STATE UNIVERSITY SYSTEM of FLORIDA
Board of Governors

AGENDA
Steering Committees
for Implementation of the *2025 Strategic Plan for Online Education*
Marshall Student Center, across the hall from the Board of Governors Meeting
University of South Florida
Tampa, Florida
June 21, 2017
1:15 p.m. – 3:15 p.m.

1. Call to Order and Opening Remarks — Dr. Joe Glover, Chair

- **a. What are we trying to accomplish?**
- **b. Draft August 30 agenda**
- **c. Follow-up from March meeting: Committee Structure**
- **d. Academic Technology vs. Online/Distance Education**

2. Legislative Budget Requests — Dr. Glover

- **a. Online Programs and Courses Workgroup — Dr. Andy McCollough**
  - **i. Repository of General Education Course Resources**
  - **ii. OER/eTexts: — Jennifer Smith**
    - ***i.* OER/eText catalog tool**
    - ***ii.* OER repository tool**
  - **iii. Innovation in Florida Online Learning (IFOL) Initiative Funding — Tom Cavanagh**

- **b. Infrastructure and Shared Services Workgroup — Mr. Joseph Riquelme**
  - **i. Technology/Software/Services**
  - **ii. Proctoring Network**

- **c. Legislative Budget Request – Summary — Chair Glover**

3. For Approval

- **a. Proposal for Academic Program Coordinating Committee — Dr. McCollough**
- **b. Creation of OER/eText Committee**
- **c. Institutional Technology Reviews — Mr. Riquelme**

4. Concluding Remarks and Adjournment — Chair Glover

Draft 5/25/2017

STATE UNIVERSITY SYSTEM of FLORIDA
Board of Governors

AGENDA
Steering Committees
for Implementation of the *2025 Strategic Plan for Online Education*
University of Florida
Gainesville, Florida
August 30, 2017
8:00 a.m. – 12:00 noon

1. **Call to Order and Opening Remarks** — **Dr. Joe Glover, Chair**

2. **Consideration for Approval**
   - a. **Quality Workgroup** — **Dr. Cindy DeLuca**
     - i. **Quality Review Process**
     - ii. **FLVC Coding Structure for Quality and High Quality Courses**
     - iii. **Awards for High Quality Courses**
   - b. **Online Programs and Courses Workgroup** — **Dr. Andy McCollough**
     - i. **Leveraging OER-eText Resources**
     - ii. **Appointments to the IFOL Committee**

3. **Unizin Presentation/Discussion** — **Mr. Amin Qazi**

4. **For Guidance from Steering Committee**
   - a. **Data Analytic Tools** — **Mr. Riquelme**
   - b. **Creating Predictive Analytic Tools and Interventions**
   - c. **Multiple, Accelerated Terms**
   - d. **Online Marketplace** — **Dr. Pam Northrup**
   - e. **Statewide Marketing Strategies**
   - f. **Research Consortium Expectations** — **Dr. McCollough**
   - g. **Meeting Needs of Employers**

5. **One-minute Updates**
   - a. **Quality:** — **Dr. DeLuca**
     - i. **Survey on Certifying Quality of Courses in SUS**
     - ii. **Opt-in Agreement with QM**
   - b. **Online Programs and Courses:** — **Dr. McCollough**
     - i. **Shared Degree Task Force**
     - ii. **2 + 2 Committee**
   - c. **Professional Development: Integrating Certification Systems** — **Dr. DeLuca**
   - d. **Infrastructure and Shared Services Workgroup: Shared Services**

6. **Concluding Remarks and Adjournment** — **Chair Glover**

DRAFT 6/05/17

Implementation Committee's Workgroups and Proposed Committees/Workgroups/Task Forces *			
Workgroups/Committees	**Existing Groups**	**3/29/2017 Recommended Committees/Task Forces Approved by IOC**	**Proposed 5/2017**
Steering Committee and Implementation Committee	X		
Quality Workgroup	X		**Potential dissolution within next few months.**
Data Workgroup	X		**Dissolve immediately.** Future data issues will be handled by respective workgroups.
Online Programs Workgroup	X		
		Innovation in Florida Online Learning (IFOL) Coordinating Committee	
		OER/eTexts Committee	
		Shared Master Courses Oversight Committee *(Name changed from Faculty Oversight Com.)*	
		Shared Degree Program Task Force	
Research Consortium	X		Will be ongoing.
Professional Development Workgroup	X		**Potential dissolution within next few months.**
Affordability Workgroup	X		**Dissolve immediately**.
Infrastructure Workgroup	X		**Expand immediately** to 'Infrastructure and Shared Services Workgroup'
		State Educational Licensing Committee (SELC)	
		Proctoring Network Committee	
Student Services Workgroup	X		**Potential dissolution within next few months.**
Regulations Special Committee	X		**Dissolve immediately.**

* Workgroups and Committees will continue to be combined/deleted/revamped as implementation of the Strategic Plan for Online Education progresses.

State University System
Education and General
2018-2019 Legislative Budget Request
Form I

University(s): University of Florida; SUS	
Issue Title: Online Repository for State General Education Core	
Recurring Funds Requested:	**$381,000**
Non-Recurring Funds Requested:	**$200,000**
Total Funds Requested:	**$581,000; FY 2018-2019**
	$381,000; recurring
Please check the issue type below:	
Shared Services/System-Wide Issue for Fiscal Year 2018-2019	☒
Unique Issue for Fiscal Year 2018-2019	☐

I. Description – *The University of Florida will manage the Online Repository for State General Education Core (OR-SGEC)*

These materials will consist of the forty seven (47) courses listed in the State General Education Core and all presentations, modules, videos, and other ancillary materials related to such courses.

The University will provide thirty seven (37) of these courses from its UF Online inventory. The remainder (10) will be drawn from other SUS institutions on a bid basis.

Funding will be provided to UF and reallocated as appropriate to the SUS institutions providing production and refreshment services.

The initial inventory will be primarily drawn from UF. However, the refreshment cycle will offer all SUS institutions representation in the System OR-SGEC.

All courses will be vetted by UF Faculty using UF Standards and Markers of Excellence and will be on a six term refreshment cycle. A faculty advisory committee [i] with system-wide memberships will maintain oversight to assure quality and accessibility. This valuable system resource will be available on an "opt-in" basis. Institutions without online versions of these courses may elect to use the entire course or faculty who have been teaching such courses may use any part of the OR-SGEC course to supplement, replace, or enrich his/her lesson plan.

Access to the State General Education Core online will benefit all institutions and students in the state's higher education system. Obviously the on-line student will benefit but the face to face instructor may also enrich his/her presentation with digital objects found in the Repository. The goal of the Repository is not to standardize course content, rather the intent is to provide access to high quality content that can be used to supplement and/or fill course gaps in the State General Education Core.

The OR-SGEC will be a major contributor to the Strategic Goals for Online Education 2025 set by the BOG Innovation and Online Committee, as noted in section II. The establishment and support of this repository will contribute to major savings and a significant Return on Investment (ROI) for the system. This cost saving and enhanced efficiency is consistent with the Affordability Goal of the strategic plan. In addition, a "master" source of the State General Education Core properly vetted by faculty in accordance with accepted Markers of Excellence, will enhance the Quality environment of the SUS General Education.

II. Return on Investment - *This structure will provide an efficient, cost effective mechanism to deliver and/or enrich General Education on all campuses. The need for redundant instances of the courses will be reduced and access and quality level will be enhanced with a system-wide faculty committee providing the necessary oversight.*

Adoption of the entire inventory by an institution would save an estimated $1,175,000 or $25,000 per course and the refreshment would have no local cost. A conservative usage estimation would suggest average savings within SUS over the 1st ten years of $800,000 annually. Savings would grow significantly if the inventory received wide adoption.

Assumptions:

1. *Number of institutions – 11*
2. *Number of instances of courses per year.*
   - *47 courses*
   - *½ offered by each institution in Fall and Spring, ¼ offered in summer*
   - *58 courses offered by each institution each year (total (58)(11) = 698)*
3. *Ten courses not in UF portfolio to be drawn from SUS institution.*
4. *Refreshment allocated to SUS institution on demand*
5. *Annually – refresh thirty percent (30%)*

Cost and Savings:

- ***Costs***

Non-recurring $200,000
Recurring $381,000

- ***Production Costs*** *associated with the initial development of the courses in the collection are not included in the cost computation in recognition of the fact all SGEC courses are in online status somewhere in the system*

However the availability of the Master Course collection will save local production costs for institutions without the complete set of SGEC courses. The computation of this possible savings in the first year has not been included here due to estimation difficulties.

- ***Refreshment Costs*** *incurred on a six term cycle, are estimated at $10,000 per course. Refreshment of the Master Course collection will be funded by the Repository manager.*

- ***Savings:*** *The savings that will be realized are focused on the refreshment costs associated with the Master course collection.*

Assume an adaptive path of an additional 10% each year. The first year refreshment saving would be $155,000 and the tenth year savings would be $1,551,000. Net savings would exceed $1,000,000 in the tenth year.

- ***Computations:***

Refreshment (47)($10,000)(.3) = $141,000 annually

Comments:

1. *The Master Course collection would provide an optional resource for the SUS.*
2. *Contributions to that collection would be system-wide through the multi sourcing refreshment.*
3. *The presence of excellent content and support materials will encourage system migration to the Master Courses.*
4. *In many cases, the Master Courses may be viewed as the core around which the faculty builds the course.*
5. *Any use of common materials provides a basis for increased efficiency and improved quality control.*

III. Facilities (*If this issue requires an expansion or construction of a facility, please complete the following table.):*

	Facility Project Title	Fiscal Year	Amount Requested	Priority Number
1.	N/A			
2.				

[i] Faculty Advisory Committee

I. Memberships
   a. One Faculty member from each SUS institution
   b. Manager of Repository (non-voting)
   c. Meet at least once per term

II. Functions and responsibilities
   a. Production
      1. Establish criteria for inclusion in MCC
      2. Evaluate bids for inclusion
   b. Refreshment
      1. Establish refreshment cycle
      2. Establish criteria for refreshment provider
      3. Select annual refreshment provider
   c. Course attribute
      1. Oversee integration of Systems Quality standards
      2. Monitor course usage and feedback on term by term basis

2018-2019 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: **University of Florida; SUS**
Issue Title: **Online Repository for State General Education Core**

	RECURRING	NON-RECURRING	TOTAL
Positions			
Faculty	0.00	0.00	0.00
Other (A&P/USPS)	3.00	0.00	3.00
Total	3.00	0.00	3.00
Salary Rate (for all positions noted above)			
Faculty	$0	$0	$0
Other (A&P/USPS)	$240,000	$0	$240,000
including fringe			
Total	$240,000	$0	$240,000
Salaries and Benefits	$240,000	$0	$240,000
Other Personal Services	$0	$0	$0
Expenses	$0	$0	$0
Operating Capital Outlay	$0	$0	$0
Electronic Data Processing	$0	$0	$0
Special Category (Specific) *	$0	*$200,000	$200,000
Refreshment cost	$141,000	$0	$141,000
	$0	$0	$0
	$0	$0	$0
Total All Categories	$381,000	$200,000	$581,000

* Note: The content repository to be utilized with this tactic and tactics 2.1.1 and 2.1.2 will be a Unizin Product available to the system by virtue of membership in the consortium. The non-recurring budget item ($200,000) is the estimated cost of integrating the repository into the Canvas LMS.

Education and General
2018-2019 No Legislative Budget Request
Form III
For Consideration by the Steering Committee on June 21, 2017

Issue: Online Repository for State General Education Core

Submitted by: *A. McCollough, Chair Online Programs Workgroup*

I. Assuming no Legislative Budget Request will be submitted for 2018-19, describe activities that could be accomplished in 2017-18 and in 2018-19. How would these activities benefit students?

- Repository could be established (2017-2018)
- Repository could be populated with the State General Education Core

II. What are the estimated costs of the above activities for 2017-18 and for 2018-19 and who would pay those costs?

$200,000 - UF

II. What would be the primary differences in outcomes between the activities described on this form and the ones described in LBR Form I?

No refreshment funding to enable multi-institutional representation in the Master Course collection.

State University System
Education and General
2018-2019 Legislative Budget Request
Form I

University(s):	University of Florida
Issue Title:	Open Access Textbooks and Resources: Increasing Usage, Reducing Costs
Recurring Funds Requested:	$1,498,280
Non-Recurring Funds Requested:	$160,640
Total Funds Requested:	$1,658,920
Please check the issue type below:	
Shared Services/System-Wide Issue for Fiscal Year 2018-2019	☒
Unique Issue for Fiscal Year 2018-2019	☐

I. Description –

OER/eText Catalog Tool and Repository Tool Implementation, Support & Maintenance

1. **2025 Strategic Plan for Online Education**

Tactic 2.1.1: Determine and promote methods to increase the use of open-access textbooks and education resources to reduce costs to students.

Tactic 2.1.2: Reduce the costs of eTextbooks for students through mechanisms that could include negotiating lower pricing with vendors and providing an enhanced repository for educational materials.

This requests funding for the implementation and ongoing support of a state-level OER(Open Educational Resources)/eText Catalog Tool and an OER Repository Tool. Support for an awareness campaign coupled with training and support for using the tools is included with this request.

OER/eText Catalog Tool: Aggregates lower-cost eTexts and no-cost Open Educational Resources (OER) enabling faculty to identify and select the most appropriate course material at the lowest price.

- This is a new service/program.
- Volume discounts will be negotiated with publishers for eTexts and homework systems to be made available across the SUS and FCS.
- OER material will be listed in the same catalog to support the selection of course-appropriate material at the lowest price available.
- OER material initially offered through the (separate) *OER Repository* may be listed in the catalog after the completion of appropriate vetting.
- Upon selection of the lower-cost resource, the information will be sent to the appropriate institution for inclusion in the Textbook Adoption system, Publisher, Bookstore or other partner (as appropriate) for eText/OER platform setup within the course management system.
- Upon the individual student's choice of the "opt-in" for the lower-cost material, billing information would be sent to the institution's Bursar to be charged to the student account (this would occur after the drop/add period is over).
- Students opting in would have access to the content on the first day of classes.

OER Repository Tool: Provides a mechanism for faculty to share course content in a manner that can be easily searched and incorporated by other faculty for instructional use.

- This is a new service/program.
- The repository will support the sharing of a single learning object such as a video or activity as well as an entire course as outlined in Tactic 1.2.2 with regard to master courses.
- The repository will support a review process to assist with the discovery process as well as to identify materials for inclusion in the *OER/eText Catalog Tool*.

Affordability awareness, training and support will be facilitated by institutional eText/OER Coordinators who work with faculty using the provided tools. Coordinators will identify faculty Champions who will share strategies and resources with peers in their own institutions and throughout the state.

2. Service/Project Impact

The Florida Virtual Campus *2016 Student Textbook and Course Materials Survey* found that the cost of textbooks has a negative impact on student access, success and completion, with student reporting that they:

- Occasionally or frequently take fewer courses (47.5%)
- Do not register for a course (45.5%)
- Drop a course (26.1%),
- Or withdraw from courses (20.7%)

Used textbooks and textbook rental can provide some savings, but when access to online homework tools and media resources is required, an eText or OER solution is an important strategy for reducing costs. Benefits include:

- First-day access to course material to reduce the potential for students to fall behind and need to drop the course.
- Collaboration and interactive elements to enhance the learning experience.

- Support for mobile devices makes learning available anytime, anywhere.

II. Return on Investment –

UF's Fall 2016 IncludEd program provided student savings of an average of 43% off print prices across 79 freshman level courses. Savings made available to the 26,570 SUS FTIC freshman would result in:

- $1,251,117 in savings for one class
- $2,502,234 in savings for two classes.
- $5,004,468 in savings for four classes.
- An individual student taking four courses with eText options would save $188.
- Savings increase significantly when the 30 Florida College System schools are included.

Easy discovery and support for integration of no-cost* OER has the potential to provide even greater cost savings to students. Through small incentives to faculty, the first round of six courses in FSU's *Alternative Textbook Grants* program is expected to save FSU students over $41,000 in textbook costs by Summer 2018.

*There may be licensing costs depending upon the selected eText or homework delivery platform. These costs typically range from $3.00 - $20.00 per course.

III. Facilities (*If this issue requires an expansion or construction of a facility, please complete the following table.):*

	Facility Project Title	Fiscal Year	Amount Requested	Priority Number
1.	N/A			
2.				

2018-2019 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: **University of Florida**
Issue Title: **OER/eText Catalog & Repository Tools**

	RECURRING	NON-RECURRING	TOTAL
Positions			
Faculty	0.00	0.00	0.00
Other (A&P/USPS)	13.00	1.00	14.00
Total	13.00	1.00	14.00
Salary Rate (for all positions noted above)			
Faculty	$0	$0	$0
Other (A&P/USPS)	$910,000	$80,000	$990,000
Total	$910,000	$80,000	$990,000
Salaries and Benefits	$1,235,780	$108,640	$1,344,420
Other Personal Services	$0	$0	$0
Expenses	$262,500	$52,000	$314,500
Operating Capital Outlay	$0	$0	$0
Electronic Data Processing	$0	$0	$0
Special Category (Specific)	$0	$0	$0
	$0	$0	$0
	$0	$0	$0
	$0	$0	$0
Total All Categories	$1,498,280	$160,640	$1,658,920

Education and General
2018-2019 No Legislative Budget Request
Form III
For Consideration by the Steering Committee on June 21, 2017

Issue: Open Access Textbooks and Resources: Increasing Usage, Reducing Costs

Submitted by: *Dr. Andy McCollough, Online Programs and Courses*

I. Assuming no Legislative Budget Request will be submitted for 2018-19, describe activities that could be accomplished in 2017-18 and in 2018-19. How would these activities benefit students?

OER/eText Catalog Tool

In the event that implementation of an OER/eText Catalog Tool that includes lower-cost pricing negotiated at the state level is not available, individual institutions can partner with bookstores to negotiate with publishers on their own behalf. In negotiating these agreements, institutions may be able to require inclusion of Open Education Resources (OER) as part of the bookstore catalog. The availability of volume pricing will depend upon enrollment numbers at the institution.

OER Repository Tool

There are a number of existing OER Networks and repositories. Each has different requirements for the submission of work as well as the use of resources. It can take a significant amount of time to sift through the available resources on a given topic as well as to integrate content into a course. Institutions can provide staff to search for appropriate resources. It is also possible to partner with a vendor for such services (at costs ranging from $20 - $30/student).

Training, Support and Awareness

Institutional strategies will be most effective if training and support are provided. Efforts that include collaboration between units such as libraries, IT, faculty development and training are likely to have the best chances of success. Raising faculty awareness regarding the impact of the high cost of publisher materials may help to increase participation in OER/eText efforts.

II. What are the estimated costs of the above activities for 2017-18 and for 2018-19 and who would pay those costs?

OER/eText Catalog Tool

Negotiations to lower costs in partnership with bookstores will require a per-text fee ranging from $10 - $20 that would be paid by the student.

OER Repository Tool

Cost to join an OER Network or repository at an institution level range from $0 -$10,000. System memberships are generally significantly less. The cost for staff support would depend upon the size of the institution and demand for services and could range from $100,000 upwards. A single individual would most likely not be able to provide all of the services listed above. If each institution hired 3 staff members, the cost would be $3,600,000, double the cost proposed in LBR Form I. These costs would be borne by the institutions.

II. What would be the primary differences in outcomes between the activities described on this form and the ones described in LBR Form I?

Without a centralized push, it is likely that students will continue to face higher textbook costs which have led to the negative impacts identified by the *2016 Student Textbook and Course Materials Survey:*

- Occasionally or frequently take fewer courses (47.5%)
- Do not register for a course (45.5%)
- Drop a course (26.1%),
- Or withdraw from courses (20.7%)

Negotiating licensing and providing access to resources centrally has the potential to bring down the overall cost of course materials for the entire SUS. The ability to easily identify appropriate lower-cost content will help to put materials into the hands faculty and students quickly. It is likely to take time for each institution to tackle textbook affordability challenges alone.

State University System
Education and General
2018-2019 Legislative Budget Request
Form I

University(s):	**TBD**
Issue Title:	**Innovation in Florida Online Learning (IFOL)**
Recurring Funds Requested:	**$650,000**
Non-Recurring Funds Requested:	
Total Funds Requested:	**$650,000**
Please check the issue type below:	
Shared Services/System-Wide Issue for Fiscal Year 2018-2019	☐ **YES**
Unique Issue for Fiscal Year 2018-2019	☐

I. Description – *1. Describe the service or program to be provided and how this issue aligns with the goals and objectives of the strategic priorities and the 2017 Work Plan established by your institution (include whether this is a new or expanded service/program). If expanded, what has been accomplished with the current service/program?* 2. *Describe any projected impact on academic programs, student enrollments, and student services.*

In support of the SUS 2025 Strategic Plan for Online Learning, the resulting Implementation Plan included a number of tactics designed to support the effective application of academic technology to advance the three domains of quality, access, and affordability across all instructional modalities. Two of those tactics relate specifically to the power of technology to innovate and place Florida in a leadership position for student access and affordability in particular.

> *Access: 2.1.3*
> Seek incentive funding to encourage institutions to implement innovations in online education
>
> *Affordability: 3.1.4*
> Develop a series of experimental incubation pilot projects to support new and emerging online education innovations through institutional partnerships, lead institution, or other methods to support collaboration with the purpose of building affordable, innovative approaches and models that work.

These tactics support experimental pilot projects that seek to push the boundaries of current academic technology and practice in order to disrupt existing models and positively impact the constraints of the "iron triangle" of quality, cost, and access for students.

Innovative and experimental project categories include:

- Adaptive Learning
- Competency-Based Learning
- Microcredentials / Digital Badges
- MOOCs for credit
- Development of open educational resources (OER)
- Shared courses between institutions
- Share programs between institutions

This funding request will provide the resources required to seed innovative projects for systemwide dissemination and impact on quality, cost, and access, as well as support minimal governance and oversight to ensure efficacy, relevance, and proper stewardship.

Process for Selecting Pilot Projects

This SUS Innovation in Florida Online Learning (IFOL) program is intended to improve the quality, ease of access, and cost of education for students in multiple instructional modalities. Proposals that address significant needs and have the ability to scale will receive special consideration. The emphasis will be on innovations with potentially high impact. All projects must meet ADA requirements.

In order to manage the selection and oversight of proposed innovative projects, an ad hoc body will be established. Below are the preliminary characteristics for such a selection and oversight committee, to be called the Innovation in Florida Online Learning (IFOL) Coordinating Committee:

<u>Innovation in Florida Online Learning (IFOL) Coordinating Committee</u>

- Managed at the system level by the Steering Committee for the implementation of the 2025 Strategic Plan for Online Education and hosted by a lead university selected by the Steering Committee.
- Include faculty, staff, and other expert representatives from across the SUS
- Develop IFOL project selection rubric
- Issue a Call for Proposals (CFP)
- Review end-of-project reports
- Facilitate the Florida Higher Education Innovation Summit
- Leverage existing partnerships/tools (e.g., Unizin)
- Convene a brainstorming session (such as during an FLVC meeting or a special meeting)
  - What are the challenges we seek to solve?
  - What solutions are already in place in limited implementations across the SUS or elsewhere?

<u>Proposal Process</u>

All individuals and institutions wishing to propose an innovative pilot project will do so through a standardized proposal template. The following is a summary of some key components of the proposal template:

- Name
- Title
- Institution
- Senior Administrative Sponsor (Dean level or above)
- Project Goal / Intended Outcome
- Brief Project Description
- Evaluation Plan
- Project Timeline

- Sustainability
- Project Budget / Required Resources
- Partners
- Institutional Co-Investment
- Potential for Widespread Scale
- Key Personnel

The IFOL Coordinating Committee will determine the timing and frequency of proposal submissions, reviews, and decisions.

At a high level, it is expected that the IFOL Coordinating Committee will issue a call for proposals. Once the proposal deadline has passed, the committee will review candidate projects against a to-be-established rubric. The top scoring projects will receive funding for one-year pilots.

Selection Rubric

The IFOL Coordinating Committee will develop an evaluation rubric for proposed pilot projects, allowing for an objective review and selection of the most worthy projects within available funding. This committee will determine the appropriate weights for each rubric element, but key consideration will be given to the following attributes:

- Significance of need being addressed
- Level of innovation
- Underserved population(s) being impacted
- Reduction in cost of instruction
- Scale potential
- Benefit to state
- Quality of plan
- Potential impact to quality, access, and affordability
- Partnerships between institutions

Process for Pilot Project Oversight

Each project that is awarded funding for a pilot will be required to provide information in three primary categories: *Reporting* (both during the pilot and after its completion), *Evaluation* (results and impact), and *Plans for Scaling or Discontinuation* (should the work continue and, if so, how can success be scaled to other institutions across the state).

Reporting Expectations

- Progress/Status during pilot implementation at milestones
- Upon completion of pilot

Evaluation Expectations

- Data collection and analysis as outlined in proposal
- Were outcomes as expected?
- What is the principal investigator's analysis of the results?

Plan for Scaling or Discontinuing

- Is revision or redesign needed?
- What is the rationale that would indicate discontinuation?
- What further funding is needed to support scaling?
- What support is needed for sustainability?
- What is a sustainability plan and timeline?
- How can the project and its results be shared through an annual innovation summit?

Annual Florida Higher Education Innovation Summit

As part of the IFOL strategy for scaling the impact of potentially-isolated pilot projects, awardees and other institutional representatives will be expected to attend an annual Florida Higher Education Innovation Summit, hosted by a state institution. The goal of the annual innovation summit is to disseminate information about each funded project to help foster the scaling of high-impact innovations across both college and university systems.

The summit logistics will be coordinated at the system level (for example, by the Florida Virtual Campus). If possible, the summit will also include innovative projects from statewide institutions that were not part of IFOL funding but that would still be of benefit to students in both state systems. It is also possible that representatives from non-state institutions (e.g., ICUF) could participate in the summit, especially if they had innovative projects to share.

Funding Considerations

The size and scope of potential projects will be entirely dependent upon the available funding. The goal of the IFOL Coordinating Committee will be to award as many high-impact projects as possible within funding limits. Since each potential experimental project is so unique, it is not recommended that any particular budget be placed on each proposed project. This will allow for IFOL Coordinating Committee discretion to consider both high-cost and low-cost projects, always weighing the relative potential for statewide impact.

Note that the budget includes expenses associated with travel support for a minimum ten-member IFOL Coordinating Committee and logistics support for hosting the annual Florida Higher Education Innovation Summit.

Requested funding:

$ 10,000	IFOL Governance travel and logistics
$ 40,000	Florida Higher Education Innovation Summit Expenses
$600,000	IFOL Project Funding (Individual project funding will vary depending upon requested budgets and total worthy proposals, with a maximum of up to $50,000 per project. Selection decisions to be determined by the IFOL Coordinating Committee.)

II. Return on Investment - *Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment. Be specific. For example, if this issue focuses on improving retention rates, indicate the current retention rate and the expected increase in the retention rate. Similarly, if it focuses on expanding access to academic programs or student services, indicate the current and expected outcomes.*

Each project proposed under the IFOL program would be required to identify its primary area of impact (quality, cost, or access), along with any secondary or tertiary impacts. The proposals will need to specifically describe both the current state and the anticipated state, using accepted measures and statistics. At the conclusion of the project, the actual results will be required to be included in the final report, as well as in dissemination communications, to include presentations at the Florida Higher Education Innovation Summit.

By aggregating the collective impacts of each pilot project and then disseminating success across the system statewide, the goal of IFOL program is to make a significant, measurable difference in educational access, student success, and affordability.

III. Facilities (*If this issue requires an expansion or construction of a facility, please complete the following table.):*

Not applicable.

	Facility Project Title	Fiscal Year	Amount Requested	Priority Number
1.				
2.				

2018-2019 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: **System Proposal**
Issue Title: **Academic Technology Innovation**

	RECURRING	NON-RECURRING	TOTAL
Positions			
Faculty	0.00	0.00	0.00
Other (A&P/USPS)	0.00	0.00	0.00
Total	0.00	0.00	0.00
Salary Rate (for all positions noted above)			
Faculty	$0	$0	$0
Other (A&P/USPS)	$0	$0	$0
Total	$0	$0	$0
Salaries and Benefits	$0	$0	$0
Other Personal Services	$0	$0	$0
Expenses	$0	$0	$0
Operating Capital Outlay	$0	$0	$0
Electronic Data Processing	$0	$0	$0
Special Category (Specific)	$0	$0	$0
IFOL Governance	$10,000	$0	$10,000
FL Higher Ed Innovation Summit	$40,000	$0	$40,000
IFOL Project Funding	$600,000	$0	$600,000
Total All Categories	$650,000	$0	$650,000

Education and General
2018-2019 No Legislative Budget Request
Form III
For Consideration by the Steering Committee on June 21, 2017

Issue: Innovation in Florida Online Learning (IFOL)

Submitted by: Thomas Cavanagh, Programs Committee (Chair: McCollough)

I. Assuming no Legislative Budget Request will be submitted for 2018-19, describe activities that could be accomplished in 2017-18 and in 2018-19. How would these activities benefit students?

Since the proposed IFOL program is specifically designed to leverage new investment to incentivize innovative pilot projects across the state, it is unlikely that any of these experimental projects would be undertaken without funding. The program's fundamental intention is to seed potentially-impactful projects that would otherwise not be commenced.

Since the IFOL Coordinating Committee would oversee and manage the selection process, without funding for this governance activity it is unlikely that appropriate projects could be encouraged and disseminated.

II. What are the estimated costs of the above activities for 2017-18 and for 2018-19 and who would pay those costs?

The costs would be dependent upon the nature of each project and the funding sources would be idiosyncratic (e.g., agencies such as NSF, philanthropic, or institutional investment).

II. What would be the primary differences in outcomes between the activities described on this form and the ones described in LBR Form I?

If external sources of funding are pursued (e.g., philanthropic organizations), it is also quite likely that the specific goals of the funding sources will not be in complete alignment with Florida SUS goals. Recipients of such funding would be primarily responsible for satisfying funding sponsors' objectives, not state of Florida objectives.

State University System
Education and General
2018-2019 Legislative Budget Request
Form I

University(s):	FLVC- Innovation and Online
Issue Title:	Proctoring and Statewide Licensing (Quality 2.2.2 & Affordability 1.1.2)
Recurring Funds Requested:	$75,000
Non-Recurring Funds Requested:	$65,000
Total Funds Requested:	$140,000
Please check the issue type below:	
Shared Services/System-Wide Issue for Fiscal Year 2018-2019	✓
Unique Issue for Fiscal Year 2018-2019	☐

I. Description -

This LBR request is to support the implementation of the recommended tactics from the Innovation and Online Committee of the Florida Board of Governors. This request specifically supports tactic recommendations from the Infrastructure workgroup. Please review Affordability 1.1.2 and Quality 2.2.2. In addition, this LBR could support future initiatives from the Innovation and Online Committee.

We are requesting recurring funding to hire an Institutional Service Manager (ISM) which would report to the FLVC and serve as the main project manager in achieving the initiatives put forth by the 2025 Strategic Plan for Online Education. Specifically, the ISM will lead the efforts to develop a system-wide proctoring website, and the development of a website to support the centralization and enhancements to the acquisitions of licensing, services, and software across the system. A few examples of related tasks are:

- Overall Project Management
- Ensure that all operations and initiatives align with the tactics set forth by the Innovation and Online Committee.
- Conduct feasibility analyses, evaluate existing systems, research policy, and develop and define project scope and project plans.

- Develop and maintain strong partnerships with representatives from Florida colleges and universities.
- Serve as the main contact for the technical teams that support these initiatives.

We are also requesting $65,000 in one time funds to hire a company or consultant to build a proctoring website and the application/website that will be used to manage institutional licensing.

Proctoring Network (Affordability 1.1.2):

A statewide proctoring website allows for the establishment of a centralized location to provide education, procedural information, and resources on academic integrity. Colleges and universities in the State of Florida are independently developing content and resources to support proctoring and academic integrity initiatives. The development and establishment of a proctoring website will reduce the current duplication of efforts and facilitate the advancement of proctoring to support system wide academic integrity.

Core components:

- Proctoring service instructions, guidelines, procedures and resources on academic integrity.
- Resources on the best practices for course design to mitigate the risk of academic integrity.
- Repository of qualified proctors/proctoring locations across the state.
- Proctoring service vendor information, pricing, and support.

Statewide Licensing (Quality 2.2.2):

Schools often work independently to explore, test, and implement educational technology. Supporting educational technology diversity, while maintaining system wide cohesion is a challenge. The development of a statewide licensing website would assist in the exploration, evaluation, and procurement of technology. The website would enable institutions to identify the technology/software being used throughout the state, and easily access documentation and resources to facilitate adoption.

Core components:

- Knowledge management system.
- Institutional technology/software licensing information repository.
- Repository for instructions on system wide technology/software.
- Repository for best practices on system wide technology/software use.

II. Return on Investment -

Funding this initiative is critical to the success of Affordability 1.1.2 and Quality 2.2.2 of the 2025 Strategic Plan for Online Education. The websites will enable universities and colleges to strengthen and expand academic integrity efforts through proctoring services, and facilitate better collaboration on licensing, services and software. Please note a few examples of the expected return on investment:

- The proctoring network website supports the following:
    - Strengthening of academic integrity at a system level. Reductions in barriers to adopting proctoring services can increase the presence of proctored exams in online courses.
    - Development of an academic integrity culture at a system level. Resources on academic integrity for faculty and students can spotlight the impact of academic dishonesty on an institution.
    - Collaboration on the development of best practices for reducing instances of academic misconduct. The website would include shared resources on course design and academic misconduct mitigation strategies.
- The statewide licensing website supports the following:
    - A reduced spending in technology procurement. If institutions collaborate on RFPs, then a single rate can be established for software and services statewide, enabling collective bargaining on pricing.
    - Streamlined adoption of software or services by allowing institutions to identify those solutions used by others and benefit from the licensing contract in place, as well as shared adoption information.
    - Shared technology/services. If institutions are using the same resources/technology, instructions and resources can be shared to reduce a duplication of efforts.

III. Facilities*:*

	Facility Project Title	**Fiscal Year**	**Amount Requested**	**Priority Number**
1.	N/A			
2.				

2018-2019 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

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Total	1.00	0.00	1.00
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Total	$55,000	$0	$55,000
Salaries and Benefits	$75,000	$0	$75,000
Other Personal Services	$0	$0	$0
Expenses	$0	$65,000	$65,000
Operating Capital Outlay	$0	$0	$0
Electronic Data Processing	$0	$0	$0
Special Category (Specific)	$0	$0	$0
	$0	$0	$0
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STATE UNIVERSITY SYSTEM OF FLORIDA

Steering Committee for the
2025 Strategic Plan for Online Education
June 21, 2017

SUBJECT: Academic Program Coordinating Committee Proposal

PROPOSED ACTION

Disseminate to the CAVP group the recommendations of the Tactic 1.1.2 Workgroup (see attached)

Institutions planning to submit a proposal for a new online undergraduate degree program with a CIP and/or major within the GAP groups must first submit the proposal to the Academic Program Coordinating Committee (APCC) for review. After due consideration of the APCC feedback, the proposal can then be submitted to the Chancellor's office for inclusion in the online programs inventory.

It should be noted that while the program gaps were identified by CIP code, the recommendations for new programs were made by major to avoid confusion in CIP with multiple majors, some of which were already online.

BACKGROUND INFORMATION

The proposal has been shared with the Chair of the APPC for her comments or procedural suggestions.

Supporting Documentation Included: Tactic 1.1.2 – Current Online offerings and Gaps.

Facilitators/Presenters: **A. McCollough**
Mike Ronco

STATE UNIVERSITY SYSTEM OF FLORIDA

Steering Committee for the
2025 Strategic Plan for Online Education
June 21, 2017

SUBJECT: OER/eText Coordinating Committee

PROPOSED ACTION

OER (Open Educational Resources)/eText Coordinating Committee to be approved.

BACKGROUND INFORMATION

Committee Membership

The OER/eText Coordinating Committee shall include but not be limited to representatives from the SUS libraries and FLVC Orange Grove.

Recommended committee membership:

Babb, Meredith	UF/Orange Grove	Director, University Press of Florida	Manages vetting selection process for Orange Grove Texts Plus
Brown, Christine	USF	Creative Director, Media Innovation Team	Course design, coordination and innovation
Colding, Linda	FGCU	Associate Librarian	Head of Reference, Research & Instruction
Donaldson, Robin	FLVC	Distance Learning & Student Services division	Open Access Textbook Project
Freeman, Willie	FAU	Director of eLearning	Institutional-level instructional technology oversight
Fruin, Christine	UF	Scholarly Communications Librarian	Coordinates Open Access and OER initiatives
Golden, Julie	FAU	Associate Director, eLearning and Professional Development	FAU OER awareness campaign
Haynes, Troy	UF	Project Manager	Institution-level IT integration

McDonald, Andrew	UF	Canvas Administrator	Enterprise level tool integration
Meth, Mike	FSU	Associate Dean	FSU Libraries: Research and Learning Services
Metz-Wiseman, Monica	USF	Coordinator of Electronic Collections	Textbook Affordability Program leader
Raible, John	UCF	Instructional Designer	OER and eText Initiatives
Roque, Gus	FIU	Educational Technology Manager	Textbook Affordability Initiative, learning management system projects
Smith, Jennifer	UF	Director, Faculty Development & Teaching Excellence	Affordability work group member, online course development
Soper, Devin	FSU	Scholarly Communications Librarian	OER initiative, alternative textbook grants, #textbookbroke campaign

Supporting Documentation Included:

The State University System Online Education 2025 Strategic Plan Affordability Goal 2 is to reduce the costs of educational materials for students.

Tactic 2.1.1 Determine and promote methods to increase the use of open-access textbooks and educational resources to reduce costs to students.

Tactic 2.1.2 Reduce the costs of eTextbooks for students through mechanisms that could include negotiating lower pricing with vendors and providing an enhanced repository for educational materials.

Contracts negotiated with vendors should ensure that such materials are accessible to students with disabilities.

The affordability work group recommends that a coordinating committee comprised of representatives from the SUS and FLVC be established. The charge to the committee:

1. Develop or identify an existing OER/eText catalog tool that will facilitate the process of selecting appropriate course material.
2. Implement and coordinate state-wide awareness, training and technical support for OER adoption and usage.
3. Develop or identify an existing OER repository that will facilitate the creation and vetting of new OER.

Preliminary timeline

- May, 2017: Identify committee members.
- June, 2017: Identify necessary features, requirements and costs.
- June 21, 2017: LBR is presented to the Innovations Steering Committee.
- July, 2017: Identify tools that fulfill needs.
- July 24, 2017: Coordinating committee meets to discuss tool recommendations.
- August 7, 2017: Tool recommendations are provided for review by the Innovations Steering Committee.
- August 18, 2017: Recommendations are presented to the Online Innovations Steering Committee.
- September 7 – 8, 2017: FLVC is hosting the Florida OER Summit.
- September, 2017: Determine timeline for tool deployment.
- October, 2017: Determine PR/Marketing plan.

Facilitators/Presenters:
Ms. Jennifer K. Smith
Director, Office of Faculty Development and Teaching Excellence
University of Florida

STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Joint Meeting of the Steering Committee and Implementation Committee for the
2025 Strategic Plan for Online Education

SUBJECT: Technology Scorecard

Quality 2.2.1
Tactic: Using Quality Scorecard or a similar process, ensure that each institution has the technology needed to provide quality online education.

May 2017: Infrastructure Workgroup will develop recommendations for the best process(es) for conducting technology reviews and the timeframe the reviews should be undertaken at each institution.

Quality 2.2.3
Tactic: Using Quality Scorecard or a similar process, ensure universities review their infrastructure to confirm that students, including students with disabilities, can easily access their online instruction.

May 2017: Infrastructure Workgroup will develop recommendation for the best process(es) for conducting technology reviews and the timeframe the reviews should be undertaken at each institution.

Background: The expansion of distance education is current and forthcoming; a capable technology infrastructure is fundamental for the growth and maintenance of a quality educational experience. In response, the Infrastructure Workgroup has developed a Distance Learning Technology Scorecard for institutions to evaluate the strengths and weaknesses of their distance learning technology, accessibility compliance, and support environment.

Recommendations: The Infrastructure Workgroup recommends that institutions use the Distance Learning Technology Scorecard to evaluate the characteristics of their distance learning environment and support systems.

The scorecard will be distributed at the end of July 2017 via the Board's Data Request System. Following distribution, institutional reviews will take place from August 2017 - September 2017. During this time, CIOs, or technology leadership, from each state institution should complete the Distance Learning Technology Scorecard by assigning a score to each of the quality indicators, providing comments as appropriate. Once complete, the filled in scorecard would be sent to the Board Office via its Data Request System.

Note: The scorecard is considered an internal management tool that could be used for the development of an infrastructure improvement plan. If an institution scores below 26 points, a scorecard evaluation will take place again in two years to evaluate the success of the improvement plan. If low scores persist, an institution should be prepared to present an improvement plan to the Board's Innovation and Online Committee.

Facilitators/Presenters: Joseph Riquelme
Supporting Documentation: None

Distance Learning Technology Scorecard

Criteria for Supporting Distance Learning Infrastructure

Developed by the Infrastructure Workgroup for the 2025 SUS Strategic Plan for Online Education

Table of Contents

Background

Information technology infrastructure is deeply embedded in the distance learning experience. To ensure that systems enable student and faculty success, the course delivery and supporting technology is to be considered a critical system and supported as such. The Distance Learning Technology Scorecard enables institutions to evaluate the strengths and weaknesses of their distance learning technology, accessibility compliance, and support environment.

Overview of systems

1) **Learning Management System:** application that allows for the administration, distribution of content and resources, performance management and assessment, and reporting for courses. A Learning Management System typically integrates with a variety of third party tool providers to enable additional functionality.
2) **Student Information System:** application that facilitates the interaction and management of admissions, registration and financial aid processes. The system supports a variety of operational processes such as course scheduling, grading, student and personnel record management.
3) **Customer Relationship Management:** application used to manage and support interactions with customers.
4) **Enrollment Management Middleware:** system(s) which integrates with Student Information System, Learning Management System, and Customer Relationship Management System to enable and facilitate a variety of administrative processes such as automatic/manual course enrollment, course creation, and reporting.

Scoring

The scorecard provided contains 17 quality indicators where each indicator is worth up to three points. The reviewer will determine at what level their distance learning program meets the intent of the indicator after examining all internal systems, procedures, and policies.

3 = Exemplary	2 = Meets Criteria	1 = Insufficient	0 = Not Observed

- **0 points = Not Observed.** There are no indications that the standards are in place.
- **1 point = Insufficient.** There is existence of the standard, though much improvement is needed in this area.
- **2 points = Meets Criteria.** The standard is fully implemented.
- **3 points = Exemplary.** The standard goes beyond full implementation.

Scoring Ranges

There is a total of 51 points attainable on the scorecard. An evaluator should tally up all of the points attained on the scorecard and compare the total to the ranges below for guidance on the strength of an institution's distance learning infrastructure:

- **0 - 17 - Insufficient**
- **18 - 25 - Needs improvement**
- **26 - 33 - Good**
- **34 - 41 - Very good**
- **42 - 51 - Excellent**

The scorecard provides the opportunity to go beyond "Meets Criteria" with an "Exemplary" designation; an institution that "Meets Criteria" for all of the items on the scorecard will receive a minimum of 34 points.

Operations

The Learning Management System is an integral part of the distance learning environment where it serves as the central point for student and faculty interaction. Operational processes revolve around usability, reliability, and support structures to facilitate student, staff, and faculty success.

Suggested practices

- A website is available that details the requirements of the Learning Management System, provides access to tutorials on its use, and recommended best practices.[1]
- Maximize the power of a Learning Management System API to create middleware to facilitate integration with institutional systems.
- Learning Management System testing is frequently performed to ensure a quality and consistent user experience.[2]

Quality indicators

	Exemplary (3)	**Meets Criteria (2)**	**Insufficient (1)**	**Score**
Building and maintaining infrastructure	The Learning Management System is scalable and is prepared to handle client growth. Equipment and resources are available to monitor, adjust performance, and ensure that applications and systems run optimally.	The Learning Management System is scalable and is prepared to handle client growth. Equipment and resources are available to monitor system performance and applications. The system does not allow for real time performance adjustments.	The Learning Management System is partially prepared to handle client growth.	
	Comments: Optional			

[1] "Teaching and Learning Online - UMass Amherst." http://www.umass.edu/oapa/oapa/publications/online_handbooks/Teaching_and_Learning_Online_Handbook.pdf. Accessed 28 Mar. 2017.

[2] "LMS Operation and Governance: Taming the Beast by Steve Foreman ...." 9 Sep. 2013, https://www.learningsolutionsmag.com/articles/1244/lms-operation-and-governance-taming-the-beast-part-3-of-4. Accessed 30 Mar. 2017.

Reliability and operability	Systems are highly reliable and operable with measurable standards being utilized, such as system downtime tracking or benchmarking. The institution is proactive in ensuring that the system maintains reliability during peak connectivity periods.	Systems are reliable and operable with measurable standards being utilized, such as system downtime tracking or task benchmarking.	Systems are reliable and operable. The institution does not regularly monitor system performance or perform benchmarking.	
	Comments: Optional			
Technical requirements and usage	The minimum computer and browser requirements of end-user interaction with the Learning Management System are defined, available, and accessible from multiple locations. Tutorial videos on how to use the system are available and regularly updated to ensure relevance.	The minimum computer and browser requirements of end-user interaction with the Learning Management System are defined, available, and accessible from multiple locations.	The minimum computer and browser requirements of end-user interaction with the Learning Management System are defined and available.	
	Comments: Optional			
Analytics and business intelligence	Dashboards and reports on users, courses, tools, and Learning Management System usage are available.	Dashboards and reports on users, courses, tools, and Learning Management System usage are available.	Dashboards and reports on users, courses, tools, and Learning Management System usage are available, though reporting is only	

	Support, training, and resources are available to assist users with the use of analytics.		available to administrative users.	
	Comments: Optional			
Academic integrity	The system supports a variety of assessment methods to mitigate the risk of academic misconduct. Procedures, tools, and best practices are available and in place to maintain the integrity of courses. For example: ● Secure examinations ● Support for proctored exams service ● Plagiarism detection	The system supports a variety of assessment methods to mitigate the risk of academic misconduct. Procedures and tools are available and in place to maintain the integrity of courses. For example: ● Secure examinations ● Support for proctored exams service ● Plagiarism detection	The system supports a variety of assessment methods to mitigate the risk of academic misconduct.	
	Comments: Optional			
Third party integration, customization, and support	The Learning Management System ecosystem supports integration with third party tools and custom services. The system supports content	The Learning Management System ecosystem supports integration with third party tools. The system supports content compliance standards	The Learning Management System ecosystem has limited support for third party tools.	

	compliance standards such as SCORM, xAPI, AICC.	such as SCORM, xAPI, AICC.		
	Comments: Optional			

Support

Support structures are in place to enable the success of users and their interactions with the various distance learning systems. Training procedures are in place to maximize the utilization of system features and services.

Suggested practices

- Provide training to users who support the technology infrastructure as the systems are continuously evolving.[3]
- Ensure that resources are available to support a variety of user technological aptitude levels. Support training in person, and online to accommodate the needs of a variety of users.
- The use of an enterprise CRM allows for a consolidated approach to handling student support services. [4]
- Leverage technology resources to monitor performance against quality assurance objectives to ensure quality outputs and improvements.[5]
- Develop accessibility checklists to ensure that new software and services comply with policies on product accessibility.[6]

Quality indicators

	Exemplary (3)	**Meets Criteria (2)**	**Insufficient (1)**	**Score**
End-user support	Personnel and resources are in place to support faculty, staff, and students in the	Personnel and resources are in place to support faculty, staff, and students in the	Personnel and resources are in place to support faculty, staff, and students in	

[3] "University IT Strategy - University of Glasgow." 16 Jan. 2015, http://www.gla.ac.uk/media/media_387823_en.pdf. Accessed 24 Mar. 2017.
[4] "ITS Self-Study 2011 - UC Santa Cruz - Information Technology Services." 11 Jan. 2011, http://its.ucsc.edu/planning/docs/self-study2011-2.pdf. Accessed 20 Mar. 2017.
[5] "The Practice of a Quality Assurance System in Open and Distance ...." http://unpan1.un.org/intradoc/groups/public/documents/apcity/unpan029184.pdf. Accessed 30 Mar. 2017.
[6] "Procure accessible technology - UW-Madison Information Technology." 11 Feb. 2016, https://it.wisc.edu/guides/accessible-content-tech/procure-accessible-technology/. Accessed 30 Mar. 2017.

	development, use, and troubleshooting of technology and skills. Multiple modalities of end-user support are available. For example: ● Phone ● Chat ● Email End-user support is available during peak hours. System-support is available 24 hours per day.	development, use, and troubleshooting of technology and skills. Multiple modalities of end-user support are available. For example: ● Phone ● Chat ● Email End-user support is available during peak hours.	the development, use, and troubleshooting of technology and skills.	
	Comments: Optional			
Training	Resources are provided to users to facilitate interactions and use with the Learning Management System and related components. Training is available in person, and online: synchronously, and asynchronously. Professional development is available for support staff who maintain the distance learning infrastructure.	Resources are provided to users to facilitate interactions and use with the Learning Management System and related components. Training is available in person, and online: synchronously, and asynchronously.	Resources are provided to users to facilitate interactions and use with the Learning Management System and related components.	

	Comments: Optional			
Disability Support	Ability to provide personalized support to students with disabilities. Systems support the use of assistive technology tools such as: ● Screen readers ● Magnifiers Accommodations are available at the user and system level.	Ability to provide support to students with disabilities. Systems support the use of assistive technology tools such as: ● Screen readers ● Magnifiers	Ability to provide support to students with disabilities.	
	Comments: Optional			
Accessibility compliance	Compliance with Section 508 of the Rehabilitation Act of 1973 and alignment with Web Content Accessibility Guidelines (WCAG) 2.0. Processes are in place to vet and ensure that information technology implementation does not create barriers for access. Courses are audited to ensure compliance with accessibility law.	Compliance with Section 508 of the Rehabilitation Act of 1973. Processes are in place to vet and ensure that information technology implementation does not create barriers for access.	Compliance with Section 508 of the Rehabilitation Act of 1973 is considered on an as needed basis.	

	Comments: Optional

Security Policies

Distance learning information systems and their use enable the transfer of confidential student information, which presents a potential for risk of maintaining the security of student records. There is a delicate balance between maintaining student privacy and creating an online environment that is conducive to learning. To preserve the balance, institutions should examine their distance learning infrastructure to ensure that systems support privacy, while facilitating access to information.

Suggested practices

- Ensure compliance with the information security triad: confidentiality, integrity and availability.
- Authentication is available to ensure that the user who is accessing the information, is indeed who they present themselves to be. [7]
- Encode information upon transmission and storage to ensure that only authorized individuals have access. Use encryption to process information into another form, to prevent unauthorized access.[8]
- Roles on what a user can and cannot do are clear and defined. Every user that is part of the online learning environment is assigned to a role with specific privileges. [9]

Quality indicators

	Exemplary (3)	**Meets Criteria (2)**	**Insufficient (1)**	**Score**
Security plan	A documented security plan is in place and operational to ensure quality, in accordance with industry best practices.	A documented security plan is in place and operational to ensure quality, in accordance with industry best practices.	A user access and password management plan is in place.	

[7] "Chapter 6: Information Systems Security | Information Systems for ...." https://bus206.pressbooks.com/chapter/chapter-6-information-systems-security/. Accessed 30 Mar. 2017.
[8] "Electronic Data Security | Institutional Review Board | University of ...." http://www.irb.pitt.edu/electronic-data-security. Accessed 30 Mar. 2017.
[9] "User Roles and Privileges - Blackboard Help." 11 Oct. 2016, https://en-us.help.blackboard.com/Learn/Administrator/Hosting/User_Management/User_Roles_and_Privileges. Accessed 30 Mar. 2017.

	Security plan addresses the confidentiality, integrity, and availability of data on systems that support distance learning. The security plan is frequently revised and tested to ensure relevance with latest information security developments.	Security plan addresses the confidentiality, integrity, and availability of data on systems that support distance learning.		
	Comments: Optional			
Data management practices	Data management practices comply with regional privacy and information system laws. Policies are in place for data input, maintenance, and removal. Access control is available where definitions are available for access categories and user roles. Data access roles are organized by users, owners, and custodians.	Data management practices comply with regional privacy and information system laws. Policies are in place for data input, maintenance, and removal. Access control is available where definitions are available for access categories and user roles.	Data management practices comply with regional privacy and information system laws.	
	Comments: Optional			

User access control	Administrative access is limited to privileged users. The Learning Management System and Enrollment Management Middleware support the ability for custom roles and privileges. A role based access control (RBAC) or access control list (ACL) is in place. A scheduled auditing process is in place to ensure privileged users do not access content above their defined access level.	Administrative access is limited to privileged users. The Learning Management System and Enrollment Management Middleware support the ability for custom roles and privileges. A role based access control (RBAC) or access control list (ACL) is in place.	Administrative access is limited to privileged users. The Learning Management System supports the ability for custom roles and privileges.	
	Comments: Optional			
User tracking	Inspection abilities are present. The system allows for retrieval and investigation of user access logs. The system gathers information on page access and interactions.	Inspection abilities are present. The system allows for retrieval and investigation of user access logs. The system gathers information on user page access, though it does not provide details on page interactions.	Inspection abilities are present. The system allows for retrieval and investigation of user access logs.	

	Comments: Optional

Disaster Recovery

An unforeseen event has the ability to bring a distance learning environment to a halt. A disaster recovery plan can enable an institution to recover as quickly as possible and resume operations for students, faculty, and staff. Not having a disaster recovery plan puts student success and institutional reputation at risk.

Suggested practices

- Ensure that the Learning Management System maintains an uptime of at least 99.9% with a software monitoring system in place to notify users of outages or disruptions.[10] [11]
- Implement a redundancy system to eliminate any single points of failure.
- A comprehensive backup plan is part of the disaster recovery plan. Regular backups of all data should be performed to minimize the impact that data loss would have on the institution.[12]
- An assessment of what effect downtime would have on the institution should be considered. If the systems that support distance learning go down, what would happen.

Quality indicators

	Exemplary (3)	**Meets Criteria (2)**	**Insufficient (1)**	**Score**
System testing	Testing procedures and policies are documented and in place to ensure that system updates maintain confidentiality, system integrity, and provide a minimal impact on	Testing procedures and policies are documented and in place to ensure that system updates maintain confidentiality and system integrity. System testing takes	Testing procedures and policies are documented and in place to ensure that system updates maintain confidentiality and system integrity.	

[10] "Scope of UMassOnline Hosted Learning Management System Services." 29 Jul. 2015, https://confluence.umassonline.net/display/UMOLTT/Scope+of+UMassOnline+Hosted+Learning+Management+System+Services. Accessed 30 Mar. 2017.
[11] "Texas A&M IT Assessment Report 2011-2012 - Office of the Vice ...." http://cio.tamu.edu/files/IT_Weave_Online_Assessment_11_12.pdf. Accessed 28 Mar. 2017.
[12] "IT Disaster Recovery Plan | Ready.gov." https://www.ready.gov/business/implementation/IT. Accessed 30 Mar. 2017.

	Learning Management System availability. System testing takes place on a non-production environment.	place on a non-production environment.		
	Comments: Optional			
Disaster Recovery Plan	The institution has established a disaster recovery plan for the continuance of the Learning Management System and associated systems, in the event of prolonged service disruption: ● Recovery time objective (RTO) is defined as resuming normal operations within a maximum of 12 hours of a system failure. ● Recovery point objective (RPO) is defined as being able to retrieve a data backup point within 24 hours of a system failure.	The institution has established a disaster recovery plan for the continuance of the Learning Management System and associated systems, in the event of prolonged service disruption: ● Recovery time objective (RTO) is defined as resuming normal operations within a maximum of 24 hours of a system failure. ● Recovery point objective (RPO) is defined as being able to retrieve a data backup point within 48 hours of a system failure.	The institution has established a disaster recovery plan for the continuance of the Learning Management System and associated systems, in the event of prolonged service disruption: ● Recovery time objective (RTO) is defined as resuming normal operations within a maximum of 48 hours of a system failure. ● Recovery point objective (RPO) is defined as	

			being able to retrieve a data backup point within 1 week of a system failure.	
	Comments: Optional			
Disaster Recovery Test	Full system disaster recovery tests are performed bi-annually to ensure compliance with Recovery Time Objective (RTO) and Recovery Point Objective (RPO).	Partial Disaster recovery tests are performed annually to ensure compliance with Recovery Time Objective (RTO) and Recovery Point Objective (RPO).	Disaster recovery tests are performed occasionally to ensure compliance with Recovery Time Objective (RTO) and Recovery Point Objective (RPO).	
	Comments: Optional			

Total Score 0

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