWiC to compare the implementations of two courseware products in the same algebra course</td>
<td>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</td>
<td>Evaluate the implementation of a courseware product using the Interactive CWiC Framework</td>
</tr>
</tbody>
</table>

### Participants

<table>
<thead>
<tr>
<th></th>
<th>Georgia State University</th>
<th>University 1</th>
<th>University 2</th>
<th>University 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Instructional Designers</td>
<td>Instructional Designers</td>
<td>Administrators</td>
<td>Administrators</td>
</tr>
<tr>
<td></td>
<td>Faculty</td>
<td>Faculty</td>
<td>Faculty piloting courseware</td>
<td>Faculty using courseware</td>
</tr>
</tbody>
</table>
As CWiC Framework Enters Year 2, Emphasis on Accessibility and Vendor Engagement Will Expand

### 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

www.coursewareincontext.org
04 Where We Are Today
(with Digital Learning & Courseware)
Research Efforts in 2016 Were Informed by Two Years of Market Evolution and Data Collection

2014
- Digital courseware survey of 2,700 faculty and admins

2015
- Publication of *Time for Class* 2015 series, revealing high awareness of courseware, but low levels of satisfaction, high barriers to adoption, and confusion around products
- Kick-off of Courseware in Context (CWiC) project with OLC, and SRI International. Goal of bringing courseware definition to market and developing resource to improve market understanding

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2017
- Release of *Time for Class* 2017
- Development of interactive version of CWiC Framework to improve usability
The 2016 Survey Administration Expanded to Address Postsecondary Digital Learning, Inclusive of Courseware

- 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

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

Source: Tyton Partners Time for Class 2017
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

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>2-Year, Low Distance</th>
<th>2-Year, High Distance</th>
<th>Public 4-Year, Low Distance</th>
<th>Public 4-Year, High Distance</th>
<th>Private 4-Year, Low Distance</th>
<th>Private 4-Year, High Distance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve access and scheduling flexibility for students</td>
<td>78%</td>
<td>83%</td>
<td>71%</td>
<td>82%</td>
<td>59%</td>
<td>75%</td>
</tr>
<tr>
<td>Encourage faculty to implement innovative instructional methods</td>
<td>63%</td>
<td>70%</td>
<td>67%</td>
<td>71%</td>
<td>70%</td>
<td>61%</td>
</tr>
<tr>
<td>Increase retention and rates of degree completion</td>
<td>55%</td>
<td>68%</td>
<td>50%</td>
<td>64%</td>
<td>41%</td>
<td>52%</td>
</tr>
<tr>
<td>Identify new / alternative revenue streams</td>
<td>40%</td>
<td>51%</td>
<td>64%</td>
<td>71%</td>
<td>61%</td>
<td>76%</td>
</tr>
<tr>
<td>Become more cost effective in course development and delivery</td>
<td>50%</td>
<td>51%</td>
<td>56%</td>
<td>63%</td>
<td>44%</td>
<td>69%</td>
</tr>
<tr>
<td>Enhance the value of our institutional brand</td>
<td>42%</td>
<td>49%</td>
<td>39%</td>
<td>55%</td>
<td>44%</td>
<td>62%</td>
</tr>
<tr>
<td>Increase the diversity of the student body</td>
<td>22%</td>
<td>40%</td>
<td>24%</td>
<td>35%</td>
<td>23%</td>
<td>34%</td>
</tr>
</tbody>
</table>

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.”

Source: Tyton Partners Time for Class 2017

<table>
<thead>
<tr>
<th>Goal</th>
<th>Progress at or Above Expectations</th>
<th>Below Expectations or No Progress</th>
<th>Too Early to Tell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve access and scheduling flexibility for students</td>
<td>65%</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>Encourage faculty to implement Innovative instructional methods</td>
<td>59%</td>
<td>31%</td>
<td>10%</td>
</tr>
<tr>
<td>Identify new / alternative revenue streams</td>
<td>38%</td>
<td>42%</td>
<td>19%</td>
</tr>
<tr>
<td>Become more cost effective in course development and delivery</td>
<td>42%</td>
<td>35%</td>
<td>23%</td>
</tr>
<tr>
<td>Increase retention and rates of degree completion</td>
<td>38%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Enhance the value of our institutional brand</td>
<td>50%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Increase the diversity of the student body</td>
<td>43%</td>
<td>33%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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?

Source: Tyton Partners Time for Class 2017
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

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

Note: Top 3 responses per segment are shaded

Source: Tyton Partners Time for Class 2017
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)

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

Note: Top 3 responses per segment are shaded

Source: Tyton Partners Time for Class 2017
And Despite its Importance, Faculty PD Is at Best a Work-in-Progress Effort at Most Institutions

Source: Tyton Partners Time for Class 2017
“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)

- 64: 16% NOT FACULTY
- 161: 19% NOT FACULTY
- 207: 10% NOT FACULTY
- 198: 7% NOT FACULTY
- 362: 4% NOT FACULTY
- 69: 17% NOT FACULTY

- 64: 45% FACULTY + OTHERS
- 161: 44% FACULTY + OTHERS
- 207: 36% FACULTY + OTHERS
- 198: 39% FACULTY + OTHERS
- 362: 40% FACULTY + OTHERS
- 69: 45% FACULTY + OTHERS

- 64: 39% FACULTY
- 161: 37% FACULTY
- 207: 54% FACULTY
- 198: 54% FACULTY
- 362: 56% FACULTY
- 69: 38% FACULTY

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

Source: Tyton Partners Time for Class 2017
While 2-Year Schools Report the Most Dept-Level Use, Courseware Remains Primarily an Individual Activity

**EXTENT OF COURSEWARE USE (ADMINISTRATOR)**

- **Not sure**: 6%
- **Courseware is not used**: 6%
- **Courseware is primarily used among individual faculty**: 72%
- **Courseware is used at the department or college level**: 60%
- **Courseware is used institution-wide**: 14%

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

Source: Tyton Partners Time for Class 2017
Administrators and Faculty Would (Still) Not Recommend their Courseware Products to Peers…

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

- Recommendations from colleagues / peers at your institution: 57%
- Recommendations from colleagues / peers at other institutions: 57%
- Conferences / events: 40%
- The Center for Teaching and Learning at your institution: 32%
- Vendor websites / demos: 25%
- Web Searches: 18%
- Third-party research / reviews: 16%
- Education blogs / websites-Group: 14%
- NA: I am not involved in any digital learning product discovery and selection: 7%

Source: Tyton Partners Time for Class 2017
05 Implications for Your Institution
Scaled Digital Learning Is Changing the Cost, Quality and Access Equation in Higher Education

Source: Tyton Partners Time for Class 2017
Can this Virtuous Cycle Break The Iron Triangle?

- Lower Education & Related Spend Per Student
- Increased 1st Year Retention + Completion
- Faster time to Degree, less Credit Waste
- Scaling High Quality Digital Learning
- Increased Access & Flexibility for Students

Can this Virtuous Cycle Break The Iron Triangle?
Scaling High Quality Digital Learning Requires a Systematic, Sustained Approach to Answering Key Questions

- **Teaching & Learning Model**
  - What is the Gen Ed experience across modalities?
  - What are the required instructional resources?

- **Faculty Support & Incentives**
  - What does systematic PD look like?
  - How should benefits of DL accrue to department/instructor?

- **Content & Curriculum Management**
  - How has program design and competency mapping considered DL?
  - What is mix of build vs buy and OER vs Proprietary?

- **Technology Infrastructure**
  - Can it scale to meet demand?
  - Is there single accountability for support?
  - Data governance?

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**Outcomes & ROI Measurement**

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

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

1. DL Alignment to Institution Strategy
2. Identify Opportunities and Gaps Based on Benchmarking
3. Initiative 1
4. Initiative 2
5. Initiative 3
6. Initiative 4
...As Planning and Persuasive Rationale Leads Execution

**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

**Planning Beyond the Pilot**

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

• 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?