3.1   Institutional Strategy

Key Gaps in Institutional Strategy

The Blackboard team identified five key gaps in the area of institutional strategy, as follows:

1	Online Learning is not strongly represented in the current strategic plan
2	An explicit vision and goals for online learning have not been formally articulated and tied to strategic plan, mission, and institutional priorities. More importantly, a plan to grow online learning seems to be at odds with the major thrust of strategic growth for the traditional campus over the last few years - to build a stronger on-campus student body and traditional campus experience.
3	A steering team has been put into place, but it appears the primary responsibility is for distribution of distance learning funds.
4	There is a deep mistrust of USF at Tampa and a fear that Tampa will exert control over USFSP online programs. However, USFSP is highly dependent on USF Tampa for IT support, SIS and LMS support, and other levels of administrative support. The online learning initiative will only achieve limited results unless some degree of cooperation with or autonomy from Tampa is secured.
5	Executive leadership is strongly evident but decision-making seems to be reactive and ad hoc absent a clear plan.

Recommended Goal: **Distance learning at USFSP is guided by clear goals and outcomes so that decisions of leaders and governing bodies and the actions of programs result in quality teaching and learning at USFSP.**

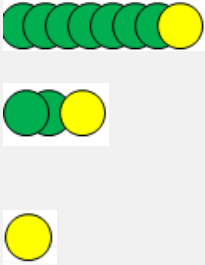| 1	**Establish and Document the Vision**: Create a charter document for distance learning that outlines the vision for online learning that connects the online learning initiative to the goals and plans of the University as well as how serving students through online learning aligns with the focus on building a stronger traditional campus community.
2	**Establish a Governance Structure:** As part of the charter document the role and composition of a governing body should be stated. The key function of the governing body should be to assure that the online learning initiative aligns with the goals and objectives outlined in the charter document. Include faculty representation on this governing body to assure appropriate faculty input and support.
3	**Establish Goals and Targets:** Goal statements operationalize the vision and describe the desired end state of key dimensions of a comprehensive online learning program. In addition to goals, the University should also establish specific targets that support the goals with respect to growth, quality, impact, student experience, faculty experience, reputation of the University and other key elements. It is especially important that the target statements address both the amount and kind of growth the University expects to achieve.
4	**Establish a case statement**: Clearly articulating local institutional needs and values will be an important step toward establishing a unique "claim" over online learning at USFSP. Building greater institutional level support and processes further legitimizes the UFSSP effort.
5	**Organize for Change Management:** Establish a change management team including administrators, faculty, and student representatives as a subcommittee to the governing body. The key responsibilities of the change management team will be to: 1. Communicate with and listen to key stakeholders throughout the USFSP community; 2. Advise the governing body and Distance Learning Leaders on key messages and appropriate points of communication regarding the online initiative; 3. Identify key policies and other gaps in program implementation and provide recommendations to the governing body. 4. The Change Management team should compile a list of key policies that need developed or revised in light of online learning and prioritize them along with recommendations for crafting appropriate policies in a report to the governing body.

Key Gaps in Financial and Organizational Model

The Blackboard team identified four key gaps in USFSP's financial and organizational practices, as follows:

1	Revenues and costs for online learning are not directly related in a formalized budget.
2	A clear resource plan based on strategic goals has not been developed; spending appears to be ad-hoc and not according to defined plan.
3	Online learning lacks an experienced leader with primary responsibility to manage strategic direction and operations for online learning.
4	The organizational model for online learning at USFSP is currently emerging as departmental or college centered approach; there is already evidence of duplication of effort and inefficiencies in the use of staff and provision of services.

Recommended Goal: **A comprehensive, accurate and sufficiently detailed budget model is used to support and grow the USFSP distance learning program including physical, technological, and human resources needs.**

1	**Establish a Revenue and Expense Model**: Develop a pro forma budget for online learning that connects true costs to revenues in order to provide a useful guide for financial decision-making and investment in online learning.
2	**Establish a Financial Plan:** Based on goals established for strategic growth of online learning, develop a 3 year resource plan that addresses key areas of support for: 1. Faculty Development 2. Course and Program Development 3. Support Staffing 4. Technology and Infrastructure 5. Development of student support services 6. Marketing and Recruiting The plan should include a modeling function to predict overall institutional levels of resources required as well as a pro forma for per program resource and capacity planning.
3	**Establish Operational Capacity:** Establish an Office of Distance Learning to provide coordination and services for all online programs and for faculty developing online courses. 1. Create a Director of Distance Learning position with the chief responsibility to grow and develop new programs in partnership with College and Departments. 2. Locate this office with the Library initially, to provide central support for distance learning efforts and services. 3. Draft a charter for this new department to include not only faculty development and media development support, but also program, marketing, and business development support for online programs. Charge this office with being the primary point of coordination for all online programs. 4. Expand the RFP process to focus on development of programs and course clusters based on strategic, institutional goals In the RFP, spell out specific services provided by the Office of Distance Learning and requirements departments and Colleges must agree to in order to receive funding.

3.3 Marketing and Recruiting

Key Gaps in Marketing and Recruiting

The team identified four key gaps in USFSP's marketing and recruiting practices, as follows:

1	No clear roles and responsibilities for marketing and recruiting for online have been determined. The current plan seems to leave marketing to the individual departments as programs come online.
2	A clear recruiting process for adult, remote learners that drive inquiry-to-application conversion has not been developed for online programs; it appears that recruiting efforts fall to individual programs and the traditional advising process.
3	Program selection is not based uniformly on clear and consistent analysis of market data; decisions about potential program development seem to be driven more by institutional factors and less by market demand.
4	Only limited marketing resources exist outside departments or Colleges to market online programs.

Recommended Goal: **Distance learning at USFSP is widely known for distinctive and high quality online education through powerful branding, as well as effective marketing and recruitment practices that meet student and community needs.**

1	**Establish Operational Capacity**: Establish a new centralized support function for university marketing and recruiting of all online programs. This support could be located within an office of Distance Learning, but given the size of the staff at USFSP it may make more sense to put this into the current admissions and marketing areas. At least one new support position will be required for marketing and recruiting. Additional recruiters would be added as the number of online programs grow. To get started with new programs, USFSP might consider outsourcing some marketing and recruiting functions as the University grows internal capacity to support online programs in this area.
2	**Establish Recruitment Process**: Develop a funnel process for online recruiting similar to that used for traditional students. Configure this funnel process to focus on distance learners and shorter recruiting cycles. Provide dedicated recruiters for online (and potentially other programs) that drive recruits to academic advisors but also coach recruits through the application and enrollment process.
3	**Establish a Program Identification Method**: The process for selecting programs to put online should be driven in significant measure by the potential size of the program. In order for online learning to be efficient and generate new revenue streams, the institution must focus on those programs that can generate the largest number of new students to the university. This should not be the only criterion for program selection, but it should be the primary one. Running 10 programs a total of 300 students each per year is far more costly than running one or two programs that attract a total of 300 students per year.
4	**Establish Marketing Capacity**: Develop an Online Program Marketing process that includes audience segmentation, messaging strategy, a micro website with branded graphics, and identification of specific marketing communications strategies focused on targeted segments. 1. Hire a Marketing Specialist to develop, execute, and monitor marketing campaigns specific to each online program. 2. USFSP might consider hiring outside resources for initial programs and to help build this process and internal capacity for continued operations in the long term.

3.4   Faculty and Program Development

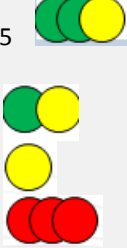### Key Gaps in Faculty and Program Development

The team identified six key gaps in faculty and program development practices at USFSP.

1	No formal standards or measures of quality course design have been adopted or used systematically by USFSP.
2	The faculty development process seems to focus primarily on technology skills and does not provide much opportunity for faculty to experience online learning from a student perspective.
3	Course development at USFSP seems to focus heavily on lecture capture (media development) and presentation of content and less on instructional design and pedagogy that supports student engagement and interaction.
4	There is no clear faculty development curriculum or path for faculty to progress from beginning to more advanced levels of online course design and facilitation; faculty seems to learn mostly by trial and error.
5	The focus of support for programs is on course delivery with no evidence of a process to prepare an entire program for online delivery.
6	The grant process to support course and program development , while a solid idea, lack sufficient criteria for selection and requirements for delivery and performance to achieve significant strategic benefit.

Recommended Goal: **USFSP faculty who teach online have been qualified to do so through a progressive mastery and performance review program and are supported by a range of pedagogical and technical resources**.

1	**Establish Course Design and Delivery Standards**: Adopt Quality Matters as University course design standards. 1. Train instructional design staff to become QM certified reviewers and trainers; 2. Provide QM training as part of the faculty development curriculum; 3. Target a specific number of courses each year to be reviewed through the QM process; 4. Consider requiring at least one faculty member become a certified QM reviewer for each fully online program; 5. Consider requiring completion of faculty development cycle as a prerequisite to teach online. 6. Deliver online faculty development options so that learning online becomes a prerequisite to teaching online
2	**Establish Standard Course Development Processes**: Create a course development process for efficient workflow and effective instructional design (Note: This strategy is being addressed as part of this engagement.) 1. Use this course design process to establish clear support metrics and manage capacity of human resources and process that support course design 2. Develop a tracking method to account for time and materials provided to develop courses for programs support by the Distance Learning Office
3	**Establish a Faculty Development Program:** Create a Faculty Development Curriculum that provides a clear pathway for faculty to become effective online course designers and facilitators; Create a community of Practice for experienced online faculty to develop their skills and share teaching strategies and course design examples. (Note: This strategy is being addressed as part of this engagement)

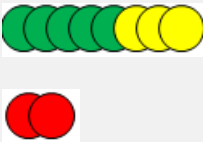| 4	**Establish a Program Development Process:** Create a Program Development process led by a program developer to prepare a program for full online delivery. This process would consider alignment of program goals and course objectives and course level assessments; strategies to engage learners; common technology applications; course delivery modes (6 week, 8 week, executive format, etc), and assessment strategies.
5	**Redefine services and service levels for online support:** Establish a Student Technology Assistants program to leverage cost-effective student labor to enhance Tier 1 and Tier 2 technical support and to provide a full range of media development services for faculty. Media services in this sense means building online courses in the LMS, not simply capturing and converting lecture material. Define standards for service delivery with priority place on achieving strategic goals. Allocate resources based on capacity and desire strategic outcomes (e.g. provide higher levels of support to programs receiving grants). For strategic programs, work to develop cohorts of faculty where possible rather than individuals to maximize inter-faculty collaboration and cross-support.

Key Gaps in Student Support and Engagement

The Blackboard team identified five key gaps in USFSP's student support and engagement practices, as follows:

1	Because most online students at USFSP are also on-ground students, no concerted effort has been undertaken to develop services specifically for remote learners who will never come to campus.
2	The approach to providing services to remote learners seems to be emerging at the college or departmental level.
3	No cross functional team of student support services staff exists to plan for scaling services to fully remote learners.
4	Expectations and strategies for student engagement seems to be left up to individual faculty with little evidence that programs have worked together to consistently adopt practices and approaches appropriate to the discipline that support learner engagement across the program.
5	Only a very limited orientation to online learning is provided, although some examples of online courses and online lectures are available. No links to other institutional support for online learners beyond the library.

Recommended Goal: **Distance learning students are prepared to be successful through orientation to technology and to being an online student through a comprehensive and collaboratively administered program designed to support online students in a manner that is on par with traditional learners.**

1	**Establish a structure for student support:** Adopt the Center for Transformation of Student Services (CENTSS) process to begin an annual audit process for online student services. The Team chooses 3-4 areas to audit each year.
2	**Establish a process for student support**: Establish an online student services coordination team to develop service standards and coordinate efforts between service departments. The Office of distance Learning should serve as the coordinator for student support services for online learners; The Office of distance Learning should create a "one-stop" student support service for all non-technical questions that provides phone, email, and web support with response within the same business day or better.
3	**Leverage technology to support online students:** Develop an enhanced website with support resources and links for online student services. Work with key support units to develop corresponding web pages with resources and services specific to remote learners. Create an interactive online assessment for student online readiness that addresses technology readiness, skill readiness, and attitude or personal readiness. Include this assessment formally as part of the admissions process and promote to advisors.

Key Gaps in Program Delivery and Management

The Blackboard team identified six key gaps in USFSP's program delivery and management practices, as follows:

1	Decisions on program delivery model seem to be left to individual departments or colleges.
2	Monitoring student enrollments, retention, and other measures of student success seem to be limited, mostly to enrollment information and not to guide development of retention and success strategies.
3	Some gaps exist in policies related to online learning. There are few, if any, policies articulated formally in relation to online learning.
4	Staffing for online learning courses is left to the department or college; it is not clear to what extent the use of adjuncts has been factored into growth plans for online programs.
5	No clear growth targets for online learning have been articulated or communicated across the institution. No measure for how big a program should grow in order to receive support has been articulated.
6	A surprising number of courses offered online at USFSP are large enrollment (over 50 students). USFSP seems to rely on lecture mode plus Teaching Assistants similar to on-ground courses.

Recommended Goal: **Distance learning at USFSP is designed to meet student needs in terms of delivery models, systematic monitoring, and ongoing planning to support all online students and programs.**

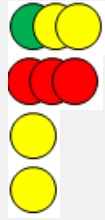|	
1	**Align Program Delivery with Student Need**: Explore offering online programs and courses on a term (6-8 week) basis and on a cohort basis. As part of the program development process, create scheduling scenarios that factor different levels of growth and project possible faculty staffing needs. Use these scenarios to develop a staffing plan for each program.
2	**Establish a Systematic Monitoring Process**: Develop a standard dashboard report of distance learning activity to be reported to the governing body each semester. This report should include a summary of student enrollments by course, by program, and by college, class size, course completion rates, semester credit hours generated, faculty loads and other relevant details. 1. The Distance Learning Office should produce an annual report to the President and University community that summarizes year-to-year comparisons along with a report on other activities, strategies for growth and quality improvement and other key performance indicators for online programs. 2. Individual programs should be responsible for reporting required data necessary to compile these reports as necessary.
3	**Establish a Growth Plan**: Identify enrollment targets by online program for new recruits and semester-to-semester retention. Track these targets and coordinate with marketing and recruiting to drive planned, controlled, growth. Use the semester reports to manage capacity for each program.
4	**Establish a Process to Manage Course Size**: Develop a Distance Learning Office sponsored project to work with selected departments to develop effective strategies to handle large enrollment courses. This project should seek effective practices from other institutions on models to support large enrollment courses effectively. The Office should work with several programs to implement a pilot to test how effectively some models work on the USFSP campus and publish results to the University community. The Office of Distance Learning should include planning for large enrollment courses in the Program Development Process.

3.7   Learning Environment

Key Gaps in Learning Environment

The Blackboard team identified two key gaps in USFSP's learning environment, as follows:

1	Both the Blackboard Learn environment and Student Information systems are hosted in single instance for the USF system by IT Services in Tampa which limits USFSP's flexibility and control over SIS integration, product customizations, course lifecycle management and other course management functions.
2	It is not clear what the scalability of the learning environment is because it is managed in Tampa. If online learning demands from USFSP were to grow suddenly, this could create load or other performance issues.
3.	The investment in technology outside the LMS has been largely focused on lecture capture and video streaming. Other technologies with the potential to drive student interaction have not been as aggressively considered.
4.	Decision-making about which technologies and platforms to support have been largely driven by faculty demand without much regard for standardization of services or technologies in order to raise levels of support.

Recommended goal: **Distance learning at USFSP is based on platform flexibility, stability, and scalability that meet the needs of a unique and growing set of offerings.**

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	Establish Control over the Learning Environment: In the short term, USFSP should develop a list of service requirements for LMS management and SIS integration as an agenda to discuss with USF Tampa. The goal should be to formally articulate the needs for enhanced service to accommodate general growth and online learning development and should include:
	    1. User management
	    2. SIS Integration
	    3. Customizations
	    4. Branding
	    5. Course and Content Management
	    6. Other Requirements

2 	**Plan for USFSP Autonomy**: UFSSP should develop a plan to implement a separate instance of both the Learning Management System and the Student Information System in the long term.

Key Gaps in Continuous Improvement

The Blackboard team identified two key gaps in terms of program assessment and continuous improvement, as follows:

1	There appear to be very few mechanisms in place to measure student learning for online courses.
2	As a result of little being known about the impact of online teaching and learning, there are likely few improvement process activities occurring within the realm of online learning.

Recommended Goal: **Distance learning at USFSP meets its goals for teaching, learning and support programs through systematic evaluation of expected outcomes and consistent use of results ongoing quality improvement.**

1	**Establish Process Metrics**: Develop a set of clearly articulated service metrics for student and faculty support, including faculty development. .
2	**Establish Program Quality Metrics**: Create student and faculty surveys to assess perceived quality and responsiveness of support services for online learners and faculty. Administer each semester and use results to prioritize and develop improvements. Develop course evaluations to measure teaching quality. Develop faculty performance rubrics to measure faculty portfolios
3	**Establish Student Learning Outcomes Metrics**: Develop methods, instruments, and reports that will ensure that the quality of student learning is on par or better than traditional teaching methods. Use data for improving the design and delivery of the curriculum. Develop rubrics to evaluate student artifacts on all expected outcomes.
4	**Use Assessment Results:** Use these metrics to gather data and measure effectiveness. Review metrics annually and use results for planning