# UM System-Wide eLearning Initiative

# eLearning Vision

- UM System will be the premier eLearning provider in Missouri and contiguous states in respect to the quality of programs, courses offered and the number of learners served. Our initial focus will be on adult and traditional learners to meet the workforce needs of the state of Missouri and beyond while reaching a goal of at least 25,000 new learners by 2025.
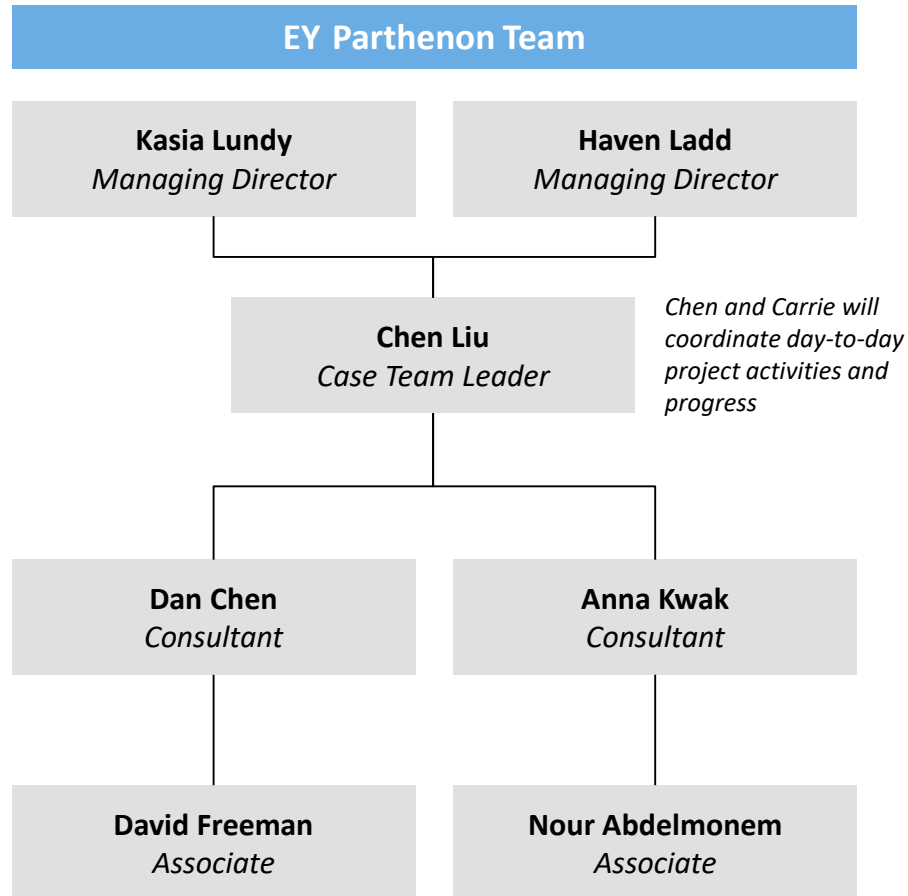
# Future Desired State

- Build a world class reputation in eLearning
- Reach new students who we are not currently serving
- Meet the workforce needs of the State of Missouri
- eLearning Student Supports
  - Success Coaches
  - Data & Analytics
  - Artificial Intelligence (not replacing, enhancing)
  - Meaningful Online Communities
  - Robust Career Placement Services
  - Experiential Learning

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# Introduction to EY-Parthenon team structure and University of Missouri's eLearning Task Force

*UM's eLearning Task Force has retained EY-Parthenon as an advisor to grow their eLearning program*

## EY Parthenon Team

**Kasia Lundy**
*Managing Director*

**Haven Ladd**
*Managing Director*

**Chen Liu**
*Case Team Leader*

*Chen and Carrie will coordinate day-to-day project activities and progress*

**Dan Chen**
*Consultant*

**Anna Kwak**
*Consultant*

**David Freeman**
*Associate*

**Nour Abdelmonem**
*Associate*

## University of Missouri Team

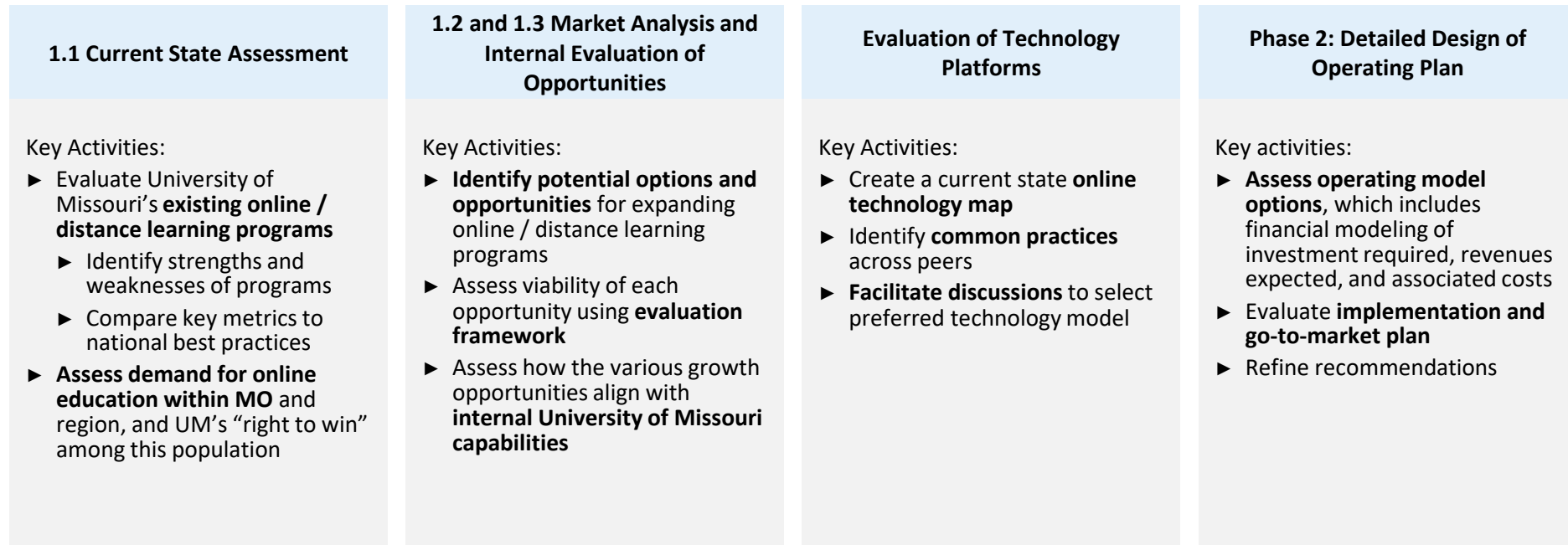| University of Missouri eLearning Task Force | |
|---|---|
| **Gary Allen** | VP for Information Technology, UM System |
| **Barb Bichelmeyer** | Provost, UMKC |
| **Mun Choi** | President, UM System |
| **Kelvin Erickson** | Former Chair of Electrical Engineering; Distance Education Pioneer, S&T |
| **Dale Fitch** | Associate Professor, Director, School of Social Work, MU |
| **Christine Holt** | Chief of Staff, UM System |
| **Robert Marley** | Provost, S&T |
| **John Phillips** | Vice Chair, Board of Curators |
| **Latha Ramchand** | Provost, MU |
| **Ryan Rapp** | VP for Finance and CFO, UM System |
| **Amber Reinhart** | Faculty Fellow, Associate Chair of Communication, UMSL |
| **Kristen Sobolik** | Provost, UMSL |
| **David Steelman** | Chair, Board of Curators |
| **Ajay Vinze** | Dean of the College of Business, MU |
| **Marilyn Yoder** | Associate Professor, Division Head, School of Biological Sciences, UMKC |
| Project Coordinators | |
| **Steven Graham** | Senior Associate VP, Academic Affairs; Project Manager, UM System |
| **Carrie Nicholson** | Research Consultant II; Project Manager, UM System |
| **Jill Wood** | Director, Academic Affairs; Project Manager, UM System |

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# Timeline of collaboration between University of Missouri eLearning Task Force and EY-Parthenon team

| | Phase 0 | Phase 1 (10 weeks) | Phase 2 (8 weeks) | Phase 3 |
|---|---|---|---|---|

| Week of: | 11/5 | 11/12 | 11/19 | 11/26 | 12/3 | 12/10 | 12/17 | 12/24 | 12/31 | 1/7 | 1/14 | 1/21 | 1/28 | 2/4 | 2/11 | 2/18 | 2/25 | 3/4 | 3/11 | Ongoing |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Task Force Meetings\*** | | ◆ | | | | | | | | | | | | | | | | | | |
| **Phase 0:** Mobilization | ▮ | | | | | | | | | | | | | | | | | | | |
| **Phase 1.1:** Current State Assessment | | Internal Assessment / Assess Market Demand | | | | | | | | | | | | | | | | | | |
| **Phase 1.2:** Market Analysis of Opportunities | | | | | | | | Align on Opportunities | | | | | | | | | | | | |
| **Phase 1.3:** Internal Evaluation of Opportunities | | | | | | | | Focus Groups\*\* / Synthesize Findings | | | | | | | | | | | | |
| **Technology Analysis** | | Technology Platform Analysis | | | | | | | | | | | | | | | | | | |
| **Phase 2:** Detailed Design and Mobilization | | | | | | | | | | | | Implementation Plan Analysis / Focus Groups / Refine | | | | | | | | |
| **Phase 3:** Program Implementation | | | | | | | | | | | | | | | | | | | | Ongoing |

Note: *EY-Parthenon will have bi-weekly touchpoints with the program management team; **Denotes optional activities

# In Phase 1, the task force will identify and evaluate various options for growth, while Phase 2 will focus on the design of an operating model
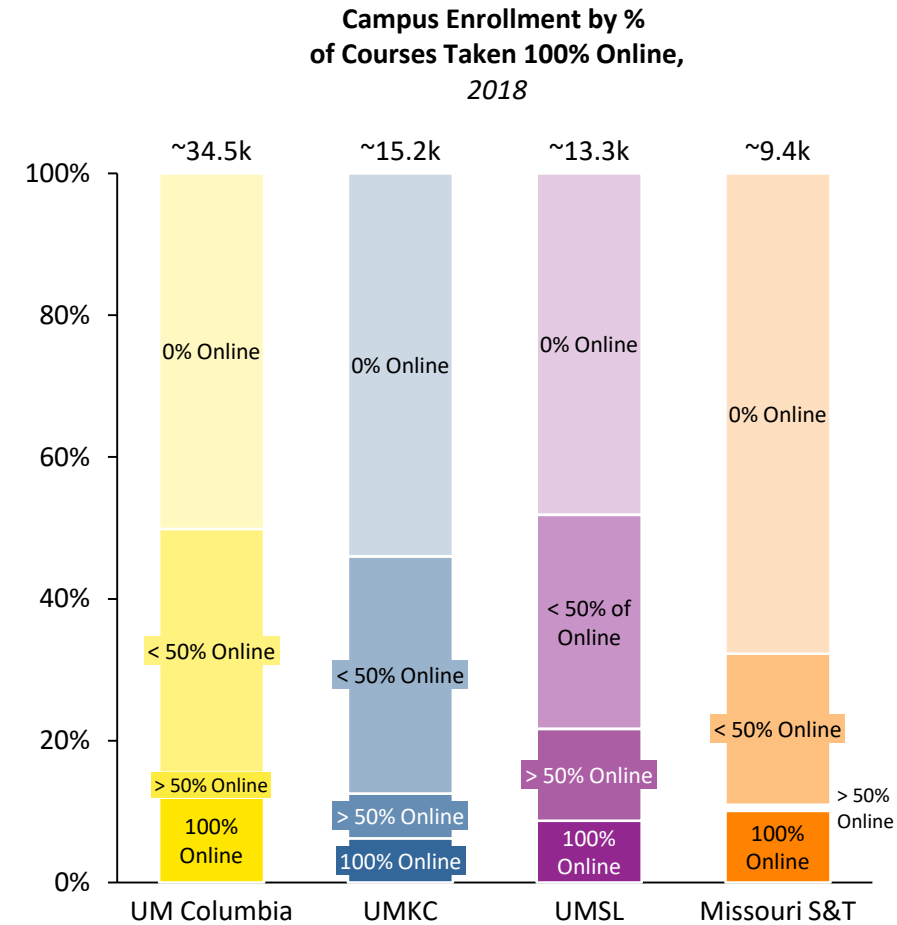
| Phase 0 | Phase 1 | | | Phase 2 | Phase 3 |
|---|---|---|---|---|---|
| Mobilization (1 week) | 1.1 Current State Assessment (6 weeks) | 1.2 Market Analysis of Opportunities (4 weeks) | | Detailed Design and Mobilization (8 weeks) | Implementation (as needed) |
| | | 1.3 Internal Evaluation of Opportunities (4 weeks) | | | |
| | Information gathering and evaluation of technology platforms | | | Plan performance tracking and management | |

| 1.1 Current State Assessment | 1.2 and 1.3 Market Analysis and Internal Evaluation of Opportunities | Evaluation of Technology Platforms | Phase 2: Detailed Design of Operating Plan |
|---|---|---|---|
| Key Activities:<br>► Evaluate University of Missouri's **existing online / distance learning programs**<br>   ► Identify strengths and weaknesses of programs<br>   ► Compare key metrics to national best practices<br>► **Assess demand for online education within MO** and region, and UM's "right to win" among this population | Key Activities:<br>► **Identify potential options and opportunities** for expanding online / distance learning programs<br>► Assess viability of each opportunity using **evaluation framework**<br>► Assess how the various growth opportunities align with **internal University of Missouri capabilities** | Key Activities:<br>► Create a current state **online technology map**<br>► Identify **common practices** across peers<br>► **Facilitate discussions** to select preferred technology model | Key activities:<br>► **Assess operating model options,** which includes financial modeling of investment required, revenues expected, and associated costs<br>► Evaluate **implementation and go-to-market plan**<br>► Refine recommendations |

**University of Missouri System**
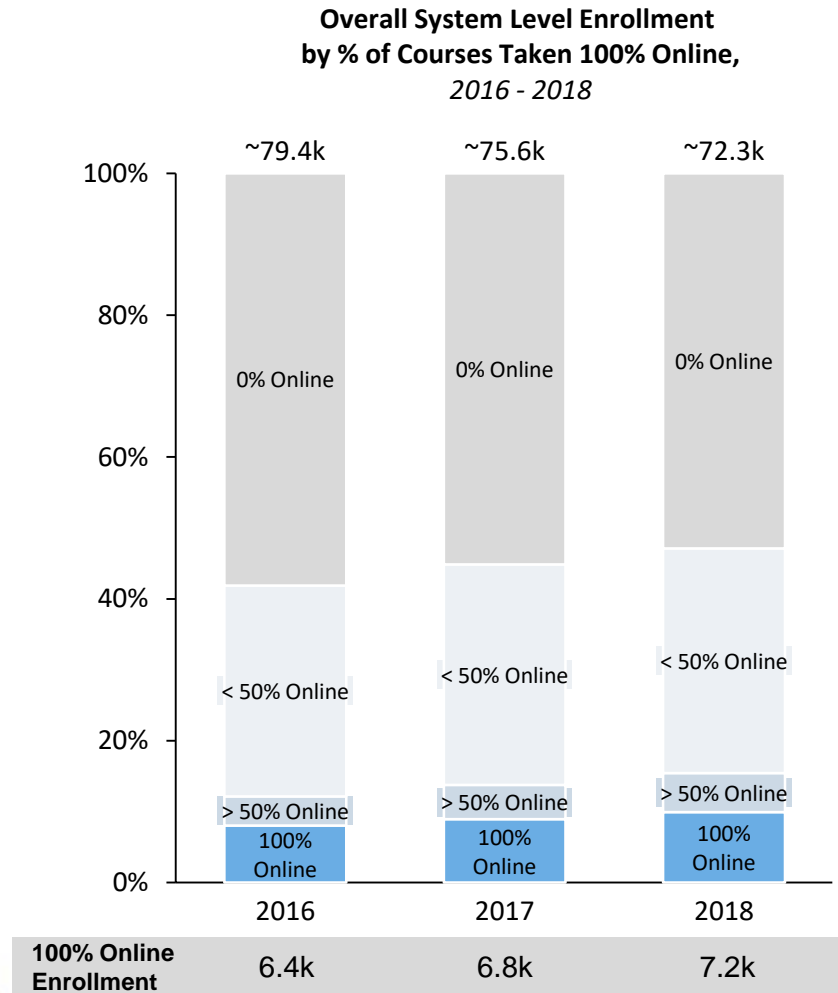COLUMBIA | KANSAS CITY | ROLLA | ST.LOUIS

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# Work Completed To Date

- Internal assessment
  - Analyzed data from the four universities
  - Conducted approximately 40 individual interviews
  - Survey of faculty teaching online
- External assessment
  - National comparisons
  - Conducted a prospective student survey
  - Researched industry leading practices
- Faculty Technical Group Launch
- Website for communications
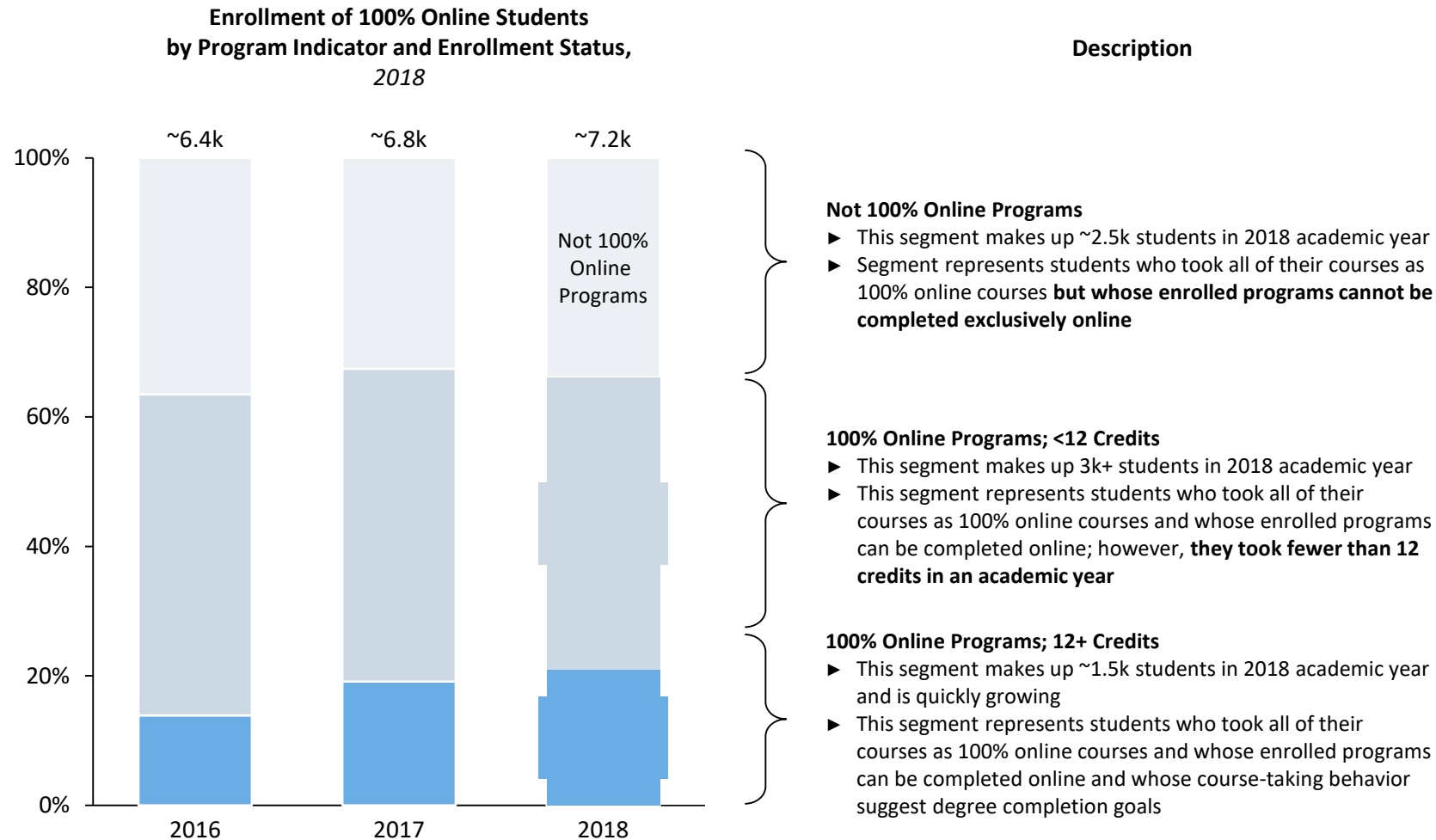- UM System-wide search committee launched for Chief eLearning Officer

# University of Missouri enrolled ~7k fully online students across its four campuses in FY18, representing 10% of its 72k overall enrollments

**Overall System Level Enrollment
by % of Courses Taken 100% Online,**
*2016 - 2018*



| 100% Online Enrollment | 6.4k | 6.8k | 7.2k |
|---|---|---|---|

**Campus Enrollment by %
of Courses Taken 100% Online,**
*2018*



*Assumptions: 1) % of courses taken 100% online calculated by dividing the number of 100% online courses taken by the total number of courses taken; only courses with the OA and OS codes are considered to be 100% online. 2) 12 credits or more threshold applies to undergraduates; 9 credits or more is threshold for graduate students; all credit counts are for a given academic year. 3) 100% Online Program aligns with relevant codes for different campuses

Source: Internal data, EY-Parthenon Analysis

# Within its fully online population, UM serves ~1.5k students enrolled in online degree programs and taking 12+ credits in a year

### Enrollment of 100% Online Students by Program Indicator and Enrollment Status, *2018*



**Description**

**Not 100% Online Programs**
► This segment makes up ~2.5k students in 2018 academic year
► Segment represents students who took all of their courses as 100% online courses **but whose enrolled programs cannot be completed exclusively online**

**100% Online Programs; <12 Credits**
► This segment makes up 3k+ students in 2018 academic year
► This segment represents students who took all of their courses as 100% online courses and whose enrolled programs can be completed online; however, **they took fewer than 12 credits in an academic year**

**100% Online Programs; 12+ Credits**
► This segment makes up ~1.5k students in 2018 academic year and is quickly growing
► This segment represents students who took all of their courses as 100% online courses and whose enrolled programs can be completed online and whose course-taking behavior suggest degree completion goals

# Prospective Survey Results

**There is strong demand for higher education programs among the adult population in Missouri and surrounding states**

► ~1.5m adults in Missouri and ~9m in surrounding states aged 25 and above are addressable for higher education degrees and certificates

► Of these ~11m adults, 20-25% express a high level of interest in enrolling in a higher education program within the next 5 years

► The desire to develop new skills and advance careers are the primary drivers behind the demand for higher education offerings

**Obtaining higher education degrees and certificates will benefit the state of Missouri as well as the adult learners**

► Preliminary analysis of workforce demand and degree completions suggests potential shortages of qualified candidates in fields such as nursing, accounting, and software development

**Online / eLearning programs are best suited to meet the educational needs of this adult population**

► Online programs offer the flexibility to study according to the students' preferred pace and schedule, and allow the learner to balance coursework with family and job obligations

► 70-80% of adults in Missouri and surrounding states interested in enrolling in a higher education program prefer a fully online or hybrid offering

► This implies a theoretical population of ~310k and ~1.4m in Missouri and surrounding states, respectively, that could potentially enroll in an online degree / certificate program within the next 5 years

► Considering additional factors such as actions taken to enroll in a program and prioritization of earning a degree yields a more realistically convertible population of ~160k in Missouri and ~740k in surrounding states

**The strong demand for online learning in Missouri and surrounding states represents a significant opportunity for University of Missouri as it seeks to expand its eLearning capabilities**

► Prospective online students have a strong preference to attend an institution within the same state and region where they reside

► Furthermore, adults in Missouri and surrounding states have positive perceptions of the UM campuses, and many prospective students indicate interest in considering UM if a suitable online program were offered

► University of Missouri would need to convert ~5% of the realistically convertible prospective student population with an interest in their programs to achieve its goal of 25k enrollments

# University of Missouri campuses would need to convert ~4% of prospective students with an interest in their eLearning programs to achieve 25k enrollments

**University of Missouri System Implied Share of Realistically Convertible Population**

**Realistically Convertible Population (Missouri and Surrounding States)***
*~920k*

| *Currently interested* in University of Missouri eLearning program | *Would have interest* in a high quality, affordable eLearning program from University of Missouri |
|---|---|
| **~290k** | **~310k** |
| *Based on the percentage of survey respondents who are **considering applying to** any University of Missouri campus for a fully online degree or certificate* | *Based on the percentage of survey respondents who are not currently considering applying to any University of Missouri campus, but would be **very or extremely interested** in applying if a quality and affordable program existed* |

► *The total estimated portion of the realistically convertible population* with an interest in applying to a quality, affordable eLearning program from University of Missouri is ~600k*

► *University of Missouri would need to convert ~4% of this population to achieve its goal of 25k enrollments*

*Note: among adults aged 25+
Source: EY-Parthenon Prospective Student Survey (n=539)

# Internal Analysis: UM's eLearning course development capabilities align with industry leading practices; other aspects of the student lifecycle need additional investment

| | Marketing & Lead Generation | Pre Matriculation Student Services | Course Development and Instruction | Post Matriculation Student Services |
|---|---|---|---|---|
| **System alignment with leading practices** | ◑ | ◔ | ◔ | ◔ |
| **Consistency in alignment** | 🟡 | 🟡 | 🟢 | 🟢 |
| **Select Industry Leading Capabilities** | ▶ Dedicated eLearning marketing budget<br>▶ Cost per lead ~$30-$70 | ▶ Standard timeline for application returns and other communications<br>▶ Access to unofficial transcript evaluation | ▶ Access to instructional designers<br>▶ Professional development courses available | ▶ Access to Success Coaches<br>▶ Access to various student support resources |
| **System Level Capabilities*** | ▶ Most campuses have dedicated eLearning marketing budgets<br>▶ Cost per lead: **$90 - $400** | ▶ **Typically no standard timeline** for application returns; high variability<br>▶ Some campuses provide unofficial transcript evaluations | ▶ Instructional professionals: **30-40 / some mandatory use**<br>▶ Professional development: **Yes / some mandatory use** | ▶ Success Coaches: **Limited dedicated for degree-seeking eLearners**<br>▶ Resources: **Limited for dedicated eLearners** |
| **MISSOURI S&T*** | ▶ Global Learning has a dedicated eLearning marketing budget<br>▶ Cost per lead: **$400** | ▶ **No standard timeline** for application returns<br>▶ Unofficial transcript evaluations: **No** | ▶ Instructional professionals: **~8 / non-mandatory use**<br>▶ Professional development: **Yes / non-mandatory use** | ▶ Success Coaches: **Limited**<br>▶ Resources: **Limited** |
| **MU** | ▶ Mizzou Online has a dedicated eLearning marketing budget<br>▶ Cost per lead: **$90** | ▶ Applications returned **within 1-2 weeks**<br>▶ Unofficial transcript evaluations: **No** | ▶ Instructional professionals: **15-20 / non-mandatory use**<br>▶ Professional development: **Yes / non-mandatory use** | ▶ Success Coaches: for **self-paced courses only**<br>▶ Resources: **Varies by Academic Unit** |
| **UMKC** | ▶ Division of Strategic Marketing has a dedicated eLearning marketing budget<br>▶ Cost per lead: **N/A** | ▶ Applications returned **within ~3 weeks**<br>▶ Unofficial transcript evaluations: **Yes** | ▶ Instructional professionals: **6 / mandatory use**<br>▶ Professional development: **Yes / mandatory use** | ▶ Success Coaches: **Limited**<br>▶ Resources: **Tutoring and writing support offered, but otherwise limited** |
| **UMSL** | ▶ UMSL NOW has a dedicated eLearning marketing budget<br>▶ Cost per lead: **$250** | ▶ Applications returned **within 72 hours** for UMSL NOW<br>▶ Unofficial transcript evaluations: **Yes** | ▶ Instructional professionals: **6-8 / mandatory use**<br>▶ Professional development: **Yes / non-mandatory use** | ▶ Success Coaches: **Limited**<br>▶ Resources: **Many resources offered, but little specialized access for eLearners** |

Note: *Assumptions confirmed by UM faculty and leadership
**Specific to Global Learning
Source: EY-Parthenon Interviews and Analysis

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Not aligned to industry leading practices ○ ——▶ ● Well aligned to industry leading practices

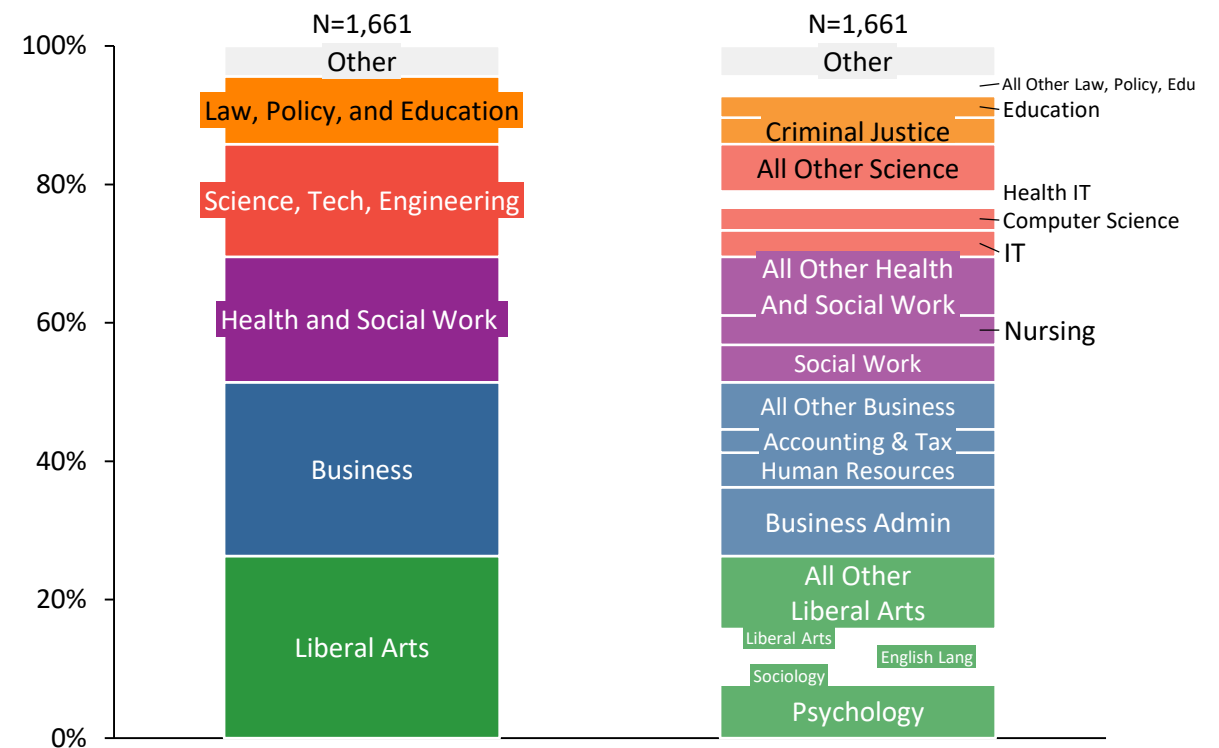🔴 Inconsistent      🟡 Mixed      🟢 Consistent

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# Prospective Survey Results



Q: [PROSPECTIVE STUDENTS] When considering applying to a post-secondary institution and program, what degree type are you considering pursuing? (n=539)
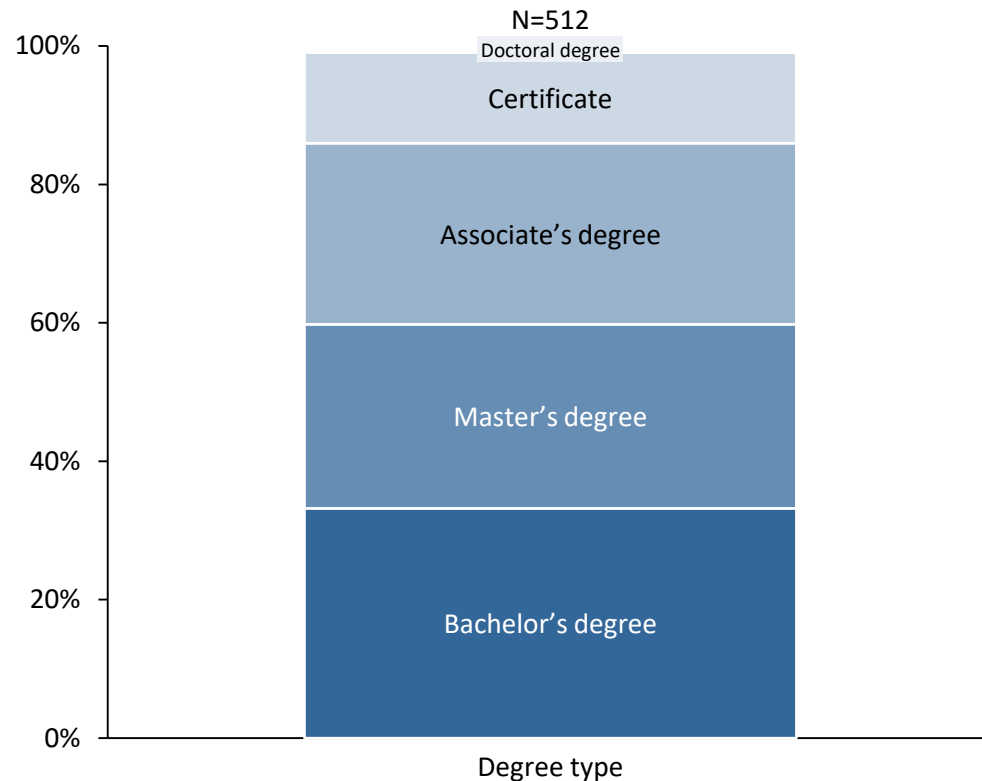
N=512

- Doctoral degree
- Certificate
- Associate's degree
- Master's degree
- Bachelor's degree

Degree type

Q: [PROSPECTIVE STUDENTS] When considering applying to a post-secondary institution and program, what disciplines are you considering pursuing? (select multiple) (n=539)

N=1,661

- Other
- Law, Policy, and Education
- Science, Tech, Engineering
- Health and Social Work
- Business
- Liberal Arts

N=1,661

- Other
- All Other Law, Policy, Edu
- Education
- Criminal Justice
- All Other Science
- Health IT
- Computer Science
- IT
- All Other Health And Social Work
- Nursing
- Social Work
- All Other Business
- Accounting & Tax
- Human Resources
- Business Admin
- All Other Liberal Arts
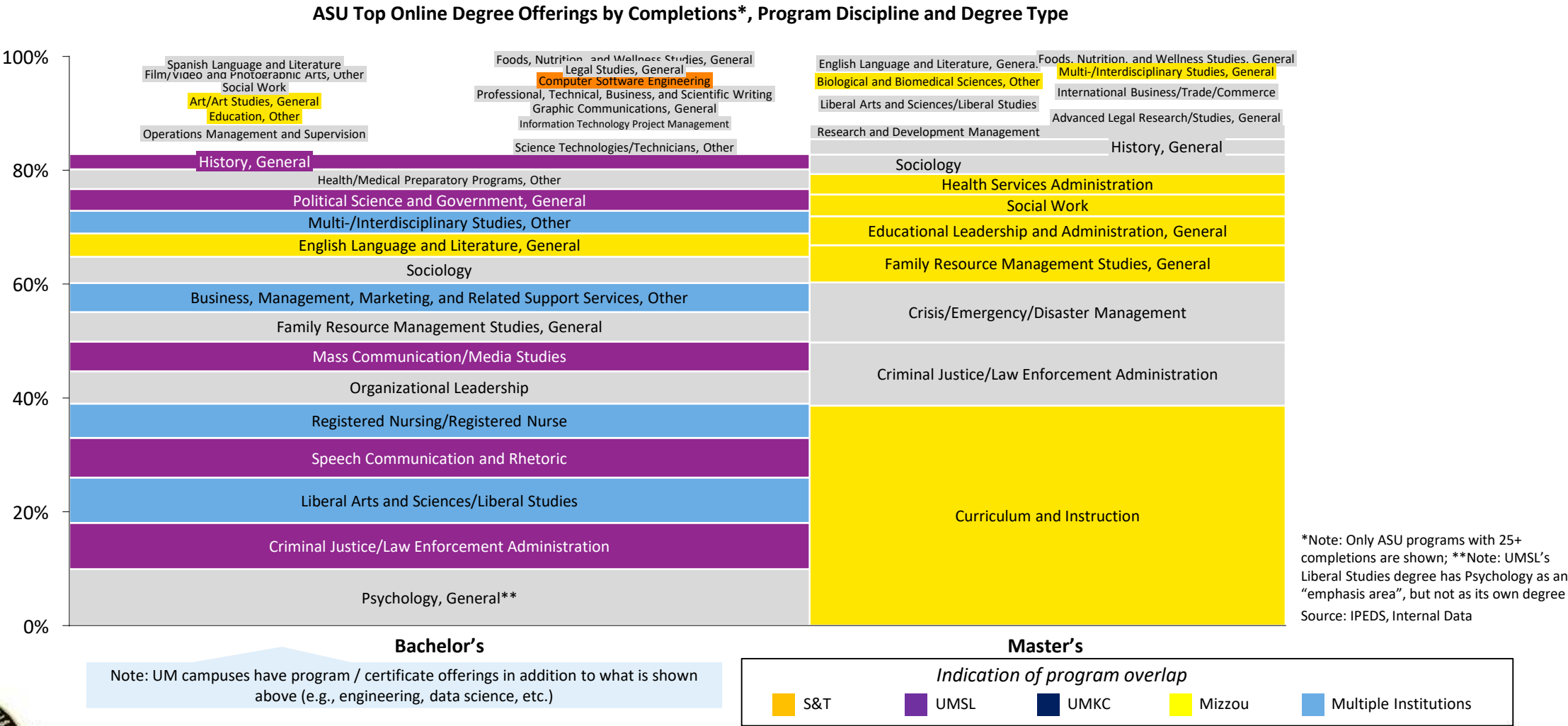- Liberal Arts
- English Lang
- Sociology
- Psychology

*Note: Responses of "Other" and "I don't know" were not included in data analysis
Source: EY-Parthenon Prospective Student Survey (n=539)

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# Comparison of eLearning program offerings with ASU suggests opportunity for UM to add new programs for both bachelor's and master's degrees

## ASU Top Online Degree Offerings by Completions*, Program Discipline and Degree Type



**Bachelor's column (bottom to top):**
- Psychology, General**
- Criminal Justice/Law Enforcement Administration
- Liberal Arts and Sciences/Liberal Studies
- Speech Communication and Rhetoric
- Registered Nursing/Registered Nurse
- Organizational Leadership
- Mass Communication/Media Studies
- Family Resource Management Studies, General
- Business, Management, Marketing, and Related Support Services, Other
- Sociology
- English Language and Literature, General
- Multi-/Interdisciplinary Studies, Other
- Political Science and Government, General
- Health/Medical Preparatory Programs, Other
- History, General
- Operations Management and Supervision
- Education, Other
- Art/Art Studies, General
- Social Work
- Film/Video and Photographic Arts, Other
- Spanish Language and Literature

**Middle column (top labels):**
- Foods, Nutrition, and Wellness Studies, General
- Legal Studies, General
- Computer Software Engineering
- Professional, Technical, Business, and Scientific Writing
- Graphic Communications, General
- Information Technology Project Management
- Science Technologies/Technicians, Other

**Master's column (bottom to top):**
- Curriculum and Instruction
- Criminal Justice/Law Enforcement Administration
- Crisis/Emergency/Disaster Management
- Family Resource Management Studies, General
- Educational Leadership and Administration, General
- Social Work
- Health Services Administration
- Sociology
- History, General
- Research and Development Management
- Liberal Arts and Sciences/Liberal Studies
- Biological and Biomedical Sciences, Other
- English Language and Literature, General
- Advanced Legal Research/Studies, General
- International Business/Trade/Commerce
- Multi-/Interdisciplinary Studies, General
- Foods, Nutrition, and Wellness Studies, General

*Note: Only ASU programs with 25+ completions are shown; **Note: UMSL's Liberal Studies degree has Psychology as an "emphasis area", but not as its own degree
Source: IPEDS, Internal Data

**Bachelor's**   **Master's**

Note: UM campuses have program / certificate offerings in addition to what is shown above (e.g., engineering, data science, etc.)

**Indication of program overlap**
- S&T
- UMSL
- UMKC
- Mizzou
- Multiple Institutions

# Next Steps

- Explore and evaluate growth opportunities
- Technology platform analysis
- Develop implementation plans
- Focus groups

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# Faculty Technical Group

- The UM Faculty Technical Team will be a component of the UM eLearning initiative and implementation. We plan to include faculty members with significant experience teaching in an online format as well as those with active research interests in the area. One of the goals will be to determine innovative ways to achieve the scale desired in UM's vision for our eLearning initiative. We will also be seeking faculty who are influential and have credibility with their colleagues as they will help us engage other faculty and ensure that we maintain quality programs.

# Faculty Technical Group Membership

MU
- Rose Marra  - Education
- Heather Hunt – Bioengineering
- Bethany Stone – Biological Sciences

UMKC
- Amanda Grimes - Nursing
- Kati Toivanen - Art
- Leigh Salzseider - Business-Finance

S&T
- David Enke - Engineering Mgt
- Keng Siau - Business & IT

- Klaus Woelk -Chemistry

UMSL
- Jennifer Reynolds-Moehrle – Accounting
- Beth Huebner – CCJ
- Haitao Li – SCMA
- Amber Reinhart - Communications

UM System
- Steve Graham
- Carrie Nicholson

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# Chief eLearning Officer
# Duties & Responsibilities

- Develop, implement, oversee and operate an innovative and highly successful eLearning platform that will serve all learners in Missouri and the region

- Create a Center for Excellence in online learning to ensure a superior academic and learning experience for students who seek to engage in college entirely online and help UM System to meet their ambitious enrollment goals for such a platform

- Ensure an exceptional student experience through the implementation of learner success coaches, meaningful online learning communities, robust career placement services, and experiential learning

- Utilize analytic methods to facilitate student recruitment and retention in eLearning courses

- Guarantee course and program effectiveness through developing and implementing auditing and quality assurance standards and the appropriate application of artificial intelligence tools

- Expand and align online programs and services initiatives of all four UM universities to guarantee the vision, mission and strategic goals of UM System are met

- Partner with faculty and academic leaders as well as administration of all four universities to plan and launch appealing eLearning programs

- Collaborate effectively with existing external stakeholder, partners and vendors and lead efforts to explore possible alliances with additional leaders in the field of online learning

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# Qualifications

- Experience in an eLearning program to the scale of UM's vision
- Doctorate degree preferred and Master's degree required
- Five years of progressive senior leadership experience developing and administering online learning initiatives in a higher education setting
- Advanced understanding of public higher education issues, of the current and emerging trends in online education as well as best practice learning theories and techniques
- Comprehensive knowledge of online instructional design and teaching with technology
- Demonstrated ability to build up new successful online programs or further expand existing programs
- Excellent written and verbal communication skills and the ability to collaborate effectively with students, faculty, university administration, external agencies, and staff
- Ability to effectively present information to top management, faculty, public groups, and governing boards
- Demonstrated knowledge and experience with strategic planning, strong conceptual, analytical and critical thinking skills as well as problem solving skills
- Hands on mentality with the ability to build up and effectively lead a team
- Ability to work effectively in a diverse and inclusive environment with students, faculty, staff, and leaders