STATE UNIVERSITY SYSTEM of FLORIDA
Board of Governors

AGENDA
Strategic Planning Committee
Workshop on the Expansion of Online Education
Student Union Building, Room 105
Florida Atlantic University, Davie Campus
3200 College Avenue
Davie, Florida 33314
December 17, 2012
12:30 p.m. –5:00 p.m.

Chair: Mr. John Rood
Members: Chopra, Colson, Frost, Perez, Webster

1.	**Call to Order and Opening Remarks**	**Governor John Rood**
2.	**Post-Secondary Online Expansion in Florida**	**Dr. Robert Lytle** **Ms. Vanessa Webb** *The Parthenon Group*
3.	**Policy Issues for Online Expansion**	**Dr. David Longanecker** *President, Western Interstate Commission for Higher Education (WICHE)*
4.	**National Landscape of Online Education**	**Dr. Bruce Chaloux** *CEO, Sloan Consortium*
5.	**Panel Discussion**	**Governor Rood**

Dr. Joe Glover, *UF Provost*
Chancellor Randy Hanna, *Florida College System*
Dr. Ed Moore, *Independent Colleges and Universities of Florida*
Ms. Susan Pareigis, *Council of 100*
Dr. Eddie Wachter, *DeVry University*
Dr. Longanecker (reactant)
Dr. Chaloux (reactant)

6.	**Committee Discussion**	**Governor Rood**
7.	**Concluding Remarks and Adjournment**	**Governor Rood**

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STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
Workshop on the Expansion of Online Education
December 17, 2012

SUBJECT: Post-Secondary Online Expansion in Florida (the Parthenon Report)

PROPOSED COMMITTEE ACTION

For information.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Not applicable.

BACKGROUND INFORMATION

The 2012 Legislature provided funds to the Board of Governors to obtain the services of a consulting firm that would study online education in Florida. Through a competitive bidding process, the contract was awarded to The Parthenon Group, which is based in Boston, MA. The Scope of Services provided that the study would include, among other requirements, a description of the nature and extent of existing online postsecondary programs in Florida; an assessment of educational opportunities needed to boost Florida's economy; options for expanding the awarding of degrees; and, for each option, a ten-year plan for start-up and operating costs, enrollments, degree production, and revenue generated.

Parthenon's report, Postsecondary Online Expansion in Florida, its Detailed Fact Base, and its cover letter were submitted to the Board Office on November 16, 2012. The Council of Academic Vice Presidents (CAVP), the Florida College System (FCS), and Independent Colleges and Universities of Florida (ICUF) were each requested to submit a letter reflecting their perspectives of Parthenon's report. Those letters are included in the agenda packet.

After Parthenon's presentation of the report, the workshop will focus on policy decisions that the Committee and, ultimately, the Board will need to make in order to determine the best approach to recommend to the Legislature for moving forward with postsecondary online education in Florida. At the end of the workshop, the Committee will take the policy issues into consideration while discussing the pros and cons of

Parthenon's options and determine whether any – or a combination of any – should be pursued in preparation for January's Committee meeting.

Supporting Documentation Included:	Parthenon cover letter (hyperlinks to the Scope of Services, report, and detailed fact base are provided in the above Background Information); Letters from CAVP, FCS, and ICUF
Facilitators/Presenters:	Dr. Lytle and Ms. Webb The Parthenon Group

SECTION 7 – SCOPE OF SERVICES

7.0 SCOPE OF SERVICES

1. A description of the nature and extent of existing online postsecondary education programs in Florida;

   Specifications: The report must include, but not be limited to:

   - A description of the Florida Distance Learning Catalog (hereinafter referred to as the "Catalog"), including related statutory language, institutional participation, criteria for inclusion of programs and courses, and its usage.
   - By delivery system (SUS, Florida College System, Independent Colleges and Universities of Florida, Commission on Independent Education), the number and level of total programs and unduplicated programs (A.S, A.A, Bachelor's, Master's, doctoral, certificate) in the Catalog and, separately, those not in the Catalog that are offered in Florida by regionally accredited institutions and by nationally accredited institutions.
   - By delivery system (SUS, Florida College System, Independent Colleges and Universities of Florida, Commission on Independent Education), the average student tuition and fees charged to resident and nonresident students by level of distance learning program (A.S, A.A, Bachelor's, Master's, doctoral, certificate).
   - A description of limitations in Florida statutes and in Board of Governors regulations concerning tuition and fees that may be charged for Florida's public distance learning programs.
   - A description of innovative postsecondary online universities in or outside of Florida.
   - A description of groups of universities in or outside of Florida that collaboratively offer online education programs.

2. An assessment of educational opportunities needed to boost Florida's economy

   Specifications: The report must include:

   - An assessment of Florida's market and types of programs that could expand or be created to help boost the state's economy.

3. Options for expanding the awarding of degrees in Florida through both a System and independent approach to online learning;

   Specifications: The report must include:

   - Policy options that will reflect strategies for expanding online education programs and access to those programs. Such options must include, but not be limited to, ones that address (1) leveraging existing universities to

create and/or expand existing online programs and (2) creating an online university that delivers programs, content, and degrees separately and independently from the existing universities and, as such, competes directly with them.
    - Consideration of public-private partnerships.
    - A matrix reflecting how various approaches could interact.
4. Opportunities, obstacles, benefits, risks, market analysis, and market viability of each option.

    Specifications: For each option, the report must include:
    - Descriptions of - and supporting data for - opportunities, obstacles, benefits, risks, market analysis, and market viability.
5. Description of regional accreditation requirements for implementing each option;

    Specifications: For each option, the report must include:
    - Southern Association of Colleges and Schools' requirements and the estimated activities and timeline for implementation of those requirements.
6. Ten-year plan for start-up and operating costs, enrollments, degree production, and revenue generated for each option;

    Specifications: For each option, the report must include:
    - Key levers that would affect cost.
    - A ten-year plan that includes start-up costs; operating costs; headcount enrollment by level (Bachelor's, Master's, doctoral, certificate); full-time-equivalent (FTE) enrollment by level; degree production by level; and revenue that could be generated through tuition and fees.
7. Evaluation of the Florida Virtual Campus and its potential role in supporting each option;

    Specifications: The report must include:
    - Statutory requirements for the Florida Virtual Campus and the status of implementation of those requirements.
    - Recommended changes to the Florida Virtual Campus that could enhance its ability to provide support services for online education, and the related start-up and continuation costs of those changes.
8. Path and timeline for launching each option.

    Specifications: The report must include for each option:
    - A list of major activities required to launch the option.
    - The time it will take to complete each major activity.
    - The dependencies between major activities.
    - The total time estimated for launching the option.

9. Recommended Board and/or legislative action, if necessary.

   Specifications: For each option, the report must include:

   - A determination of whether Board and/or legislative action would be needed to implement the option.
   - Recommended statutory language, if needed.
   - Recommended funding in the General Appropriations Act, if needed.

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To: Florida Board of Governors

From: Haven Ladd, Robert Lytle and Vanessa Webb, *the Parthenon Group*

Date: November 16, 2012

Re: Online University Study

Over the course of the last four months, a team from The Parthenon Group has been engaged in a project with the Florida Board of Governors to develop the fact-base for Florida post-secondary online education and identify potential online strategies to expand the number of post-secondary graduates through the use of online education. The memo that follows provides a high level description of the objectives for post-secondary online learning in Florida and potential options for the state of Florida to pursue. The attached summary presentation and detailed fact-base presentation include additional information on the options we have developed through an iterative process with higher education stakeholders across the state.

Process

This process has relied on deep engagement with stakeholders from the Florida Board of Governors, the Florida Department of Education, the Florida Virtual Campus, individual institutions both within the Florida systems of higher education and external to those systems, as well as state legislative and budget staff. We have kept these stakeholders updated through a series of ongoing discussions and meetings designed to gather input, push the dialogue forward and solicit feedback, all while maintaining our objective view. The options presented here and in the accompanying documents represent the output of that iterative process.

Online Offerings

The online offerings that students seek come in a number of forms, targeting different students with different requirements for success:

- **Online / hybrid courses** are taken primarily by students living on-campus but seeking increased course flexibility. ~40% of SUS and FCS students took an online course in 2010-2011, above the national average.

- **Fully online degree programs** are targeted towards degree-completer students who are unable to take onsite courses, for work, family, geographical, or other reasons. These courses require fundamentally different onboarding, ongoing support services and data tracking than programs for onsite students. Examples of

these supports include multi-modal support services (in-person, online, phone) with 24/7 responsiveness, identification of a student's "at risk" factors prior to enrollment, and daily, weekly, and monthly monitoring of a student's activity levels and grades to allow early identification of "at-risk" behavior that can then be addressed with the student. While the SUS and FCS do offer ~700 programs that can be taken fully online, the online-only student has been a lesser focus and online-only enrollee levels are below the national average.

- Finally, **self-directed courses** (e.g., the Massively Online Open Courses – MOOCs) that pervade the higher education media are a nascent online offering at a very low cost. Florida's statewide common course numbering system could allow MOOCs developed within the FCS/SUS (e.g., for introductory and high demand courses) to be taken by students of all types (e.g., high school, on-campus, adult) across the state. Proctored exams would need to be established in order for students to receive course credit.

While these three types of online offerings share much in common, the different target students and varying requirements for success imply that different strategies could be considered for each.

Objectives for Online Learning

Through discussions with stakeholders, Parthenon identified four primary objectives for online learning in higher education within the state of Florida:

- **Expanding Access**: Allows students who cannot take face-to-face courses to continue their education.

- **Reducing System and Student Costs**: Allows for a lower cost of delivery, through lower physical infrastructure costs, better utilization of resources, reduced time- and cost-to-completion, and increased effective capacity of institutions.

- **Strengthening the Link between the Labor Market and Post-Secondary Education**: Enables a broader scaling of labor force-demanded degree programs through coordination with the Department of Economic Opportunity (DEO) and "Labor Councils" and program dissemination beyond the local catchment area.

- **Enhancing the Student Experience**: Allows digital delivery, in its many forms, to enhance the quality of existing core programs and to expand the flexibility offered to students through a portfolio of online learning models.

We understand that different stakeholders have different objectives for online learning. In developing potential strategies for the state of Florida to pursue, we have been inclusive of these objectives to allow stakeholders to decide their relative priority.

Strategic Options to Consider

In focusing on the objectives for online learning outlined above, we provide four strategic options for Florida to consider for the creation, development and expansion of new online learning models. These strategies are meant to build on the online efforts already underway across the SUS and FCS today, to develop a comprehensive, best-in-class portfolio of online degree programs, while testing best practices that could be applied to existing offerings. These programs would include both competency-based and credit-based[1] offerings, would be tied to labor market needs and would aim to lower the recurring per student costs to the state and/or the student. These strategies include:

1) **Institution by Institution**: Institutions continue to develop online offerings on their own, driving innovation in a way that fits each institution's mission. The state will clarify objectives of expanded online learning models, but potential collaboration among institutions remains at their own discretion.

2) **Institutional Collaboration**: System-wide online degree program offerings are developed under the direction of a coordinating body (e.g., FLVC, BOG, FL DOE). Centralized marketing, onboarding, support services, and data analytics are each either managed by the central body or one of the participating institutions. Program-level RFPs are issued to institutions for program development. Online degree programs developed collaboratively under the direction of this coordinating body would be marketed to students across the state.

3) **Lead Institution**: One (or a few) institution is selected by RFP process to drive the development of new online programs in target degree levels and disciplines. The lead institution would be selected on the basis of a performance grant process that allows applicants to emphasize existing best practices and organizational strengths that can contribute to effective state-wide online degree programs. This institution, on its own or with other institutions, would need to ensure program access to a diverse student body.

4) **New Online Institution**: An online institution is launched with a mandate to drive the development of new online programs in target degree levels and disciplines.

[1] Competency programs award credit based on mastery of material rather than seat time. These programs lower instructional costs by utilizing student tutors/mentors and allowing students to complete courses at their own pace.

The primary focus of these strategies has been on the development of online-only degree programs, and the marketing, onboarding, support services, and data analytics needed to make them successful. These supports require a fundamentally different approach vs. the onsite student. These strategic options could also apply to existing online/hybrid courses and to the development of credit-bearing MOOCs (and their proctored exams). The strategic option implemented for each type of online offering could differ (see the worksheet matrix on page 37 in the summary presentation).

Additional Considerations

Given our familiarity with Florida's comprehensive K-20 data system, we were surprised at the lack of persistence (beyond course level) and graduation rate data for hybrid and online-only students, available across the system. Because these students are not walking into a classroom, more extensive data monitoring of their progress is needed. Persistence and activity data should be monitored on an ongoing (e.g., weekly, monthly, by term, yearly, cohort) basis to enable the early identification of a student being "at risk" of dropping out to then trigger action. It is difficult to establish best practices for this newer modality without comprehensive tracking. As the state of Florida plans for the expansion of online learning opportunities, we would strongly encourage that it make comprehensive data tracking a critical priority.

This report is being submitted to fulfill the requirements of RFP #2012-65

Summary: Post-Secondary Online Expansion in Florida

THE PARTHENON GROUP

November 16, 2012

Introduction

- There are differing views as to the primary objectives for online post-secondary education in Florida. The strategies presented here attempt to encompass this spectrum of objectives
- This is a long-term post-secondary online strategy; it is not meant to focus on any specific degree level or industry
- Any strategy adopted should exhibit outstanding offerings and best practices for post-secondary online learning, such as best-in-class course and program design, top faculty, highly efficient course scheduling, analytically advanced marketing efforts, and data-driven student supports
- Any adopted strategy must include comprehensive tracking of online outcomes. Online learning is an evolving method of delivery – constant evaluation is critical to drive further innovations and improvements; daily, weekly, and monthly monitoring of online students is critical
- The National Center for Educational Statistics (NCES) is the source of the expenditure data in this report. This data is submitted to IPEDS by all Title IV eligible institutions
- Online learning is not a “silver bullet”: Different learners are suited to different ways of learning. Online learning allows Florida to expand its portfolio of offerings to meet the needs of its diverse constituent base
- The strategies presented here have been described, modeled, and evaluated one at a time. A combination of the strategies could also be adopted
- The accompanying detailed fact-base provides both background and further detail behind the materials presented in this summary

Agenda

Objectives for Online Learning

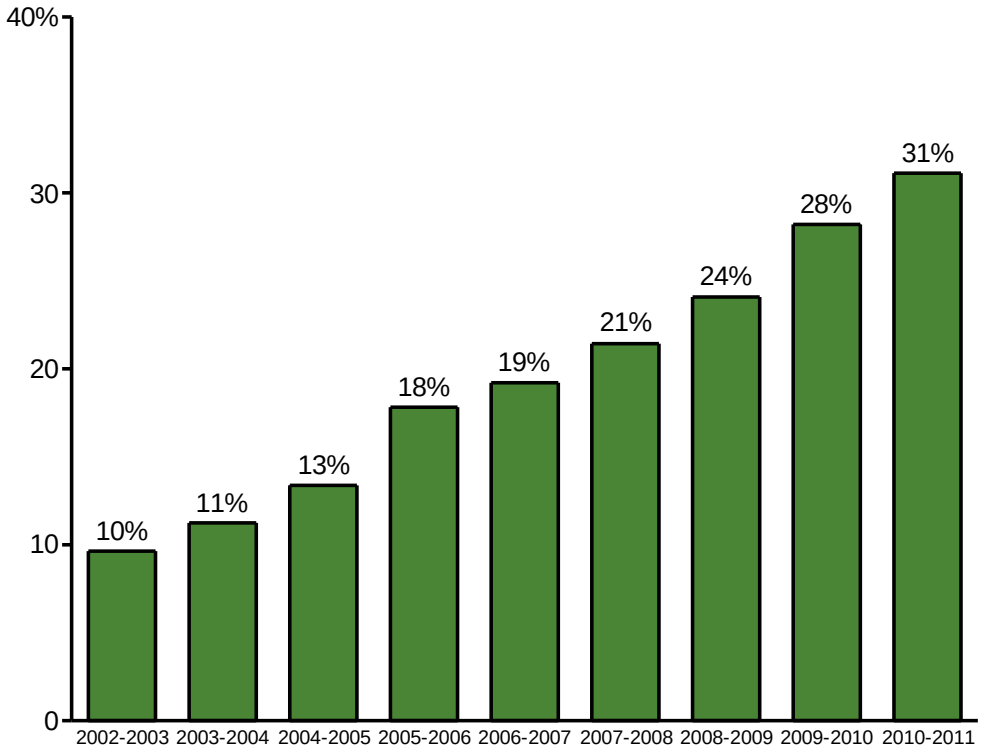
Strategies for Consideration

15

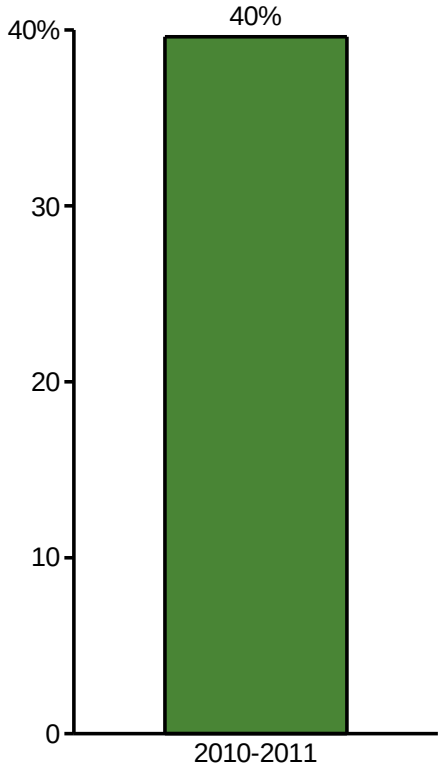
Objectives for Online Learning

In Florida and across the nation, students are taking advantage of online learning opportunities

Percent of Nationwide Students Taking at Least One Course Online, 2002-2003 to 2010-2011



Percent of Florida SUS and FCS Students Taking at Least One Course Online, 2010-2011



16

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Note: Students taking at least one online class is defined as students taking at least one course where 80% or more of the content is delivered online
Source: Babson Survey Research Group; SUS Board of Governors; FL DOE

Objectives for Online Learning

The online offerings that students seek come in a number of forms, targeting different students with different requirements for success

		Target Students	Requirements for Success
Online/Hybrid Courses for Campus-Based Students *~1/3 of students are already taking an online course*		• Residential and commuter students • Can be campus-based or remote	• Coordination on degree program design and supplemental services to achieve best-in-class offerings, scale efficiencies and lower costs across the system
Fully Online Degree Programs *~50% of institutions are offering online degree programs*	**Undergraduate Certificate / Associate Degree Completion**	• Adults looking to enhance their employment prospects or transition professions	• Incoming students have 20+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Bachelor Degree Completion	• Working adults looking to complete bachelor's degrees • Typically employed and/or with families	• Incoming students have 40+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Graduate Degree	• Employed working adults typically intending to remain in their current career field	• Self-directed study often possible and preferred • Highly aligned with labor market needs
Self-Directed Courses (MOOC-Inspired) *Nascent offering*		• Wide age range of students (e.g., high school through adult) seeking to accelerate credit accumulation at a very low cost • Self-directed students, who require no instructor contact	• Quality evaluation frameworks and testing policies to allow for awarding of credits

17

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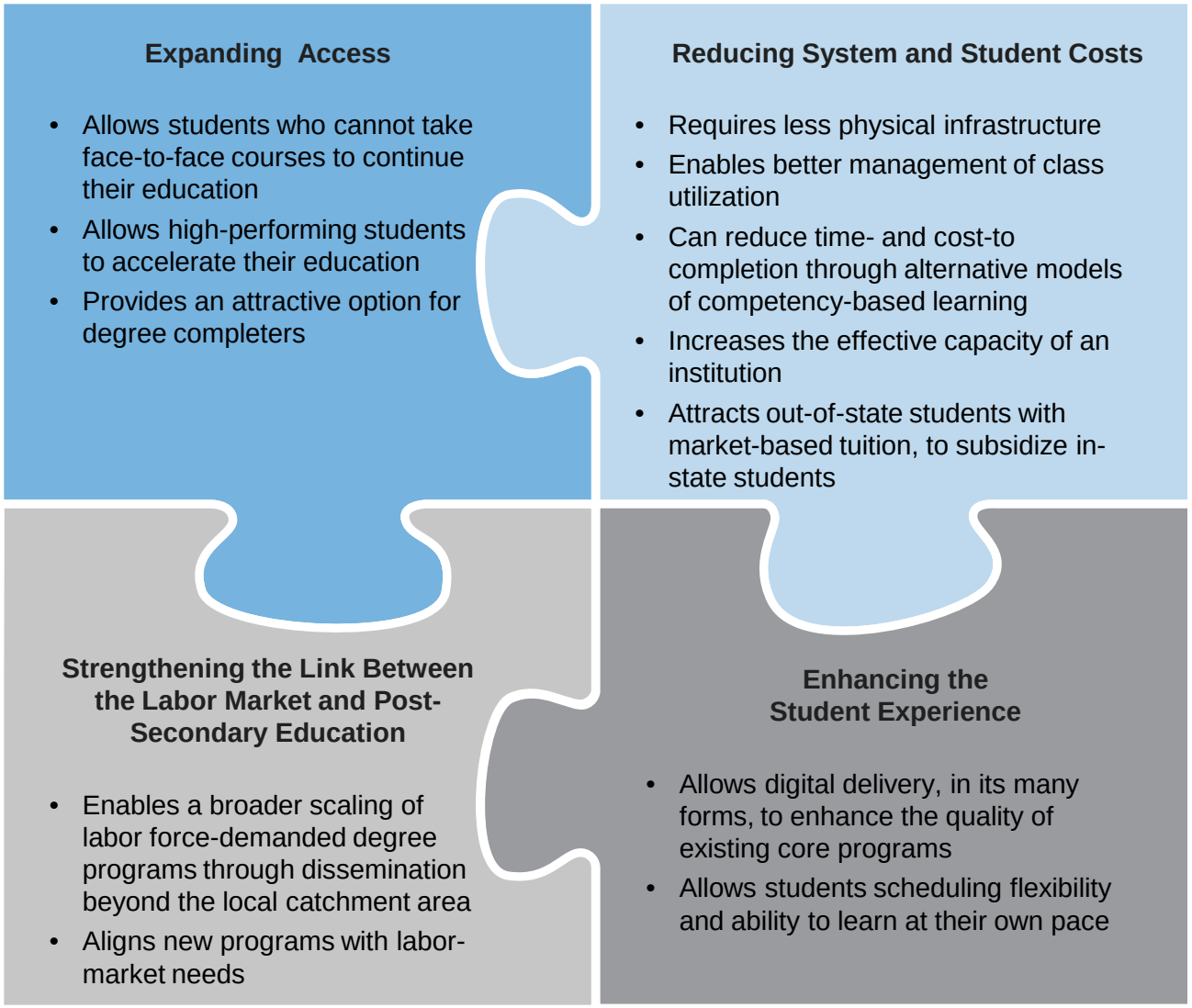
Source: Babson Survey Research Group; Parthenon Online Survey; Peterson's Database

Objectives for Online Learning

Stakeholders across Florida have conveyed four primary objectives for post-secondary online learning

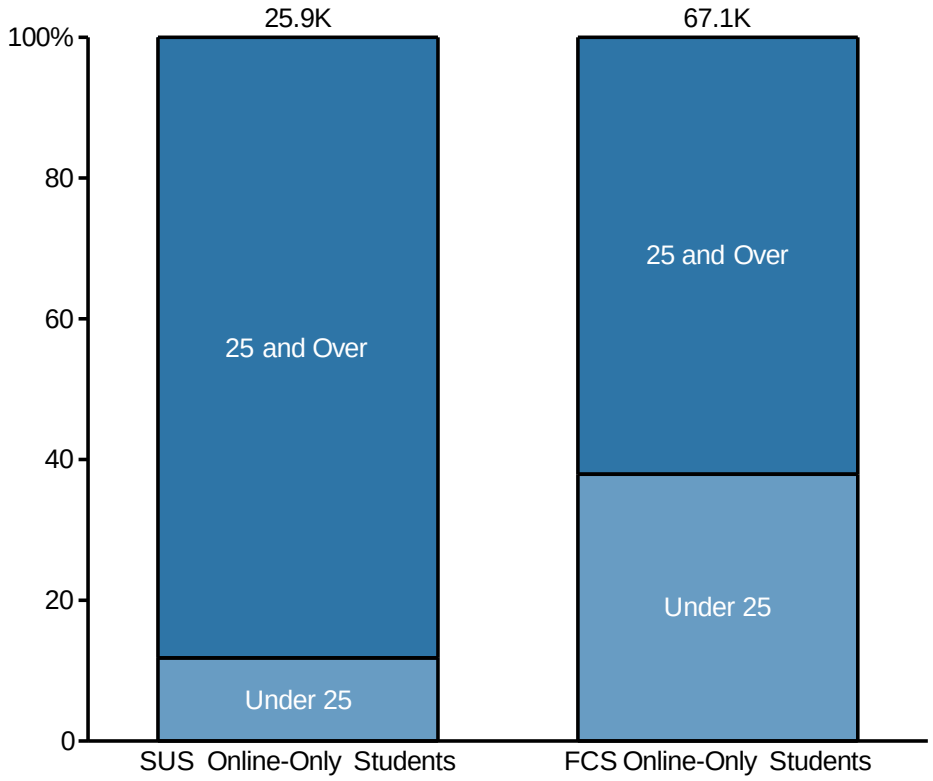


Objectives for Online Learning

Online degree programs are expanding access to adult and non-traditional learners

Expanding Access

SUS and FCS Online-Only Students Enrollment by Age, 2010-2011



Florida Today

- Students are enrolling in online programs at all degree levels; the demographics of these students are similar across degree levels
- The SUS and FCS currently offer ~700 online programs; ICUF (~220) and for-profit institutions (~850) also offer many online programs
- Online courses within the SUS and FCS are primarily focused on providing multiple modality options for the same target student
- The Florida Virtual Campus (FLVC) allows students to more easily access courses from other institutions
- Florida's common course numbering and articulation agreements promote easy transfer of course credit between Florida's institutions
- UF has recently announced it will post non-credit MOOCs on Coursera

Opportunities for Further Innovation Within the SUS/FCS

- Develop robust onboarding/ support services and data tracking capabilities across the SUS and FCS
- Develop MOOCs and proctored exams for high demand courses

19

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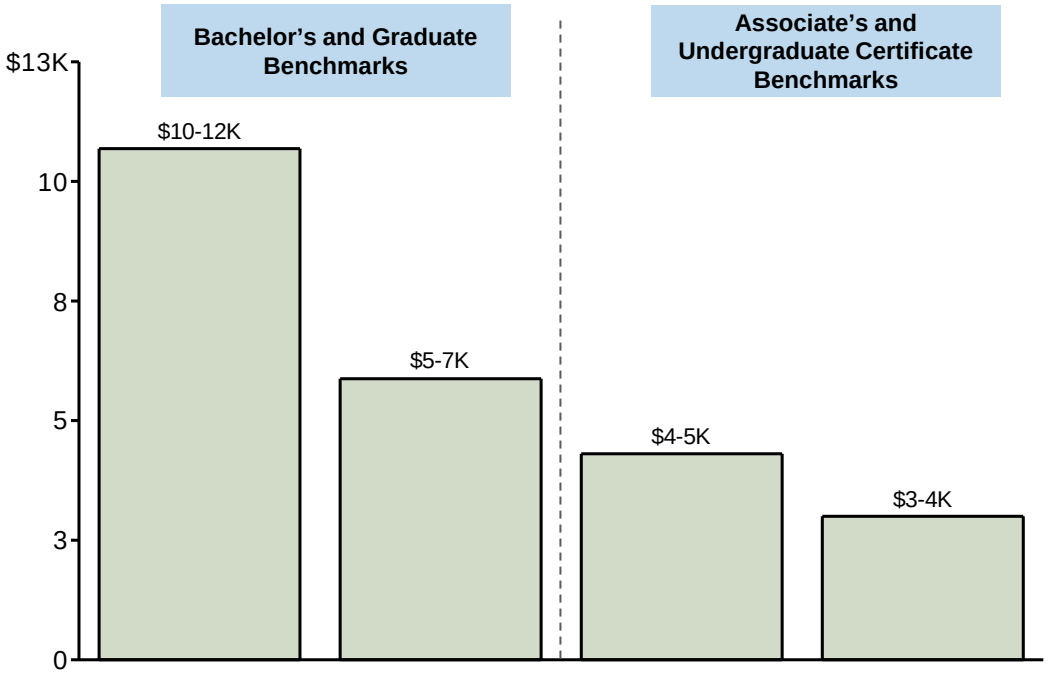
Note: Additional breakdown by degree level can be found in the detailed fact base; SUS and FCS online-only defined as students who only took online courses in 2010-2011
Source: SUS Board of Governors; FL DOE, Interviews with SUS and FCS institutions

Objectives for Online Learning

Online-focused institutions are developing fundamentally different expenditure models

Reducing System and Student Costs

Benchmarked Online Institutional Expenditures per FTE, 2010-2011



Degree Program Model	Credit-Based	Competency-Based	Credit-Based	Competency-Based
Instructional touch	High	Low	Low	Very Low
Student-faculty ratio	18:1	30:1	39:1	N/A

Florida Today

- Online courses within the SUS and FCS are offered at the same tuition levels as comparable face-to-face courses
- The addition of the distance learning fee increases the total cost per credit hour for most distance learning students in SUS and FCS institutions
- Most SUS and FCS institutions believe online and onsite costs are comparable
- The costs of their online-only courses and degree programs cannot easily be separated from other institutional costs
- ICUF and for-profit online offerings are typically offered at lower tuition levels than onsite

Opportunities for Further Innovation Within the SUS/FCS

- Develop lower-expenditure and lower-tuition models to expand the portfolio of offerings available to students, while maintaining commitment to performance
- Closely identify and track online course costs

20

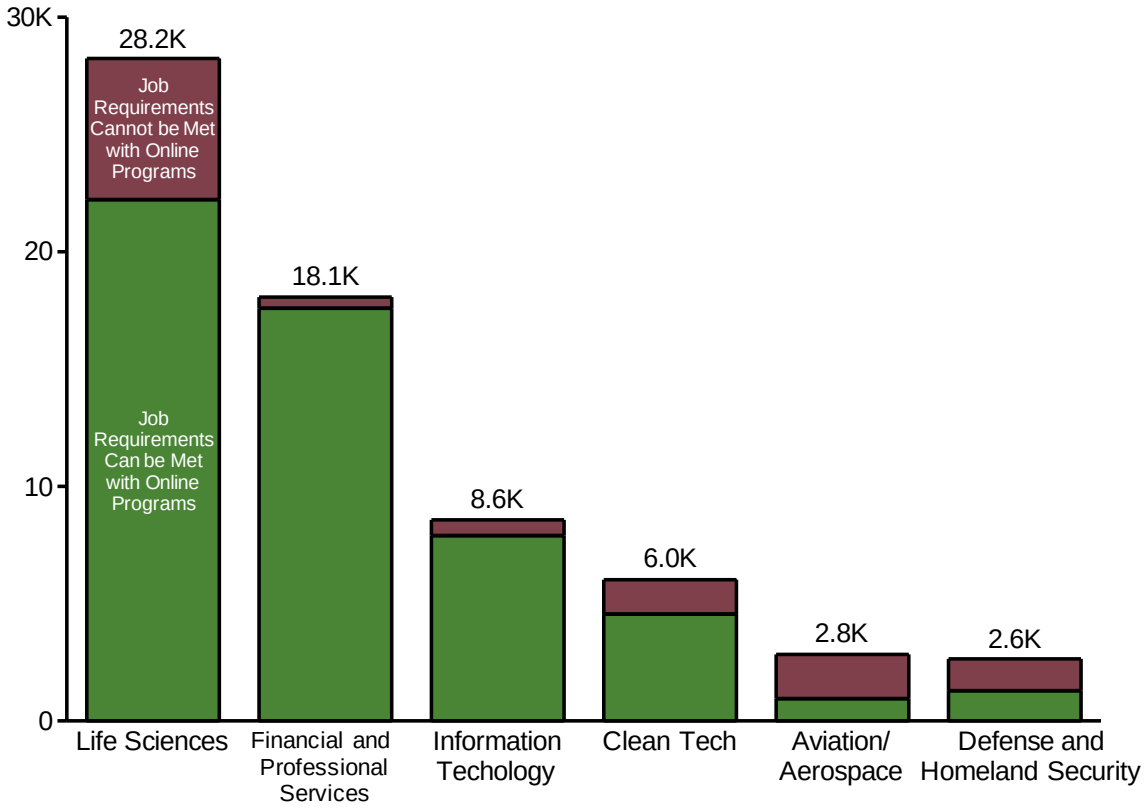
Note: Competency programs award credit based on mastery of material rather than on seat time. These programs minimize instructional costs by utilizing student mentors and allowing students to complete courses at their own pace; Expenditures include academic support expenditures, student service expenditures, institutional support expenditures, and instruction expenditures
Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Objectives for Online Learning

Nationally, online degree programs can meet post-secondary requirements for ~80% of job openings in target clusters

Strengthening the Link Between the Labor Market and Post-Secondary Education

EFI Target Industry Job Openings (2020 Projected) that Can Be Satisfied with Current National Online Degree Program Offerings



Florida Today

- Institutions are offering online courses and degree programs with career-focused options at every degree level
- Of the EFI Target Industry Job Openings (2020 Projected), ~30% can be satisfied with SUS or FCS online programs

Opportunities for Further Innovation Within the SUS/FCS

- Increase the focus on online-only students through a broader portfolio of more flexible offerings, while maintaining high standards of academic quality
- Better alignment between industry and post-secondary education through state-level "Industry Councils" and Florida Department of Economic Opportunity, who would provide input on new degree programs and curriculum

21

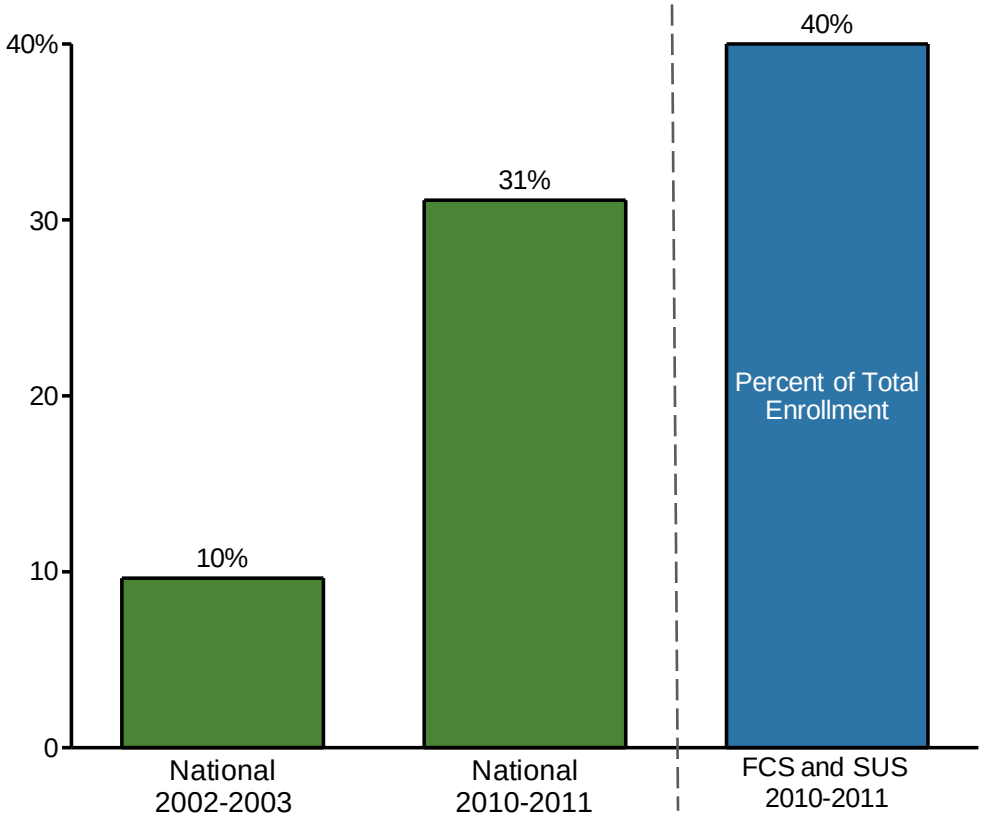
Note: SOC codes are manually mapped to Florida's 6 target clusters, identified by Enterprise Florida Inc; Job openings in positions with SOC codes are mapped to a program CIP code; it is then determined which program CIP codes map to DL courses offered nationally (green); Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DEO); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI); Peterson's Distance Learning Database; IPEDS; SUS Board of Governors; FL DOE

Objectives for Online Learning

Students are increasingly seeking online options

Enhancing the Student Experience

Percent of Students Taking at Least One Course Online, National 2002-2003 and 2010-2011, SUS and FCS 2010-11



Percent of Students Taking Fully Online Degree Programs	N/A	12%-14%	<10%*

Florida Today

- Online courses often fill first
- A small subset of students within the SUS and FCS take fully online degree programs*
- ICUF institutions have ~30K students enrolled in online-only programs
- Professors are adding online components to core onsite courses to enhance the student experience
- Program design, marketing, and support service capabilities differ across the 38 FCS and SUS institutions that offer online courses

Opportunities for Further Innovation Within the SUS/FCS

- Ensure all students have access to best-in-class online offerings and supports
- Robust ongoing analysis on a daily and weekly basis will be critical to improving online outcomes

Note: Students taking at least one course online refers to any student taking at least one course where 80% or more of the content is delivered online;
*There is no designation within SUS/FCS for online-only students; The number of students taking online-only courses in 2010-2011 is 93K; It appears that the actual number of online-only students is lower as only 19K of those same students were enrolled in online-only courses in 2011-12
Source: Babson Survey Research Group; Deutsche Bank Report; Eduventures Online Higher Education Update 2011; School websites; IPEDS; SUS Board of Governors; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Objectives for Online Learning

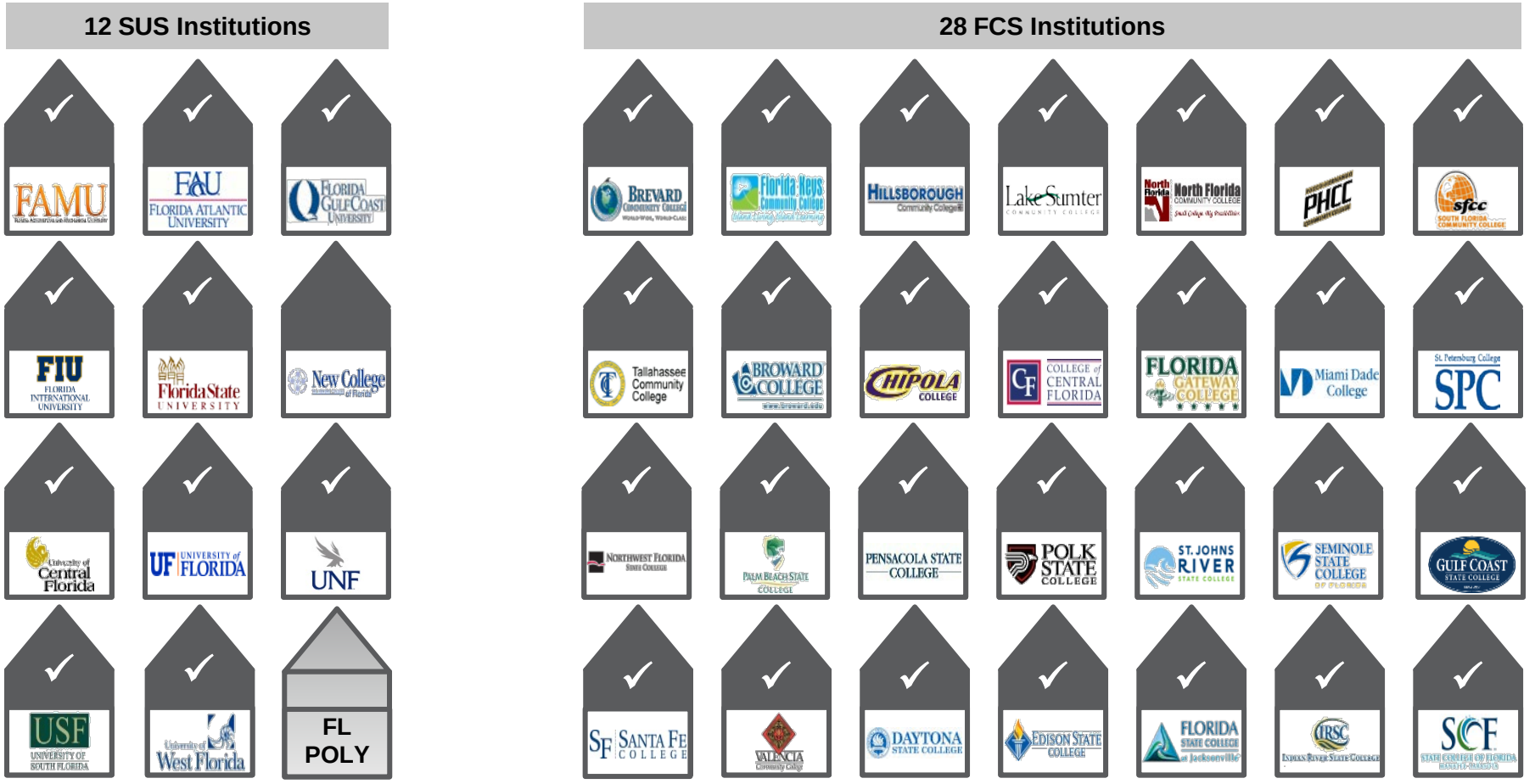
Institutions are developing best practices in online post-secondary education, with a focus on high quality program development, delivery and support

	Program Design	Marketing and Inquiry	Onboarding/ Student Support	Course Scheduling	Instruction	IT and Data Analytics
	How do best practices in online learning help satisfy online objectives across the value chain?					
Expanding Access	Students can access a portfolio of offerings	State, regional, and national marketing efforts to ensure coverage of all target students	Multi-modal support services (in-person, online, phone), responsive 24/7	Increased frequency of start dates offer greater flexibility to nontraditional students	Asynchronous and synchronous modalities	-
Reducing System and Student Costs	Studio space, technology, and faculty serve multiple institutions	Large-scale data-driven marketing that drives economies of scale	-	Coordinated scheduling that allows for optimization of student-teacher ratios	Greater instructor utilization possible	Early-warning systems tied to intervention to reduce attrition
Strengthening the Link Between the Labor Market and Post-Secondary Education	Industry collaboration on program offerings	Private partners utilized to target offerings to student segments with in-demand program offerings	Career service and job placement teams	-	-	Job placement tracking linked to other performance metrics
Enhancing the Student Experience	State of the art technology and best-in-class design teams serve multiple institutions	Private partners utilized to target offerings to student segments best matching student need	Data-driven at-risk identification and proactive intervention strategies Assigned success mentors and guidance counselors	Virtual campuses allowing students to leverage course offerings across a system Common course numbering	Embedded value-added digital learning solutions Leverage star faculty	Dedicated analytics teams tracking real-time student performance Common LMS and student information system

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Objectives for Online Learning

These activities are currently being developed independently across the 38 institutions that offer online courses



Each institution within the SUS and FCS with an online program (✓) has an independent online strategy, with its own marketing, course design, instruction, support services, and IT capabilities

24

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Source: FLVC

Agenda

Objectives for Online Learning

Strategies for Consideration

Strategies for Consideration

Florida could consider four strategies to drive the development and expansion of high quality new program offerings

1 Institution by Institution	2 Institutional Collaboration	3 Lead Institution(s)	4 New Online Institution
Description:			
• Institutions develop online offerings on their own, driving innovation in a way that best fits each school's mission	• System-wide online degree program offerings are developed under the direction of a coordinating body (e.g., FLVC, BoG, FL DOE)	• One (or a few) institution(s) is selected by RFP process to drive the development of new online offerings in target degree levels and disciplines	• An online institution is launched to drive portfolio expansion of lower cost models
How it Works:			
• Institutions continue to independently drive online innovation through new course and program development and/or adjustments to existing offerings • State defines broad parameters for innovation and achievement	• Centralized marketing, onboarding/ support services, and data analytics are each either managed by the central body or one of the participating institutions • Program-level RFPs are issued to institutions for program development • Program instruction and scheduling is coordinated by the institution that develops the program • All institutions continue with existing strategies	• Lead institution(s): – Designs the programs – Drives marketing, onboarding/student support, course scheduling, and data analytics – Delivers instruction • Lead institution(s), on its own or with partners, must be able to serve both the university-level and college-level target students • All institutions continue with existing strategies	• New online institution: – Designs the programs – Drives marketing, onboarding/ student support, course scheduling, and data analytics – Delivers instruction • New institution, on its own or with partners, must be able to serve both the university-level and college-level target students • All institutions continue existing online programs

Across all 4 strategies, programs will:

1. Increase student access to a **portfolio of offerings**
2. Be delivered at a **lower cost to the student** and/or the state
3. Align to **statewide labor force needs**
4. Ensure a **high quality student experience** for all students

26

Strategies for Consideration

Considered strategies could be evaluated for <u>each</u> type of online offering - the new, fully online degree programs are developed in detail in this section

		Target Students	Requirements for Success
Online/Hybrid Courses for Campus-Based Students		• Residential and commuter students • Can be campus-based or remote	• Coordination on degree program design and supplemental services to achieve best-in-class offerings, scale efficiencies and lower costs across the system
Fully Online Degree Programs	**Undergraduate Certificate/ Associate Degree Completion**	• Adults looking to enhance their employment prospects or transition professions	• Incoming students have 20+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Bachelor Degree Completion	• Working adults looking to complete bachelor's degrees • Typically employed and/or with families	• Incoming students have 40+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Graduate Degree	• Employed working adults typically intending to remain in their current career field	• Self-directed study often possible and preferred • Highly aligned with labor market needs
Self-Directed Courses (MOOC-Inspired)		• Wide age range of students (e.g., high school, college, adult) seeking to accelerate credit accumulation at a very low cost • Self-directed students, needing no instructor contact	• Quality evaluation frameworks and testing policies to allow for awarding of credits

Source: Babson Survey Research Group; Parthenon Online Survey; Peterson's Database

Strategies for Consideration

Strategy 1: Institutions develop online programs of their own accord, driving innovation in a way that best fits each school's mission

1

Benefits:
- Allows institutions to drive their own online strategy in accordance with their missions
- Fosters local innovation

Potential Drawbacks:
- Economies of scale and best-in-class processes are harder to achieve consistently if they are developed by each institution
- Lack of centralized or coordinated program aligned to changing needs of state labor markets

Role of FLVC	Legislative Considerations	Accreditation Considerations	Admission Approach
• Institutions would list all online course offerings through the FLVC • FLVC would continue to provide analytical support for students to track progress toward requirements/degree	• Changes to statute would be required if regulations regarding FLVC course listing were to be adjusted • Changes to statute would be required if tuition requirements for out-of-state students were to be relaxed	• Individual institutions demonstrate program equivalency according to SACS guidelines	• Individual institutions maintain existing admissions selectivity and focus

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Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategies for Consideration

Strategy 2: Coordinating body (e.g., FLVC/BoG/FL DoE) coordinates development of complementary course and degree program offerings across the system

2

Benefits:
- Reduced duplication of efforts across institutions
- Ability for all students to benefit from the same high quality processes and offerings
- Inclusive but coordinated: many institutions can be selected to participate

Potential Drawbacks:
- No clear "owner" of the results
- Greater political will needed to sustain innovation
- Difficult to make adjustments to processes quickly with multiple stakeholders involved

Role of FLVC

- If used as the coordinating body, the FLVC would be given the authority and budget to manage new online model development across the system(s)

Legislative Considerations

- Detailed statutory language creating the FLVC already exists, which would be updated to reflect additional budget and authority
- FLVC already receives state appropriations, which would potentially need to be increased
- Changes to statute would be required if tuition requirements for out-of-state students were to be relaxed

Accreditation Considerations

- Individual institutions demonstrate program equivalency according to SACS requirements
- Central delivery of student supports may require SACS approval

Admission Approach

- Individual institutions maintain existing admissions selectivity and focus
- Coordinating body ensures that expanded access is provided across new programs
- To ensure program access for a diverse student base, partnerships would need to be developed with other institutions where needed

29

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Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategies for Consideration

Strategy 3: Lead institution(s) develops and offers new models across the system

3

Benefits:
- Scale efficiencies can be developed
- There is a designated “owner” of the strategy in the lead institution
- Existing brand strengths can be leveraged

Potential Drawbacks:
- Participation of non-selected institutions could be limited
- Innovation is potentially stifled through focus on one institution instead of many
- Initially contentious option politically

Role of FLVC	Legislative Considerations	Accreditation Considerations	Admission Approach
• Courses offered by the lead institution can be shared with other students and institutions through the FLVC	• Legislation would be required to create and fund a performance grant • New state appropriation would be required • Changes to statute would be required if tuition requirements for out-of-state students were to be relaxed	• Few accreditation limitations, as lead institution would operate within the boundaries of existing accreditation • Lead institution demonstrates program equivalency according to SACS guidelines	• To ensure program access for a diverse student base, partnerships could be developed with other institutions, if needed

30

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Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategy 4: New online institution is created to focus exclusively on the development of new models

Benefits:
- Fewer institutional barriers to developing new models and processes
- Ability to design and implement best practices from the start
- Systems and infrastructure designed specifically for the online student

Potential Drawbacks:
- Lacks the brand equity of an existing institution
- Complexity and cost of creating new institution
- Initially contentious option politically

Role of FLVC	Legislative Considerations	Accreditation Considerations	Admission Approach
• Courses offered by the new institution can be shared with other students and institutions through the FLVC	• Extensive legislation will be required to create and delineate the mission and responsibilities of a new institution • New state appropriation would be required • Changes to statute would be required if tuition requirements for out-of-state students were to be relaxed	• New institutions will require a lengthy accreditation process • SACS timeline anticipates 3-4 years from naming of a president to full accreditation	• To ensure program access for a diverse student base, partnerships would need to be developed with other institutions where needed

Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategies for Consideration

Partners could be considered across all four strategic options

Private Providers	Description of Services
Online Enablers	• Provide expertise in areas where an institution or system may lack a core competency (e.g., marketing, support services, data tracking) • Can help defray start-up costs and ongoing capital required; flat fee or revenue share is the typical business model
Competency Program Providers	• Provide a lower-tuition postsecondary alternative, typically to degree completers and working adults • Partnership could speed learning curve of the internal development and execution of competency programs
Other Program Providers	• Provide labor-focused, flexible (e.g., more start dates, modularized) course offerings • Can defray development costs; revenue share model would likely need to be developed
Marketing Services Providers	• Provide expertise in outsourced marketing services (e.g., SEO, web marketing, TV, etc.), which is typically not a core competency of public institutions • Flat fee or revenue share is the typical business model
Testing Providers	• Provide proctored examination facilities; can also partner to develop tests • Can defray the cost of developing a more comprehensive exam proctoring operation; given testing providers' scale, they could likely offer the exam at a lower cost to the student

Strategies for Consideration

System expenditures are driven by three factors: start-up investment, recurring cost of educating students and number of students reached

Start-Up Expenditure + (Recurring Expenditure x System Volume) = System Expenditure On Educational Attainment

Start-Up Expenditures	Recurring Expenditures per FTE	System Volume *(Enrollments, Persistence, Completions)*
• Initial investment is needed to develop new educational offerings • Areas of investment include: – Physical Infrastructure – Technological Infrastructure – Brand Recognition – Program Design	• Recurring expenditures vary across different educational models and degree types • These expenditures can be broken into four primary categories: – Instructional Costs – Academic Support Services – Student Support Services – Institutional Support Services	• Educational expenditure is highly variable on FTE enrollment • FTE enrollment is dependent on: – Newly Admitted Student Rates – Persistence – Time to Completion – Degree Mix *New Admits x Persistence ^ Time to Complete = Completions*

System Expenditure on Educational Attainment

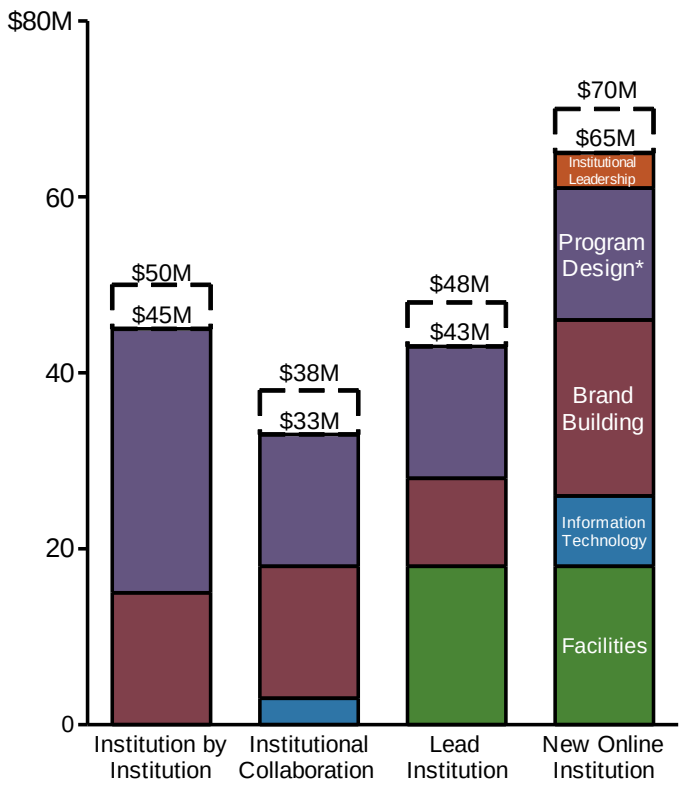
33

Strategies for Consideration

Strategies will necessitate levels of initial investment ranging from ~$30-70M

Start-Up Expenditure
Recurring Expenditure
System Volume
System Expenditure

Start-Up Expenditures Associated with Each Approach to Online Expansion



	1 Institution by Institution	2 Institutional Collaboration	3 Lead Institution(s)	4 New Online Institution
Facilities	None	None	New building ($18M)	New building ($18M)
IT	None	Expand SIS ($3M)	None	New LMS/ERP/SIS ($8M)
Brand Building	Existing brand, reduced marketing effectiveness ($15M)	Existing brand, reduced marketing effectiveness ($15M)	Existing brand ($10M)	New brand ($20M)
Program Design*	100 degree programs created across multiple institutions ($30M)	50 degree programs created ($15M)	50 degree programs created ($15M)	50 degree programs created ($15M)
New Institutional Leadership	None	None	None	Institution President and 10-15 staff ($4M)

* Program design will take place over the 10 year time period

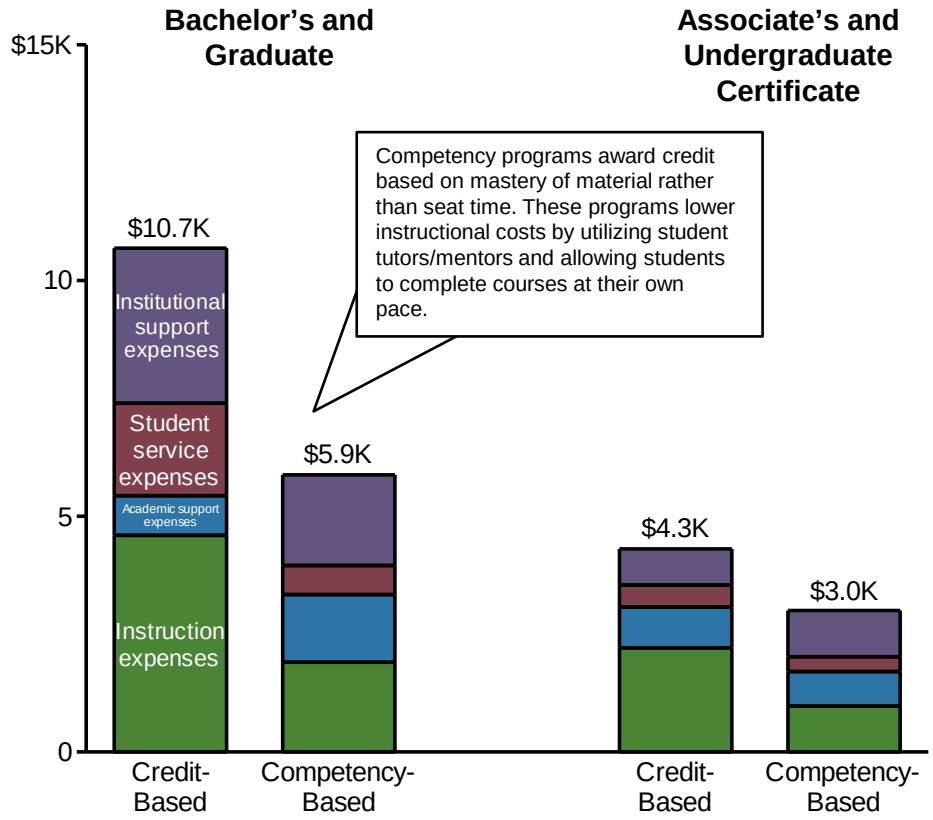
Note: Dotted lines represent range of total start-up expenditure; Facility needs benchmarked off of WGU infrastructure needs; Technology assumes: $5M for LMS (learning management system), $2M for ERP (enterprise resource planning), $1M for SIS (student information system), benchmarked off of multiple institution interviews; Brand building benchmarked off of SNHU's $15M brand building initiative and WGU's brand building spend when entering Texas, Indiana and Washington; Program design assumes $10K per course and an average of 30 unique courses per program; Institutional leadership becomes a recurring cost as FTEs begin to enroll

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July-November 2012

Strategies for Consideration

Recurring expenditures are benchmarked by degree level and program type against national best practices

Benchmarks for Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



	Credit-Based	Competency-Based	Credit-Based	Competency-Based
Student to Faculty Ratio	18:1	30:1	39:1	N/A

Expense Drivers

Instruction Expenses

- Primarily driven by class size and teacher utilization
- Professors are primarily non-research; Vast majority of their hours are spent teaching

Academic Support Expenses

- Driven by program and curriculum design as well as technology costs such as studio space, program design technology, scheduling technology, training and support for faculty and instructional design staff
- Tend to increase as instructional contact decreases to balance the supports provided to students

Student Service Expenses

- Includes expenses related to admissions, registration and general help, such as onboarding counselors for students, long term counselors through to completion, student mentors, career services, job placement counselors and 24/7 technology help desks for students
- Low cost models utilize centralized business processes at scale to reduce cost associated with these services

Institutional Support Expenses

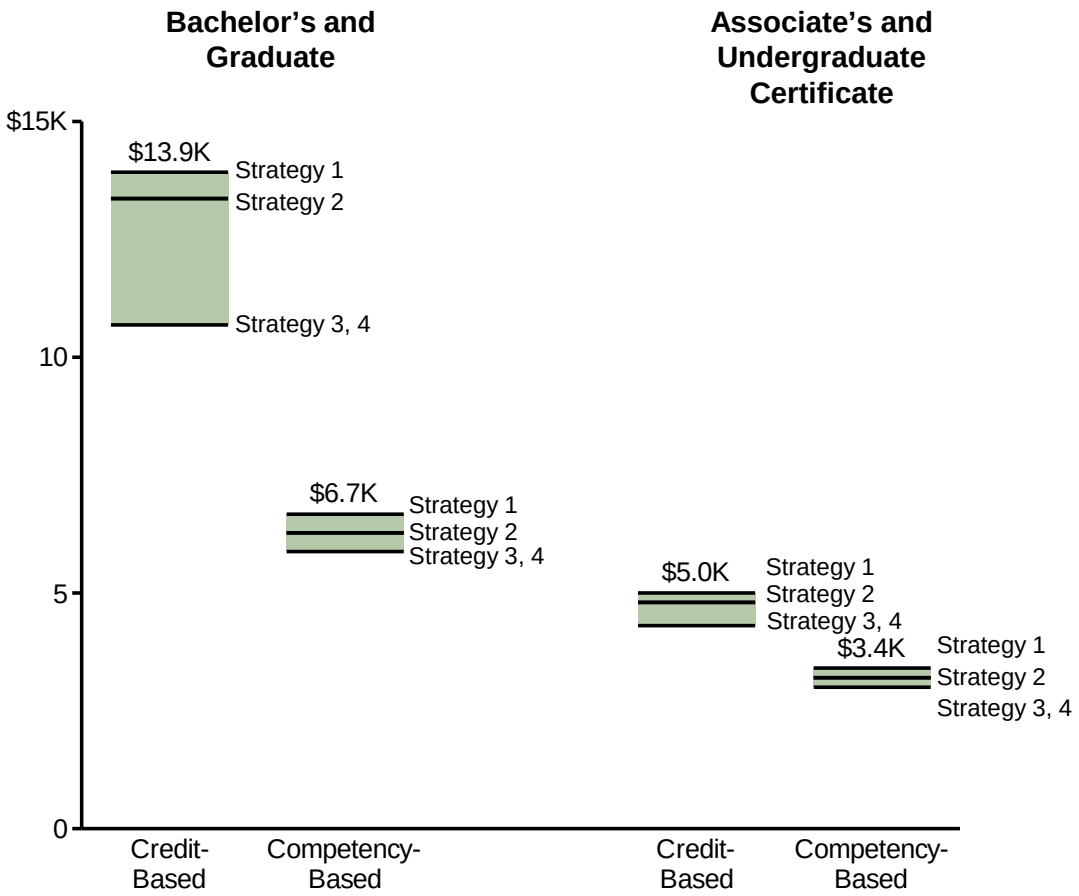
- Primarily driven by marketing and admissions costs
- Include general administrative expenses, such as partnerships with industry groups to better understand and adapt to labor market needs
- Robust data systems and dedicated staff to track student performance metrics, feeding information in real-time to counselors and other support staff
- Low-cost models utilize centralized business processes at scale to reduce cost associated with these services

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategies for Consideration

Recurring expenditures per FTE vary across models due to structural efficiencies

Recurring Expenditures per FTE for Online Instruction, by Strategy, Program and Degree Type



Recurring Expenditure Drivers

1 Institution by Institution

- Duplicative processes result in inefficiencies across support services provided to new fully-online students

2 Institutional Collaboration

- Instructional models move towards best practices, but coordination difficulties across participating institutions prevent institutions from matching best practice cost structures

3 Lead Institution

- Centralized processes allow the system to eliminate inefficiencies, achieve scale and match best-in-class support service cost structures

4 New Online Institution

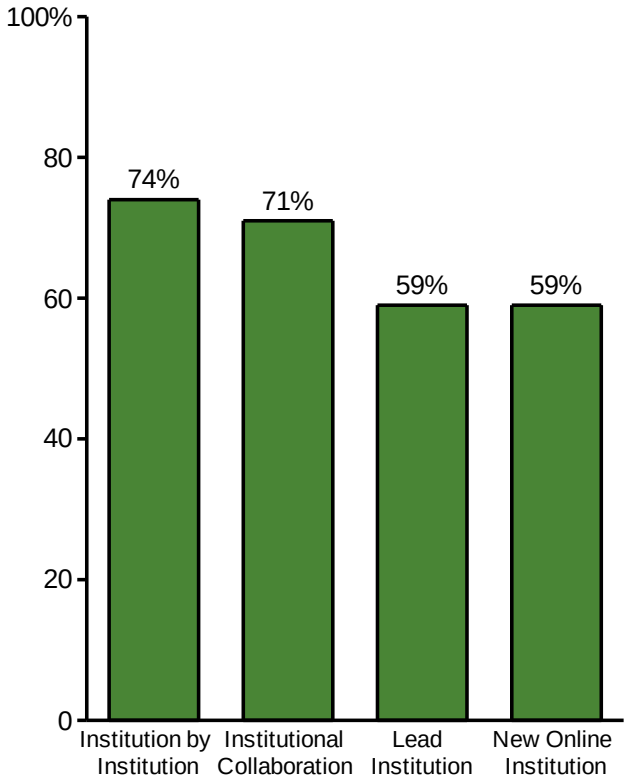
- Centralized processes allow the system to eliminate inefficiencies, achieve scale and match best-in-class support service cost structures

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

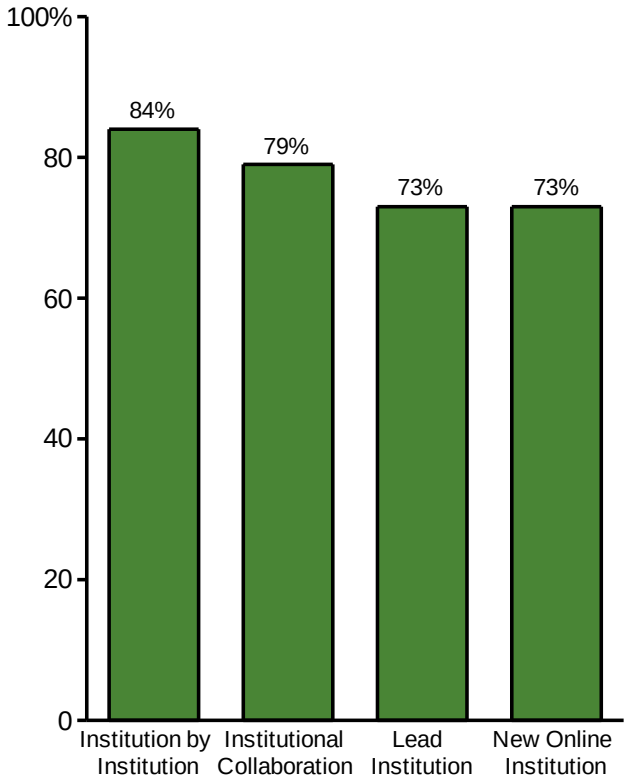
Strategies for Consideration

Recurring online expenditures per FTE will be lower and will vary across degree levels

Recurring Online Expenditures per FTE as a Percent of Current SUS Expenditures per FTE: Bachelor's and Graduate



Recurring Online Expenditures per FTE as a Percent of Current FCS Expenditures per FTE: Associate's and Undergraduate Certificate



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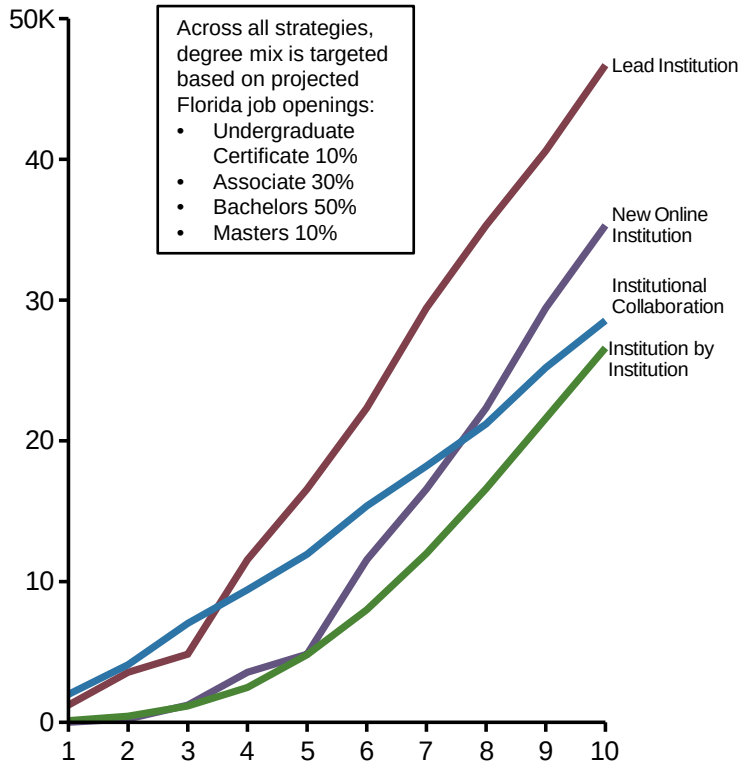
Note: Recurring online expenditures per FTE is based on the average of the recurring costs per FTE for credit-based and competency-based programs; Current expenditure per FTE is equal to $13.9K for SUS and $5.0K for FCS
Source: 10 Year Financial Model; IPEDS; FL DOE

Strategies for Consideration

Newly admitted student growth varies with brand strength, marketing effectiveness and the speed of program design

Newly Admitted Online Students, by Potential Model



Newly Admitted Student Drivers

1 Institution by Institution

- Newly admitted student growth is dependent on institutional adoption of programs
  - Assume 200 programs added gradually over 10 years
  - Assume 250 students enrolled in a mature program
  - Assume degree programs take 5 years to reach maturity

2 Institutional Collaboration

- Program growth is slowed as institutions attempt to coordinate ownership

3 Lead Institution

- Leverages existing brand to recruit new students
- Efficient centralized processes drive newly admitted student growth in line with benchmarked fully online institutions

4 New Online Institution

- New student growth is initially slowed as infrastructure is built and accreditation is gained
- New brand needs to be built and heavily marketed, but eventually this marketing will be consolidated efficiently in a single entity

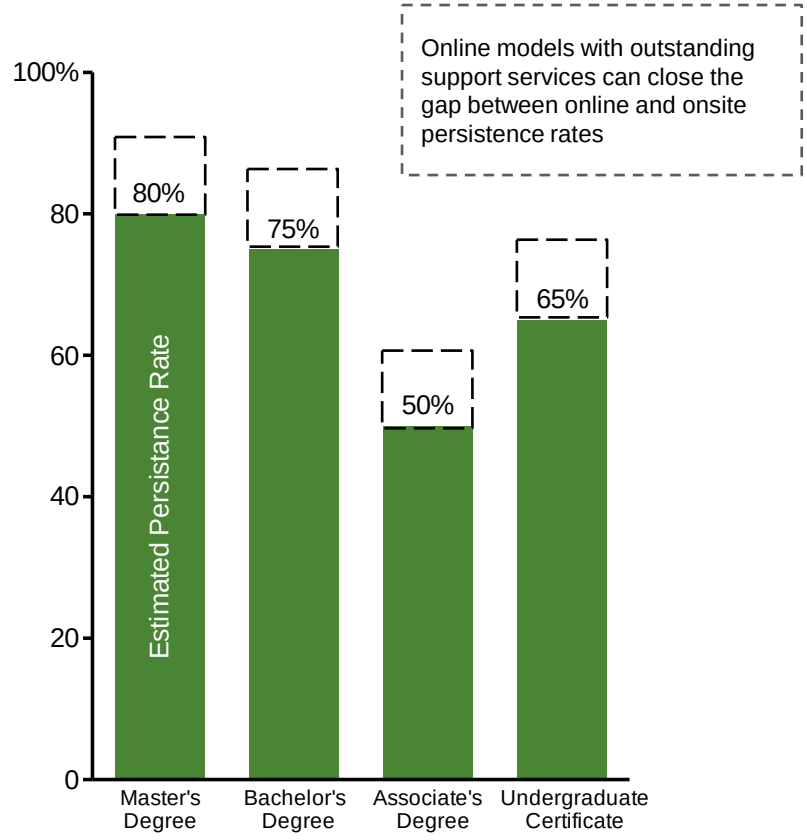
38

Source: IPEDS; Parthenon Persistence Study; BLS

Strategies for Consideration

Differences in persistence rates alter system volume and the cost of producing successful educational outcomes

Estimated One Year Persistence Rate for Fully Online Programs by Degree Level



	Master's Degree	Bachelor's Degree	Associate's Degree	Undergraduate Certificate
Estimated Online Graduation Rate	65%	42%	25%	65%

Persistence Benchmarks

Nationally, persistence rates vary by degree and modality, trending ~10% lower online than onsite

Master's Degree

- Persistence rates are highest in graduate programs due to the advanced nature of graduate students

Bachelor's Degree

- Across the SUS fully online undergraduate students persist at 75%

Associate's Degree

- On average FCS students persist at 60%. Fully online student persistence rates are assumed to be ~10% lower based on national trends

Undergraduate Certificate

- Persistence rates in undergraduate certificate programs are substantially higher than Associate persistence rates due to the short duration of the program

Note: SUS data used to estimate persistence rates for fully online Bachelor's degree programs; IPEDS retention rates and FCS graduation rate data used to estimate persistence rates for fully online Associate's degree programs; Parthenon's national persistence study used to estimate persistence rates for fully online master's degree and undergraduate certificate programs; Estimated Online Graduation Rate is for Year1
Source: IPEDS; Parthenon Persistence Study; SUS Board of Governors; FL DOE

Strategies for Consideration

Models with outstanding support services can close the modality gap in persistence rates

- Differing support services structures across strategies drive different levels of persistence rate improvements
- Time to completion is held constant across models and takes into account transfer credits and percent of competency-based classes taken

Persistence Drivers

1. **Institution by Institution**
   - Maintaining the current structure results in persistence outcomes in line with the current state
2. **Institutional Collaboration**
   - Sharing of best practices across institutions improves online persistence rates gradually
3. **Lead Institution**
   - Efficient centralized best-in-class processes drive online persistence rates in-line with onsite persistence rates
4. **New Online Institution**
   - Sole focus on online programs and efficient processes drive online persistence rates in-line with onsite persistence rates

Time to Completion Drivers

Transfer Credits

- Fully online programs target degree completers. It is assumed average students begin with transfer credits:
  - Associate's: 20 credits
  - Bachelor's: 40 credits

Program Mix

- Competency-based programs allow students to complete credits at their own pace, potentially lowering the time needed to acquire a degree
  - 50% Competency-Based
  - 50% Credit-Based

Time to Completion

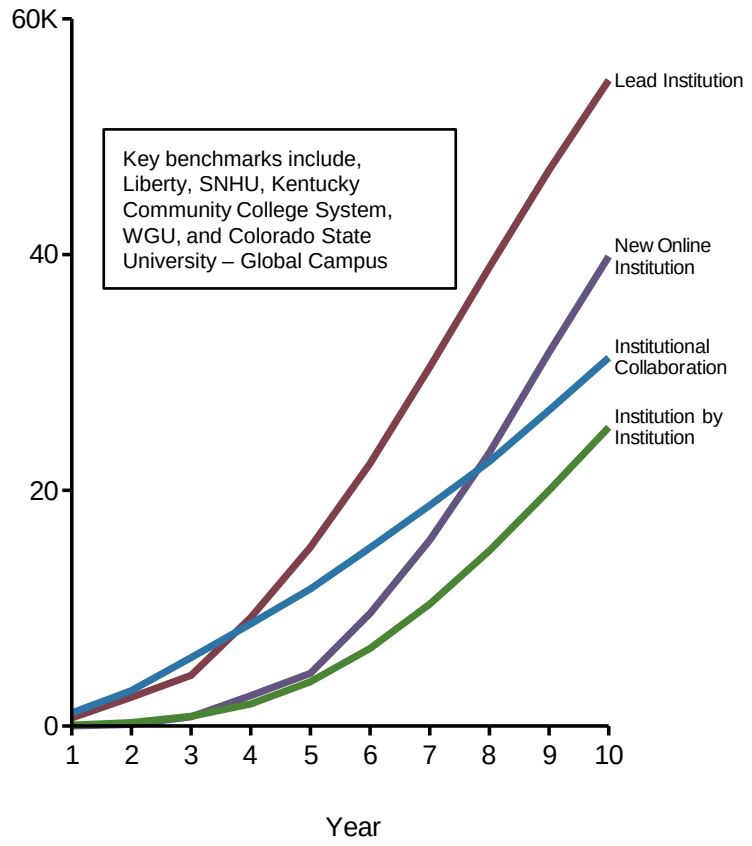
- High levels of transfer credits and adoption of self-paced competency programs result in reduced time to completion:
  - Undergraduate Certificate: 1 Year
  - Associate's: 2 Years
  - Bachelor's: 3 Years
  - Master's: 2 Years

Source: IPEDS; Parthenon Persistence Study; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012; College Board Completion Arch

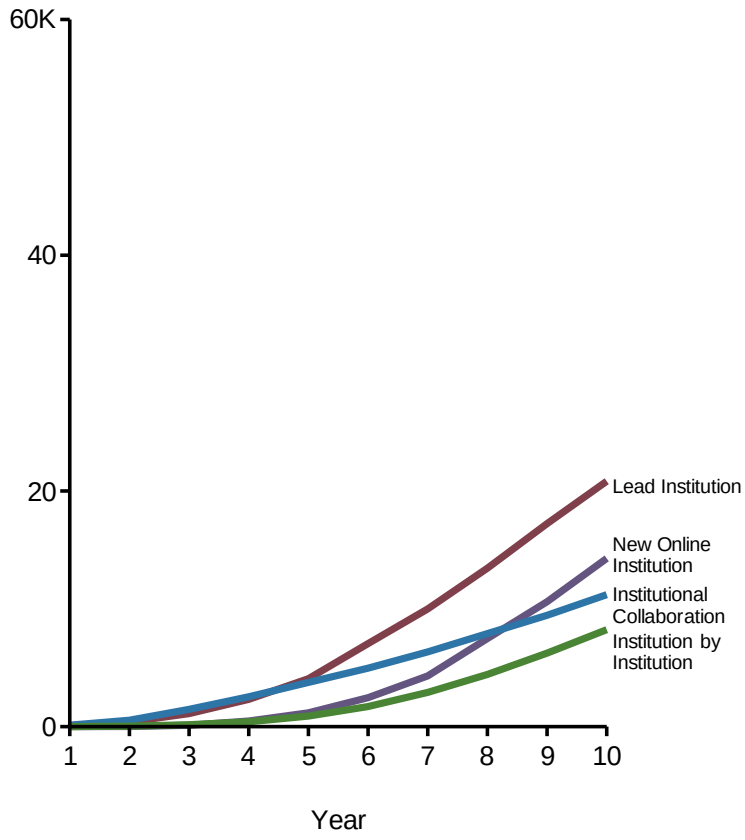
Strategies for Consideration

Differing newly admitted student and persistence rates result in varied enrollment and completion volumes

FTE Enrollments by Potential Model



Completions by Potential Model



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Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012; 10 Year Financial Model

Strategies for Consideration

Effectiveness of educational investment is measured by students served and cost of successful outcomes

Start-Up Expenditure
Recurring Expenditure
System Volume
System Expenditure

	1 Institution by Institution	2 Institutional Collaboration	3 Lead Institution(s)	4 New Online Institution
Total Completions (Over 10 Years)	25K	48K	77K	41K
Total Expenditure (Over 10 Years)	$0.9B	$1.4B	$1.9B	$1.1B

Expenditure Per Completion = Expenditure per Credit x (Credits Needed / Graduation Rate)

Example

Expenditure per BA Credit (in Year 10)	$416	$395	$332	$335
Graduation Rate (in Year 10)	42%	49%	57%	57%
Expenditure per BA Completion (in Year 10)	$79K	$64K	$47K	$47K

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Note: Expenditure per credit is calculated by dividing expenditure per FTE by 30 credits; Expenditure per completion assumes students are enrolling with 40 credits and need 120 to completes; Expenditures include instruction, academic support, student support, and institutional support expenditures
Source: 10 Year Financial Model

Strategies for Consideration

Across strategies under consideration, self-directed courses provide a unique opportunity for innovation for Florida

		Target Students	Requirements for Success
Online/Hybrid Courses for Campus-Based Students		• Residential and commuter students • Can be campus-based or remote	• Coordination on degree program design and supplemental services to achieve best-in-class offerings, scale efficiencies and lower costs across the system
Fully Online Degree Programs	Undergraduate Certificate / Associate Degree Completion	• Adults looking to enhance their employment prospects or transition professions	• Incoming students have 20+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Bachelor Degree Completion	• Working adults looking to complete bachelors degrees • Typically employed and/or with families	• Incoming students have 40+ credits • Continuous starts, competency options • Highly aligned with labor market needs
	Graduate Degree	• Employed working adults typically intending to remain in their current career field	• Self-directed study often possible and preferred • Highly aligned with labor market needs
Self-Directed Courses (MOOC-Inspired)		• Wide age range of students (e.g., high school through adult) seeking to accelerate credit accumulation at a very low cost • Self-directed students, who require no instructor contact	• Quality evaluation frameworks and testing policies to allow for awarding of credits

Source: Babson Survey Research Group; Parthenon Online Survey; Peterson's Database

Strategies for Consideration

MOOCs are the most common example of this kind of innovation in self-directed courses…

What is a MOOC (Massively Open Online Course)?

- Free course with open online access typically not offered for credit
- Institutions throughout the US are posting MOOCs through organizations such as Udacity, Coursera, and edX

How are MOOCs evolving?

- Colorado State University's Global Campus recently announced that it would grant transfer credits to students who passed a proctored Udacity computer science exam
- The UT system is seeking to develop MOOCs and offer proctored exams for credit to provide lower-tuition alternatives for students and to overcome the hurdle of students being "locked out" of oversubscribed courses

What is the Florida opportunity?

- Florida's statewide common course numbering system would allow MOOCs developed within the FCS/SUS to be used by students across the state
- Proctored exams would need to be established for these courses
- MOOCs could provide students with a lower-tuition offering; it may also attract students looking to accelerate their studies

How should expectations be tempered?

- Student demand for proctored MOOCs has not yet been established

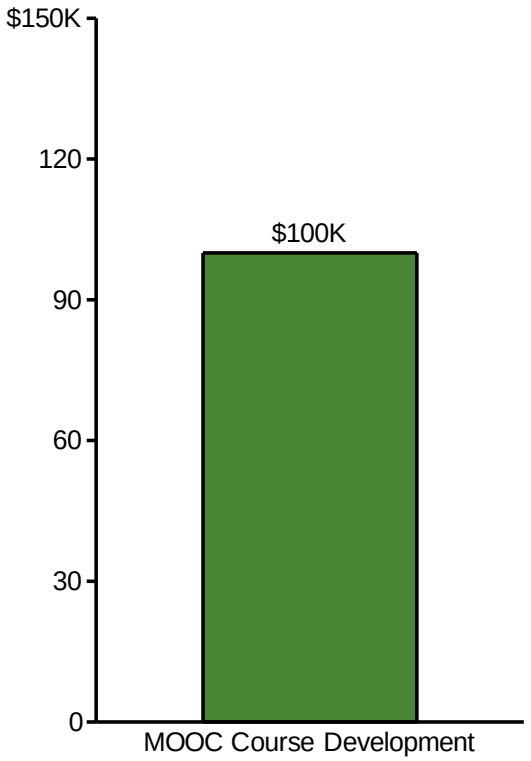
44

Source: Inside Higher Ed; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July-November 2012

Strategies for Consideration

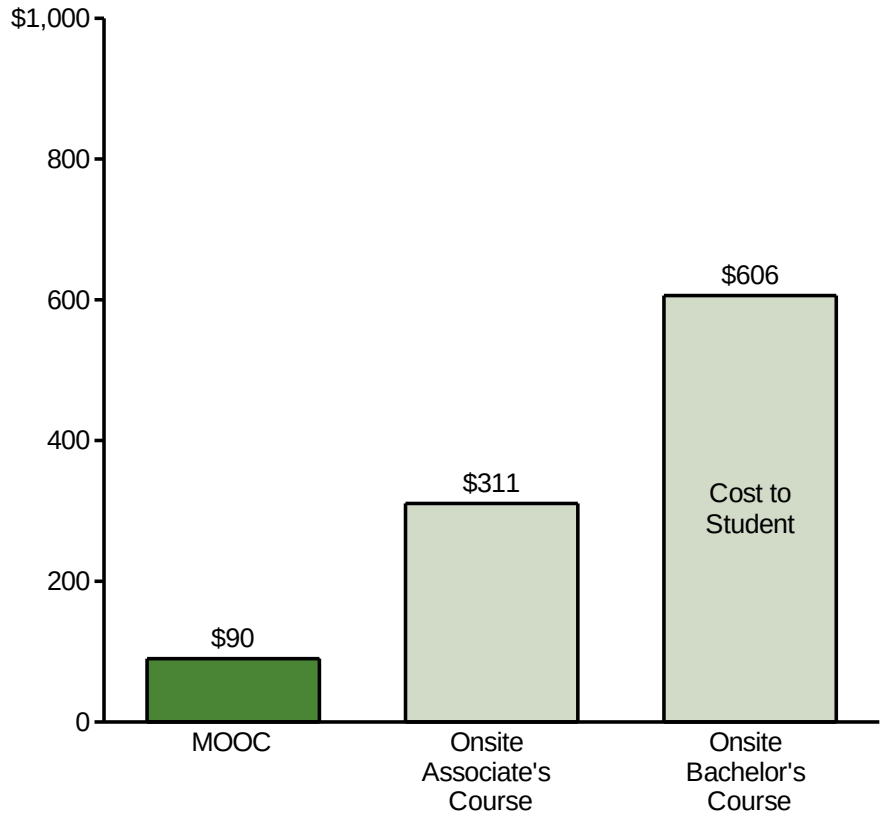
…with potential for significant cost savings to the student and to the state

Approximate Expenditure to Create One Proctored MOOC (For Course and Test Development)



15 Courses	$1.5M

Per Course Expenditure for Student: MOOC and Traditional



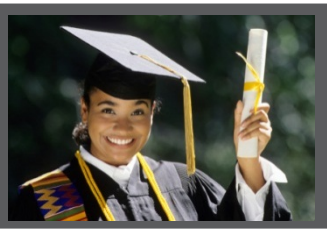
Student Savings per Course	$221	$516

Note: The cost of developing a MOOC depends on factors such as course topic, type of test administration (continuous vs. fixed administration), test format (number of open responses that must be evaluated) and security measures (number of versions of the test and type of surveillance of the test); Associate's course cost is estimated based on average tuition and fees across FCS institutions for in-state students pursuing an associate's degree; Bachelor's course cost is estimated based on average tuition and fees across SUS institutions for in-state undergraduate students

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012; School websites; SUS Board of Governors

Strategies for Consideration

A portfolio of offerings will allow different students to make choices that best meet their needs

				
	Diane graduates high school with straight A's and enrolls in a state university. She receives all of her credits onsite	**Sally** graduates high school and enrolls in a local state college. After two years she decides to pursue a Bachelor's degree and transfers to a state university where she takes the majority her credits onsite, but elects to take two MOOCs to limit the debt she is taking on	**John** enters the workforce fulltime after receiving an A.S. degree from a state college. Two years into his professional life he realizes that he needs a B.S. degree to be eligible for promotion and enrolls part time in a fully online B.S. program. John takes a number of competency based courses allowing him to complete his degree faster and takes MOOCs to limit the cost	**Wendy** enrolls in a state college after high school, but drops out after a year due to family circumstances. Without a degree she struggles to find a job and decides to complete her degree. Concerned about the high cost of college she enrolls in two MOOCs to see if she can balance academic and familial responsibilities. After successfully passing her MOOC exams, Wendy rededicates herself to school, enrolls in a fully online B.A. degree program and graduates cum laude.
Credit Accumulation by Program Type				
Florida College System	-	60	60	30
State University System	120	54	-	-
Online A.S. Credit-Based	-	-	-	-
Online A.S. Competency-Based	-	-	-	30
Online B.A./B.S. Credit-Based	-	-	30	30
Online B.A./B.S. Competency-Based	-	-	24	24
MOOCs	-	6	6	6
Total System Expenditure	**$56K**	**$35K**	**$25K**	**$23K**

46

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Note: MOOC recurring cost is assumed to be $0; One MOOC is assumed to be 3 credits; These stories are all fictional and do not represent real people
Source: iStockphoto.com;10 Year Financial Model

Strategies for Consideration

Strategies have been evaluated against online objectives as well as a range of other practical considerations

Most favorable strategies in each case will include the following:

Objectives For Online Learning

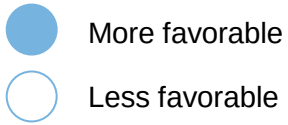
Expanding Access	• All population groups will be able to utilize online courses and degree programs to meet their education goals
Reducing System and Student Costs	• Start-up costs: initial investment will be recouped in shortest amount of time • Recurring costs: cost per FTE to the system will be greatly reduced over time
Strengthening the Link Between the Labor Market and Post-Secondary Education	• Online courses and degree programs will align to labor market needs and be informed by statewide labor councils and the Florida Department of Economic Opportunity
Enhancing the Student Experience	• Students across the state will be able to receive best-in-class online offerings and will achieve similar or better performance results to onsite students

Other Practical Considerations

Additional Accreditation Processes Required	• Impose the fewest accreditation hurdles
Degree of Implementation Difficulty	• Require the least amount of change from parties involved
Brand Strength	• Leverage strong brand names
Developing Best-in-Class Business Processes	• Facilitate the achievement of effective business processes at low cost
Start-Up Time Required	• Shortest time to enrollment of students in newly created programs

Strategies for Consideration

Prioritization of strategies may differ based on the prioritization of stakeholders and by type of online offering

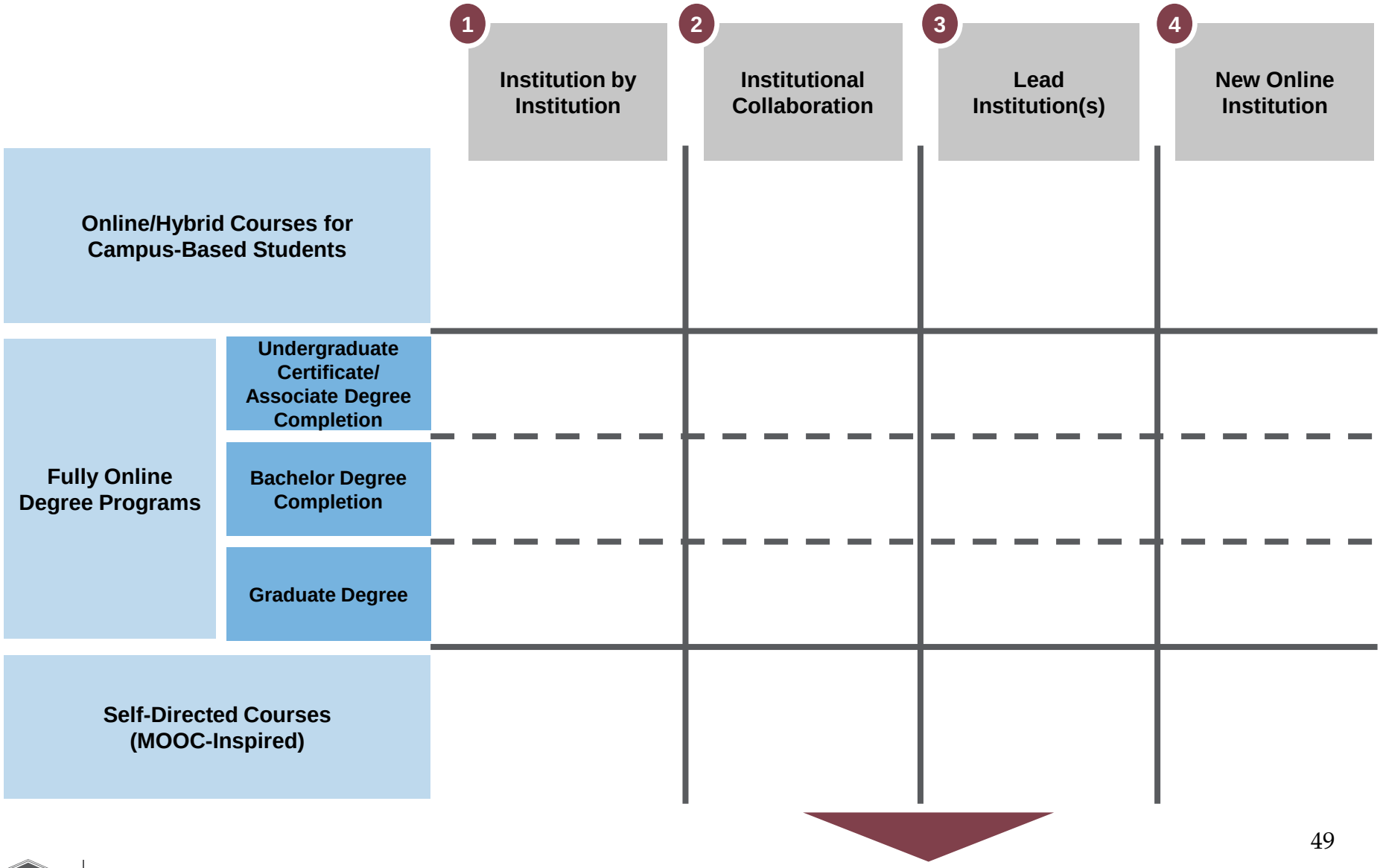


	Potential Considerations		1 Institution by Institution	2 Institutional Collaboration	3 Lead Institution	4 New Institution
Objectives For Online Learning	Expanding Access					
	Reducing System and Student Costs	Start-Up Costs				
		Recurring Costs				
	Strengthening the Link Between the Labor Market and Post-Secondary Education					
	Enhancing the Student Experience					
Other Practical Considerations	Additional Accreditation Processes Required					
	Degree of Implementation Difficulty					
	Brand Strength					
	Developing Best-in--Class Business Processes					
	Start-Up Time Required					

Stakeholder priorities should determine the relative weighting of these considerations

Strategies for Consideration

Worksheet: A matrix of approaches exist



A combination of strategies could be adopted to best meet student needs

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This report is being submitted to fulfill the requirements of RFP #2012-65

Detailed Fact-base: Post-Secondary Online Expansion in Florida

THE PARTHENON GROUP
Boston • London • Mumbai • San Francisco

November 16, 2012

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Strategy Detail

Strategy 1: Institutions develop online offerings of their own accord, driving innovation in a way that best fits each school's mission

1

Program Design	Marketing and Inquiry	Onboarding/ Student Support	Course Scheduling	Instruction	IT and Data Analytics
• Local faculty drive program identification and design • Institution-level best practices • Limited statewide coordination of labor-market needs	• Local marketing and lead generation • 40+ brands and value propositions state-wide	• Shares student services with onsite/hybrid • Limited experiential data-sets • Local career / job placement services	• Driven by faculty and classroom availability • Course availability and start dates driven by institutional calendar	• Shared online/onsite faculty • Class sizes similar to onsite	• Each institution chooses its own LMS, ERP, and SIS • Local data analytics • FLVC continues to manage statewide computer-assisted advising system

Each institution may choose to partner with other SUS/FCS institutions or a private partner

53

Note: LMS: Learning Management System; ERP: Enterprise Resource Planning; SIS: Student Information System
Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategy Detail

Strategy 2: Coordinating body (e.g., FLVC/BoG/FL DoE) coordinates development of complementary course and degree program offerings across the system

Program Design	Marketing and Inquiry	Onboarding/ Student Support	Course Scheduling	Instruction	IT and Data Analytics

Participating Institutions and/or Coordinating Body may choose to partner with a private partner

- Coordinated program offerings
- Individual institutions design courses within given parameters
- Coordination of labor-market needs through coordinating body or an institution

- Marketing and lead generation is coordinated centrally and executed by coordinating body or an institution
- Prospective candidates referred to institution admissions offices

- Student support is delivered centrally by coordinating body or an institution
- Job placement supports are developed by collaboration of institutions and delivered by coordinating body or an institution

- Centrally coordinated to maximize course utilization

- Instruction is delivered by individual institution professors and available state-wide

- Individual institutions use their own LMS, ERP, and SIS
- Central data analytics team (at coordinating body or an institution) provides analytic support to institutions

54

Note: LMS: Learning Management System; ERP: Enterprise Resource Planning; SIS: Student Information System
Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategy Detail

Strategy 3: Lead institution(s) develops and offers new models across the system

Program Design	Marketing and Inquiry	Onboarding/ Student Support	Course Scheduling	Instruction	IT and Data Analytics
• Lead institution(s) is selected through a competitive grant process to develop and deliver new online programs within grant parameters • Lead institution(s) may choose to partner with SUS/FCS, other institutions, or a private partner	• Lead institution markets state-wide • Enrollment management handled by lead institution	• Student supports are developed and coordinated at the lead institution or through a partner organization • Job placement supports are developed lead institution	• Coordinated by lead institution to meet parameters of grant	• Instruction could be delivered by the lead institution or through partner organization • Utilize current faculty and new teaching staff	• All data analytics are overseen by the lead institution

Lead institution may choose to partner with other SUS/FCS institutions and/or a private partner

55

Note: LMS: Learning Management System; ERP: Enterprise Resource Planning; SIS: Student Information System
Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategy Detail

Strategy 4: New online institution is created to focus exclusively on the development of new models

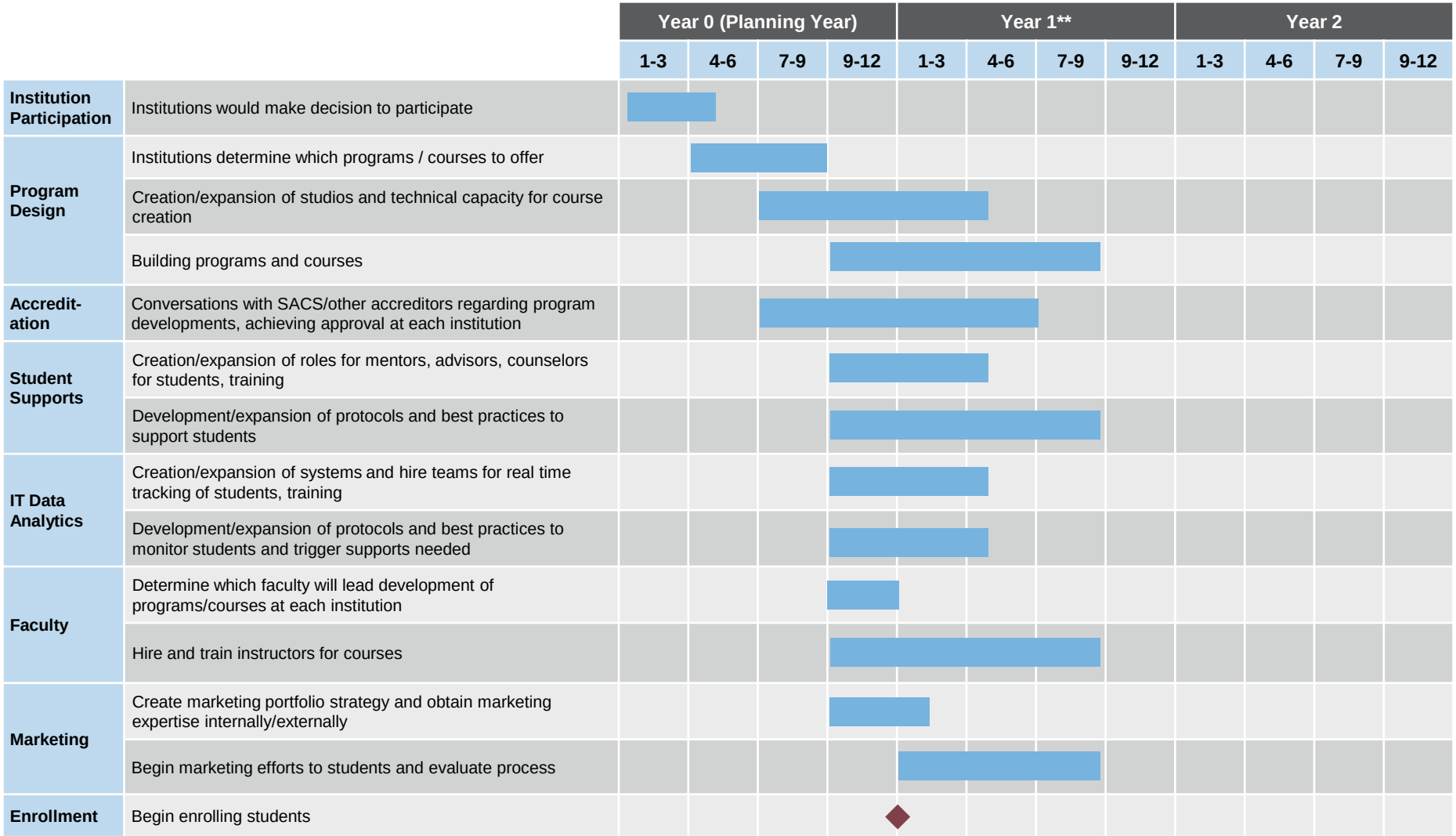
Program Design	Marketing and Inquiry	Onboarding/ Student Support	Course Scheduling	Instruction	IT and Data Analytics
• New online institution develops innovative programs to offer system-wide • Course development occurs at the new institution, coordinated with labor-market needs state-wide	• New brand created for Florida online institution • Inquiry and lead generation is coordinated by the new institution	• Utilize best practices of data-driven student support services	• Designed to meet needs of 100% online target student • Flexible starts • Synchronous and asynchronous content	• Non-research faculty deliver all online content	• Designed and built to meet the needs of the 100% online student

New online institution may choose to partner with other SUS/FCS institutions and/or a private partner

Note: LMS: Learning Management System; ERP: Enterprise Resource Planning; SIS: Student Information System
Source: Interviews with FLVC, SUS Board of Governors, SACS staff

Strategy Detail

Timeline – Strategy 1 Institution-by-Institution*



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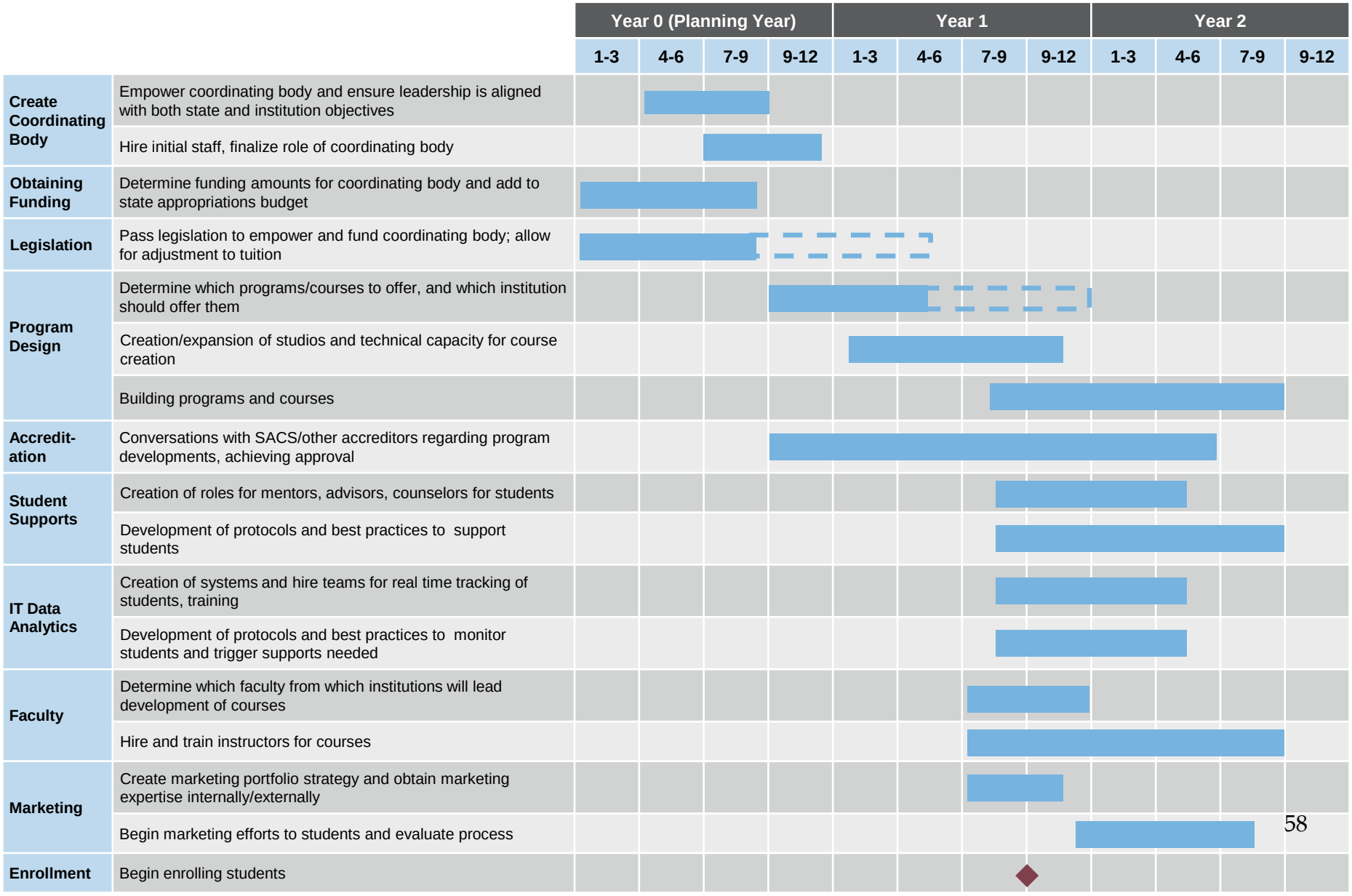
Note: *Timeline applies to one institution. In this model, institutions are continually deciding whether to participate
**Year 1 on all charts corresponds to year 1 on financial models
Northern Arizona University timeline benchmark of one year for development of new online degree programs

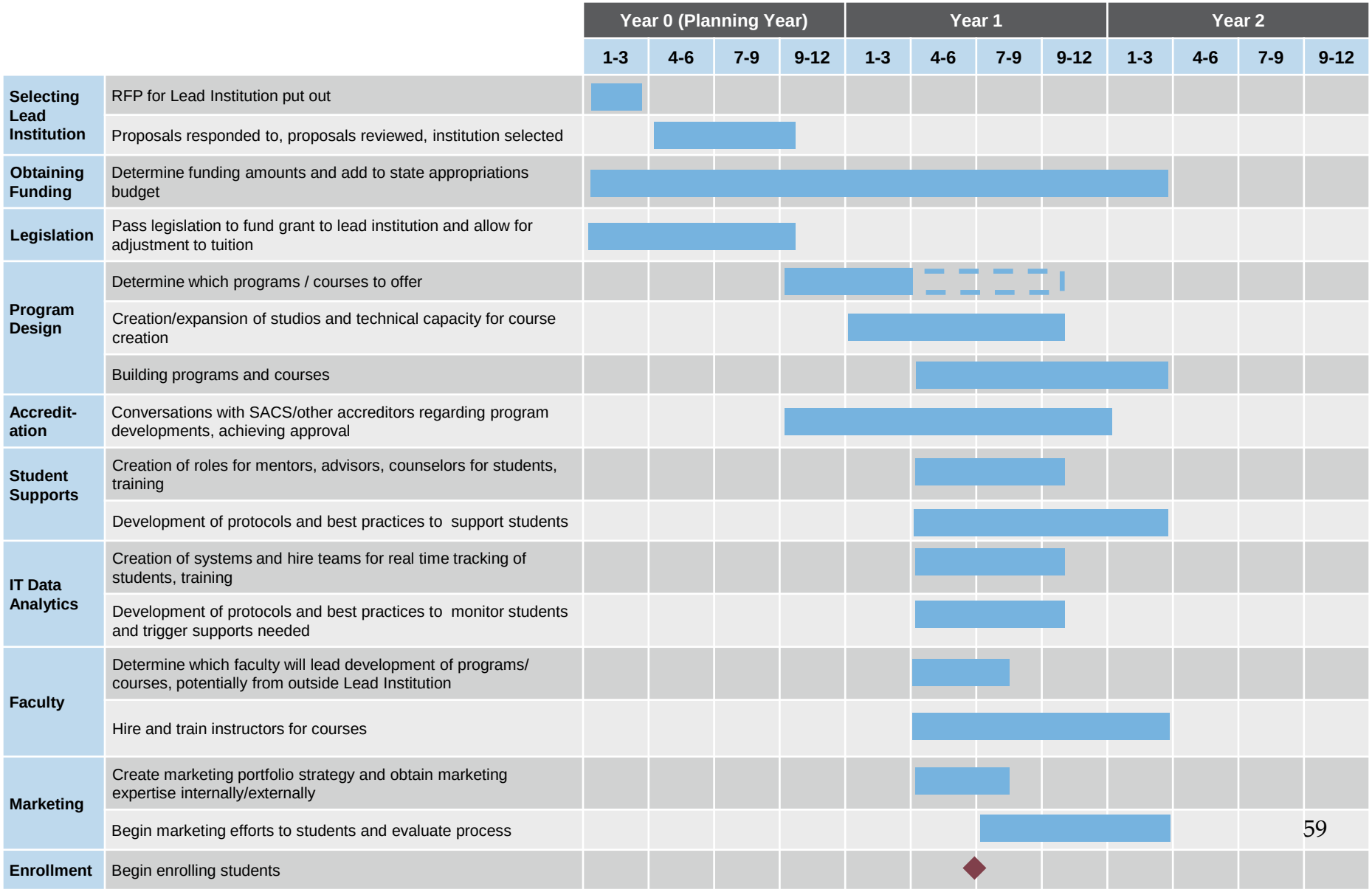
Strategy Detail

Timeline – Strategy 2 Institutional Coordination



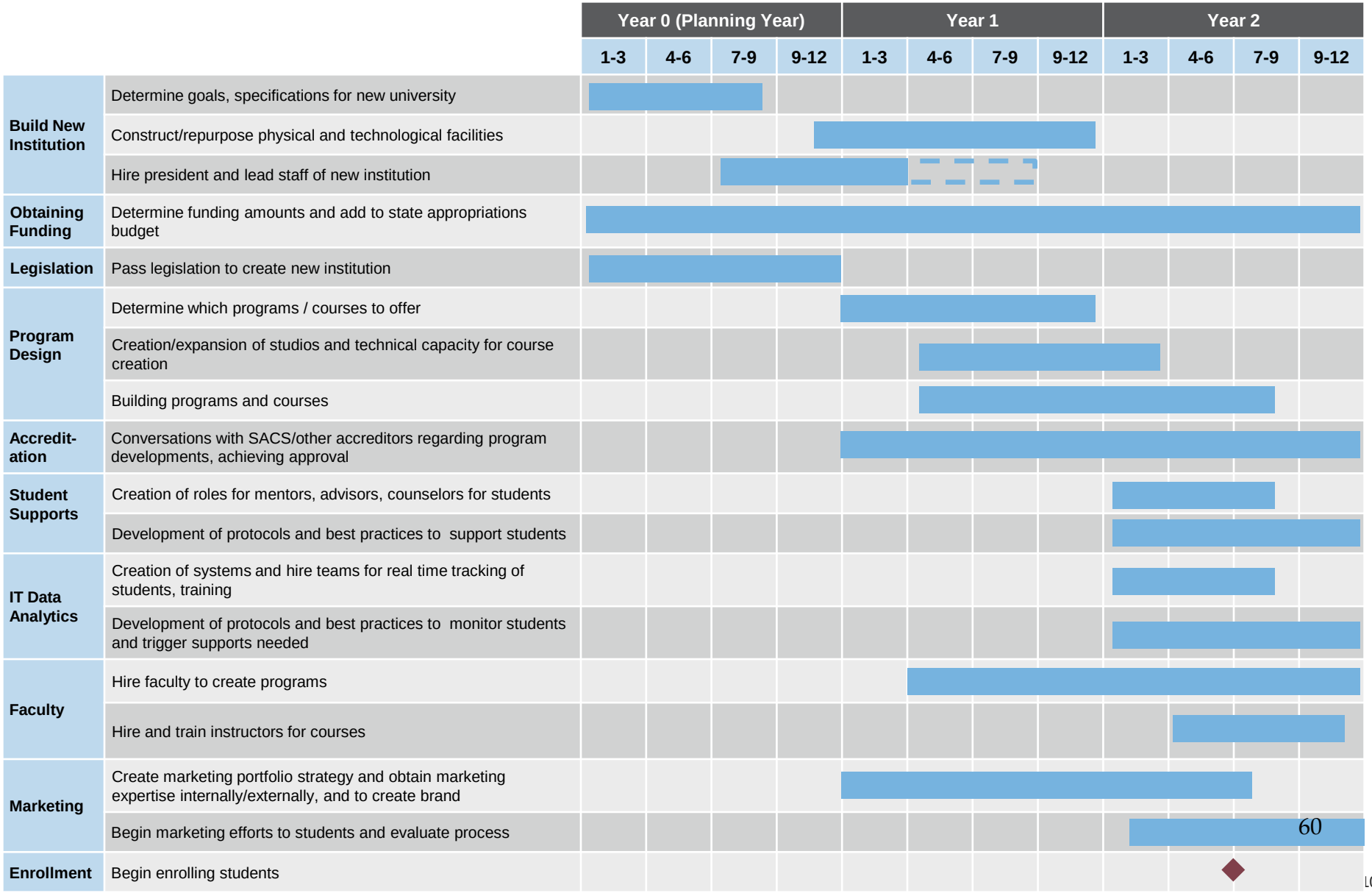
Strategy Detail

Timeline – Strategy 3 Lead Institution



Strategy Detail

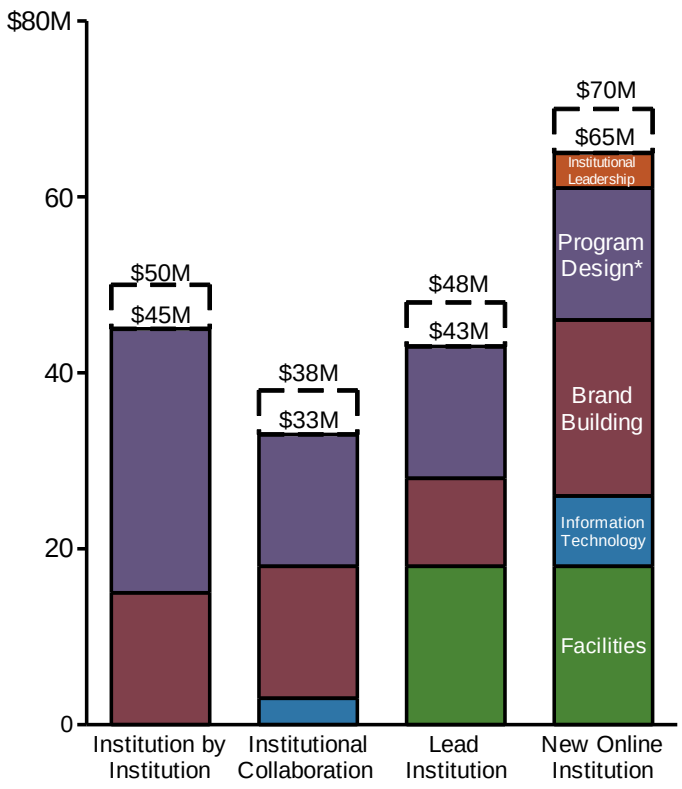
Timeline – Strategy 4 New Institution



Strategy Detail

Strategies will necessitate levels of initial investment ranging from ~$30-70M

Start-Up Expenditures Associated with Each Approach to Online Expansion



Benchmarks

Over the past 10 years, a number of online institutions have been started or built from existing institutions; Figures cited by these institutions about their initial investments inform this model

- **Overall:** WGU needed $40-$50M over the first four years of its existence for start-up related expenditure
- **Building:** WGU required a building for 400 student support professionals. Industry standards suggest call centers require 150 sq. ft per person at an estimated $250 per square foot in Florida
- **Information Technology:** UCAL invested $4.3M to build a state of the art Learning Management System. Initial investment in ERP systems range from $1-3M; student information systems can necessitate an additional $1-2M of upfront investment.
- **Brand Building:** WGU requested $10-$15M for brand building in Florida. SNHU spent $15M on marketing when they decided to take programs national
- **Program Design:** Program expenditures vary tremendously across institutions. Best-in-class course design expenditures estimated at $5K-$10K per unique course. Degree programs require 10-40 unique courses. Course materials can be leveraged for both credit based and competency based programs
- **Institutional Leadership:** A new Institution will require an Institution head and a small staff of 10-15 highly skilled individuals to create the basic infrastructure needed to run a post-secondary institution and gain accreditation

61

* Program design will take place over the 10 year time period

Note: Dotted lines represent range of total start-up expenditure; Institutional leadership becomes a recurring expenditure as FTEs begin to enroll; ERP: enterprise resource planning, LMS: learning management system, SIS: student information system

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July-November 2012

Strategy Detail
Start-Up Expenditure Assumptions

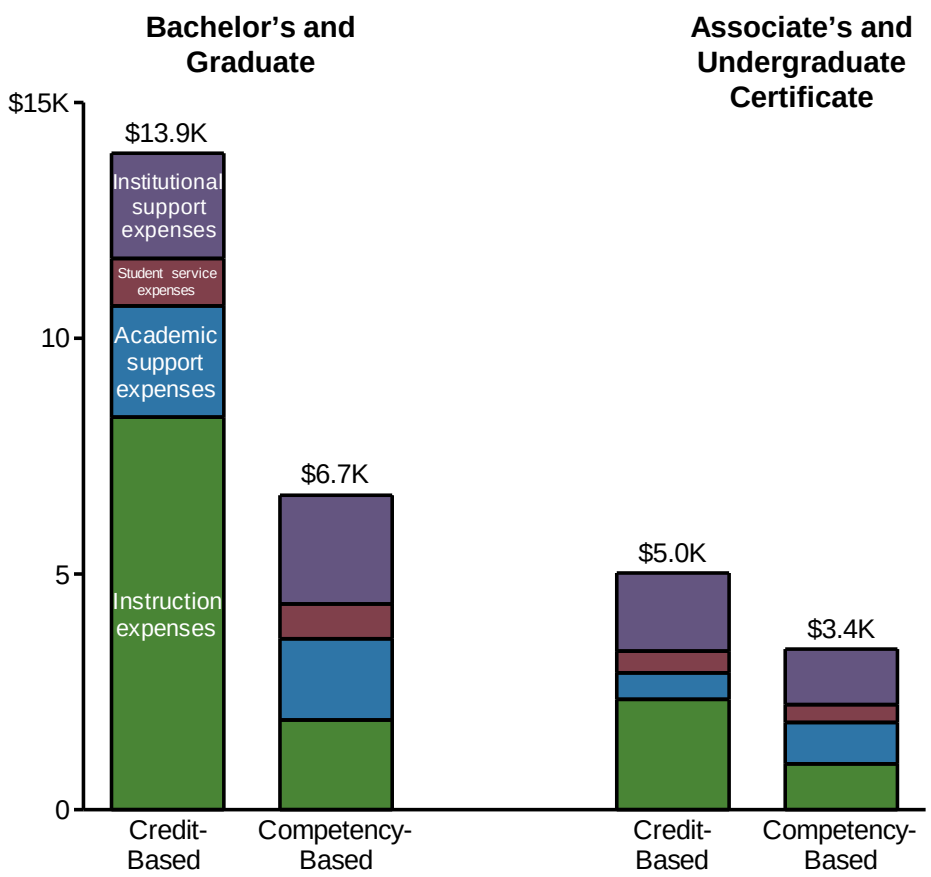
	Institution by Institution	Institutional Collaboration	Lead Institution(s)	New Online Institution
Facilities **Benchmark: WGU facility holds 400 people ($18M)**	• None needed	• None needed	• New building required to house additional support service professionals ($18M)	• New building required to house additional support service professionals ($18M)
Information Technology **Benchmark: UCAL needed $4.3M to build new LMS**	• Leverage existing institutions infrastructure, no additional investment required	• Leverage existing infrastructure, reducing start-up expenditures by 40% ($3M)	• Leverage existing institutions infrastructure, no additional investment required	• Build out new LMS ($5M), ERP ($2M), SIS ($1M) ($8M Total)
Brand Building **Benchmark: WGU brand building efforts ($20M)**	• Current brands are leveraged, but splitting the spend between institutions reduces marketing effectiveness ($15M)	• Current brands are leveraged, but need to strengthen brand across institutions ($15M)	• Leverage existing brand, reducing marketing expenditures by 50% ($10M)	• Need to create new brand for new online institution ($20M)
Program Design **Benchmark: Estimated $10K per course; Average $300K for a full degree program**	• 100 new programs created for both credit-based and competency-based programs across all participating institutions; high duplicative program creation increases program design expenditures ($30M)	• 50 new programs created for both credit-based and competency-based programs ($15M)	• 50 new programs created for both credit-based and competency-based programs ($15M)	• 50 new programs created for both credit-based and competency-based programs ($15M)
Institutional Leadership **Benchmark: Estimated need**	• None needed	• None needed	• None needed	• Institution head and 10-15 highly skilled staff needed to implement basic strategy and acquire accreditation ($4M for first 2 years)

62

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail
Recurring FTE Expenditures – Institution by Institution

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

- Credit-Based Programs
  - Benchmarked on current average Florida SUS expenditures per FTE excluding research, public services and other non core expenses
- Competency-Based Programs
  - Instructional expenses are based on WGU expenditures per FTE; Support expenditures are 20% higher than WGU expenditures due to lack of scale and inefficiency of duplicating business processes across institutions

Associate's and Undergraduate Certificate

- Credit-Based Programs
  - Benchmarked on current average FCS expenditures per FTE excluding research, public services and other non core expenses
- Competency-Based Programs
  - Instructional expenses based on SNHU's Competency AS program estimated expenditures per FTE; Support expenditures are 20% higher than SNHU's expenditures due to lack of scale and inefficiency of duplicating business processes across institutions

63

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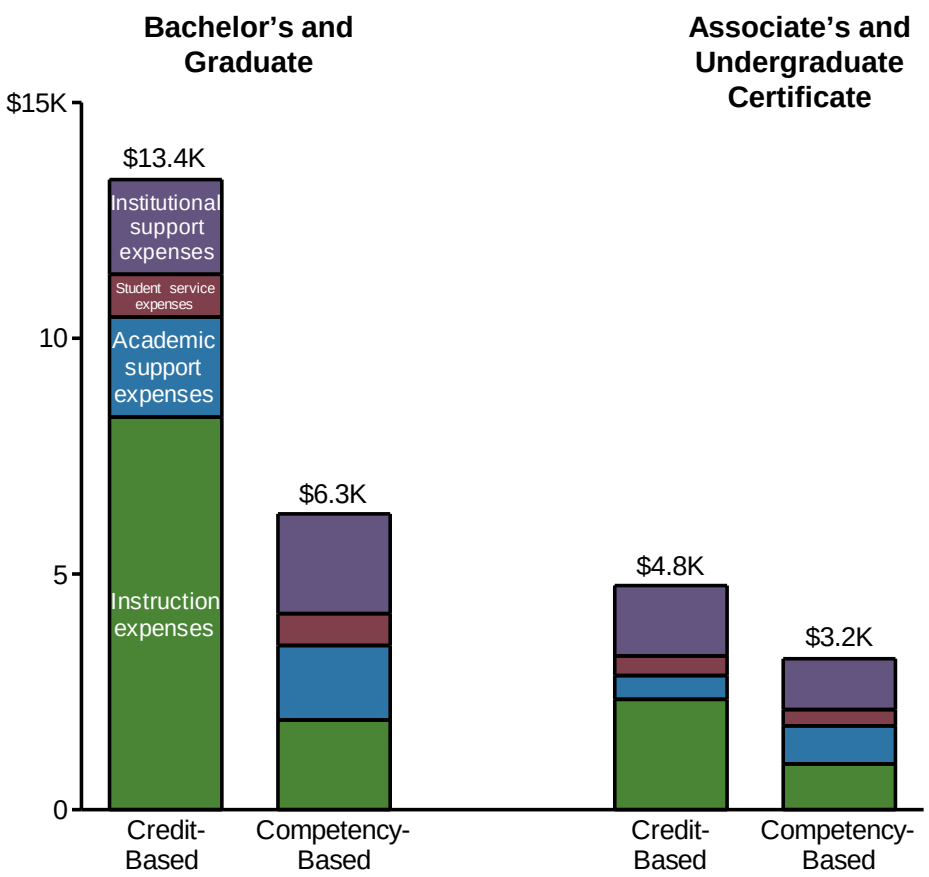
Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012, FL DOE

Strategy Detail
Recurring FTE Expenditures – Institutional Collaboration

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

- Credit-Based Programs
  - Instructional expenses benchmarked on current average Florida SUS costs per FTE; Supports costs are 10% lower than SUS costs due to scale efficiencies and improved centralized business processes
- Competency-Based Programs
  - Instructional expenses are based on WGU costs per FTE; Support costs are 10% higher than WGU costs due to inefficiency of coordinating business processes across institutions

Associate's and Undergraduate Certificate

- Credit-Based Programs
  - Instructional expenses benchmarked on current average Florida FCS costs per FTE; Supports costs are 10% lower than FCSS costs due to scale efficiencies and improved centralized business processes
- Competency-Based Programs
  - Instructional expenses based on SNHU's Competency AS program estimated costs per FTE; Support costs are 10% higher than SNHU's costs due to inefficiency of coordinating business processes across institutions

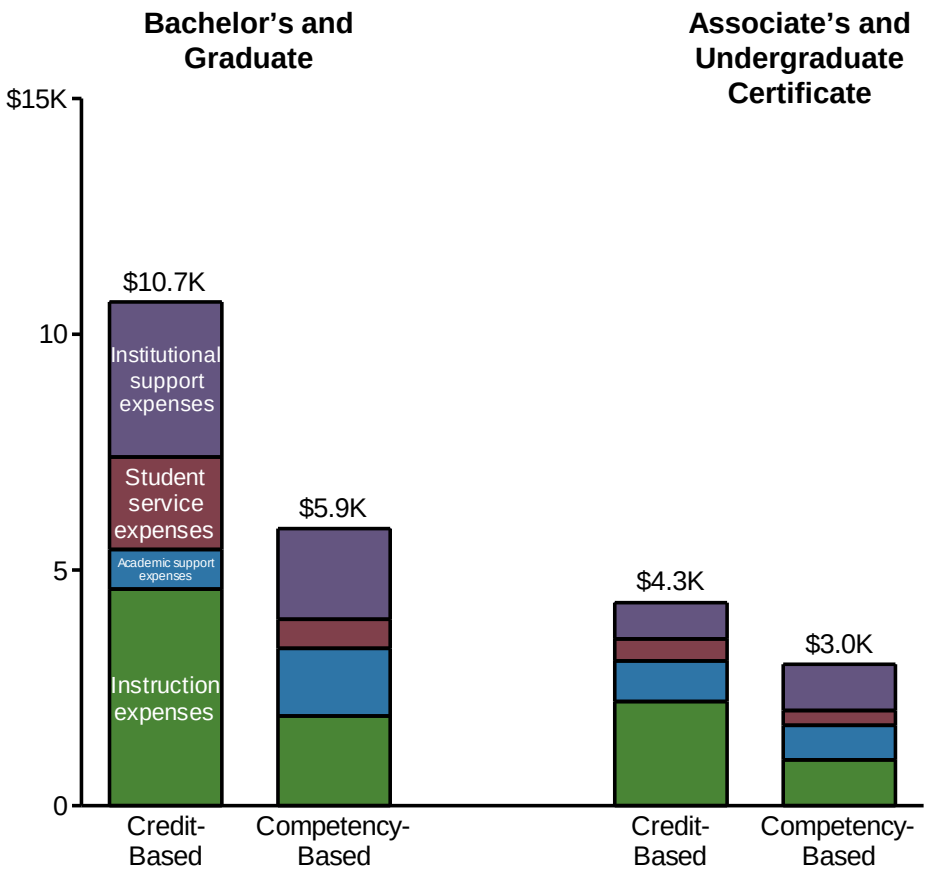
64

1211SUFL_01

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012; FL DOE

Strategy Detail
Recurring FTE Expenditures – Lead Institution(s)

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

- Credit-Based Programs
  - Centralized structure enables lead institution to reach target benchmarked on SNHUs costs per FTE
- Competency-Based Programs
  - Centralized structure enables lead institution to reach target benchmarked on WGU costs per FTE

Associate's and Undergraduate Certificate

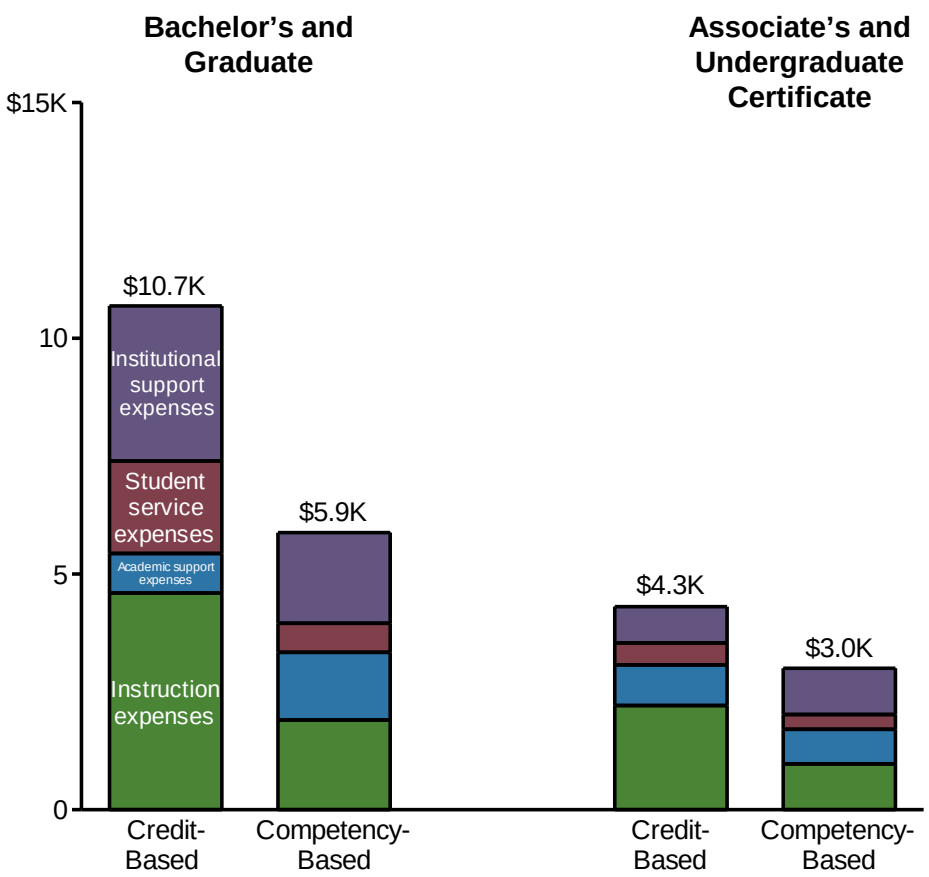
- Credit-Based Programs
  - Centralized structure enables lead institution to reach target benchmarked on Rio Salado costs per FTE
- Competency-Based Programs
  - Centralized structure enables lead institution to reach target benchmarked on SNHU's Competency AS program's estimated costs per FTE

65

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail
Recurring FTE Expenditures – New Online Institution

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

- Credit-Based Programs
  - Centralized structure enables new institution to reach target benchmarked on SNHUs costs per FTE
- Competency-Based Programs
  - Centralized structure enables new institution to reach target benchmarked on WGU costs per FTE

Associate's and Undergraduate Certificate

- Credit-Based Programs
  - Centralized structure enables new institution to reach target benchmarked on Rio Salado costs per FTE
- Competency-Based Programs
  - Centralized structure enables new institution to reach target benchmarked on SNHU's Competency AS program's estimated costs per FTE

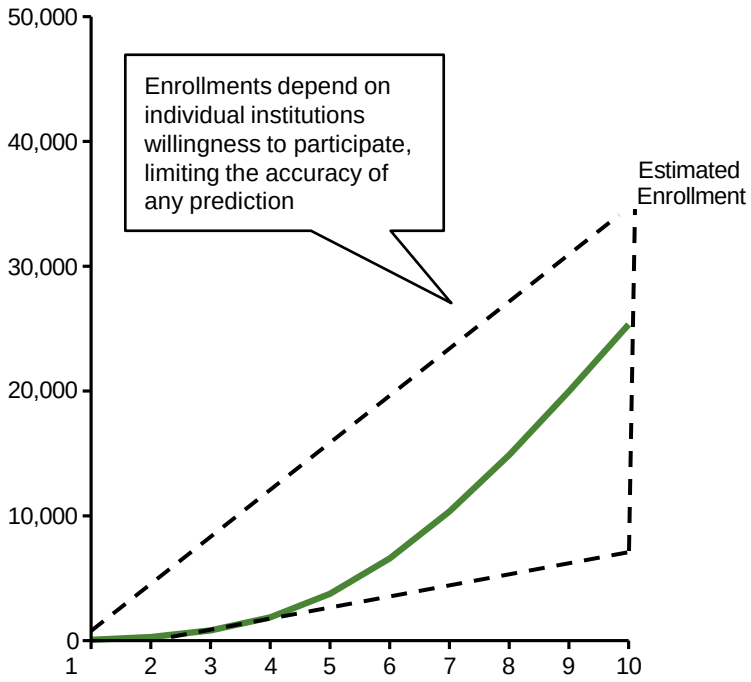
66

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail
System Volume – Enrollment Projections and Benchmarks

1

Institution by Institution Enrollment Projection (FTE)



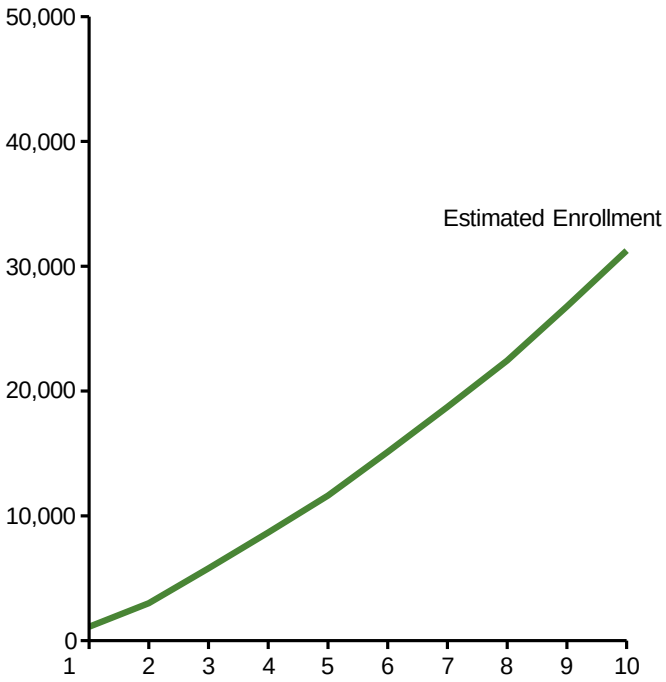
Programs Added Each Year	5	10	15	20	25	25	25	25	25	25

Institution by Institution

Benchmark: Enrollment ramp will begin slowly as institutions gradually opt to participate. By year 6, program creation will begin to level out at 25 programs per year. Benchmarks indicate roughly 5 years ramp for a program to reach maturity at 500 in both credit- and competency-based programs

2

Institutional Collaboration Enrollment Projection (FTE)



Percent Penetration	0.3%	0.6%	1.0%	1.3%	1.6%	2.0%	2.3%	2.6%	3.0%	3.3%

Institutional Collaboration

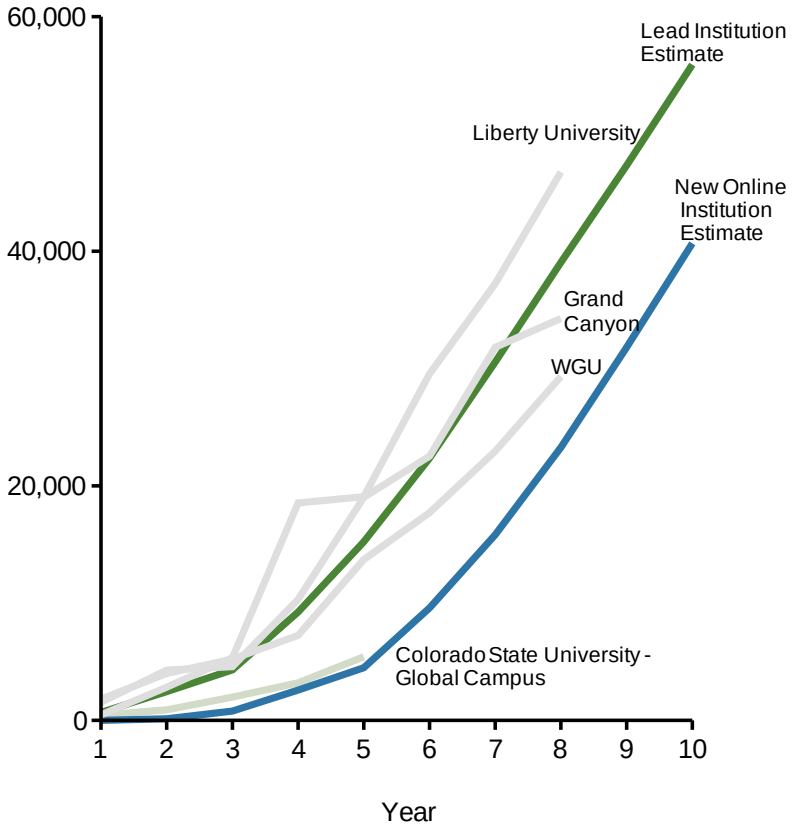
Benchmark: The Kentucky Community and Technical College System has fundamentally centralized control and development of new innovative online programs. The KCTCS has reached 1,000 enrollments by year 3 of their Kentucky On Demand project which now accounts1% of total enrollments in the system

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail
System Volume – Enrollment Projections and Benchmarks

3 4

Lead Institution and New Online Institution Enrollment Projections (FTE)



Methodology

- **Benchmarks:** Over the past 10 years a number of institutions have transformed into online universities and experienced substantial enrollment growth
- **Lead Institution:** Enrollment projection represents the average of the enrollment growth of three comparable institutions
- **New Online Institution:** Enrollment growth is assumed to be 2-3 years behind comparable institutions average due to brand building needs, infrastructure requirements, and accreditation time frame; WGU went through a similarly slow enrollment ramp-up as it sought accreditation and built brand awareness. Colorado State University – Global Campus is currently experiencing similar growth

68

Source: IPEDS

Strategy Detail
System Volume – Total Volume Estimates

New Admit Growth										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	120	440	1,160	2,480	4,800	8,000	12,000	16,600	21,600	26,600
Institutional Collaboration	1,989	4,097	7,034	9,418	11,940	15,372	18,209	21,201	25,197	28,548
Lead Institution	1,222	3,558	4,846	11,554	16,575	22,332	29,436	35,307	40,603	46,693
New Online Institution	0	240	1,222	3,558	4,846	11,554	16,575	22,332	29,436	35,307

Enrollments										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	80	345	987	2,242	4,503	7,900	12,415	17,853	23,979	30,401
Institutional Collaboration	1,333	3,608	6,970	10,414	13,973	18,182	22,507	26,980	32,192	37,564
Lead Institution	819	2,940	5,172	11,086	18,275	26,825	36,663	46,857	56,786	67,082
New Online Institution	0	163	948	3,096	5,380	11,505	18,996	27,927	38,170	48,806

FTE Enrollments										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	67	288	823	1,868	3,752	6,584	10,345	14,877	19,983	25,334
Institutional Collaboration	1,111	3,006	5,809	8,679	11,644	15,151	18,756	22,483	26,827	31,303
Lead Institution	682	2,450	4,310	9,238	15,229	22,354	30,552	39,048	47,322	55,902
New Online Institution	0	136	790	2,580	4,484	9,588	15,830	23,273	31,809	40,672

Completions										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	8	45	162	415	901	1,710	2,905	4,435	6,243	8,233
Institutional Collaboration	129	547	1,476	2,544	3,761	4,973	6,353	7,910	9,467	11,223
Lead Institution	79	407	1,112	2,328	4,091	7,071	10,028	13,497	17,283	20,896
New Online Institution	0	16	117	481	1,178	2,464	4,329	7,505	10,642	14,324

69

Note: 1.2 Enrollments per FTE benchmarked against national average
Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail

System Volume – Enrollment Projections by Degree Level

Institution by Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	8	29	75	161	312	520	780	1,079	1,404	1,729
Associate's	18	75	207	459	906	1,560	2,400	3,390	4,485	5,610
Bachelor's	45	199	584	1,349	2,742	4,873	7,763	11,288	15,300	19,552
Master's	10	43	121	273	543	947	1,472	2,096	2,790	3,510
Total	**80**	**345**	**987**	**2,242**	**4,503**	**7,900**	**12,415**	**17,853**	**23,979**	**30,401**

Institutional Collaboration										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	129	268	464	626	800	1,038	1,238	1,452	1,739	1,984
Associate's	298	771	1,393	2,009	2,619	3,399	4,178	4,952	5,919	6,892
Bachelor's	746	2,110	4,276	6,547	8,945	11,669	14,526	17,543	20,931	24,487
Master's	159	458	837	1,232	1,608	2,076	2,564	3,032	3,604	4,201
Total	**1,333**	**3,602**	**6,957**	**10,395**	**13,948**	**18,149**	**22,467**	**26,933**	**32,137**	**37,500**

Lead Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	79	235	325	786	1,144	1,563	2,090	2,542	2,964	3,455
Associate's	183	638	1,039	2,238	3,677	5,162	7,009	8,856	10,567	12,433
Bachelor's	458	1,700	3,175	6,773	11,257	17,018	23,400	30,185	36,979	43,858
Master's	98	367	634	1,289	2,198	3,082	4,164	5,274	6,276	7,336
Total	**819**	**2,930**	**5,152**	**11,043**	**18,207**	**26,731**	**36,537**	**46,701**	**56,603**	**65,749**

New Online Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	16	82	242	334	809	1,177	1,608	2,149	2,613
Associate's	0	37	210	667	1,091	2,338	3,852	5,406	7,337	9,271
Bachelor's	0	91	541	1,809	3,300	7,030	11,697	17,730	24,384	31,474
Master's	0	19	116	378	655	1,328	2,270	3,183	4,300	5,448
Total	**0**	**162**	**944**	**3,084**	**5,360**	**11,462**	**18,927**	**27,832**	**38,043**	**47,801**

Strategy Detail

System Volume – FTE Enrollment Projections by Degree Level

Institution by Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	7	24	63	134	260	433	650	899	1,170	1,441
Associate's	15	63	173	383	755	1,300	2,000	2,825	3,738	4,675
Bachelor's	38	166	487	1,124	2,285	4,061	6,469	9,406	12,750	16,293
Master's	8	36	101	227	452	789	1,227	1,747	2,325	2,925
Total	**67**	**288**	**823**	**1,868**	**3,752**	**6,584**	**10,345**	**14,877**	**19,983**	**25,334**

Institutional Collaboration										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	108	224	387	522	667	865	1,032	1,210	1,449	1,653
Associate's	249	643	1,161	1,674	2,183	2,833	3,482	4,126	4,933	5,744
Bachelor's	622	1,758	3,564	5,456	7,454	9,724	12,105	14,619	17,442	20,405
Master's	133	382	697	1,027	1,340	1,730	2,137	2,527	3,003	3,501
Total	**1,111**	**3,001**	**5,797**	**8,662**	**11,623**	**15,124**	**18,723**	**22,444**	**26,781**	**31,250**

Lead Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	66	196	271	655	953	1,303	1,742	2,118	2,470	2,879
Associate's	153	532	866	1,865	3,064	4,301	5,841	7,380	8,806	10,361
Bachelor's	382	1,417	2,646	5,645	9,380	14,182	19,500	25,154	30,816	36,548
Master's	81	306	528	1,074	1,832	2,568	3,470	4,395	5,230	6,113
Total	**682**	**2,441**	**4,294**	**9,203**	**15,172**	**22,275**	**30,447**	**38,918**	**47,169**	**54,791**

New Online Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	13	68	202	279	674	981	1,340	1,791	2,177
Associate's	0	31	175	556	909	1,949	3,210	4,505	6,114	7,726
Bachelor's	0	76	451	1,508	2,750	5,858	9,747	14,775	20,320	26,228
Master's	0	16	97	315	546	1,107	1,892	2,653	3,583	4,540
Total	**0**	**135**	**787**	**2,570**	**4,467**	**9,552**	**15,772**	**23,193**	**31,703**	**39,834**

Strategy Detail

System Volume – Completion Projections by Degree Level

Institution by Institution	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	8	29	75	161	312	520	780	1,079	1,404	1,729
Associate's	0	9	33	87	186	360	600	900	1,245	1,620
Bachelor's	0	0	25	93	245	523	1,013	1,688	2,531	3,502
Master's	0	8	28	74	159	307	512	768	1,062	1,382
Total	**8**	**45**	**162**	**415**	**901**	**1,710**	**2,905**	**4,435**	**6,243**	**8,233**

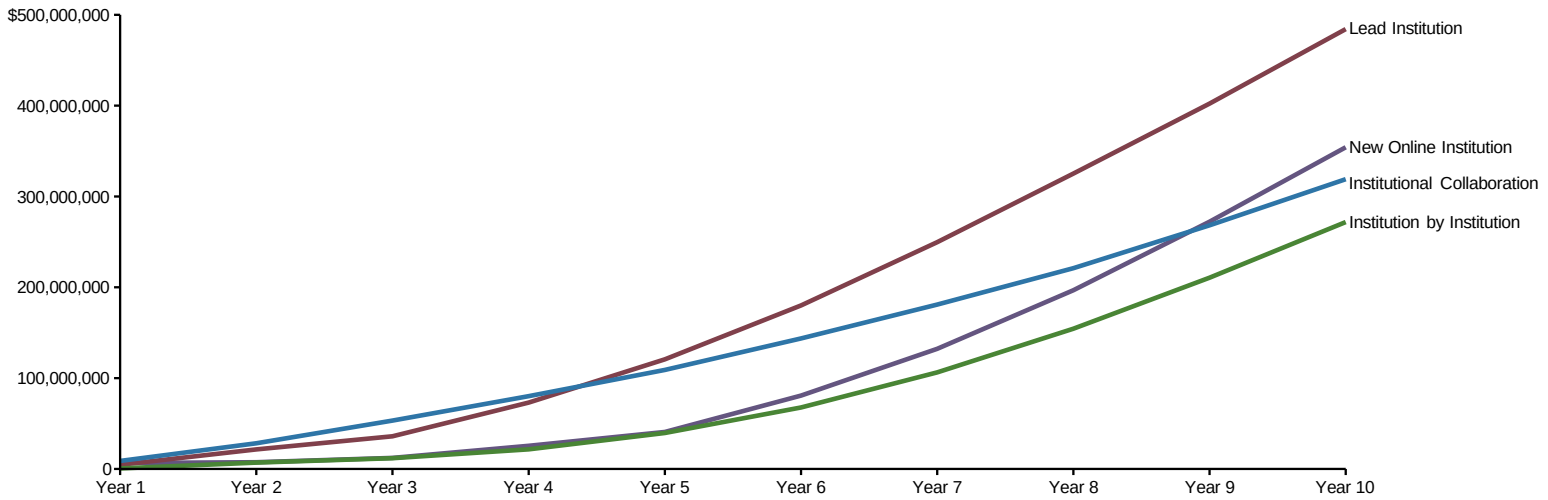
Institutional Collaboration	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	129	268	464	626	800	1,038	1,238	1,452	1,739	1,984
Associate's	0	151	317	554	757	978	1,283	1,549	1,838	2,225
Bachelor's	0	0	428	899	1,574	2,150	2,779	3,647	4,404	5,226
Master's	0	128	267	464	629	808	1,053	1,262	1,487	1,788
Total	**129**	**547**	**1,473**	**2,539**	**3,753**	**4,964**	**6,341**	**7,896**	**9,450**	**11,203**

Lead Institution	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	79	235	325	786	1,144	1,563	2,090	2,542	2,964	3,455
Associate's	0	93	283	401	992	1,477	2,063	2,819	3,502	4,168
Bachelor's	0	0	268	812	1,150	2,848	4,242	5,933	8,114	10,093
Master's	0	79	236	330	806	1,183	1,632	2,202	2,703	3,180
Total	**79**	**407**	**1,107**	**2,320**	**4,072**	**7,044**	**9,991**	**13,446**	**17,221**	**20,824**

New Online Institution	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	16	82	242	334	809	1,177	1,608	2,149	2,613
Associate's	0	0	19	101	305	432	1,068	1,587	2,215	3,022
Bachelor's	0	0	0	55	290	877	1,240	3,070	4,569	6,384
Master's	0	0	16	83	248	346	845	1,240	1,710	2,305
Total	**0**	**16**	**117**	**479**	**1,172**	**2,456**	**4,310**	**7,477**	**10,603**	**14,272**

Strategy Detail
System Expenditure – Total Expenditure Projections

Total Expenditure by Strategy, 10 Year Forecast



Total Expenditure (000's)										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	$559	$6,986	$11,826	$21,579	$39,641	$67,708	$106,315	$154,448	$210,613	$271,806
Institutional Collaboration	$8,823	$28,248	$53,235	$80,115	$109,042	$143,712	$181,004	$221,076	$268,252	$318,990
Lead Institution	$4,637	$21,562	$35,961	$73,103	$120,675	$180,031	$249,683	$325,209	$402,262	$484,261
New Online Institution	$6,500	$7,442	$12,139	$25,455	$40,738	$80,752	$132,272	$196,788	$272,237	$354,204

73

Note: Start-Up Expenditures are amortized across 10 years

Strategy Detail

Revenue from Tuition and Fees – Assumptions and Methodology

Tuition and Fee Assumptions

General Assumptions

Growth Rate	
Annual Growth Rate	2%

Population Mix	
% In-State	90%
% Out-of-State	10%

Methodology

In State Benchmarks:

- Credit-based programs are benchmarked against current FCS and SUS average tuition and fees excluding distance learning fees
- Competency-based programs can be priced at 60% of credit based program tuition due to lower system costs

Out-Of-State Benchmarks:

- Credit-based programs are priced at competitive market prices implying ~30% profit margins
- Competency-based programs can be priced at 60% of credit based program tuition due to lower system costs

In-State Tuition and Fees

Credit-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	$104	$202	$422
Per Year	$3,106	$6,069	$12,648

Competency-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	$62	$121	$253
Per Year	$1,864	$3,641	$7,589

Out-of-State Tuition and Fees

Credit-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	$175	$450	$600
Per Year	$5,250	$13,500	$18,000

Competency-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	$105	$270	$360
Per Year	$3,150	$8,100	$10,800

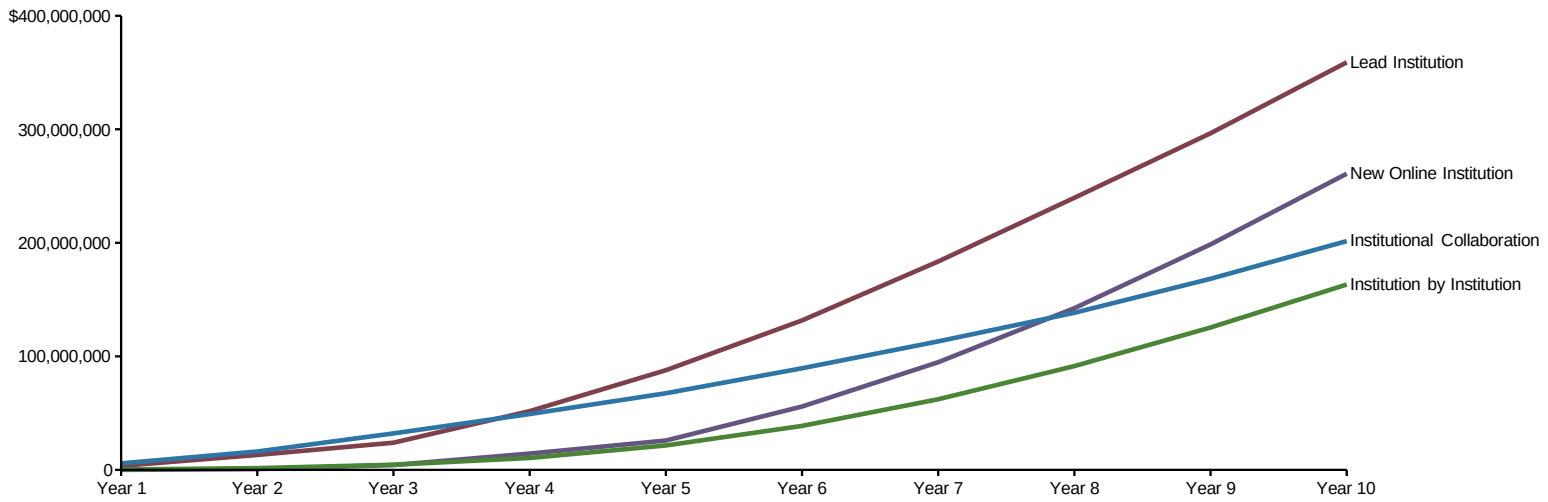
Note: Tuition and Fee levels are a policy decision; This is one potential scenario based on practices across the nation observed by Parthenon

Source: SUS Board of Governors; FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail

Revenue from Tuition and Fees – Total Projections

Total Revenue from Tuition and Fees by Strategy, 10 Year Forecast



Total Tuition and Fees Revenue (000's)										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	$346	$1,539	$4,516	$10,501	$21,561	$38,708	$62,195	$91,404	$125,415	$163,261
Institutional Collaboration	$5,732	$16,226	$32,134	$49,231	$67,466	$89,495	$113,170	$138,409	$168,335	$201,543
Lead Institution	$3,522	$13,139	$23,935	$51,765	$87,792	$131,666	$183,566	$239,685	$296,478	$358,979
New Online Institution	$0	$715	$4,288	$14,384	$25,869	$55,826	$94,823	$142,458	$198,626	$260,875

Note: Tuition and Fee levels are a policy decision; This is one potential scenario based on practices across the nation observed by Parthenon

Source: SUS Board of Governors; FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail

Expenditure per Completion Summary

	1 Institution by Institution	2 Institutional Collaboration	3 Lead Institution(s)	4 New Online Institution
Total Completions (Over 10 Years)	25K	48K	77K	41K
Total Expenditure (Over 10 Years)	$0.9B	$1.4B	$1.9B	$1.1B
Expenditure Per Completion = Expenditure per Credit x (Credits Needed / Graduation Rate)				
Example				
Expenditure per BA Credit (Year 10)	$416	$395	$332	$335
Graduation Rate (Year 10))	42%	49%	57%	57%
Expenditure per BA Completion (Year 10)	$79K	$64K	$47K	$47K

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Note: Expenditure per credit is calculated by dividing expenditure per FTE by 30 credits; Expenditure per completion assumes students are enrolling with 40 credits and need 120 to completes; Expenditures include instruction, academic support, student support, and institutional support expenditures

Strategy Detail

Expenditure per Completion in Year 10 By Degree Level

		Strategy 1	Strategy 2	Strategy 3	Strategy 4
Undergraduate Certificate	Expenditure per Credit	$173	$162	$148	$151
	Graduation Rate (Year 10)	65%	70%	74%	74%
	Expenditure per Completion (Year 10)	**$4,812**	**$4,195**	**$3,604**	**$3,673**
Associate's	Expenditure per Credit	$173	$162	$148	$151
	Graduation Rate (Year 10)	25%	29%	34%	34%
	Expenditure per Completion (Year 10)	**$30,583**	**$24,218**	**$19,050**	**$19,413**
Bachelor's	Expenditure per Credit	$416	$395	$332	$335
	Graduation Rate (Year 10)	42%	49%	57%	57%
	Expenditure per Completion (Year 10)	**$78,912**	**$64,041**	**$46,522**	**$46,917**
Master's	Expenditure per Credit	$416	$395	$332	$335
	Graduation Rate (Year 10)	64%	71%	78%	78%
	Expenditure per Completion (Year 10)	**$23,408**	**$20,017**	**$15,282**	**$15,411**

:

Note: Expenditure per credit is calculated by dividing expenditure per FTE by 30 credits; Undergraduate Certificate programs are assumed to be 18 credits in this example, Associate's programs are assumed to be 64 credits, Bachelor's programs are assumed to be 120 credits, Master's programs are assumed to be 36 credits; Students are assumed to enter with 20 credits for Associate's programs and 40 credits for Bachelor's programs; see page 25-25 in summary materials for graduation rate assumptions

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

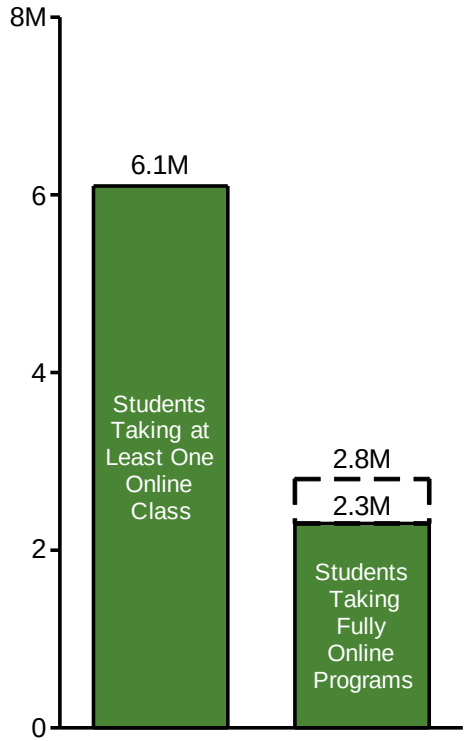
Accreditation Detail

Stakeholder Interviews

National Post-Secondary Online Market

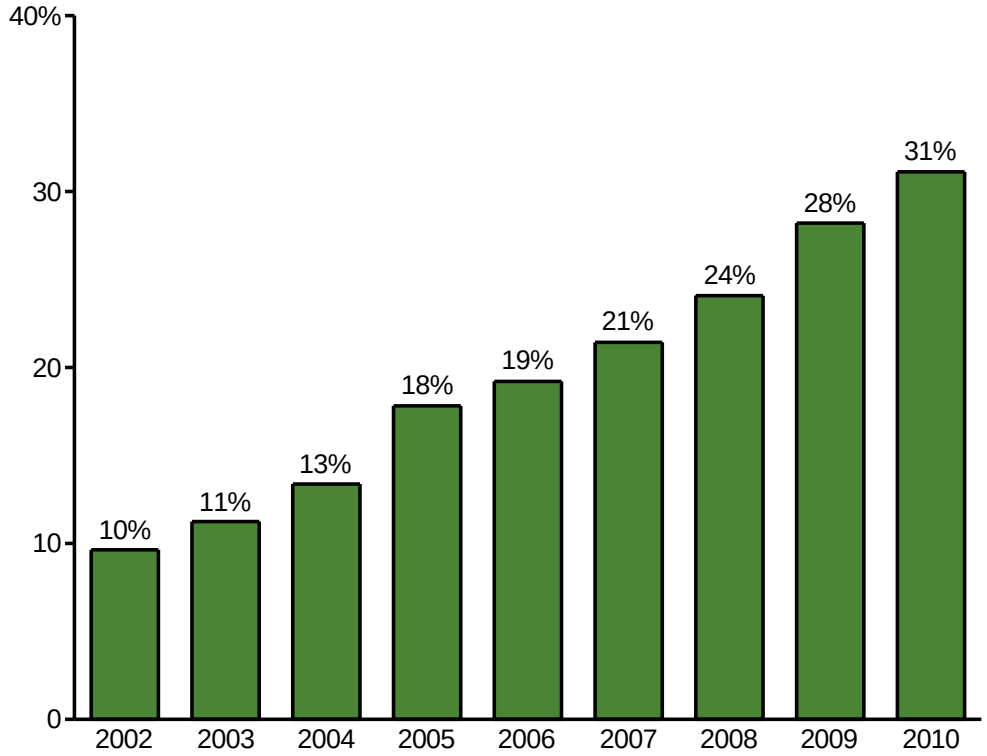
Post-Secondary Online Enrollments

National Post-Secondary Online Enrollments, 2010-2011



Percent of Total Enrollment	31%	12-14%

Percent of Nationwide Students Taking at Least One Course Online, 2002-2010



79

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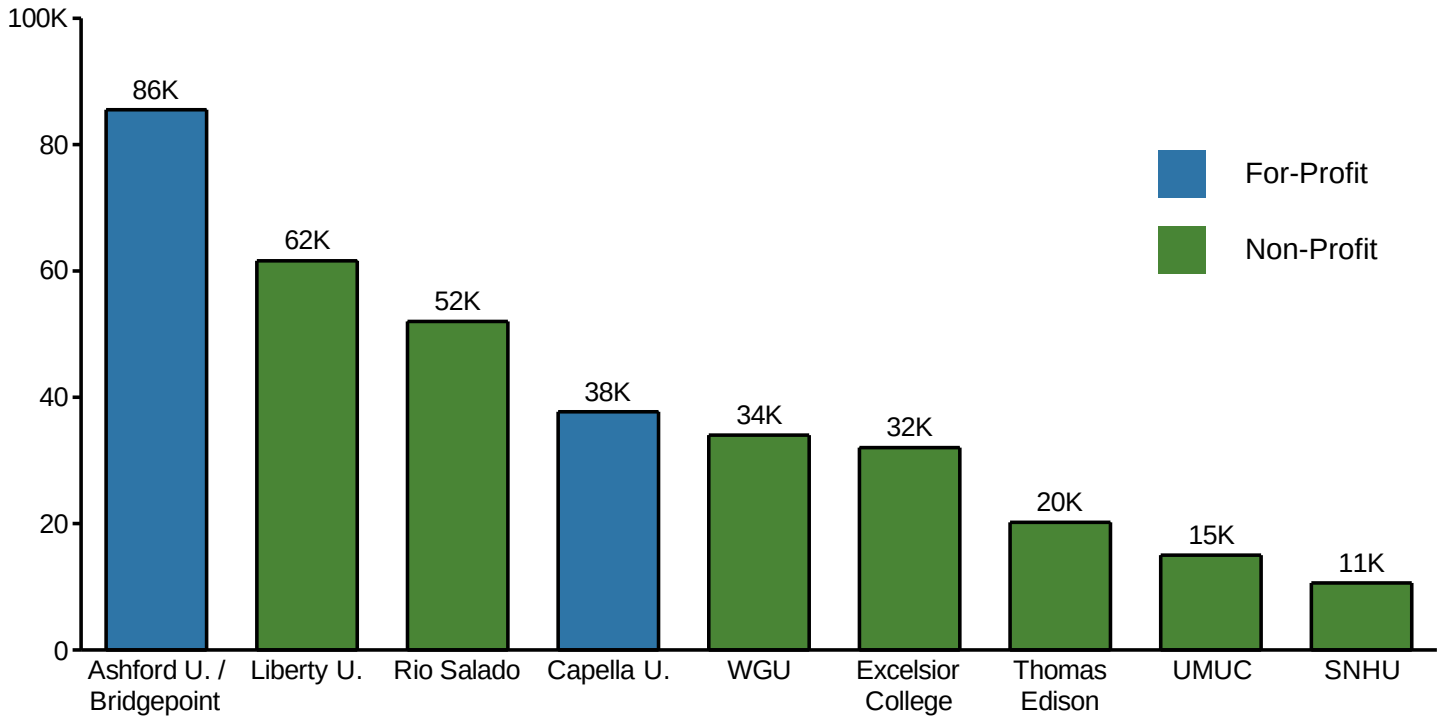
Note: Students taking at least one online class is defined as students taking at least one course where 80% or more of the content is delivered online
Source: Babson Survey Research Group; Deutsche Bank; Eduventures Online Higher Education Update 2011

National Post-Secondary Online Market

Primarily Online Institution Enrollments

Post-Secondary Enrollments in Large Primarily Online Institutions, 2010-2011



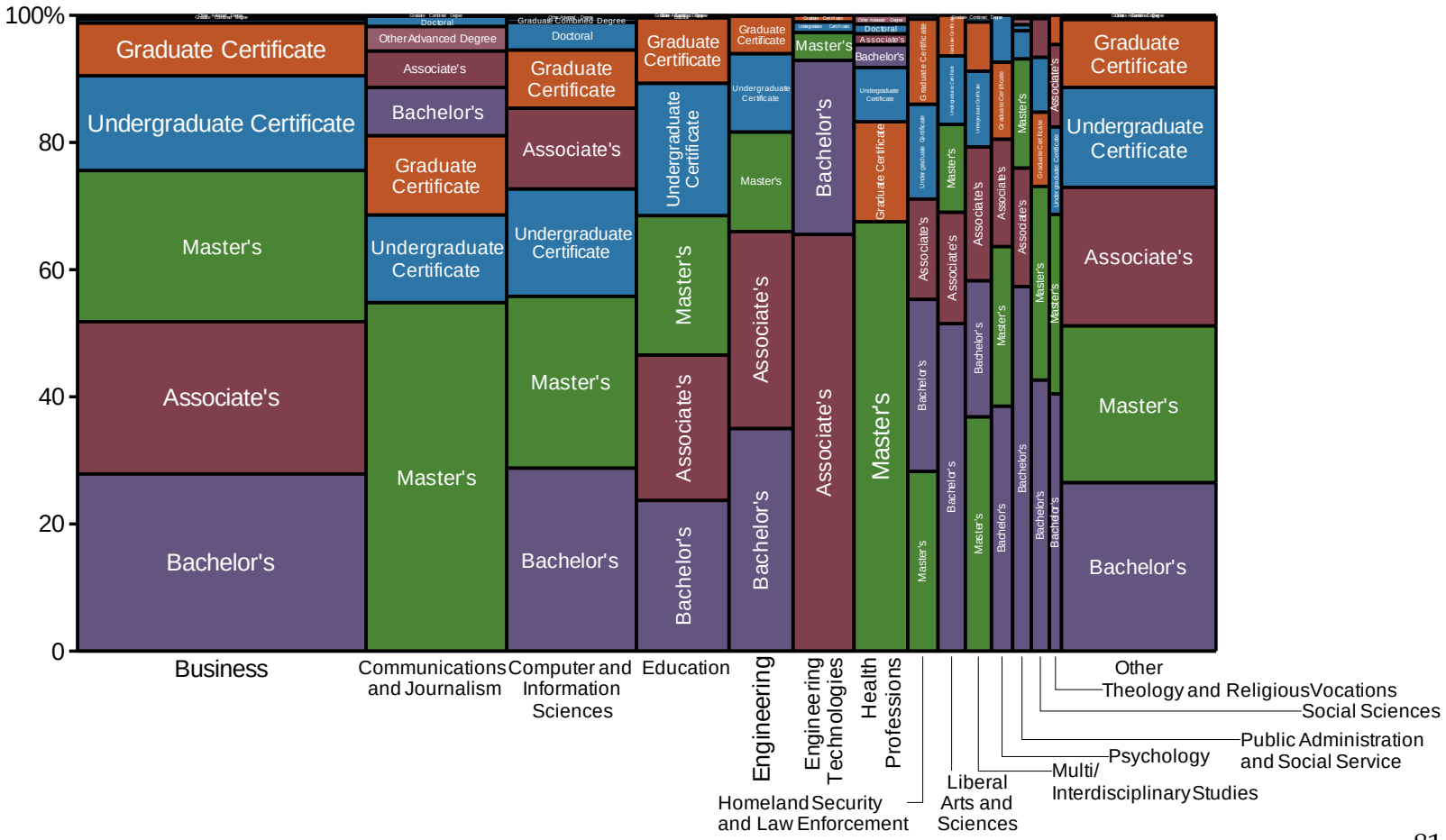
	Ashford U. / Bridgepoint	Liberty U.	Rio Salado	Capella U.	WGU	Excelsior College	Thomas Edison	UMUC	SNHU
Estimated % Master's Enrollments	24%	29%	0%	51%	27%	2%	3%	30%	27%

Note: Percent of master's enrollments is estimated by adjusting completions by degree type by average program length and applying these shares to top line enrollment figures from IPEDs
Source: Deutsche Bank; IPEDS; College Board Completion Arch

National Post-Secondary Online Market

Representative Sample: Distance Learning Programs by Level and Program Area, 2010-2011

Representative Sample: Distance Learning Programs by Level and Program Area, 2010-2011

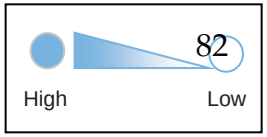


81

Note: A subset of these programs are hybrids
Source: Peterson's database

National Post-Secondary Online Market
Spectrum of Models

Total Expenditure per Student							
Learning Model	• Traditional educational model	• Increased schedule flexibility • Less need for classroom facilities	• No need for physical classroom facilities • Same curriculum and duration as traditional onsite, but 100% online • An increase in the number of start dates is utilized by some programs to provide increased flexibility	• Courses are 100% online and self paced • Increased scheduling flexibility • Reduced faculty involvement	• Courses are 100% online and self paced • Degree based on mastery of material • Students able to test out of material they already know • Shortens time to completion • Reduces the cost of instruction	• Course credit granted for prior knowledge from nonacademic experiences • Credit granted either by exam or by portfolio proving work competency • Shortens the time to completion • Reduces the cost of instruction	• "Massively Open Online Courses" • Enrollment free and available to anyone but courses do not culminate in a degree • Open enrollment maximizes access • Instructional and testing model still in infancy
Current Target Student	• Traditional students	• Traditional students	• Traditional and non-traditional students • Working adults • Older demographic	• Non-traditional students • Working adults • Older demographic	• Non-traditional students • Working adults • Older demographic	• Non-traditional students • Working adults • Older demographic	• All students



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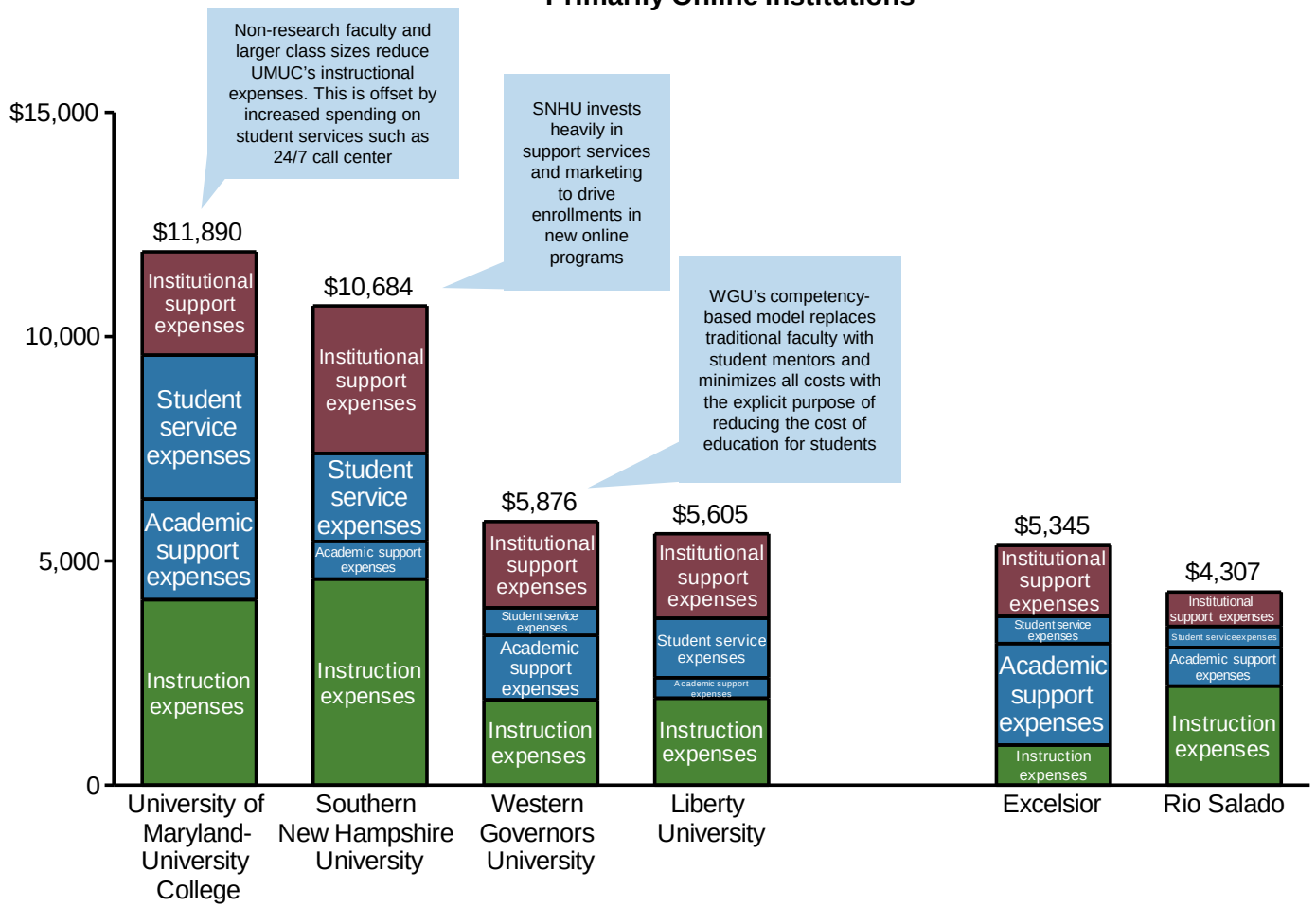
Source: School websites

National Post-Secondary Online Market

Expenditures per Non-Profit FTE: Primarily Online Institutions

Institution Expenditure per Non-Profit FTE, 2010-2011
Primarily Online Institutions



	University of Maryland-University College	Southern New Hampshire University	Western Governors University	Liberty University	Excelsior	Rio Salado
% Online Enrollment	85%	82%	100%	84%	100%	90%

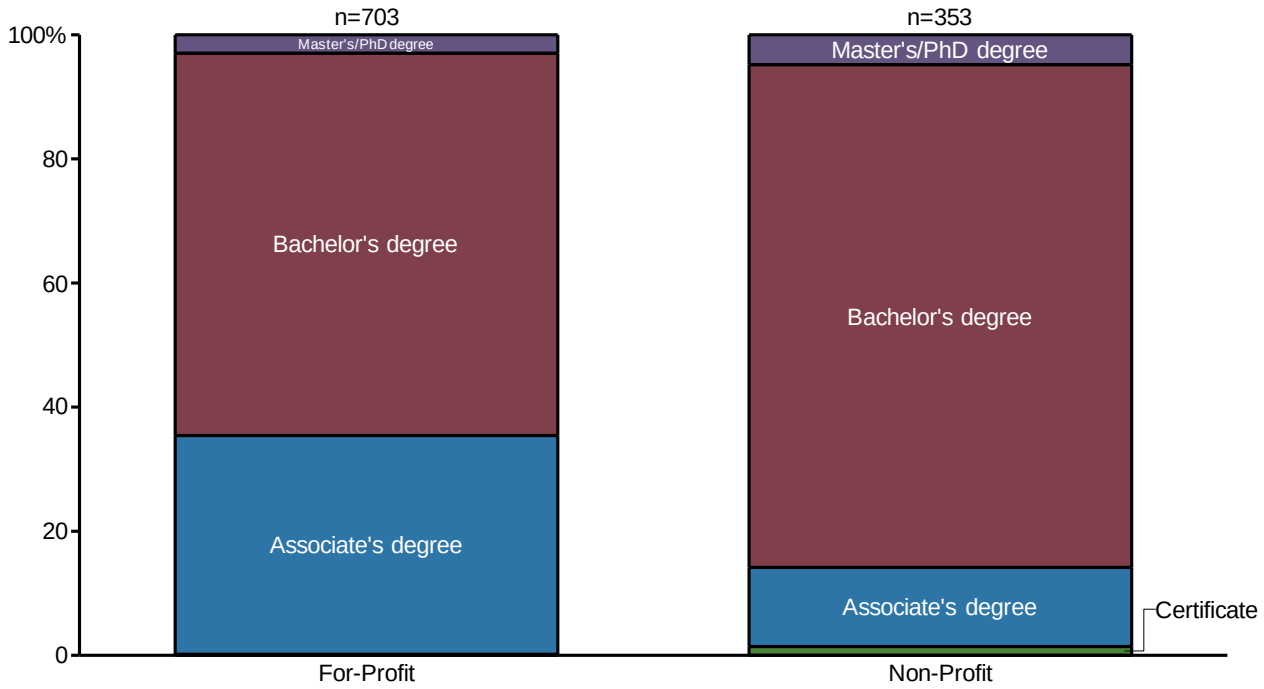
83

Note: Excludes Research, Public Service, and Other expenditures; Excludes Thomas Edison because of lack of data on IPEDS
Source: IPEDS; Deutsche Bank; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Q: In which of the following programs are you currently enrolled?



84

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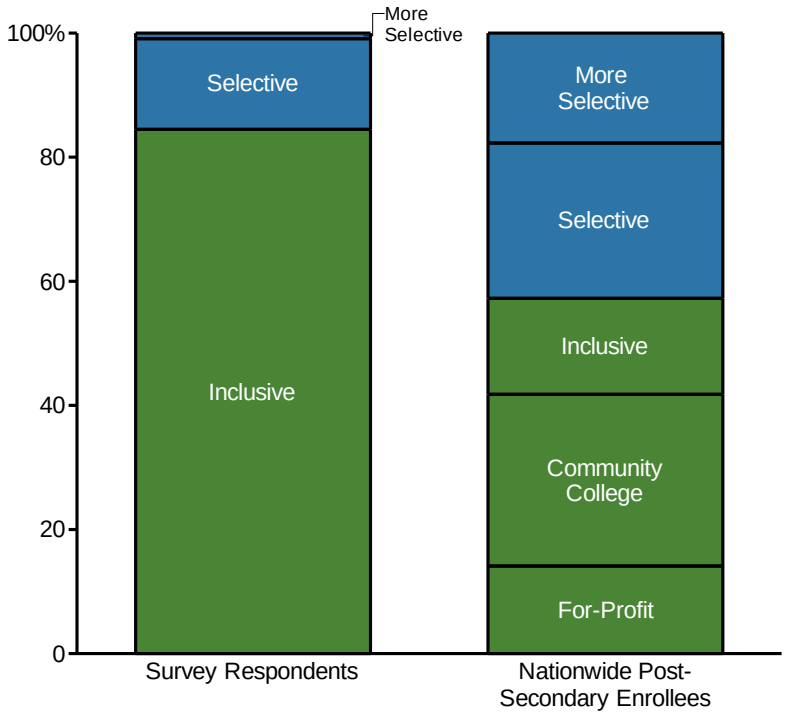
Source: Parthenon Higher Education Survey (n=1,057)

National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Unduplicated Headcount, Enrollment by Institution Type, 2011



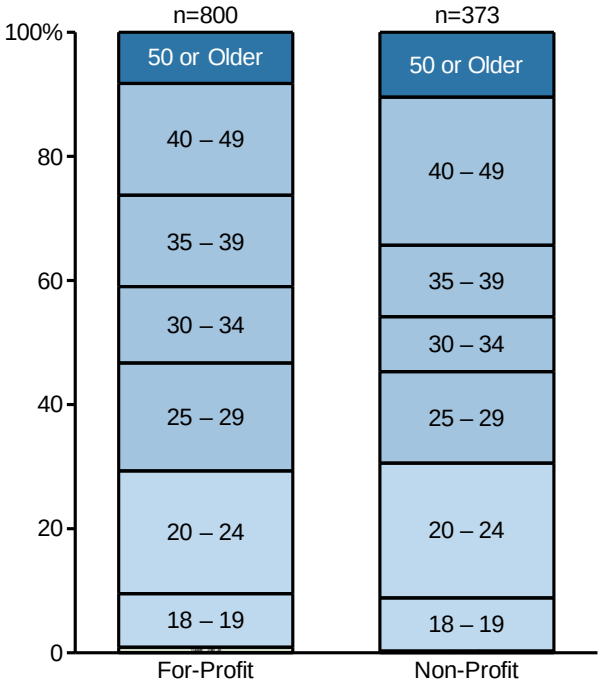
85

Note: "Selective" and "Inclusive" categorizations are from IPEDS definitions based on analysis of first-year students' test scores
Source: Parthenon Higher Education Survey (n=1,057)

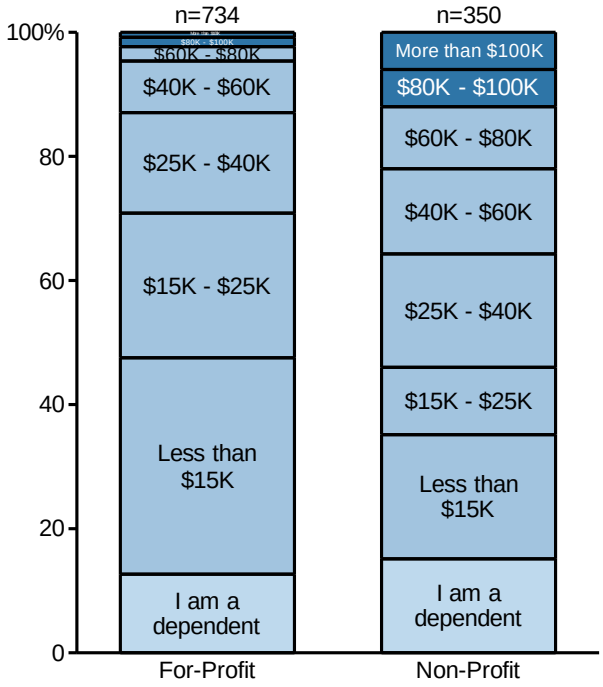
National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Age Demographic of Respondents



Income of Respondents



86

1211SUFL_01

Source: Parthenon Higher Education Survey (n=1,057)

Parthenon August 2012 Post-Secondary Online Student Survey

Q: What are your reasons for wanting to attend college?	
For-Profit	**Non-Profit**
1) To fulfill a personal goal	1) To fulfill a personal goal
2) To make more money	2) To make more money
3) To gain skills for the job market	3) To gain skills for the job market
4) Opportunity to change careers	4) For the sake of learning
5) Employers require a degree	5) Employers require a degree

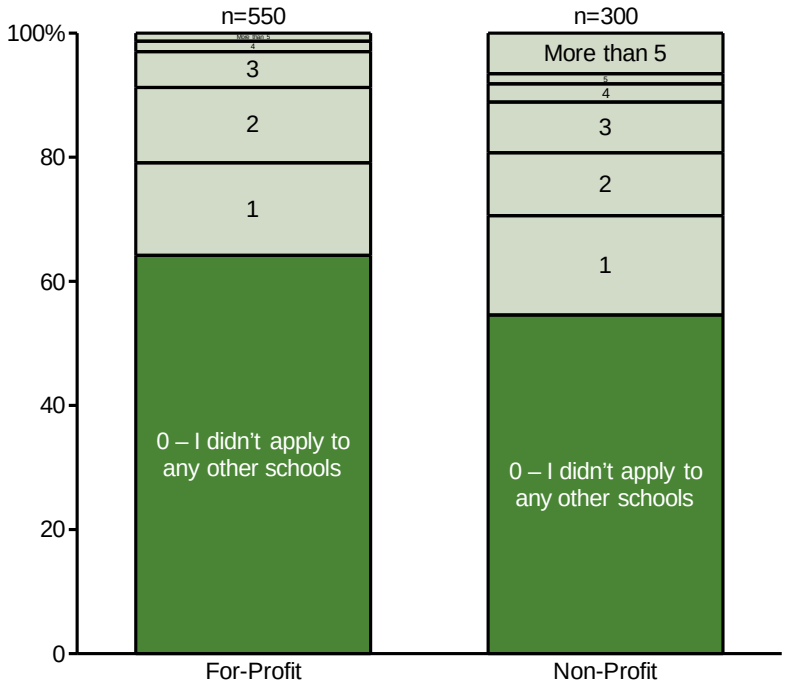
87

Source: Parthenon Higher Education Survey (n=1,057)

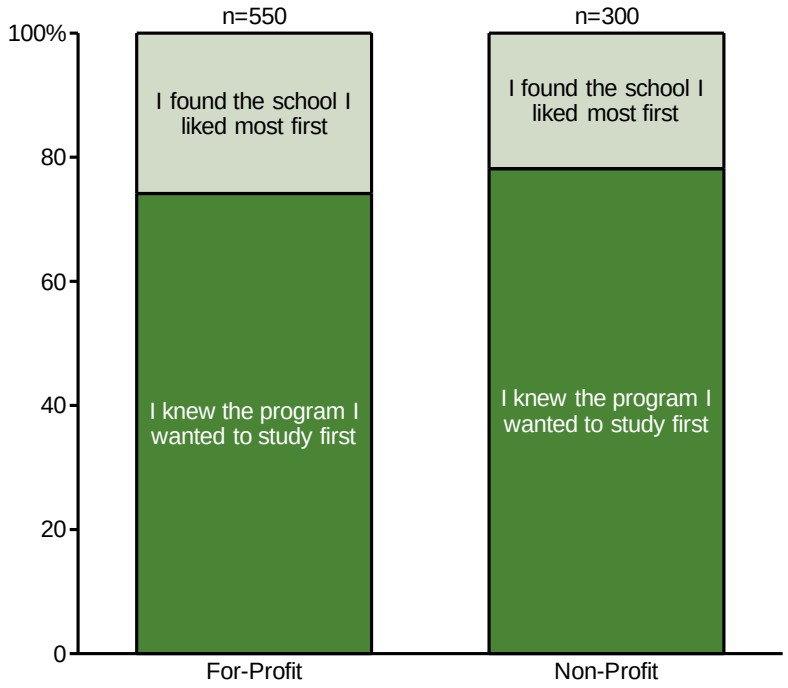
National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Q: When you applied to college, how many other schools did you apply to?



Q: Which of the following describes how you made the decision about what school to attend?



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Source: Parthenon Higher Education Survey (n=1,057)

National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Q: How likely would you be to recommend your school to a friend or colleague? (Net Promoter Score)

Non-Profit Responses

For-Profit Responses

89

1211SUFL_01

Source: Parthenon Higher Education Survey (n=1,057)

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Innovative Post-Secondary Online Institutions

UMUC – Example of an institution that transformed its offerings into primarily online

	University of Maryland, University College
Why innovative?	• Primarily online public institution • Offers credit for prior learning by portfolio
Tuition	• $251/credit (residents); $499/credit (non-residents)
Offerings	• 100 programs, ~800 courses • Traditional Online and Prior Learning Assessment (PLA) Courses
School Size and Type	• Public institution • ~50K online-only enrollments, ~60K total enrollment
Program/ Course Profile	• Prior Learning Assessment: Students can complete a Portfolio* or take a "course challenge" to earn UMUC credits with prior learning; Students must enroll in a Portfolio development course for ~$3K to create their Portfolio and have it evaluated • Maximum of 30 credits can be obtained through PLA, and PLA can fulfill up to half of major and minor credits • Course challenge: a test equivalent to a course's final exam taken for the same cost as the course; if passed student earns a credit for that course
External Relationships	• Under the umbrella of the University of Maryland system along with 11 other schools

Note: *Portfolio: a description of "college-level learning" (obtained through jobs, volunteering, etc.) and a collection of verifying documents
Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

Rio Salado – Example of a community college that transformed its offerings into primarily online

	Rio Salado, Maricopa Community Colleges
Why innovative?	• Community college that has transformed into a primarily online institution (with approximately 90% of students enrolled in online only programs) • Teacher-Student ratio allows the school to achieve extremely low costs
Tuition	• $76/credit (In-state resident, living in AZ for >1 year); $212/credit (In-state non-resident , living in AZ<1 year); $317/credit (out of state)
Offerings	• 100+ online programs, 600+ online courses
School Size and Type	• Public institution • ~52K online-only enrollments
Program/ Course Profile	• Students may enroll to take individual online courses or pursue a certificate or associate degree • Also offers GED, Adult Basic Education Classes, and ELL courses • College has transfer relationships with 32 universities if students wish to purse a bachelor's degree (schools include UMUC and WGU) • 17 physical locations offering Advising, Tutoring and Counseling services, Computer Labs, Testing Centers and state-of-the-art classrooms
External Relationships	• Part of the Maricopa Community College Network; transfer relationships with state of Arizona's universities

92

Source: School website

Innovative Post-Secondary Online Institutions

SNHU – Example of a university that transformed its offerings into primarily online

	Southern New Hampshire University
Why innovative?	• Private not-for-profit university that has transformed into a primarily online university (with ~85% of students enrolled in online only programs)
Tuition	• $320/undergraduate credit; $627/graduate credit
Offerings	• 180+ online programs; 40+ undergraduate majors • Traditional Online and Hybrid Courses
School Size and Type	• Private, nonprofit institution • ~11K online-only enrollments
Program/Course Profile	• Offers Certificate, Associate's, Bachelor's and Master's degrees • Developing competency-based learning for Associate's degrees
Support Services	• Access to 24/7 tech support as well as full access to SNHU's Shapiro Library collection – all of which has been digitized • 5 physical locations, offering student services, classrooms • Students are monitored through a new software system that tracks factors that predict student success (e.g., length of their average post on a class discussion board or how long it's been since their last class) and alerts advisors to flagging students • Student coaches track student progress from enrollment through graduation • 9 person analytics team responsible for tracking student performance • SNHU is in the process of piloting new student advising program
External Relationships	• Community economic development program – strategic partnerships with community action groups provide students with additional training opportunities, real world experience, and partial academic scholarships

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

WGU – Example of a new online institution offering competency based programs

	Western Governors University
Why innovative?	• Designed to meet the learning needs of working adults • Programs employ competency-based education, which is focused on measuring learning rather than seat time
Tuition	• Flat fee/6 month term ($2,890 - $4,250); no tuition increases over the last 5 years
Offerings	• Programs are offered in four areas: business, information technology, teacher education and health care
School Size and Type	• Private, nonprofit institution • ~37K students and almost 1,800 in Florida
Program/ Course Profile	• Programs and courses are designed around developing and assessing key competencies; students move through coursework as quickly as they can demonstrate mastery in course subject matter • Student mentors give academic support via weekly/biweekly academic progress conversations • Course mentors (like professors) who are subject matter experts provide course-specific academic assistance as needed • Alumni provided assistance in developing resumes, interview skills, job hunting skills • Additional support services include: financial aid, financial literacy, orientation, scholarships, field placements, withdrawal recovery, social networking, online library, ADA/VA accommodations, WellConnect (EAP provided to students at no extra cost) • In 2011, was the nation's leading provider of master's degrees in math education, 3rd largest in science education and 4th largest in bachelor's in math education • Student satisfaction rated higher than overall recent college grad results (http://www.wgu.edu/about_WGU/graduate_success); surveys of employers also showed positive results
External Relationships	• To ensure that curriculum is relevant to employer needs, WGU collaborates with industry councils in each discipline • Through partnerships with Indiana, Washington, and Texas, WGU operates state-chartered universities in those states. These universities are subsidiaries of WGU and all enrolled students residing in those states are served by the state-chartered institutions • Each state-chartered WGU is led by a resident chancellor and works with a State Advisory Board composed of leaders in government, academia, and industry • WGU provides all of the curriculum, learning resources, mentoring, and student services for the state-chartered universities

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

Northern Arizona University – Example of an institution developing competency-based learning

	Northern Arizona University – Personalized Learning
Why innovative?	• In the process of developing competency-based programs with flat-rate tuitions, specifically targeting degree completers and working adults
Goal and Population Served	• Directive from University President to innovate in all programs, including online. Also responding to national call to lower cost of higher education
Political Conditions	• Arizona Board of Regents, which oversees the universities, has set several goals for the universities related to enrollment and increasing the number of college graduates • No additional grants or subsidies were given by the state to specifically incent Personalized Learning initiative, although existing state funding has contributed. In addition, NAU was a recipient of a Next Generation Learning Challenges grant • If enrollment goals are not met, institution governance and Board of Regents will determine if online degrees are beneficial to the universities and the state (http://azregents.asu.edu/public/abouttheboard/arizona%20higher%20education%20enterprise/arizona-higher-education-enterprise.pdf) (http://www.azregents.edu/abouttheboard/arizonahighereducationenterprise/default.aspx)
Model and Tuition	• Model: Competency • Tuition: Flat rate of $5K per year ($2500 per 6 month subscription), subscription model
School Size and Type	• Public Institution • Launching 2013
Course Development and Teaching	• Offerings: Business Administration, Computer IT, and Liberal Arts programs; designed through a collaboration of current NAU professors, new hires, and Pearson instructional designers • Degrees are new degrees developed specifically for this flexible delivery model • Partner: Pearson provides the platform for course delivery, pretesting and post-testing competencies. Northern Arizona pays Pearson $875/enrolled student every six months • Faculty: NAU faculty develop and vet courses. Newly hired, full-time assistant professors are responsible for instruction

95

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Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions
ASU – Example of partnership model

	Arizona State University – ASU Online
Why innovative?	• Given public funding constraints, ASU engaged in a public/private partnership to leverage marketing, instructional design, support services and technology capabilities
Goal and Population Served	• Important component of ASU's overall mission of the University to broaden the number of students it enrolls and graduates. Reflects the desire to set standards by the quality of graduates, not the exclusivity of admissions • Goal: 100,000 online students by the year 2020
Political Conditions	• Arizona Board of Regents, which oversees the universities, has set several goals for the universities related to enrollment and increasing the number of college graduates • No grants or subsidies were given by the state to encourage these efforts • If enrollment goals are not met, institution governance and Board of Regents will determine if online programs are beneficial to the universities and the state (http://azregents.asu.edu/public/abouttheboard/arizona%20higher%20education%20enterprise/arizona-higher-education-enterprise.pdf) (http://www.azregents.edu/abouttheboard/arizonahighereducationenterprise/default.aspx) • To respond to labor market needs, ASU works closely with local industries both for placing and recruiting students in several programs (e.g., Master's in Ed, RN to BSN, and Criminal Justice)
Model and Tuition	• Model: Credit-based • Tuition: <$500 per credit hour, plus fees; $1500 per class
School Size and Type	• Public Institution • Reached 7K online enrollments in first year of business program
Course Development and Teaching	• Offerings: ~60 fully online courses • Partner: Pearson provides marketing, instructional design assistance as needed, content if the faculty want it, enrollment coaching, retention coaching, technology to support our efforts. Revenue split with Pearson • Faculty: Either faculty develop and teach the course with the assistance of TAs, graders, etc. or faculty develop and vet a course, then oversee adjuncts who teach the course

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

KCTCS – Example of a Collaborative Model (p1)

	Kentucky Community and Technical College System – Learn On Demand
Why innovative?	• Centralized coordination of all competency-based program offerings throughout the community college system
Program Initiation	• Survey commissioned by the presidents of the KCTCS. Results showed 1.34 million people in KY without a degree, 187 thousand extremely or very likely to enroll in post-secondary opportunities if it fits their need. Survey also showed what types of programs were in highest demand (IT, Business) • Launched Learn On Demand in 2008, with presidents of the colleges as the BOD • Used RFP process to develop content for the courses. Any of the 16 colleges could submit their plan and budget for a program • The central system determined the phase 1, round 1 programs they wanted were just business administration and information technology. General Education courses were developed in phase 1, round 1 to complete the AAS degree options and AA/AS degrees • Each lead college needed to show a sustainability plan for the program. A cap was put on course development costs at $1000 per credit hour
Political Conditions	• There was no pressure from the state to offer additional online programs (KCTCS had been offering traditional online programs since 2001) • The state was supportive though and gave KCTCS a revolving loan through the Council for Postsecondary Education
Population Served	• ~2100 students
Course Development and Teaching	• The lead college orchestrates the entire process of content development and course delivery. They can hire course leaders and course developers to put the content together. And then they hire adjunct faculty to teach the courses. They set up the scheduling and offerings of the course in Peoplesoft • The 16 individual colleges can enroll students in each course. It is up to course faculty to cap the number of students in a particular course (they only get paid for the number of students they teach) • Required eResources are provided by a content provider and managed through Barnes & Noble
Flexible Curriculum Options	• Competency-based model, short courses (modular)

97

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions
KCTCS – Example of a Collaborative Model (p2)

	Kentucky Community and Technical College System – Learn On Demand
Administrative Services and Costs	• $460,000 loan to launch Learn on Demand. KCTCS has paid back this loan to KCPE, and Learn on Demand is intended to be totally self-sufficient on tuition revenue. This investment went to building the website and infrastructure, marketing and sub grants for institutions developing the classes • System office provided QA certification funding, Blackboard, module development support (largest system expense was the 24/7 student support services) • Three hires at the central office (instructional design expert to help with quality assurance, student services coordinator for 24/7 student serves, and curriculum specialist to support faculty). Colleges must also hire or allocate someone to be a liaison between the college and the program
Revenue	• KCTCS' Learn on Demand revenue for Fiscal Year 2012 was $1,077,550. However, since some colleges were still paying back development costs, the net profit was approximately $120,000. For fiscal year 2013, all development costs will have been paid back • Projected revenue for fiscal year 2013 is $3,795,120 with net profit of around $2,300,000. The program will have increased operational expenses due to serving more students and adding more academic services in 2013 • Tuition revenue is used to reimburse central services costs and lead colleges for delivery costs. Any additional tuition goes to six Learn on Demand Charter Colleges. FTE allocations go to home college. eResource fees are split between content provider and Barnes & Noble
Quality Assurance	• Peer Review - All courses are peer reviewed before they are offered to students, and KCTCS has created a quality assurance (QA) procedure that measures both the courses and the delivery process. The QA procedure includes interviews with students who drop classes and student course evaluations, both at midterm and completion • Training - Faculty must apply to teach courses and complete training on how to teach and facilitate learning in a Learn On Demand online class. After they have taught the class, it is evaluated by the quality assurance procedure and the students. If the quality assurance review indicates a problem, the teacher must complete further training • Coaches - All students in Learn On Demand gets a coach to help support them, make sure they are settled in academic program • Results - This attention to quality has paid off in improved student performance. After some experimentation, Learn on Demand has increased the rate of students finishing a module with a passing grade to 88 percent, higher than the 86 percent rate for students on the physical campus
Marketing	• Search engine management and optimization program, trying to drive people to website. Direct mail campaigns are also used

98

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

WICHE ICE – Example of a Collaborative Model across states / institutions (p1)

	Western Interstate Commission for Higher Education – Internet Course Exchange
Why innovative?	• WICHE's Internet Course Exchange (ICE) allows institutions to share online courses across states and university / college systems • Potential for institutions to partner in developing and offering joint programs
Organization Description	• Regional nonprofit higher education service organization (one of four regional compacts in U.S.) • WICHE membership includes 15 western states; institutions in 7 states participating in ICE
Internet Course Exchange Description	• Alliance of member institutions and systems that broadens student access to online courses and programs • Enables students to seamlessly access other two- and four-year institutions' online courses while using the advisory, registration, and financial aid services provided at their home campuses • ICE provides the step-by-step advice for this multi-institutional collaboration
Benefits	• For institutions with a strong online offering, allows the institutions to export empty seats to other institutions to generate revenue • For institutions with students interested in an online course that they do not offer, they can import vacant seats from a course offered by another institution
Population Served	• 5 institution members; 3 consortia members; 2 affiliated consortia • Currently ~80 students annually are taking courses through the exchange • Also powers Nexus Exchange between 10 nursing PhD programs –approximately 80 students participate annually
Revenue	• Institutions that are importing courses are buying and setting up those courses as their own and, therefore, count the student enrollments • Institutions that are exporting courses are the "Teaching Institution" and receive fee revenue, not enrollments • Teaching Institutions make the seats available to Enrolling Institutions at the agreed upon WICHE ICE common wholesale price set by the Steering Board annually (currently $150 per credit hour for undergraduate courses and $200 per credit hour for graduate courses) • Students at enrolling institution will pay for the course at the retail price it sets (tuition plus mandatory fees) • WICHE keeps 15% of wholesale price

99

Source: Organization website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

WICHE ICE – Example of a Collaborative Model across states / institutions (p2)

	Western Interstate Commission for Higher Education – Internet Course Exchange
Administrative Details	• Academic department chairs must ensure that courses taught by the other institution are truly interchangeable with their own. The course is set up in the enrolling institution's own registration system and is reflected on its own transcript. Up to the enrolling institutions to determine if they will accept courses, given their admissions standards, etc. • Because enrolling institutions set up imported courses as their own in their student record systems, students do not submit additional admission applications, register through another college, or get their financial aid manually adjusted • Institutions do not need to have common LMS, SIS. Students must use the LMS of the teaching institution for the course. There have been no problems with this thus far
WICHE's Role	• Acts as the centralized broker, bills the Enrolling Institutions for each enrollment at the common wholesale or negotiated wholesale price agreed upon by the members • WICHE retains an administrative fee (15% of wholesale price) for each enrollment and pays the balance to the Teaching Institution

100

Source: Organization website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

VCCS – Example of a Lead Institution Model (p1)

	Virginia Community College System – Northern Virginia Community College as the Leader
Why innovative?	• Online program offerings and supports come from lead college in the community college system
Program Initiation	• NVCC began offering online courses for its own students and over time built up a catalog of 400 courses • In 2008, VCCS decided to be more strategic about online education, targeting their offerings to degree programs in those fields in which adult learners seek credentials (based on the courses the for-profits offer, Eduventures research, Education Advisory Board research) • In 2011 NVCC launched a pilot allowing other colleges in the VCCS to offer NVCC courses to their students, offered stipend of ~$20K to participating schools (require schools to have a communications liaison to work with ELI director) – Shared Service Distance Learning (SSDL)
Political Conditions	• Motivated in part by rumors that the legislature wanted a statewide online solution and would bring in a WGU. VCCS wanted to prove they could provide the solution internally • Access was more of a motivation than affordability, although both were considerations
Population Served	• Serve 23K students at NVCC, 2K from other VCCS schools • Only one director hired thus far, no additional hires, no special classes designed
Course Development and Teaching	• NVCC faculty and staff develop courses (instructional designers work with content experts) • Instructor faculty are hired separately and can come from outside the VCCS system • All faculty hired and paid by NVCC. Other college does not have to do anything • Full time faculty salaries are $65K, Adjuncts are paid $3K for a 3 credit course • Faculty are paid by enrollment for online courses
Flexible Curriculum Options	• Will introduce prior learning assessment models • Will introduce credit-by-examination using MOOCs

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

CSU-Global Campus – Example of a New Public Online-Only University

	Colorado State University – Global Campus
Why innovative?	• CSU-GC is a relatively new 100% online university • Designed to serve the unique needs of non-traditional adult learners • CSU-GC is giving credit for proctored exams for Udacity MOOC courses
School Type	• Public institution • 6,500 active students, approximately 65% are Colorado residents
University Initiation	• University launched in 2007 as a separate University within the CSU system, and began enrolling students in 2008 • Received independent, regional accreditation in 2011 (prior to that, student registration and financial aid came through sister campuses) • University does not receive any state appropriations and operates exclusively through its own cash flow. Initially granted $12 million loan for the creation of CSU-Global Campus by the CSU System Board of Governors. The loan and interest have been repaid in full • University was created as a statutorily separate state institution to provide it with the opportunity to fulfill its unique mission
Tuition	• Bachelor's Degree - Cost per credit: $350; cost for 3 credit course: $1050 – Estimated tuition for student with 90 transfer credits: $10,500 – Estimated tuition for student with 60 transfer credits: $21,000 – Estimated tuition for student with 30 transfer credits: $31,500 • Master's Degree - Cost per credit: $500; cost for 3 credit course: $1500 • Students pay the same tuition regardless of residency status (in-state or out-of-state). Tuition guarantee ensures that tuition will never increase as long as the student is enrolled in his/her degree program • Final exam for Udacity's courses occurs at an independent testing center and costs $89 (administered by Pearson)

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Innovative Post-Secondary Online Institutions

CSU-Global Campus – Example of a New Public Online-Only University

	Colorado State University – Global Campus
Course Development and Teaching	• Provides online graduate degrees, undergraduate degrees, completion programs, and individual courses • Programs are offered in management, technology, business, and education • Courses are primarily credit-based • All faculty members are adjunct and trained by the university to address the unique needs of adult learners in an online environment
Flexible Curriculum Options	• Prior Learning Assessment (PLA) program allows students to complete PLA portfolio projects that document prior education and experience to match CSU-Global course competencies • Credits earned through exams (AP, CLEP, DSST, StraighterLine, etc.), vocational school or military experience; other non-collegiate sources of credit can be evaluated and may be accepted • CSU-GC is giving credit for proctored exams for Udacity (MOOC) courses
Program/ Course Profile	• Classes start every four weeks and the enrollment process is streamlined to allow students to quickly begin coursework • Courses are eight weeks long • Students have access to 24/7 tutoring (live support and feedback on work) • Students have access to a 24/7 technical support center • The school provides a virtual library with 24/7 access to a librarian • Program design, support services and marketing are all done internally
Retention Rates	• Fall 2009 to Fall 2012 cohort retention/graduation rate is 73% • First-to-third term retention is 82% (FY12) • Fall-to-Spring term retention averages 92% and Spring-to-Fall term retention averages 87% (FY11 & FY12)
External Relationships	• CSU-GC is part of the Colorado State University System, which includes Colorado State University, Colorado State University-Pueblo and Colorado State University-Global Campus • CSU-Global has Industry Advisory Councils for each degree program. Councils are comprised of 7-10 industry leaders

Source: School website; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Persistence Studies

Findings from studies on online vs. onsite persistence rates

Current meta-analyses show high efficacy of online learning

Key Findings:

- Students in classes with an online component have modestly higher achievement than those in purely traditional classes
  - *Evaluation of Evidence-Based Practices in Online Learning, NCES*
- The majority of meta-analyses focus on post-secondary education
  - *Twenty Years of Research on the Academic Performance Differences Between Traditional and Distance Learning*

Other studies shine doubt on these findings, especially in remedial courses

- Studies looking at students in remedial and entry-level courses "indicate a robust negative impact of online course taking" and lower achievement levels
  - *The impact of technology on community college students' success in remedial/developmental Mathematics*
- This is especially true for "low-income and academically underprepared students"
  - *The impact of technology on community college students' success in remedial/developmental mathematics*
- Retention rates were also lower for students who took online classes with no in-person tutoring
  - *Computer-based instruction and remedial mathematics: A study of student retention at a Florida college*

However, there are still unaccounted for drivers of retention and success across modality

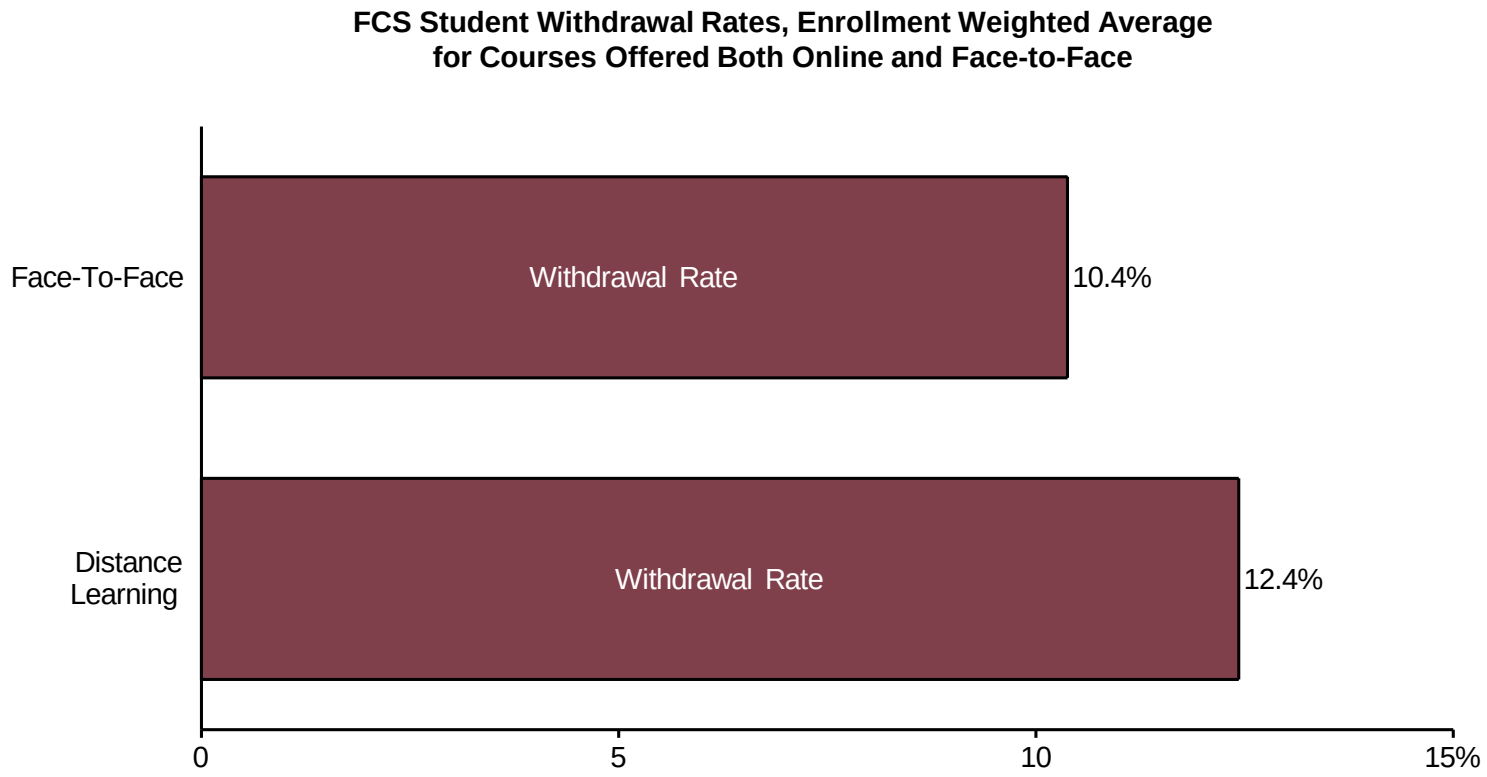
- Regardless of believed efficacy; studies agree that the success of online learning is hugely varied based on student preparedness, content, learner types, and content level
  - *Evaluation of Evidence-Based Practices in Online Learning, NCES; Effectiveness of Fully Online Courses for College Students*
- "Additionally, there is evidence that external socioeconomic factors play a role in student access and success"
  - *Response to a Department of Education Meta-Analysis, CCRC*

Given the evolving nature of both technology and new learnings to improve the efficacy of online, it is **critical that any new Florida initiative include significant data analysis and tracking of outcomes**

Source: Computer-based Instruction and Remedial Mathematics: A study of Student Retention at a Florida Community College, Carol A. Zavarella, University of South Florida Scholar Commons, 2008; Twenty Years of Research on the Academic Performance Differences Between Traditional and Distance Learning: Summative Meta-Analysis and Trend Examination, Shachar and Neumann, MERLOT Journal of Online Learning and Teaching, 2010; Evaluation of Evidence-Based Practices in Online Learning: A Meta-Analysis and Review of Online Learning Studies, NCES, 2010; Effectiveness of Fully Online Courses for College Students: Response to a Department of Education Meta-Analysis, Jaggars and Bailey, 2010; The Impact of Technology on Community College Students' Success in Remedial / Developmental Mathematics, Bendickson, University of South Florida Scholar Commons, 2004

Persistence Studies

FCS Withdrawal Rates – Online vs. Face-to-Face



106

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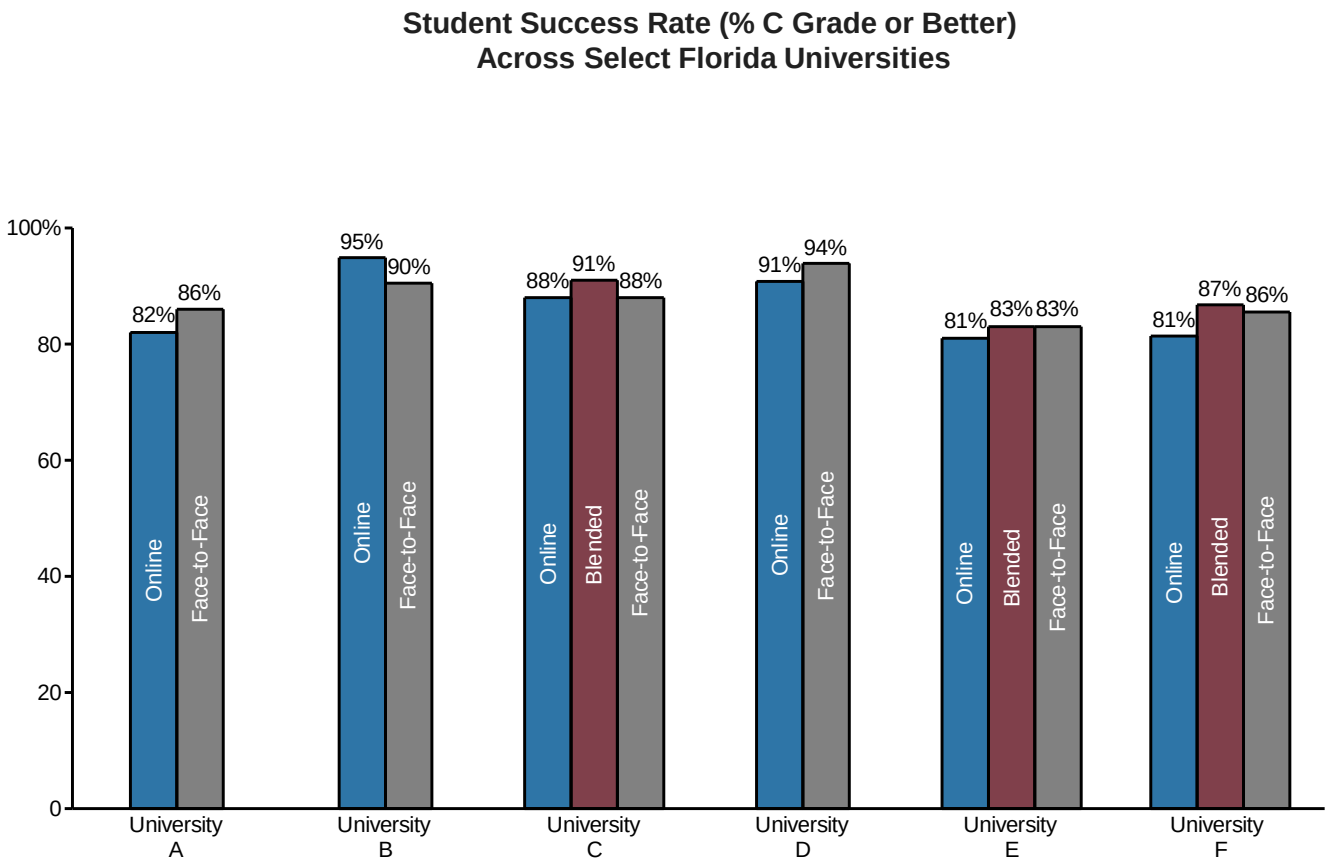
Source: FL DOE

Persistence Studies

SUS Success Rates – Online vs. Blended vs. Face-to-Face



107

Source: SUS Board of Governors

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

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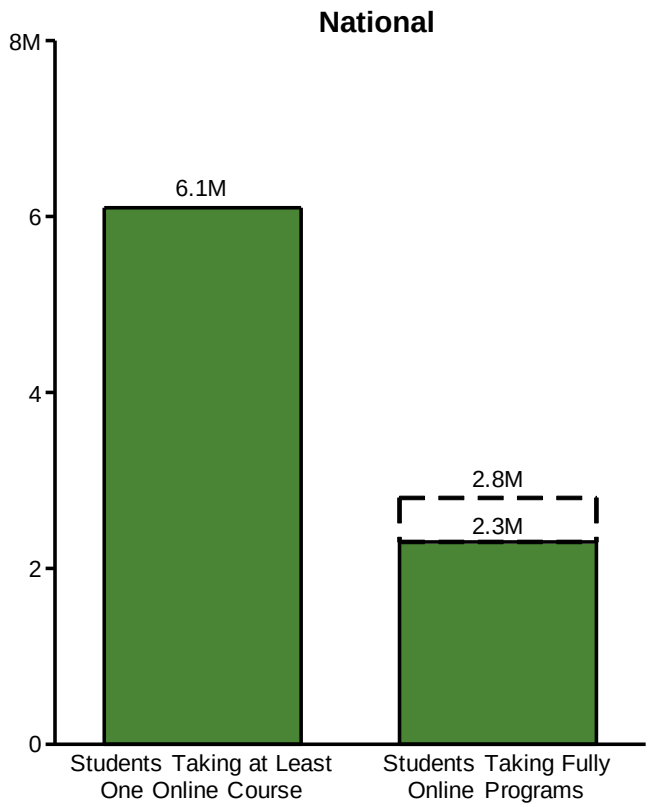
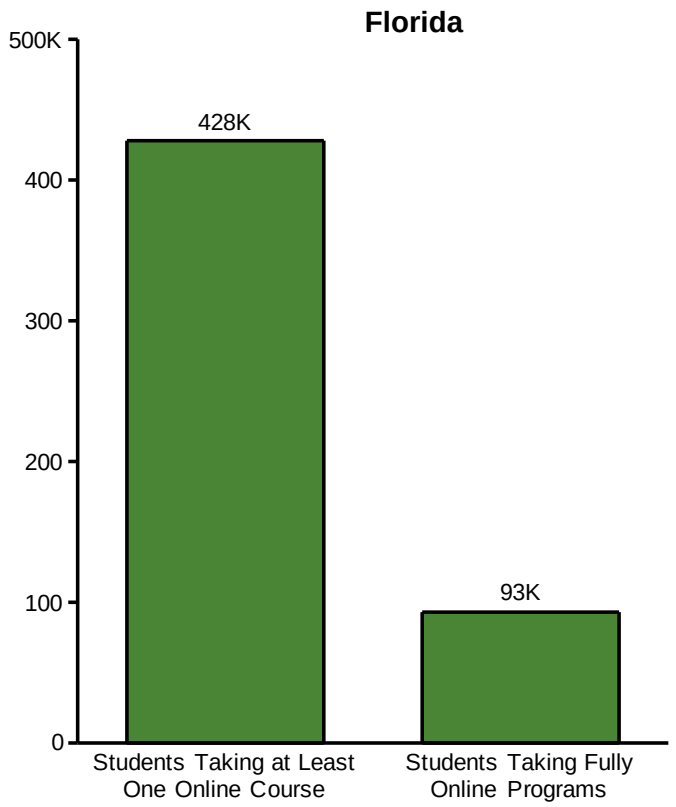
Florida Online Enrollments

National and Florida Post-Secondary Online Enrollment

Online Enrollment (Unduplicated Headcount)
Nationally and in Florida, 2010-2011





Percent of Total Enrollment	31%	12%-14%

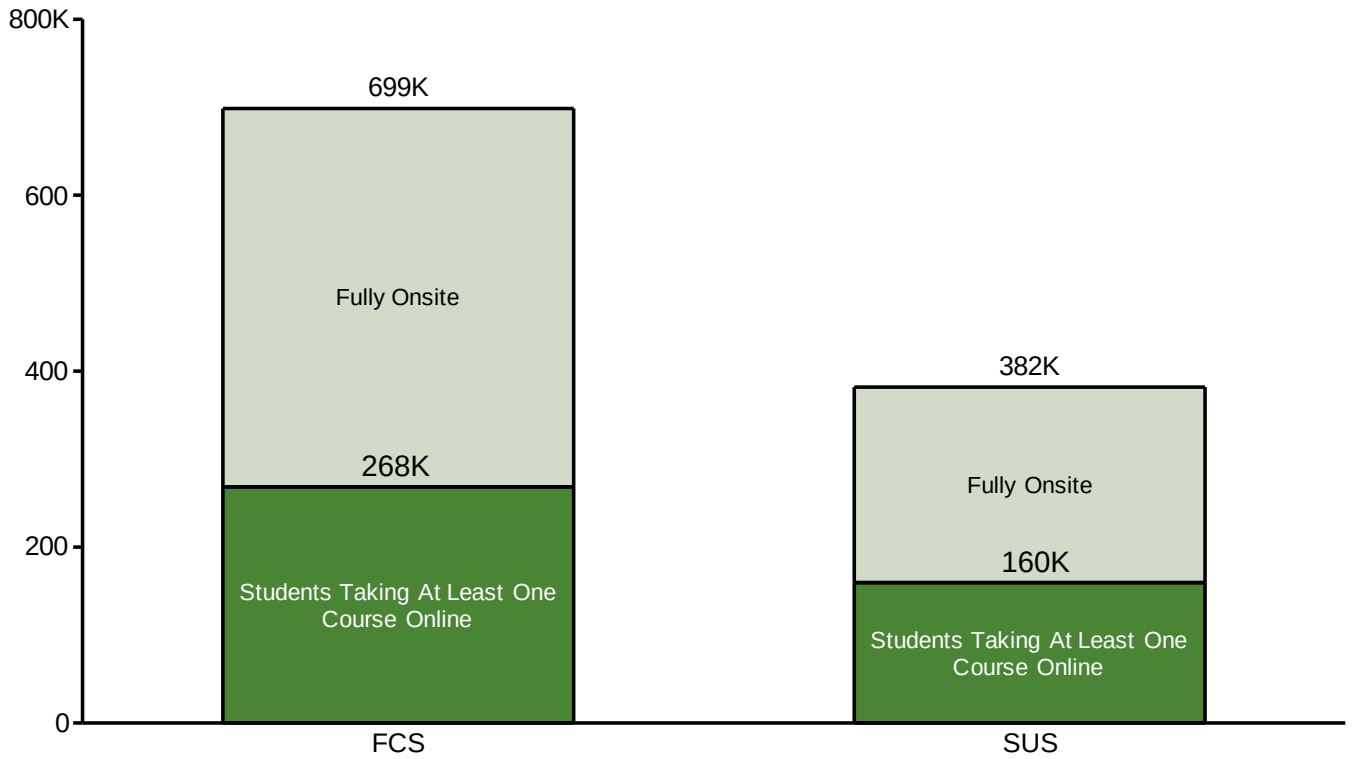
Percent of Total Enrollment	40%	<10%*

Note: Online enrollment refers to any student taking at least one course where 80% or more of the content is delivered online; *There is no designation within SUS/FCS for online-only students; The number of students taking online-only courses in 2010-2011 is 93K; It appears that the actual number of online-only students is much lower as only 19K of those students were enrolled in online-only courses in 2011-2012
Source: Babson Survey Research Group; SUS Board of Governors; FL DOE; IPEDS; Eduventures Online Higher Education Update 2012

Florida Online Enrollments

FCS and SUS Students Taking at Least One Course Online

FCS and SUS Total Unduplicated Headcount:
Fully Onsite vs. Students Taking at Least One Online Course, 2010-2011



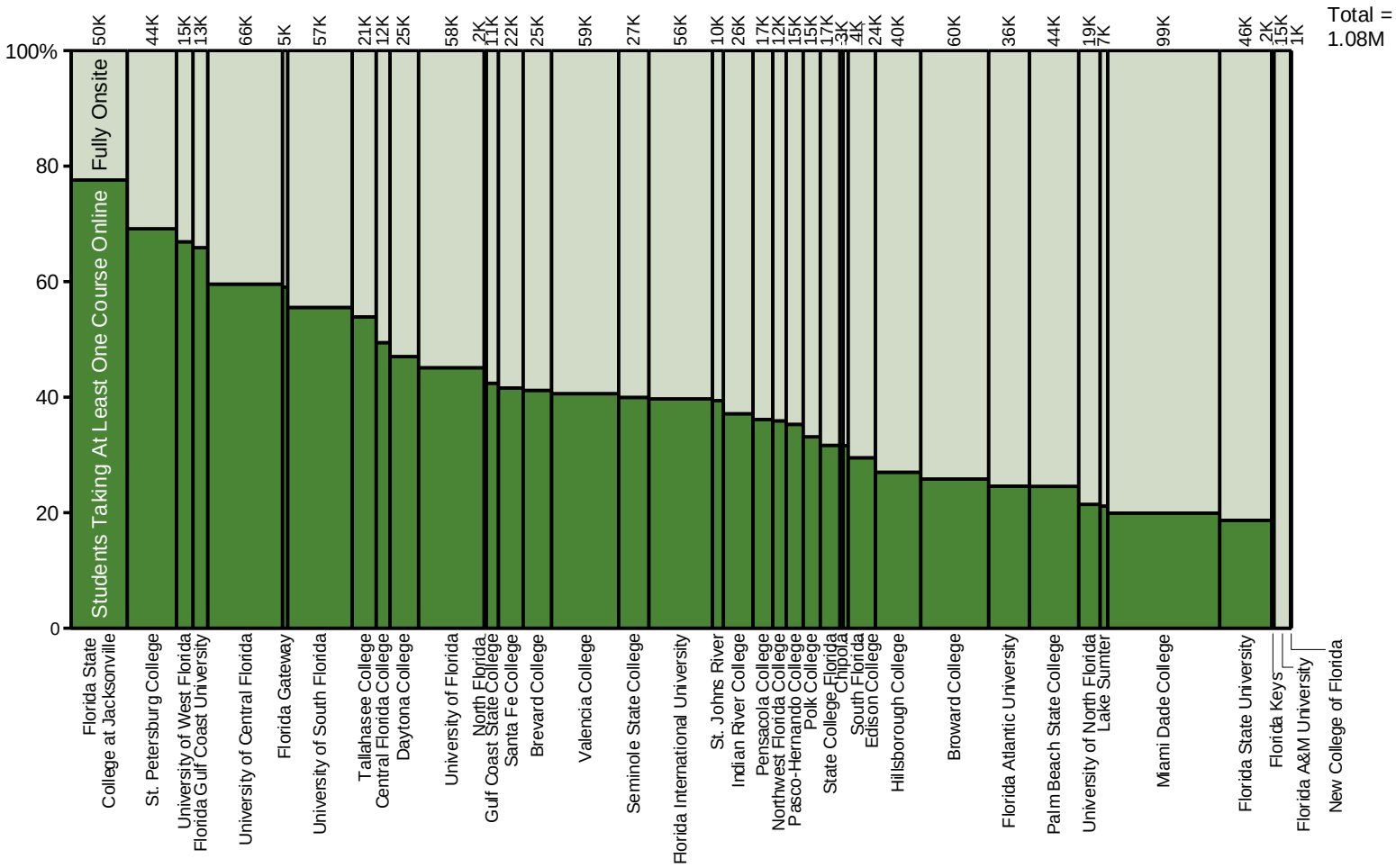
	FCS	SUS
% Students Taking At Least One Course Online	38%	42%

Note: Total headcount is 12-month unduplicated headcount from IPEDS; Online enrollment refers to any student taking at least one course where 80% or more of the content is delivered online
Source: SUS Board of Governors; FL DOE; IPEDS

Florida Online Enrollments

FCS and SUS: Students Fully Onsite vs. Students Taking at Least One Online Course

Total Enrollment (Unduplicated Headcount) by School:
Students Fully Onsite vs. Students Taking at Least One Online Course, 2010-2011

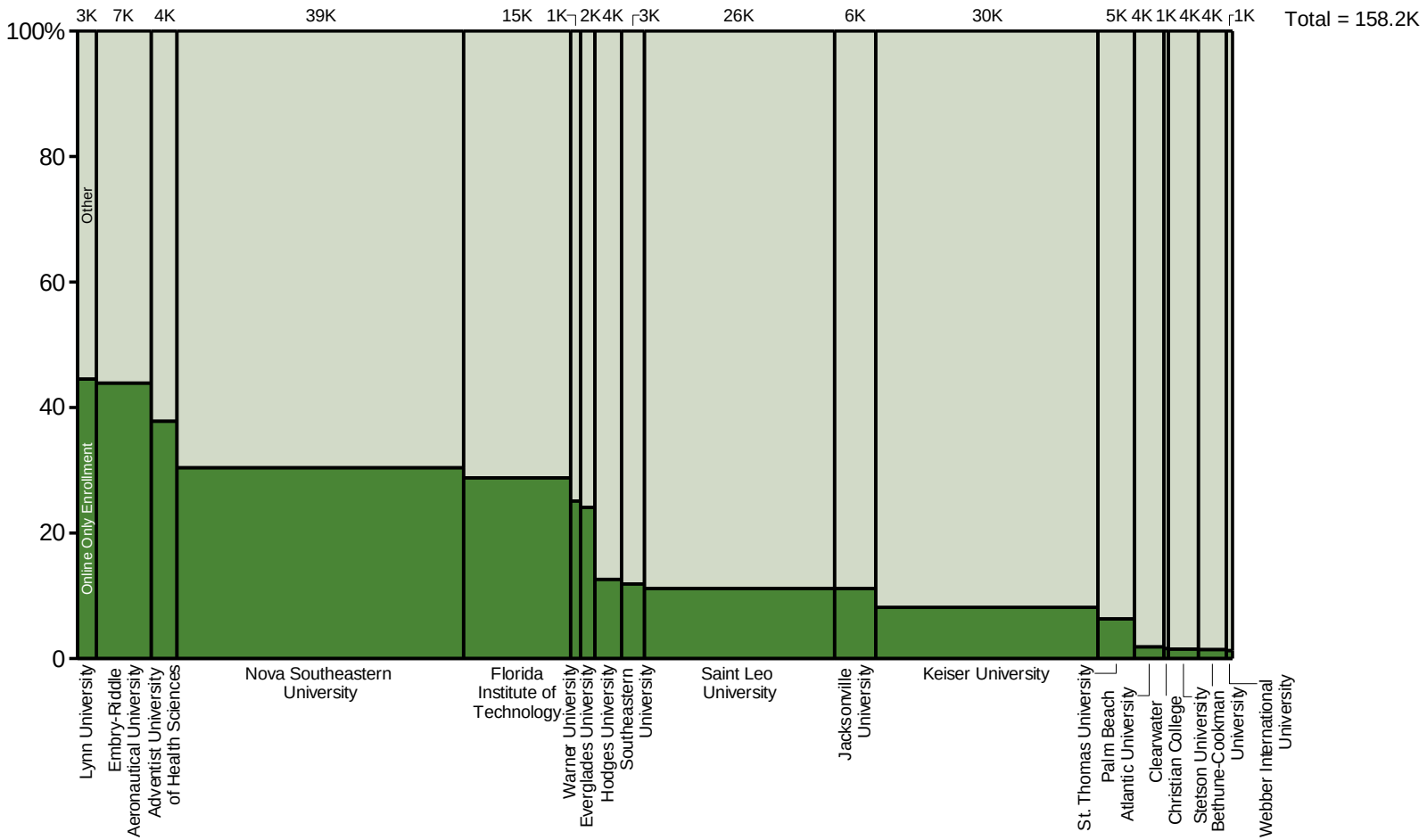


Note: Total headcount is 12-month unduplicated headcount from IPEDS; Includes only credit-bearing courses; Online enrollment refers to any student taking at least one course where 80% or more of the content is delivered online; Bar width represents total enrollment
Source: SUS Board of Governors; FL DOE; IPEDS

Florida Online Enrollments

ICUF: Students Fully Onsite vs. Students Taking at Least One Online Course

Total Enrollment (Unduplicated Headcount) by ICUF School:
Fully Onsite or Hybrid vs. Online-Only Students



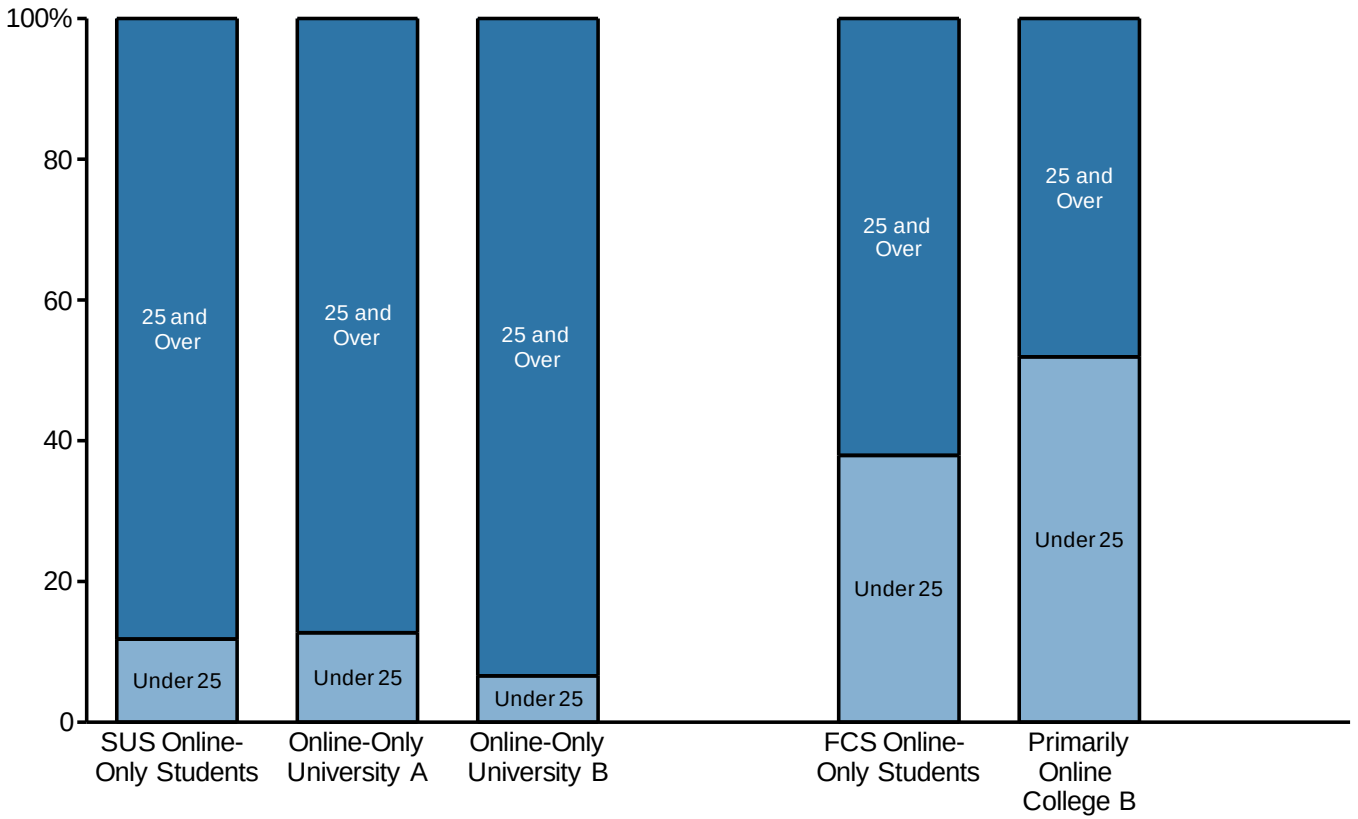
112

Note: Total headcount is 12-month unduplicated headcount 2010-2011 from IPEDS; Includes only credit-bearing courses; Online-only figures are from Fall 2011; Online enrollment refers to any student taking at least one course where 80% or more of the content is delivered online; ERAU total enrollment includes both Daytona Beach and Prescott campuses
Source: ICUF; IPEDS

Florida Online Enrollments

Percent Online Only Enrollment By Age and Percent Master's Degree

Online Enrollment Demographics, 2010-2011



	SUS Online-Only Students	Online-Only University A	Online-Only University B	FCS Online-Only Students	Primarily Online College B
% Master's Enrollments	34%	27%	2%	0%	0%

113

Note: For non-SUS/FCS institutions: Percent of enrollment by degree type is estimated by adjusting completions by degree type by average program length and applying these shares to top line enrollment figures from IPEDs. Enrollments by age for primarily online college represent fall 2010 enrollment. Online-only universities include WGU and Excelsior, primarily online college cited is Rio Salado; SUS percent master's enrollment represents online only graduate students

Source: SUS Board of Governors; FL DOE; IPEDS; College Board Completion Arch

Florida Online Enrollments

Undergraduate Enrollment by Age and Modality at SUS Institutions

	Online Only		Online and Onsite	
	Under 25	Above 25	Under 25	Above 25
FAU	94	762	2,244	3,161
FGCU	119	346	5,639	1,340
FIU	424	2,161	8,107	8,610
FSU	55	386	4,860	1,364
UCF	902	3,368	19,900	9,618
UF	505	2,240	15,641	1,609
UNF	24	87	2,165	1,159
USF	480	2,899	14,454	9,332
UWF	283	1,841	3,430	2,631
Grand Total	**2,886**	**14,090**	**76,440**	**38,824**

114

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Note: Enrollment is unduplicated headcount in 2010-2011 only
Source: SUS Board of Governors

Florida Online Enrollments

Graduate Enrollment by Age and Modality at SUS Institutions

	Online Only		Online and Onsite	
	Under 25	Above 25	Under 25	Above 25
FAU	11	710	84	1,826
FGCU	2	254	46	789
FIU	15	676	71	2,276
FSU	7	479	121	1,295
UCF	67	2,046	273	3,295
UF	21	2,153	535	3,484
UNF	1	96	14	515
USF	27	1,321	174	3,039
UWF	16	987	50	576
Grand Total	**167**	**8,722**	**1,368**	**17,095**

115

Note: Enrollment is unduplicated headcount in 2010-2011 only
Source: SUS Board of Governors

Florida Online Enrollments

Online Only Enrollment by Degree Level at SUS Institutions

	Undergraduate Enrollment	Graduate Enrollment	Total
FAU	856	721	1,577
FGCU	465	256	721
FIU	2,585	691	3,276
FSU	441	486	927
UCF	4,270	2,113	6,383
UF	2,745	2,174	4,919
UNF	111	97	208
USF	3,379	1,348	4,727
UWF	2,124	1,003	3,127
Grand Total	**16,976**	**8,889**	**25,865**

116

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Note: Enrollment is unduplicated headcount in 2010-2011 only
Source: SUS Board of Governors

Florida Online Enrollments

Total Online Enrollment by Degree Level in SUS

	Undergraduate Enrollment	Graduate Enrollment	Total
Online and Onsite (Hybrid) Students	115,264 (86%)	18,463 (14%)	133,727
Online Only Students	16,976 (66%)	8,889 (34%)	25,865
All Online Students	**132,240 (83%)**	**27,352 (17%)**	**159,592**

117

1211SUFL_01

Note: Enrollment is unduplicated headcount in 2010-2011 only
Source: SUS Board of Governors

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

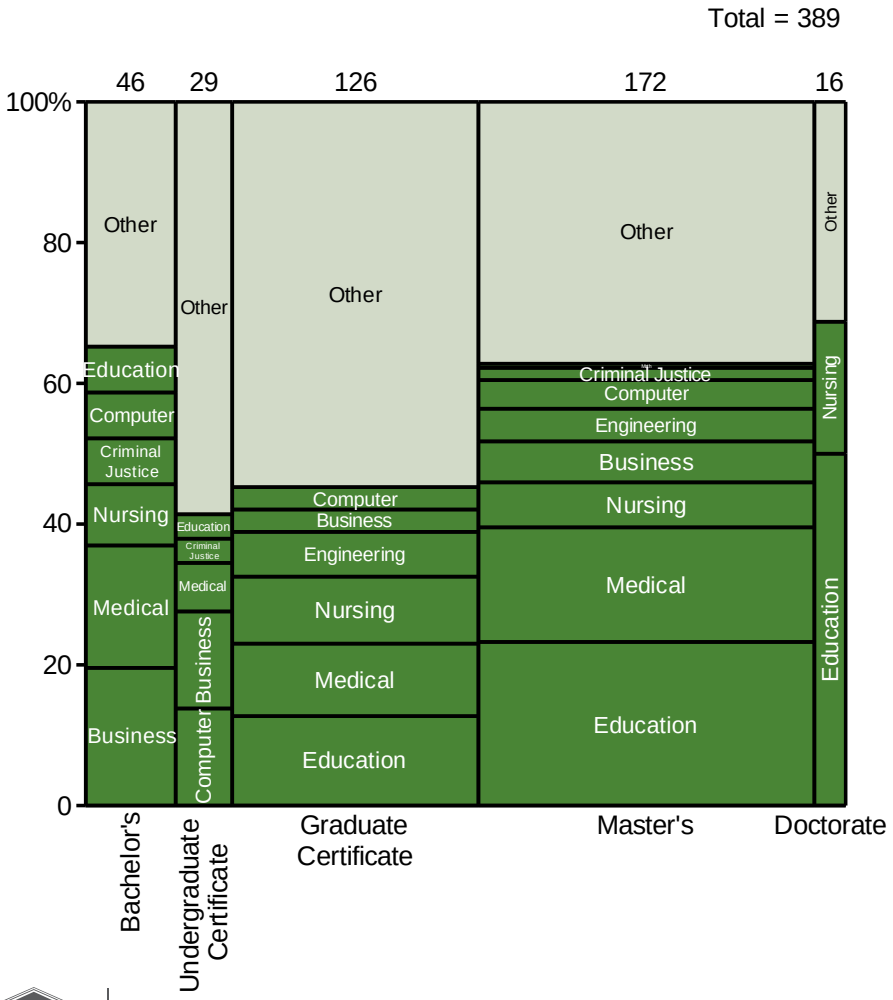
Florida Virtual Campus

Accreditation Detail

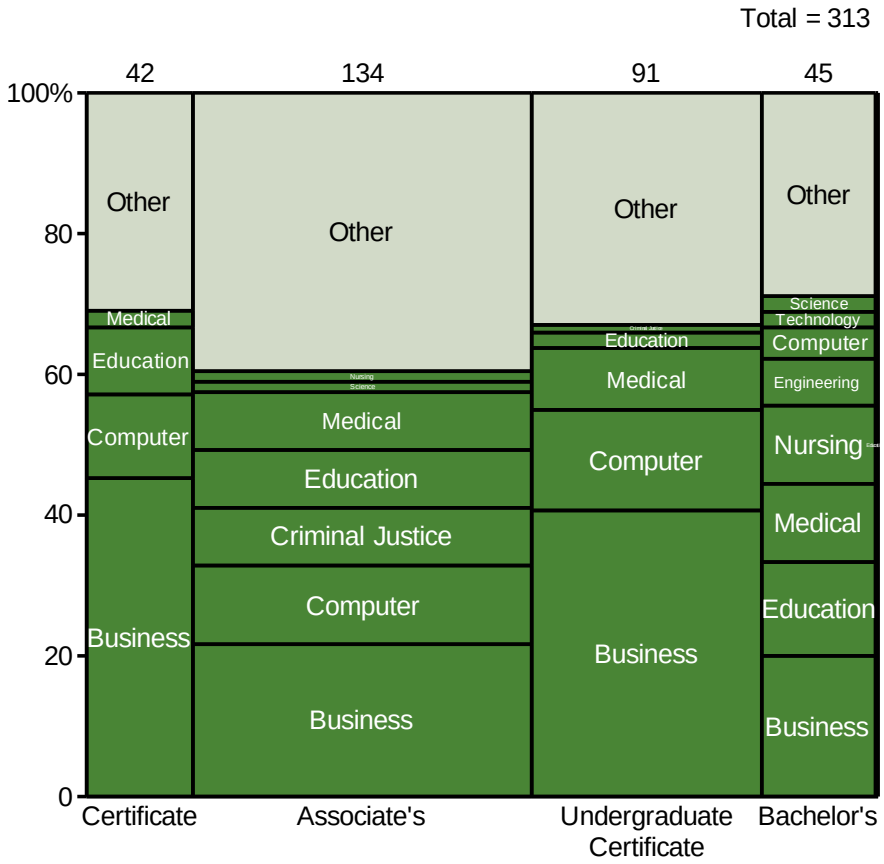
Stakeholder Interviews

Florida Online Programs
SUS and FCS Online Program Offerings

SUS Online Program Offerings



FCS Online Program Offerings

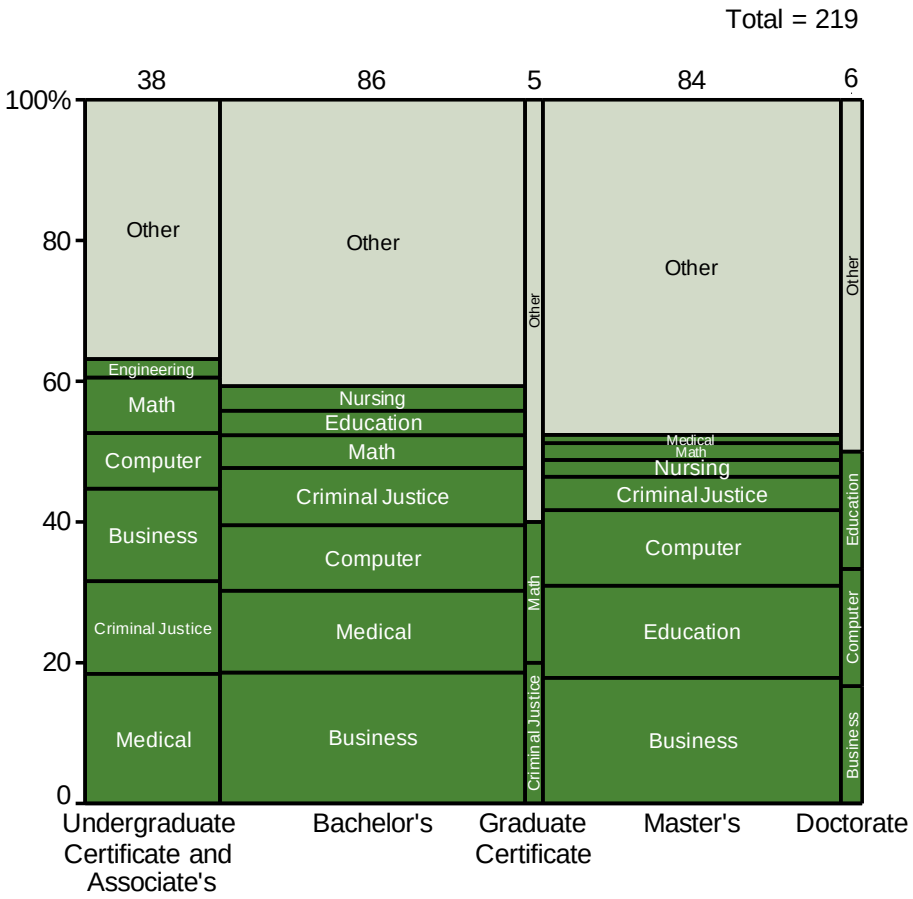


119

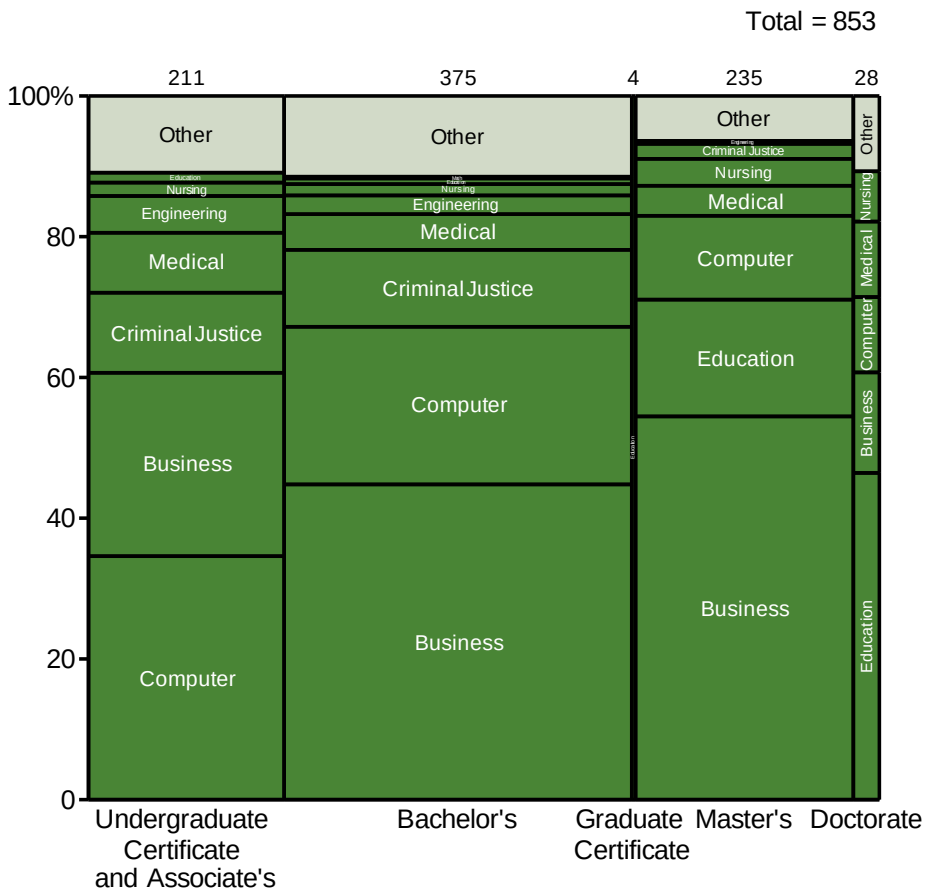
Note: Includes FL distance learning programs listed in the FLVC
Source: FLVC

Florida Online Programs
ICUF and For-Profit Program Offerings

ICUF Online Offerings



For-Profit Online Program Offerings



Note: For-profit schools: Allied Health Institute, American InterContinental University (South Florida), Agrosy University (Tampa), DeVry University (Florida), Everest University (Largo), Everglades University, Fortis College (Largo), Full Sail University, ITT Technical Institute (Fort Lauderdale, Fort Myers, Jacksonville, Tallahassee, Tampa), Keiser University (Fort Lauderdale), Le Cordon Bleu College of Culinary Arts (Miami, Orlando), Rasmussen College (Florida), Remington College (Tampa), Schiller International University, South University (Tampa, West Palm Beach), Strayer University (Florida), University of Phoenix (North Florida, South Florida, West Florida)
Source: ICUF; Florida Online Colleges Website

Florida Online Programs

SUS Online Program Offerings – "Other" Programs

Undergraduate Certificate	Bachelor's
Executive EMS Officer Certificate	Bachelor of Arts in Maritime Studies
Executive Fire & Emergency Services Officer Certificate	Bachelor of Public Administration
Certificate in Export-Import Management	Bachelor of Science Applied Physiology and Kinesiology
Certificate in Geomatics	Bachelor of Science in Fire and Emergency Services
Certificate in Landscape Pest Management	Bachelor of Science in Oceanography
Certificate in Pest Control Technology	Bachelor of Science in Workforce and Program Development
Certificate in Urban Pest Management	Bachelor of Science Microbiology and Cell Sciences
Compliance Specialist	Bachelor of Science Sport Management
Emergency Management	Construction Engineering
Geographic Information Systems	Interdisciplinary Social Science
Gifted Education Program-transcript review	Interdisciplinary Studies
Infant Toddler Development Specialist Program-letter of completion	Political Science
Online Undergraduate Certificate in African and African Diaspora Studies	Psychology B.S.
Public Procurement (UG)	Public Safety Administration
Undergraduate Certificate in Arabic Language and Culture	Public Safety and Security
Undergraduate or Graduate Certificate in Workforce and Program Development	Sports Management
Undergraduate Women's Studies Certificate	

Doctorate
Doctor of Audiology (AuD)
Doctor of Pharmacy - First Professional Degree (PharmD)
Doctor of Pharmacy - Working Professional (PharmD)
Doctor of Philosophy in Classical Civilization (PhD)
Doctor of Philosophy in Latin and Roman Studies (PhD)

121

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

SUS Online Program Offerings – "Other" Programs

Graduate Certificate	
Applied Operations Research	Concepts and Tools of Epidemiology
Autism Spectrum Disorder	Corrections Leadership
Autism Spectrum Disorders	Design for Usability
Certificate in Advanced Manufacturing	Disaster Management
Certificate in Construction Project Management	Emergency Management
Certificate in Control Systems	Event Management
Certificate in Emergency Services/Disaster Management	Graduate Certificate in Emergency Management
Certificate in Energy Management	Graduate Certificate in Human Performance Technology (HPT)
Certificate in Environmental Forensics	Graduate Certificate in Readiness and Response
Certificate in Environmental Policy Management	Hearing Specialist: Early Intervention
Certificate in Family Financial Planning	Humanitarian Assistance
Certificate in Forensic Death Investigation	Industrial Ergonomics and Safety
Certificate in Forensic DNA and Serology	Infection Control
Certificate in Forensic Drug Chemistry	Informal Science Institutions: Environmental
Certificate in Forensic Toxicology	Institutional Research
Certificate in Forensic Vocational Rehabilitation	Leadership and Management
Certificate in Gas Turbines	Leadership in Developing Human Resources
Certificate in GIS for Urban and Regional Planners	Leadership in Executive and Administrative Development in Social Work
Certificate in Global Strategic Communication	Mathematics
Certificate in Landscape Pest Management	Nonprofit Management
Certificate in Material Characterization	Pharmacy Sciences
Certificate in Non Profit Management	Police Leadership
Certificate in Pest Control Technology	Positive Behavior Support
Certificate in Pharmacy - Pharmaceutical Chemistry	Professional Writing
Certificate in Research Methods in Cultural Anthropology	Project Engineering
Certificate in Soil Ecosystems Services	Public Administration
Certificate in Solar Energy	Public Procurement (Grad)
Certificate in Sustainable Construction	Quality Assurance
Certificate in Sustainable Engineering	Reference Services
Certificate in Sustainable Land Resource and Nutrient Management	School Library Media Leadership
Certificate in Systems Engineering	Technology Management
Certificate in Urban Pest Management	Total Quality Management
Certificate in Wetland and Water Resource Management	Transportation Systems Analysis
Certificate in Wind Turbines	Youth Services
Clinical Investigation	122

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

SUS Online Program Offerings – "Other" Programs

Master's		
Aerospace Engineering	Master of Engineering in Materials Science and Engineering	Master of Science in Entomology and Nematology Specialization - Pest Management
Civil Engineering	Master of International Construction Management	Master of Science in Environmental Engineering Sciences - Specialization in Systems Ecology & Ecological Engineering
Communication Disorders	Master of Latin	Master of Science in Materials Science and Engineering – Various Specializations
Electrical Engineering	Master of Science in Administration	Master of Science in Mechanical Engineering - Dynamics, Systems and Controls
Engineering Management (MSEM)	Master of Science in Administration Specializing in Human Performance Technology Specialization	Master of Science in Mechanical Engineering - Solid Mechanics and Design
English	Master of Science in Administration Specializing in Leadership Specialization	Master of Science in Mechanical Engineering - Thermal Fluids Transport
Forensic Science	Master of Science in Administration Specializing in Public Administration Specialization	Masters in Public Administration
Global Sustainability	Master of Science in Aerospace Engineering - Dynamics, Systems and Controls	Materials Science and Engineering
Industrial Engineering	Master of Science in Aerospace Engineering - Solid Mechanics and Design	Modeling and Simulation
Instructional systems (Major in Performance Improvement and Human Resource Development)	Master of Science in Aerospace Engineering - Thermal Fluids Transport	Nonprofit Management M.N.M
Library and Information Science	Master of Science in Agricultural Education and Communication	Post Professional Master of Science in Occupational Therapy
Library and Information Studies	Master of Science in Civil Engineering	Reasearch Administration
M.Ed. ASL/English Interpretation	Master of Science in Computer Engineering - Bioinformatics	Risk Management/Insurance
Master of Arts in Latin	Master of Science in Computer Engineering General Computer Science and Engineering	Social Foundations in Instructional Technology/ M.Ed
Master of Engineering Electrical and Computer Engineering	Master of Science in Construction Management	Social Work
Master of Engineering Environmental Engineering - Specialization in Water Resources Planning and Management	Master of Science in Electrical and Computer Engineering - Communications	Speech- Language Pathology
Master of Engineering in Aerospace Engineering	Master of Science in Electrical and Computer Engineering - Electronic Semiconductor Device Technology	Transportation
Master of Engineering in Industrial and Systems Engineering	Master of Science in Entomology and Nematology Specialization - Entomology	Virtual MFA in Computer Arts

123

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

FCS Online Program Offerings – "Other" Programs

Associate's	
A.A. General Education	Associate of Science Office Administration - Office Software Specialist
A.S. Emergency Administration and Management	Economics
A.S. Fire Science	Economics for Business
A.S. Funeral Services	Emergency Administration and Management AAS
A.S. Parks and Leisure Services	Environmental Science
A.S. Paralegal & Legal Studies	History
Associate in Arts in General Studies	Industrial Management Technology
Associate in Science in Industrial Management	Journalism
Associate in Science in Office Administration	Offce Administration
Associate in Science in Paralegal	Office Administration - Office Software Applications
Associate of Arts	Optical Management Technology
Associate of Science Aviation Operations	Opticianary
Associate of Science Emergency Management	Philosophy
Associate of Science Fire Science Technology	Pre-Law/Pre-Legal
Associate of Science Marketing Management	Professional Pilot Technology Aviation Science
Associate of Science Office Administration - Legal Office Specialist	Psychology
Associate of Science Office Administration - Office Management Specialist	The Associate in Arts Degree for University Transfer

124

1211SUFL_01

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

FCS Online Program Offerings – "Other" Programs

Certificate	Bachelor's
Airline/Aviation Management	B.A.S. Sustainability Management
Insurance Claims Adjuster	B.A.S. Public Safety Adminstration
Insurance Customer Services Representative	B.A.S. Technology Management
Insurance General Lines Agent	B.A.S. Veterinary Technology
Legal Office Management	Bachelor of Applied Science Degree in Organizational Management
Life Insurance Marketing	Bachelor of Applied Science in Supervision and Management
Logistics & Transportation	Bachelor of Science Degree in Human Services
Office Management	Energy Technology Management
Office Specialist	Homeland Security
Personal Lines Insurance	Information Management
Real Estate Sales Agent	Public Safety Administration
Water Quality Tech	Public Safety Management - Corrections Option
	Technology Management

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

FCS Online Program Offerings – "Other" Programs

Undergraduate Certificate	
Admin Specialist General	Fire Officer II
Admin Specialist Legal	Florida Child Care
Certificate in Customer Service	Gang Investigations
Certificate in Emergency Management	Gangs Enforcement Management
Certificate in Office Management	Human Resources Administrator Certificate
Certificate in Office Specialist	Office Management Certificate
Certificate in Office Support	Office Specialist
Childcare Center Management Specialization Certificate	Office Specialist Technical Certificate
Critical Care (Advanced Technical Certificate)	Office Support
Emergency Administration and Management	Office Support (Technical Certificate)
Emergency Care (Advanced Technical Certificate)	Office Support Technical Certificate
Fire Inspector I	Online National Vocational CDA PSAV
Fire Inspector II	Sepsis (Advanced Technical Certificate)
Fire Investigator I	Veterinary Practice Management
Fire Officer I	

126

1211SUFL_01

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

ICUF Online Program Offerings – “Other” Programs

Undergraduate Certificate	Graduate Certificate
Management and Leadership	Health Care Management
Church Ministry	Human Resources Administration
	Instructional Design
Associate’s	**Doctorate**
Paralegal Studies	Psychology
Liberal Studies	Acquisition & Contract Management
General Studies	Leadership and Management
Interdisciplinary Studies	
Management	
Fire Science	
Aviation Business Admin	
Aviation Maintenance	
Professional Aeronautics	

Source: ICUF

Florida Online Programs

ICUF Online Program Offerings – "Other" Programs

Bachelor's	Master's
Aviation Business Administration	Transformative Leadership
Aviation Maintenance	Human Services
Professional Aeronautics	Ministerial Leadership
Psychology	Management
Hospitality Management	Project Management
Organizational Management	Legal Studies
Applied Psychology	Public Administration
Legal Studies	Professional Studies
Human Resources Administration	Aeronautical Science
International Hospitality/Tourism Management	Leadership
Liberal Studies	Management to MBAA
Sociology	Space Education
Organizational Leadership	Operations Research
Management of Tech Operations	Materiel Acquisition Management
Transportation	Logistics Management
Applied Management	Human Resources Management
Management	Project Management/Info Systems
Aviation Technology	Project Management/Ops Research
Aviation Management	Acquisition & Contract Management
Construction Management	Management/Acquisition & Contract Management
Interdisciplinary Studies	Management/Human Resources Management
Public Safety Administration	Management/Information Systems
Health Care Management	Management/Logistics Management
Human Services	Disaster Relief Logistics
Practical Theology	Psychology
Fire Science Management	Instructional Design
	General Management
	TEOSL
	Social Work

128

Source: ICUF

Florida Online Programs

For-Profit Online Program Offerings – "Other" Programs

Undergraduate Certificate	Doctorate
Paralegal	Industrial/Organizational Psychology
Associate's	
Visual Communications	
Paralegal Studies	
Fire Science	
Culinary Operations	
Psychology	
General Studies	

129

1211SUFL_01

Source: Florida Online Colleges Website

Florida Online Programs

For-Profit Online Program Offerings – "Other" Programs

Bachelor's	Master's
Visual Communication - Generalist	Public Administration - Government Management
Visual Communication - Illustration	Public Administration
Psychology	Aviation Science
Psychology - Advanced Studies in Psychology	Entertainment Business - Sports Management Elective Track
Psychology - Criminal Justice	Entertainment Business
Psychology - Human Services	Creative Writing
Psychology - Organizational Psychology	Public Administration
Psychology - Substance Abuse	Psychology
Paralegal	Administration and Supervision
Alternative and Renewable Energy Management	
Construction Management	
Aviation Technology	
Aviation Management	
Crisis and Disaster Management	
Creative Writing for Entertainment	
Game Art	
Project Management and Administration - Construction	
Legal Studies	
Interdisciplinary Studies	
Public Safety Administration	
Culinary Management	
English	
Communication - Culture and Communication	
Communication - Communication and Technology	
Environmental Science	

130

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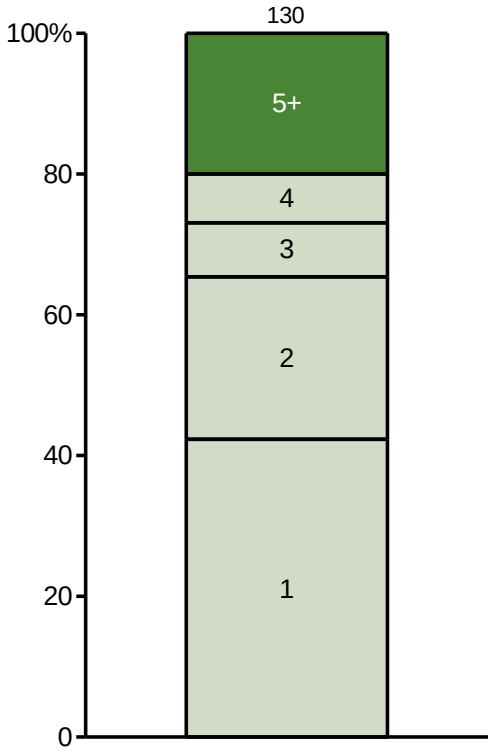
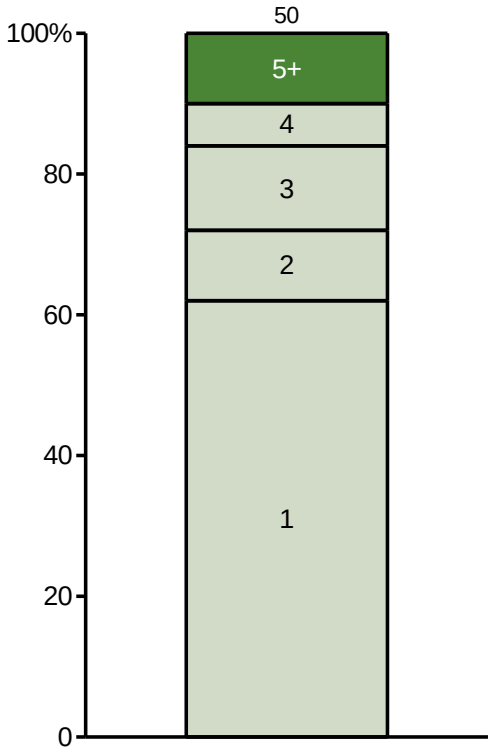
Source: Florida Online Colleges Website

Florida Online Programs
Duplication of Online Programs

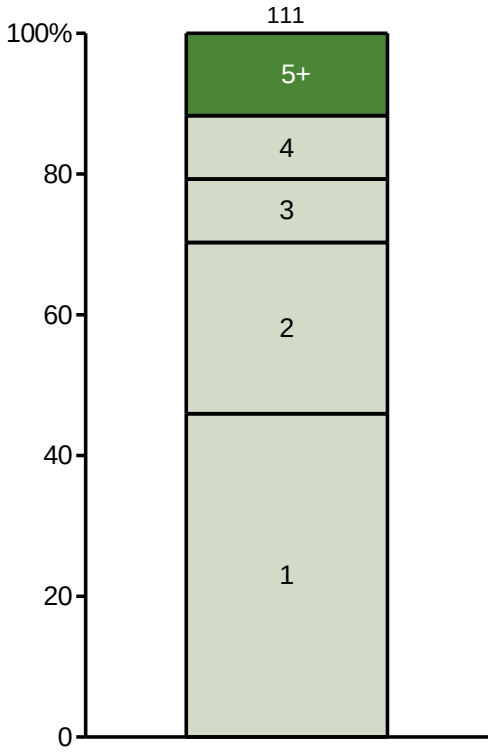
Number of Institutions Offering the Same Program, FCS and SUS



Number of Institutions Offering the Same Program, FCS



Number of Institutions Offering the Same Program, SUS



131

Note: Program overlap evaluated at the CIP code level
Source: Florida Program Offering Data and CIP Code List, FLVC; BLS

Florida Online Programs

Duplication of Online Programs

SUS Program Overlap					
Count of Institutions	**Program Name**	**Count of Institutions**	**Program Name**	**Count of Institutions**	**Program Name**
10	Business Administration & Management, General	4	Educational/Instructional Technology	3	Reading Teacher Education
7	Curriculum & Instruction	4	Environmental Science	3	Systems Engineering
7	Elementary Education & Teaching	4	General Studies	3	Trade & Industrial Teacher Education
6	Educational Leadership & Administration, General	4	Higher Education/Higher Education Administration	2	Adult & Continuing Education & Teaching
6	Liberal Arts & Sciences/Liberal Studies	4	Licensed Practical /Vocational Nurse Training	2	Audiology/Audiologist & Speech-Language Pathology/Pathologist
6	Public Administration	4	Nursing Practice	2	Civil Engineering, General
6	Registered Nursing/Registered Nurse	4	Nursing Science	2	Construction Engineering Technology/Technician
5	Business/Commerce, General	4	Special Education & Teaching, General	2	Education/Teaching of Individuals with Mental Retardation
5	Computer & Information Sciences, General	3	Accounting	2	Electrical and Electronics Engineering
5	Criminology	3	Aerospace, Aeronautical and Astronautical/Space Engineering	2	Entomology
5	Engineering, General	3	Computer Engineering, General	2	Environmental/Environmental Health Engineering
5	Health Services/Allied Health/Health Sciences, General	3	Emergency Medical Technology/Technician	2	Finance, General
5	Public Health, General	3	Health/Health Care Administration/Management	2	Forensic Science & Technology
4	Agricultural Teacher Education	3	Kinesiology & Exercise Science	2	Health Information/Medical Records Administration/Administrator
4	Criminal Justice/Safety Studies	3	Mechanical Engineering	2	Hospitality Administration/Management, General

Source: Florida Program Offering Data and CIP Code List

Florida Online Programs

Duplication of Online Programs

SUS Program Overlap Data (Continued)					
Count of Institutions	**Program Name**	**Count of Institutions**	**Program Name**	**Count of Institutions**	**Program Name**
2	Library and Information Science	1	African-American/Black Studies	1	Customer Service Support/Call Center/Teleservice Operation
2	Management Information Systems, General	1	Anthropology	1	Early Childhood Education & Teaching
2	Marketing/Marketing Management, General	1	Audiology/Audiologist	1	Education, General
2	Materials Engineering	1	Biology/Biological Sciences, General	1	Engineering Technology, General
2	Mathematics, General	1	Chemistry, General	1	English Language & Literature, General
2	Non-Profit/Public/Organizational Management	1	Child Care & Support Services Management	1	English/Language Arts Teacher Education
2	Occupational Therapy/Therapist	1	City/Urban, Community & Regional Planning	1	Family & Community Services
2	Parks, Recreation & Leisure Facilities Management	1	Classics & Classical Languages, Literatures & Linguistics, General	1	Fire Science/Firefighting
2	Pharmacy	1	Clinical Psychology	1	Funeral Service & Mortuary Science, General
2	Physical Education Teaching & Coaching	1	Community Health & Preventive Medicine	1	Geography
2	Psychology, General	1	Computer & Information Sciences, Other	1	Gerontology
2	Social Work	1	Computer Technology/Computer Systems Technology	1	Health Teacher Education
2	Sport & Fitness Administration/Management	1	Computer/Info. Techn. Svcs Administration & Management, Other	1	Industrial Engineering
2	System, Networking & LAN/WAN Management/Manager	1	Criminal Justice/Police Science	1	Information Science/Studies
2	Transportation/Mobility Management	1	Criminalistics & Criminal Science	1	Insurance

Note: Count of institutions represents number of total institutions offering the program; Source: Florida Program Offering Data and CIP Code List

Florida Online Programs
Duplication of Online Programs

SUS Program Overlap Data (Continued)					
Count of Institutions	**Program Name**	**Count of Institutions**	**Program Name**	**Count of Institutions**	**Program Name**
1	International Relations & Affairs	1	Systems Science & Theory		
1	Law	1	Taxation		
1	Management Science	1	Teacher Education, Multiple Levels		
1	Mass Communication/Media Studies	1	Urban Education & Leadership		
1	Mental Health Counseling/Counselor	1	Veterinary/Animal Health Techn. & Veterinary Assistant		
1	Music Teacher Education	1	Women's Studies		
1	Ornamental Horticulture				
1	Philosophy & Religious Studies, Other				
1	Political Science & Government, General				
1	Psychiatric/Mental Health Services Technician				
1	Religion/Religious Studies				
1	Science Teacher Education/General Science Teacher Education				
1	Social Sciences, General				
1	Soil Science & Agronomy, General				
1	Surveying Engineering				

Note: Count of institutions represents number of total institutions offering the program; Source: Florida Program Offering Data and CIP Code List

Florida Online Programs

Duplication of Online Programs

FCS Program Overlap Data					
Count of Institutions	**Program Name**	**Count of Institutions**	**Program Name**	**Count of Institutions**	**Program Name**
10	Liberal Arts & Sciences/Liberal Studies	2	Management Information Systems, General	1	General Office Occupations & Clerical Services
8	Business Administration & Management, General	2	Special Education & Teaching, General	1	Geography
7	Executive Assistant/Executive Secretary	1	Aviation/Airway Management & Operations	1	History, General
5	Accounting Technology/Technician & Bookkeeping	1	Biology/Biological Sciences, General	1	Homeland Security, Law Enforcement, Firefighting and Related Protective Services, Other
5	Entrepreneurship/Entrepreneurial Studies	1	Clinical Laboratory Science/Medical Technology/Technologist	1	Hospitality Administration/Management
4	Criminalistics & Criminal Science	1	Computer & Information Sciences, General	1	Human Development, Family Studies & Related Services, Other
4	General Studies	1	Computer Engineering, General	1	Medical Insurance Coding Specialist/Coder
4	Marketing/Marketing Management, General	1	Computer Technology/Computer Systems Technology	1	Operations Management & Supervision
3	Accounting	1	Computer/Info. Techn. Svcs Administration & Management	1	Parks, Recreation & Leisure Facilities Management
3	Business/Commerce, General	1	Corrections	1	Psychiatric/Mental Health Services Technician
3	Health Information/Medical Records Administration	1	Customer Service Support/Call Center/Teleservice Operation	1	Psychology, General
3	Health/Health Care Administration/Management	1	Dental Hygiene/Hygienist	1	Public Health/Community Nurse/Nursing
3	Licensed Practical /Vocational Nurse Training	1	Early Childhood Education & Teaching	1	Science Teacher Education/General Science Teacher Education
3	System, Networking & LAN/WAN Management/Manager	1	Economics, General	1	Social Science Teacher Education
2	Elementary Education & Teaching	1	Finance, General	1	Teacher Assistant/Aide
2	Emergency Medical Technology/Technician	1	Fire Protection & Safety Technology/Technician	1	Veterinary/Animal Health Techn. & Veterinary Assistant
2	Legal Assistant/Paralegal	1	Fire Science/Firefighting		

Source: Florida Program Offering Data and CIP Code List; Count of institutions represents number of total institutions offering the program

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

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Florida Employment

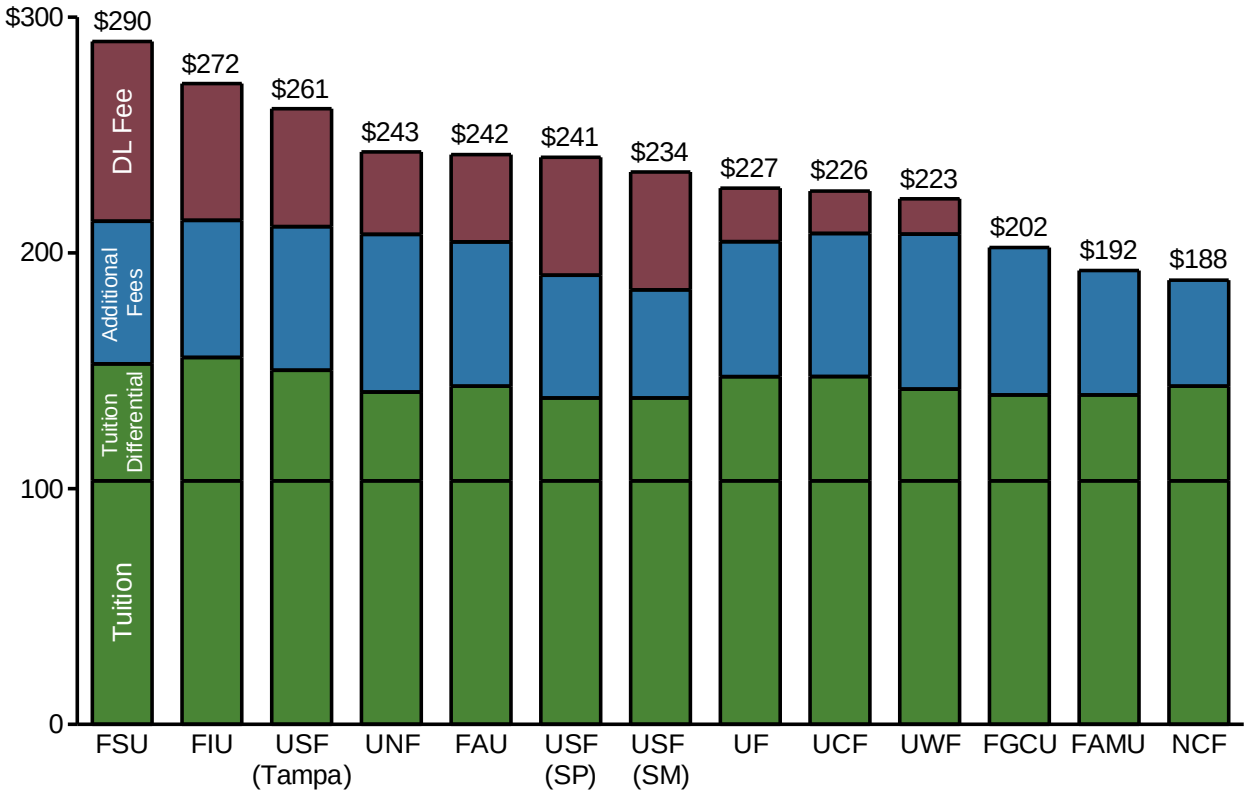
Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Tuition and fees across SUS schools

Tuition and Fees per Credit Hour
for Undergraduate In-State Students, 2012-2013

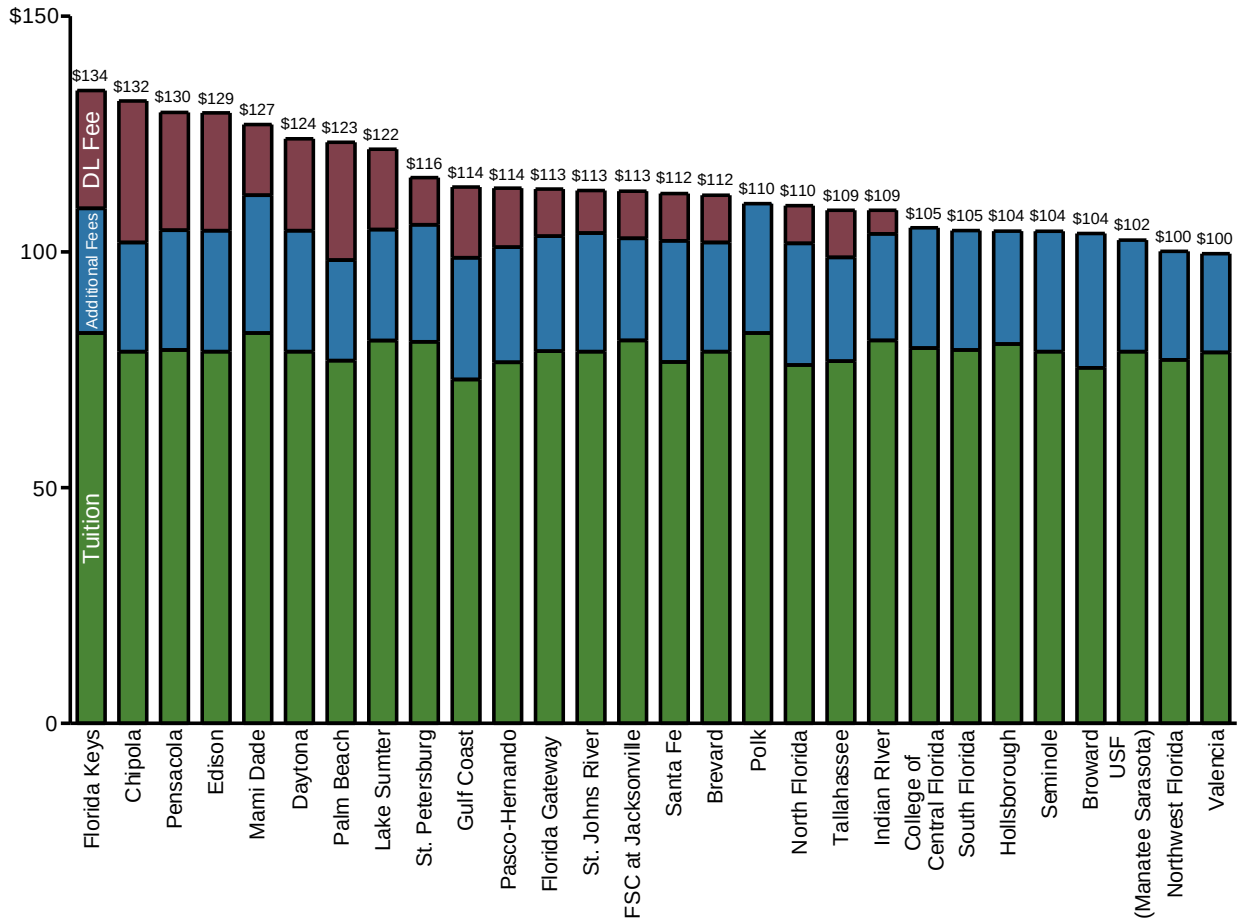


137

Note: FSU and UF distance learning fee varies by program, average is shown
Source: SUS Board of Governors

Tuition and fees across FCS schools

Tuition and Fees per Credit Hour for In-State Students Pursuing an Associate's Degree, 2012-2013

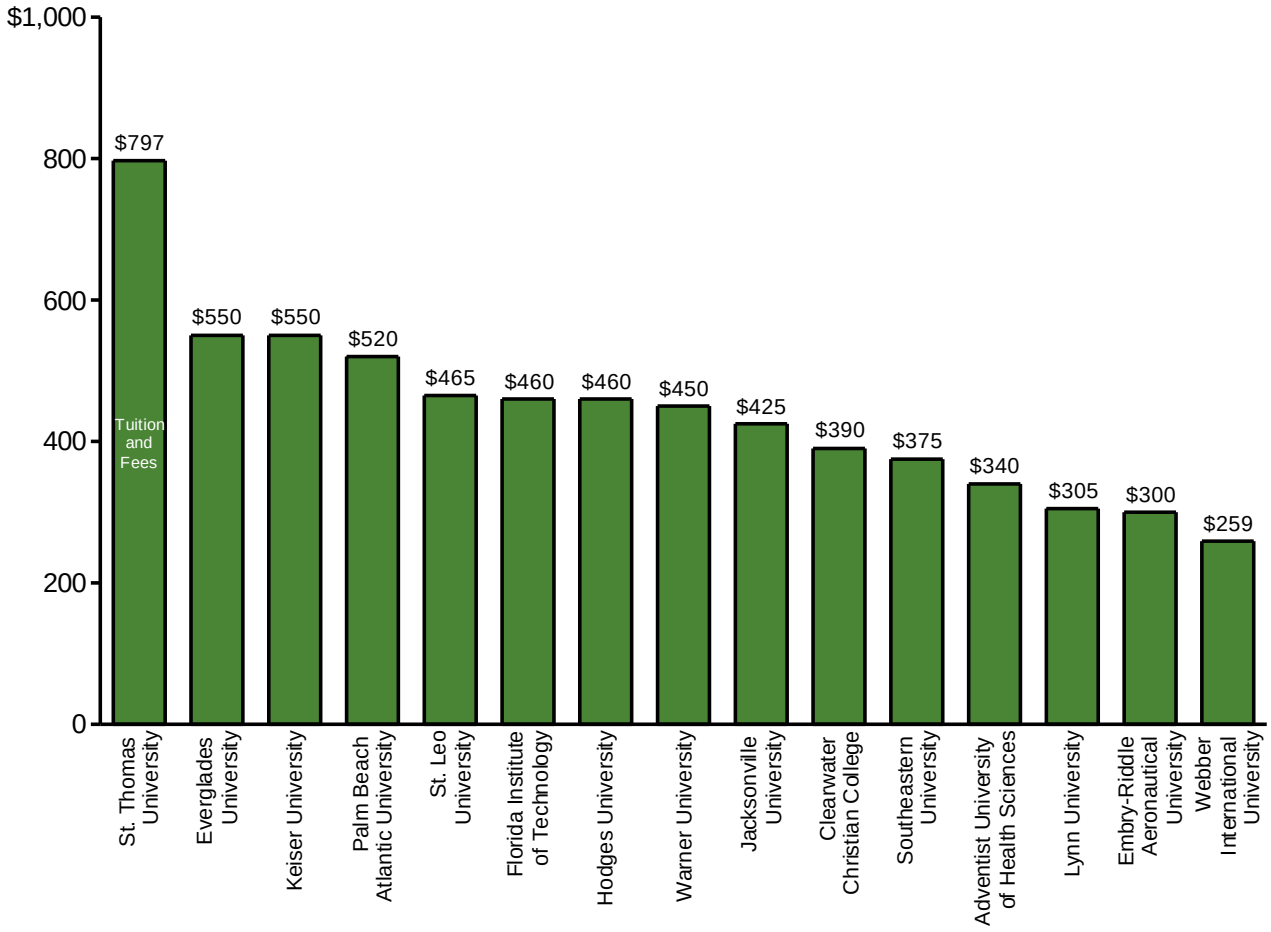


138

Note: Lake Sumter distance learning fee varies by course, figure used is for accounting
Source: FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Tuition and fees across ICUF schools

Tuition and Fees per Credit Hour for Bachelor's Programs, 2010-2011



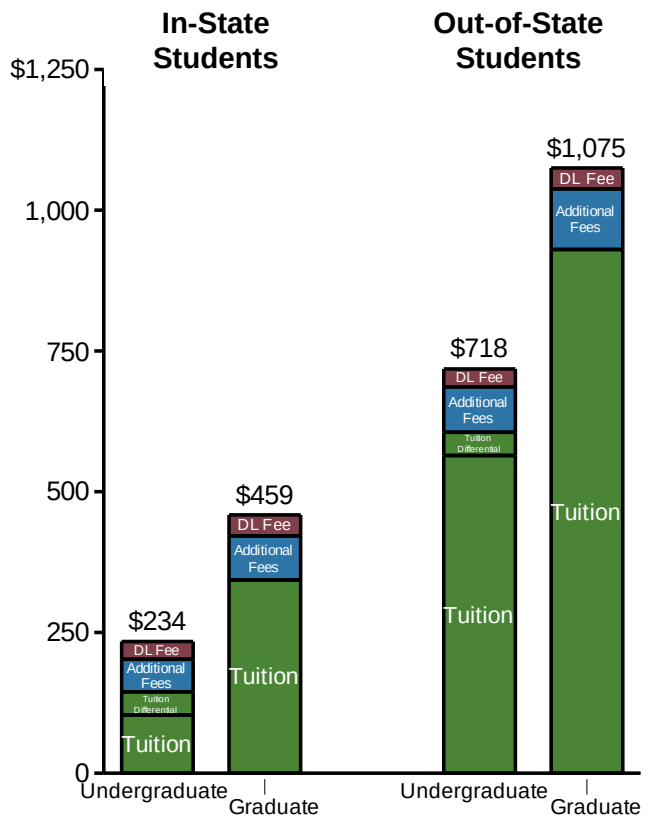
139

Note: Stetson University, Nova Southeastern, and Bethune-Cookman University are excluded due to lack of data
Source: ICUF

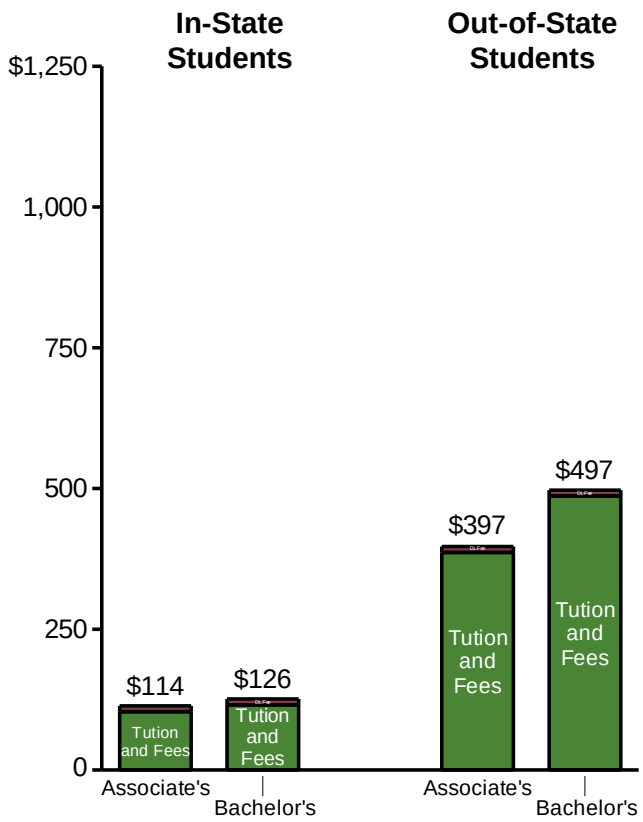
Tuition and Fees

Tuition and fees by degree level and residential status of student, SUS

Average Online Tuition and Fees per Credit Hour, SUS



Average Online Tuition and Fees per Credit Hour, FCS



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Note: Unless otherwise indicated, each school's graduate distance learning fee is assumed to be equal to the undergraduate distance learning fee

Source: SUS Board of Governors; FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

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Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

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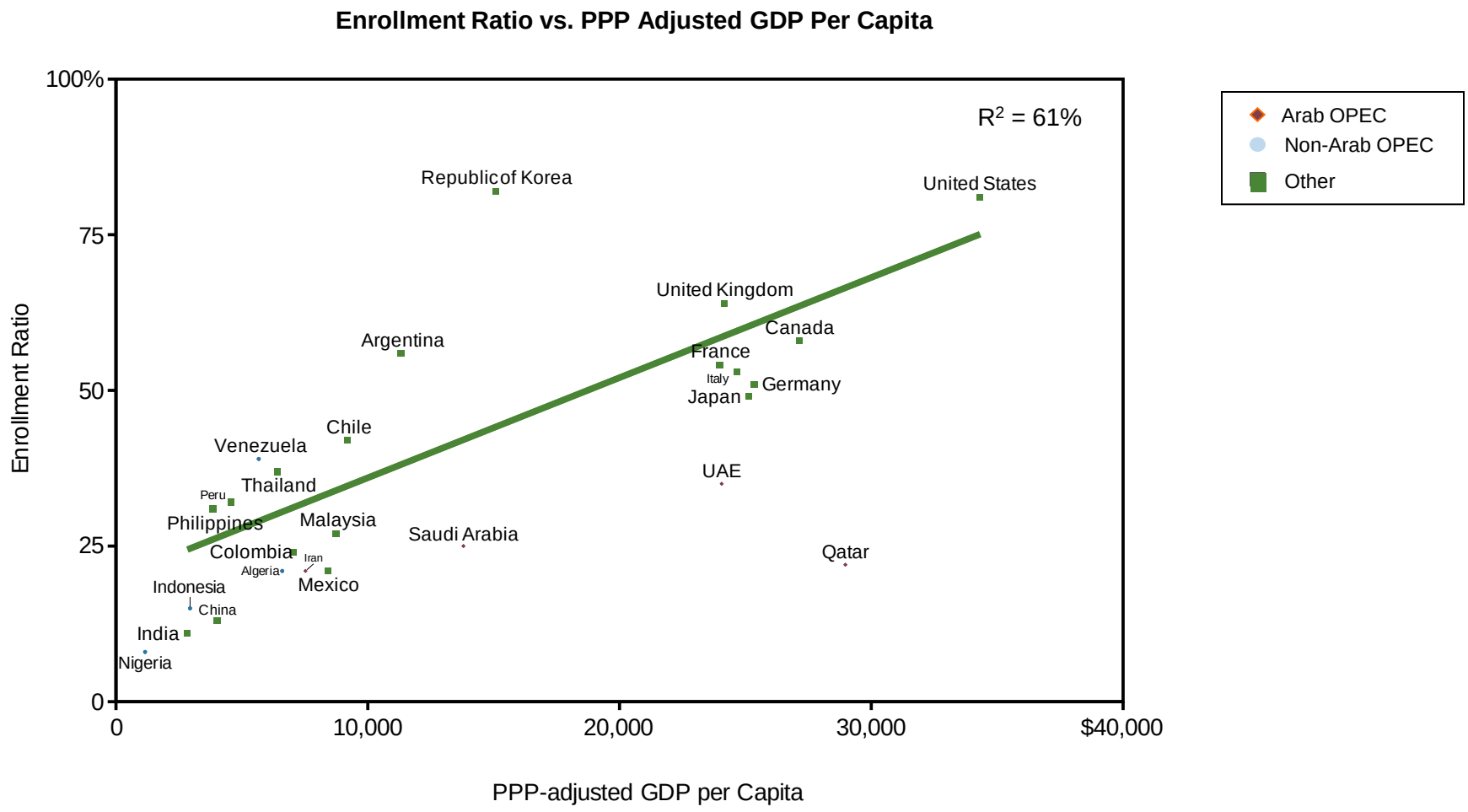
International Post-Secondary Enrollment vs. GDP per Capita

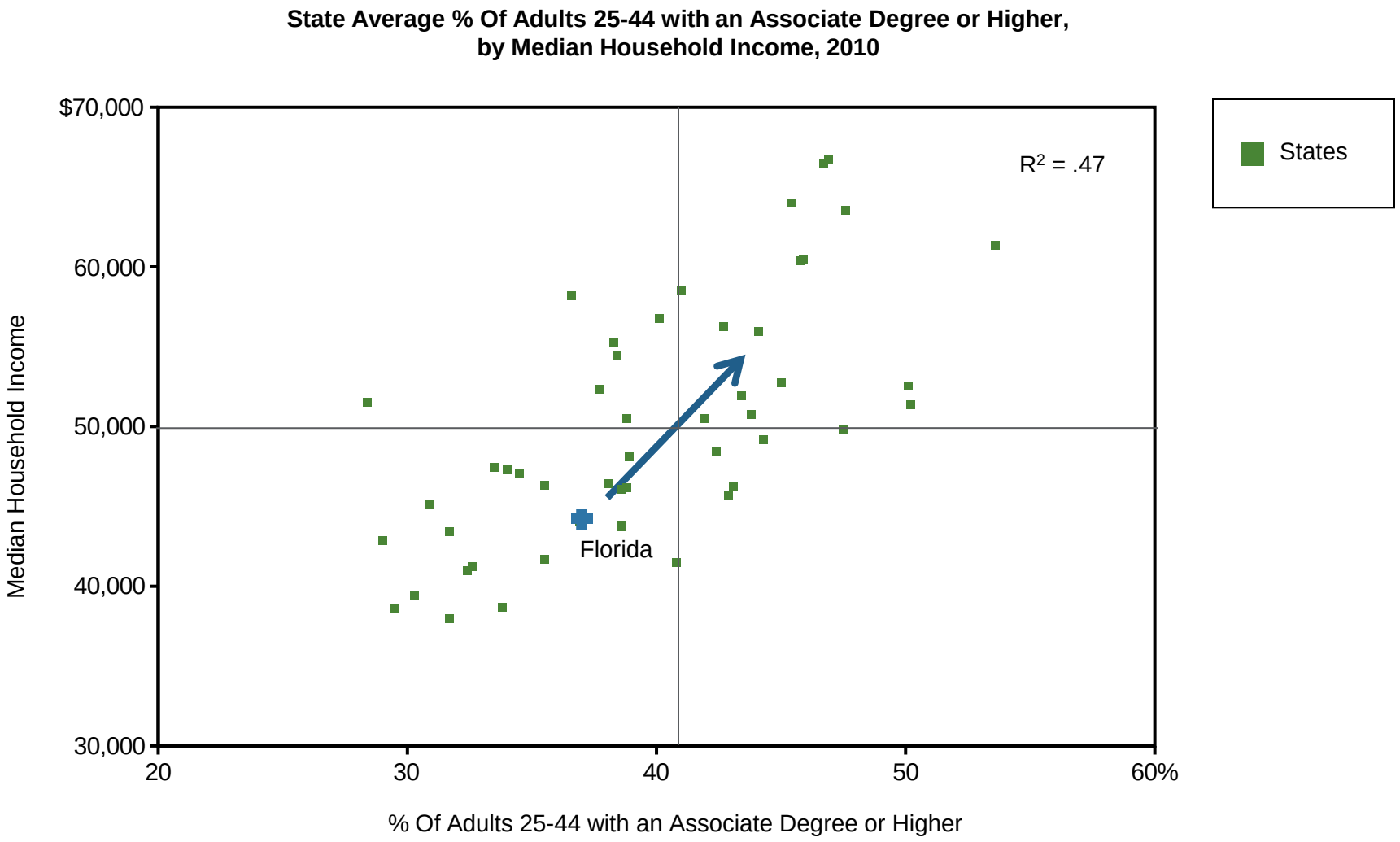


Note: UNESCO's Gross Enrolment ratio is calculated using the number of pupils enrolled in International Standard Classification of Education (ISCED) level 5 and 6 representing stages of tertiary education, regardless of age, expressed as a percentage of the population in the five-year age group following on from the secondary school leaving age; R^2 value does not include OPEC countries as outliers due to "oil" effect

Source: OECD, UNESCO

Employment

U.S. Post-Secondary Degree Attainment vs. Household Income

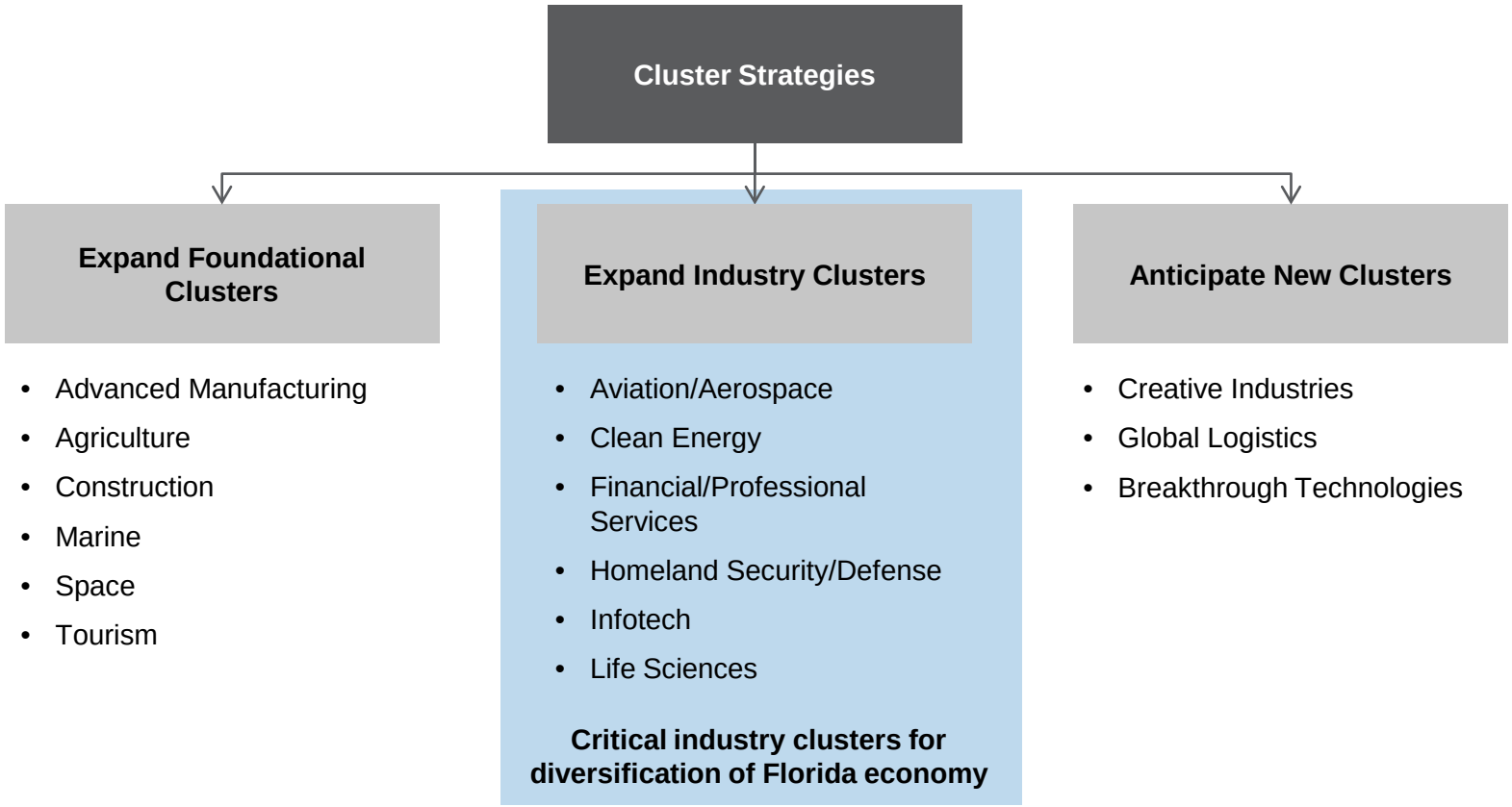


143

Source: ACS US Census Bureau

Florida Strategic Plan for Economic Development

Diversifying Florida's Economy: Cluster Strategies, 2010-2015 Strategic Plan for Economic Development

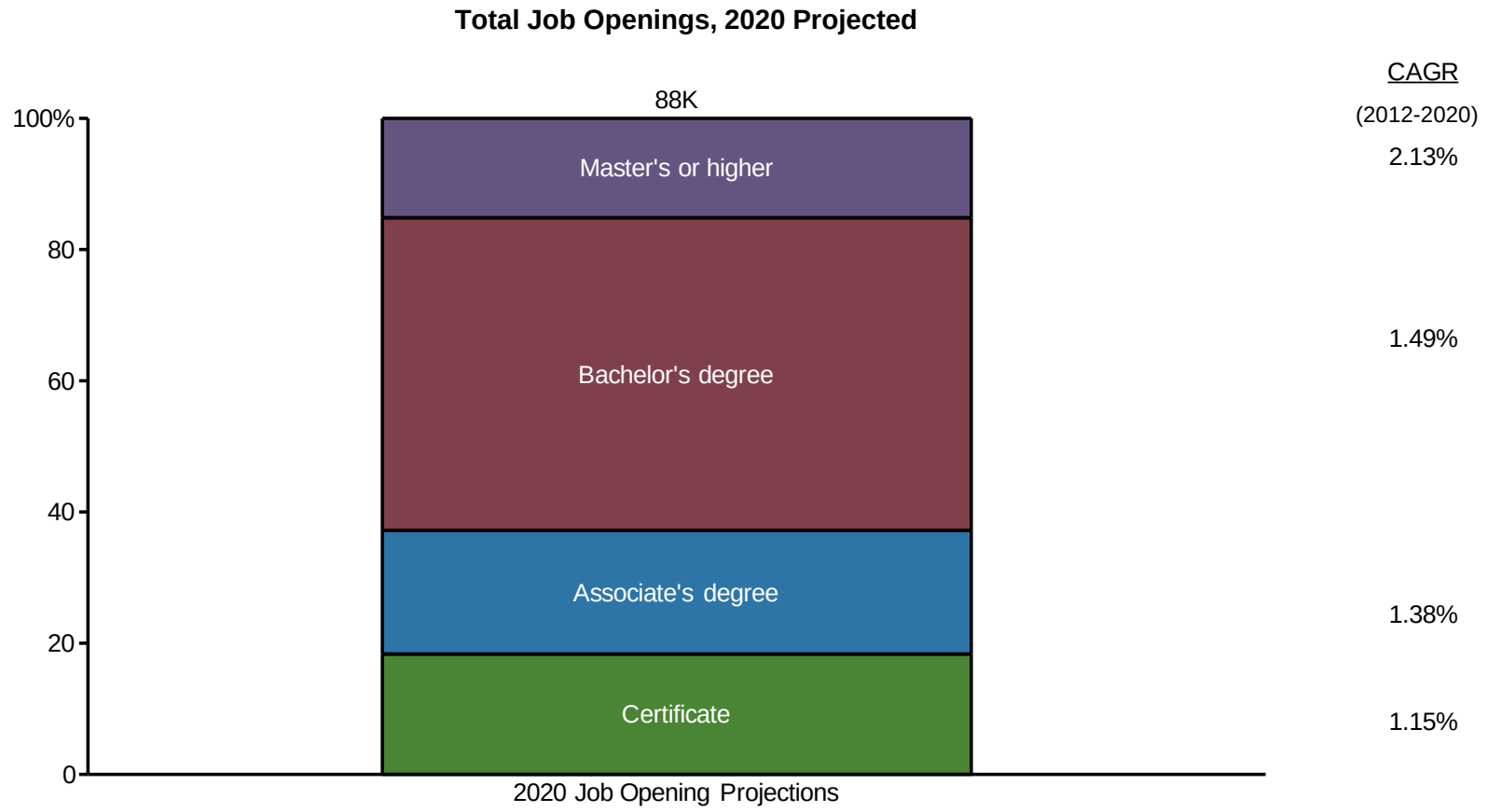


144

Source: 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (http://www.eflorida.com/IntelligenceCenter/Reports/Roadmap/Cluster_Strategies.pdf)

Employment

Total Jobs: Job Openings and Growth by Degree Level, 2020 Projected



Methodology:

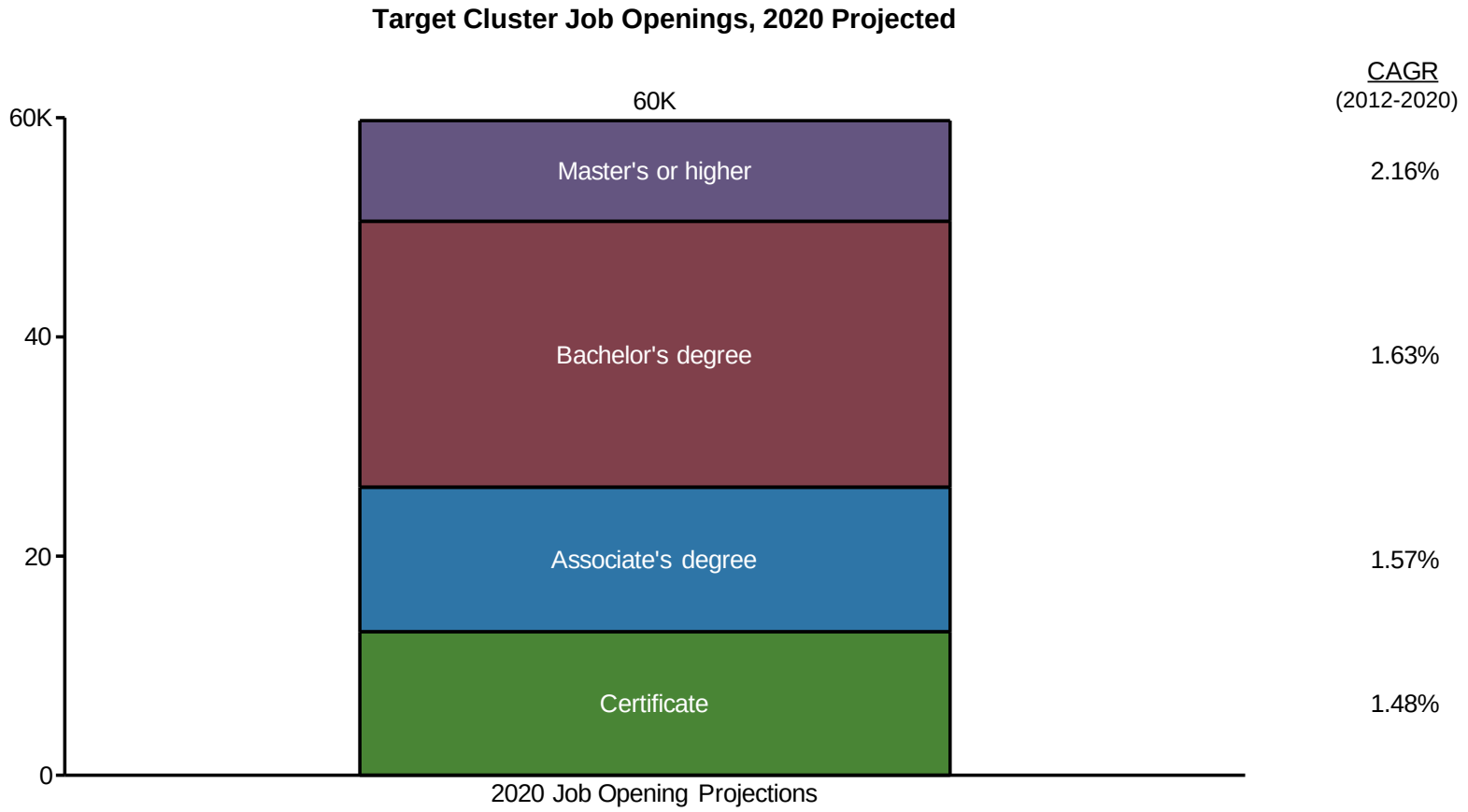
- **All occupations codes and titles**: Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data**: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Estimated 2012 Job Openings:** Derived from 2020 projections and annual growth rate.
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy**: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis

145

Note: CAGR stands for compound annual growth rate
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI)

Employment

Target Clusters: Job Openings and Growth by Degree Level, 2020 Projected



Methodology:

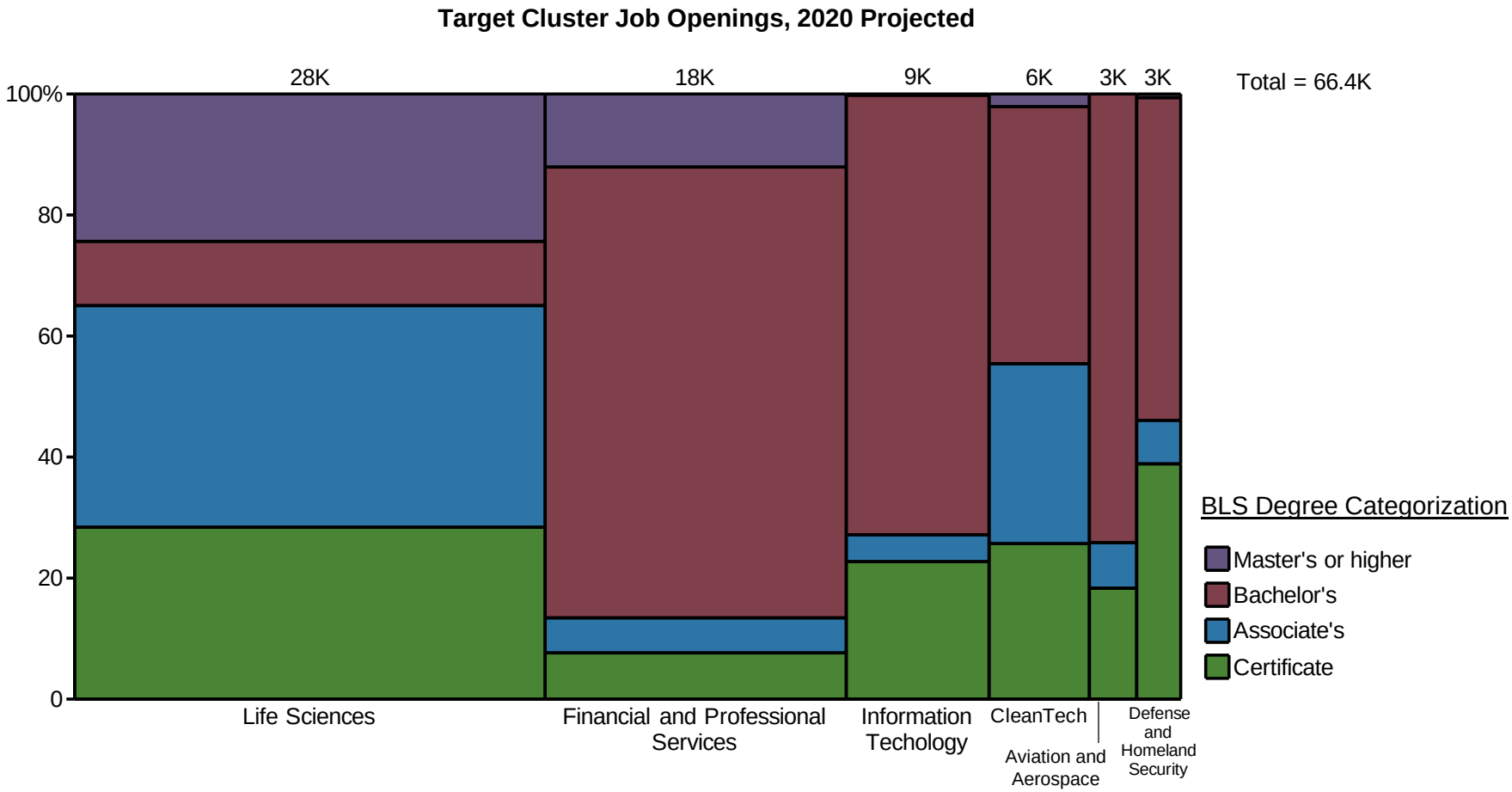
- **All occupations codes and titles**: Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data**: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Estimated 2012 Job Openings:** Derived from 2020 projections and annual growth rate.
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy**: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis

146

Note: CAGR stands for compound annual growth rate
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI)

Employment

Target Clusters: Job Openings Available by Degree Level, 2020 Projected



Methodology:

- **All occupations codes and titles**: Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data**: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy**: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis

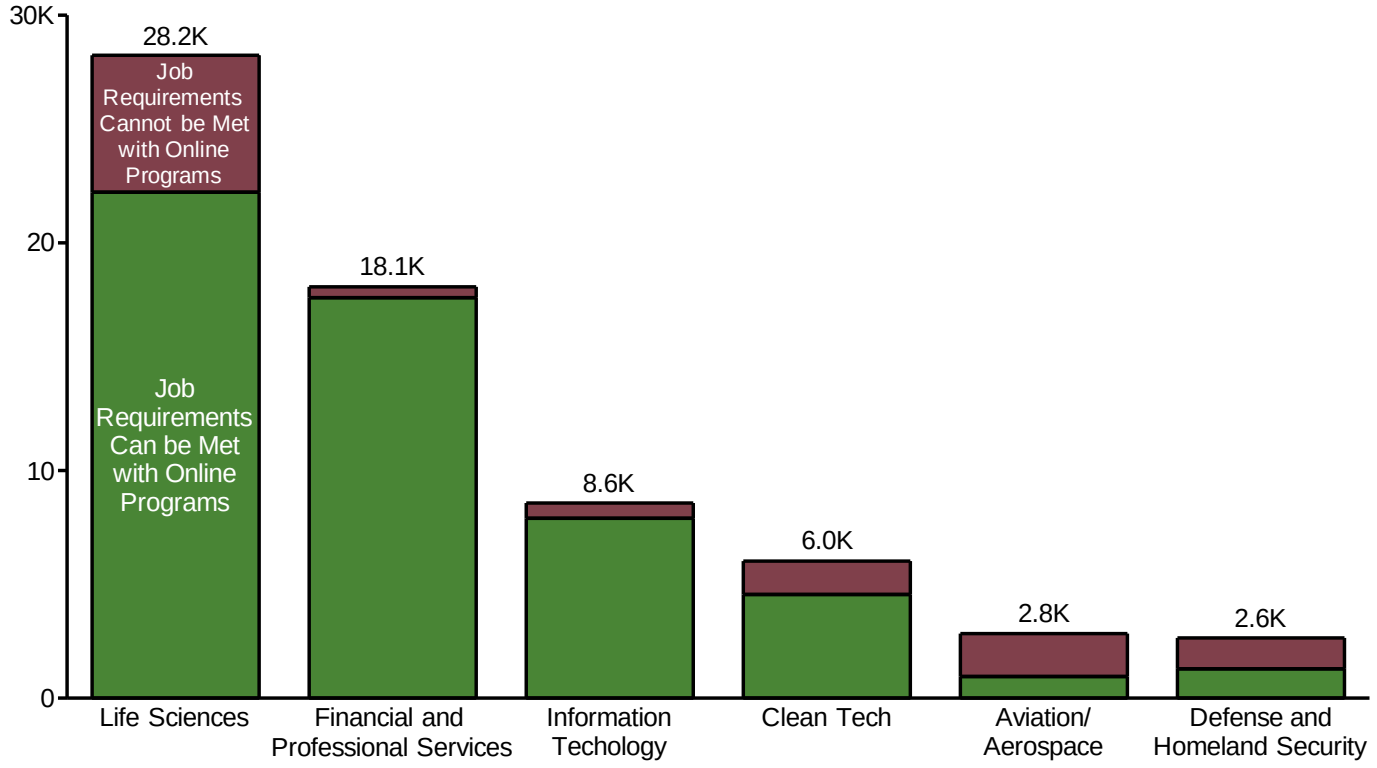
147

Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI)

Employment

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

EFI Target Industry Job Openings, 2020 Projected,
that Can Be Satisfied with Current National Online-Only Degree Program Offerings



Methodology:

- **All occupations codes and titles**: Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data**: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy**: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis
- **Online Program Information**: Peterson's Distance Learning Database

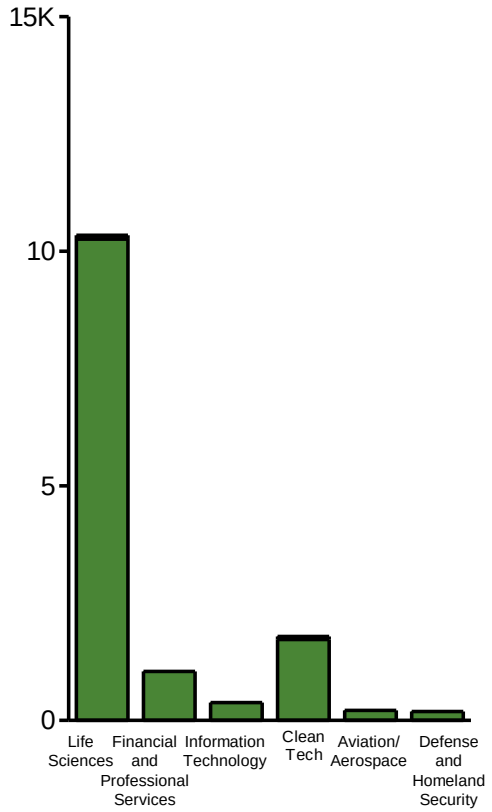
148

Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, by Enterprise Florida Inc. (EFI); Peterson's Distance Learning Database of Online Programs and Degrees used to identify programs

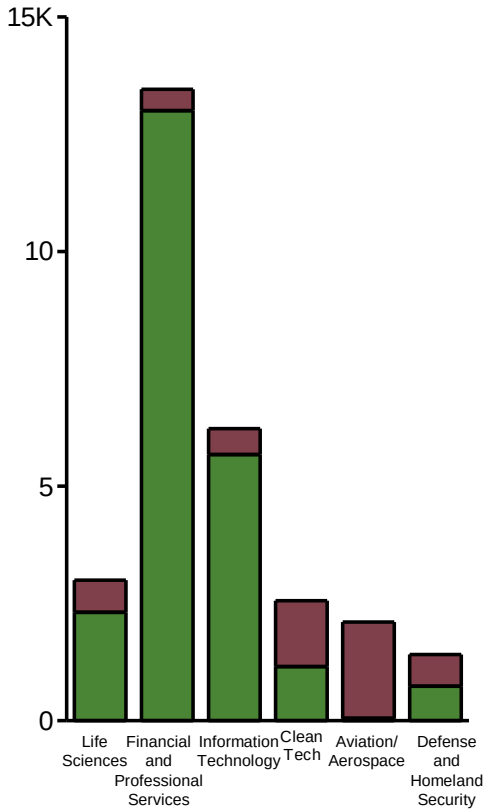
Employment

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

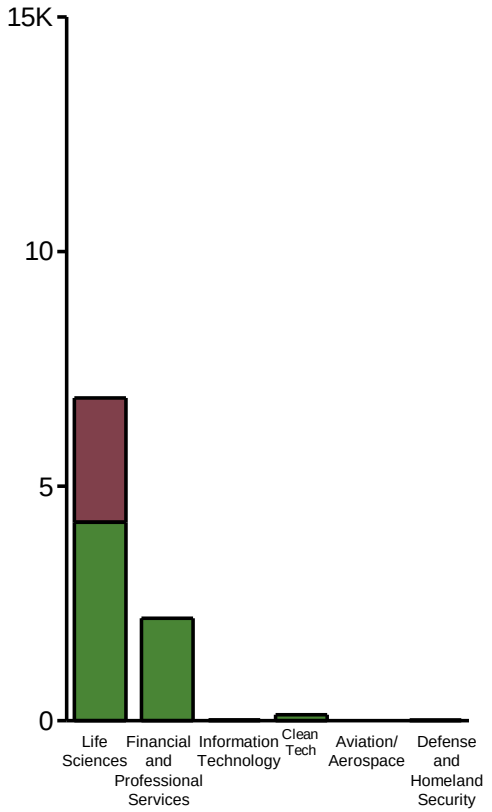
Job Openings that Can Be Satisfied with a National Online-Only Associate's Program



Job Openings that Can Be Satisfied with a National Online-Only Bachelor's Program



Job Openings that Can Be Satisfied with a National Online-Only Master's Program



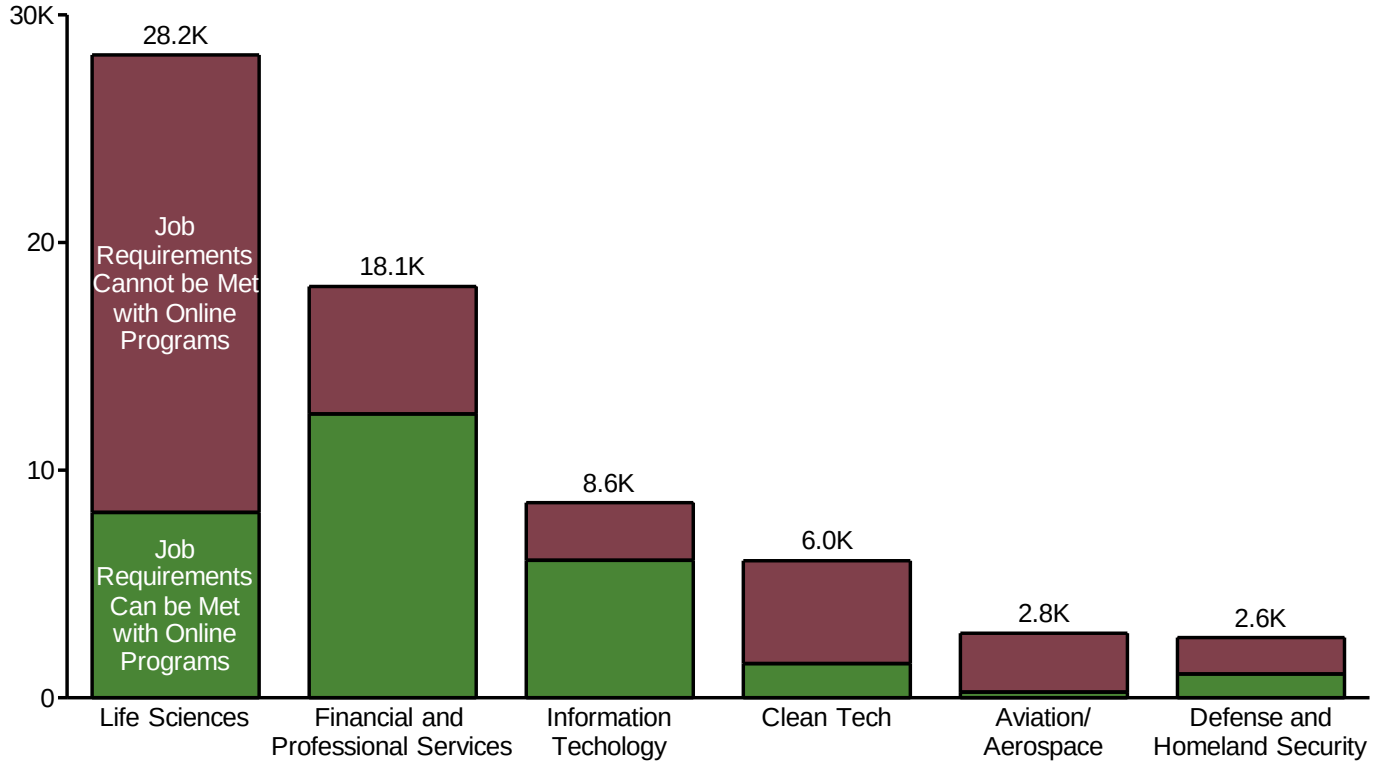
149

Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from by Enterprise Florida Inc. (EFI); Peterson's Distance Learning Database of Online Programs and Degrees used to identify programs

Employment

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

EFI Target Industry Job Openings, 2020 Projected, that Can Be Satisfied with Current Florida FCS/SUS Online-Only Degree Program Offerings



Methodology:

- **All occupations codes and titles**: Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data**: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy**: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis
- **Online Program Information**: SUS/FCS data, FLVC online course crosswalk, Parthenon analysis

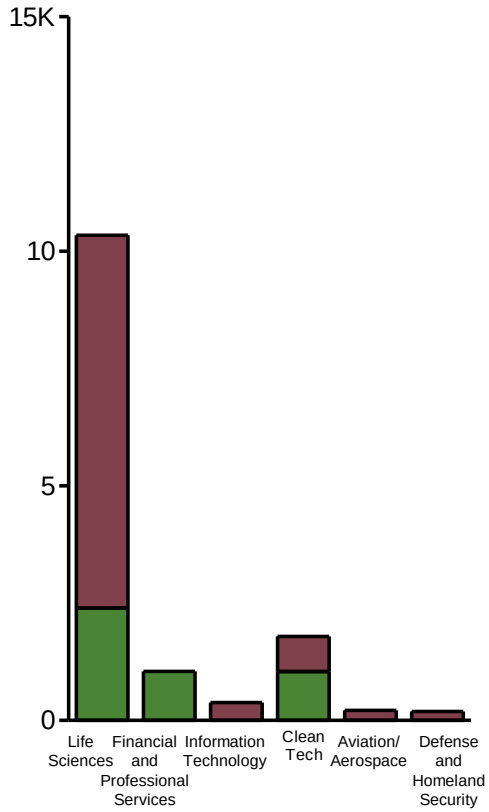
Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters; List of Florida online programs includes just those courses offered on the FLVC, the list excludes 31 of these courses that could not be matched to Florida program offerings list

Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI); SUS/FCS program data, FLVC program name crosswalk used to identify programs

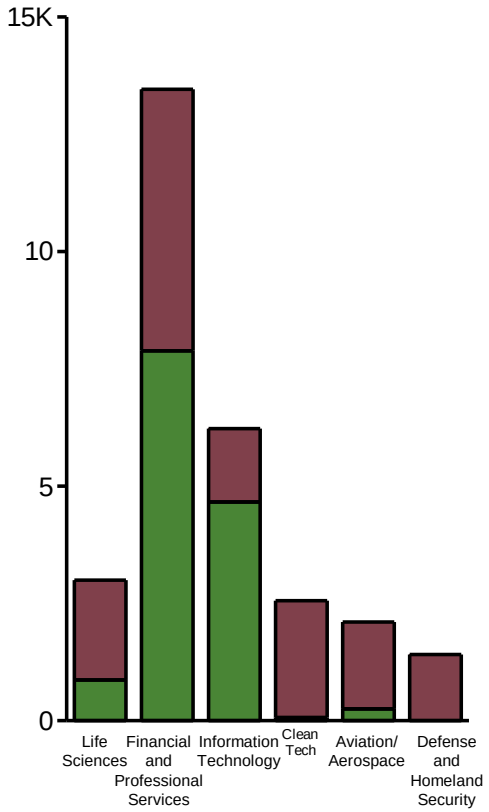
Employment

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

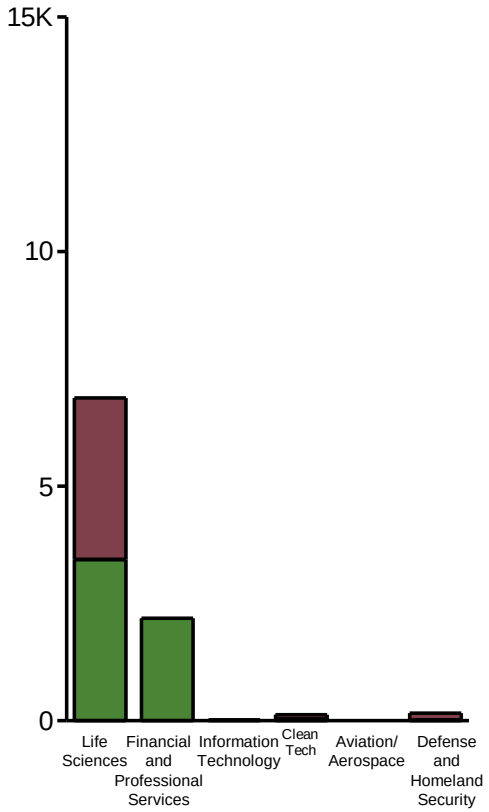
Job Offerings that Can Be Satisfied with a Florida Online-Only Associate's Program



Job Offerings that Can Be Satisfied with a Florida Online-Only Bachelor's Program



Job Offerings that Can Be Satisfied with a Florida Online-Only Master's Program



151

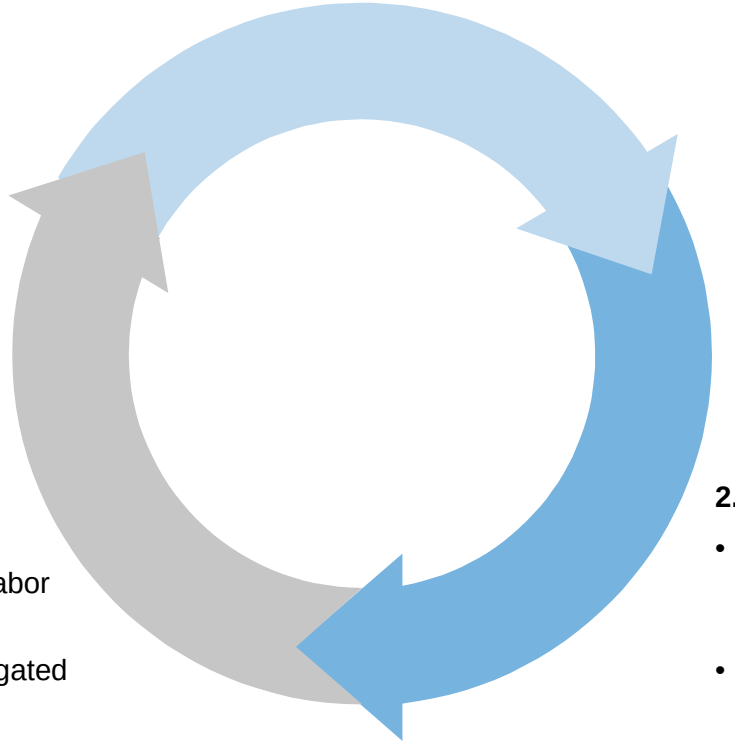
Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters; List of Florida online programs includes just those courses offered on the FLVC, the list excludes 31 of these courses that could not be matched to Florida program offerings list
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI); SUS/FCS program data, FLVC program name crosswalk used to identify programs

Employment

How online can enable a broad response to labor needs

1. Labor Needs Identified

- Companies, advocacy groups or state policy organizations identify potential labor shortages
- Clear channel of communication allows labor market needs to be shared and discussed with state higher education systems



2. Higher Education System Responds

- SUS and FCS incorporate labor market feedback into new program designs, focusing on online programs
- Online can enable broader response as one program can be disseminated to students across the state

3. Labor Market Needs Met

- Scale of online programs delivers degree/certificate holders to the labor market
- Labor shortage eliminated or mitigated

Detailed Fact Base

Florida Virtual Campus

Overview of the Florida Virtual Campus

Origins

- The Florida Virtual Campus was created out of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the Florida Center for Advising and Academic Support and the College Center for Library Automation
- House Bill 5201 established the Florida Virtual Campus to:

  "*Provide access to online student and library support services and to serve as a statewide resource and clearinghouse for technology-based public postsecondary education distance learning courses and degree programs*"

Mandate

- HB 5201 laid out a series of requirements for the operations of the FLVC and its distance learning catalog. The bill requires the FLVC to provide the following service (additional detail and status of these service requirements can be found on the following pages):
  - Develop and manage a library information portal and automated library management tools
  - Develop and manage an internet-based catalog of distance learning courses
  - Implement an online admissions application process for transient students
  - Develop and manage a computer-assisted student advising system
  - License and acquire electronic library resources
  - Promote and provide recommendations concerning the use and distribution of open-access textbooks
  - Provide help desk support to institutions and students and to identify and evaluate new technologies and instructional methods
  - Provide for the transfer of assets and liabilities of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the College Center for Library Automation, 75 and FACTS.org to the Florida Virtual Campus

Inclusion

- Institutions charging a distance learning fee must list the course on the FLVC
- Institutions have discretion as to listing courses not charging a distance learning fee: some list all online courses and others only list courses with an associated distance learning fee
- ICUF institutions currently listing courses will be removed; they may be added back in through specific service agreements covering the cost of inclusion (likely based on the 3% fee + usage costs utilized for eResources on the library side of the FLVC)

Usage

- From July 1, 2011 through June 30, 2012 the Distance Learning Catalog received 109,794 visitors, who viewed an average of 7.2 pages and spent 4.4 minutes on the site
- 32,283 courses were listed on the Distance Learning Catalog from Fall 2011-Summer 2012, as well as 654 current degree programs (including certificate programs)

Statutes (*Detail to follow*)

- The key statutes establishing and defining the FLVC and its predecessors are 1006.73, 1004.09
- The primary statutes responsible for regulating the fees charged for distance learning are1009.23 and 1009.24

154

Source: Florida Senate (flsenate.gov); Florida Virtual Campus

Florida Virtual Campus

Status of FLVC Service Provisions

Services to be provided by the FLVC:	Implementation Status:
• Library information portal and automated library management tools	• Discovery tool – Separate SUS/FCS tools currently available. Working on project plan to combine into a single tool. Expected completion Summer 2013 • eResources – Separate SUS/FCS eResources and licensing processes currently available. Working on project plan to combine into a single process by Summer 2013 • Library Management System – SUS and FCS both on Aleph ILS. Decision in mid-November on how/when to combine • Digital archives – In place for SUS. Inclusion of FCS deferred (low priority)
• Statewide Internet-based catalog of distance learning courses, degree programs, and resources	• In place, but requires modernization and improvement. Project to redesign and modernize was just approved. Targeted completion date of test environment late Spring 2013, in anticipation of Fall 2013 roll out to institutions
• Implement a streamlined, automated, online admissions application process for undergraduate transient students	• Expected completion December 1, 2012
• Develop and manage a statewide computer-assisted student advising system	• In place for SUS and FCS. Gathering of customer requirements for future changes underway
• Negotiate and license statewide eResources	• Separate SUS/FCS eResources and licensing processes currently available. Working on project plan to combine into a single process by Summer 2013. Next steps to include Distance Learning in licensing process
• Provide recommendations on the use and distribution of open-access textbooks and education resources	• Past efforts include symposium in 2012 and development of Orange Grove Text Plus open eTextbook initiative. Future enhancements TBD
• Provide appropriate help desk support, and training and consultation	• Project underway to consolidate FCS library and FCAAS Help Desks. Full consolidation of all help and support services targeted for July 2013. • Project identified to consolidate training and consultation, but on hold due to lack of resources
• Identify and evaluate new technologies and instructional methods	• Ongoing effort

155

Source: Florida Virtual Campus

Florida Virtual Campus

Cost of Implementing Critical FLVC Service Provisions – Online Catalog

Website Redesign and Centralization
$500,000
($200K recurring, $300K non-recurring)

- Consolidate, rework, or decommission content on legacy websites into central FLVC.org website. Identify customer requirements for new functionality, using focus groups, user tests, surveys, and statistics. Create and maintain a centralized software infrastructure that is scalable to meet the new consolidated and statewide requirements for FLVC, integrating a single-sign on authentication approach that allows users to log in once and access multiple programs during a session. Redesign and deploy the website to meet long-term customer needs

Modernization and Long-Term Support of the Distance Learning Catalog
$515,000
($365K recurring, $150K non-recurring)

- Redesign and recode the existing distance learning course and degree program catalog from Cold Fusion to a more flexible, expandable and maintainable programming environment (e.g., .Net). Implement features and functions that will allow FLVC to meet its statutorily mandated duties while including options for anticipated future needs of the member institutions and special projects or populations. Identified enhancements include: user customization and custom results, expanded searching and retrieval options, student calendars, career and salary information, improved reporting and institutional data loading options, single sign-on, scheduling tools, degree audits, critical and concierge advising functions, eCommerce options to link students to the resources they need (e.g. textbooks), and expanded adoption and access to free and open access eTextbooks

Stabilization and Implementation of Common Web Infrastructure Platform
$510,000
($250K recurring, $260K non-recurring)

- The stabilization, implementation and delivery of a common web platform, including support for mobile browsers and applications is critical to the success and support of current and planned services for FLVC. Analysis of the recent instability and outage in the FLVC website revealed major shortcomings in the technical platforms in hardware, software, design and engineering. These disparate and aging systems and supporting infrastructure require reengineering and rebuilding to effectively maintain current and mandated future services. The technology is dated and susceptible to single points of failure. A short-term plan is now in place to address stabilization and availability of the current site and now attention to the services and applications is a priority. This request will provide for investment, design, development, training and deployment of the new common infrastructure platform

Source: Florida Virtual Campus Budget Requests

Florida Virtual Campus

Florida Virtual Campus Participation

In 2011-2012, 38 Institutions Listed Courses on the Florida Virtual Campus

Florida College System

- Brevard Community College
- Broward College
- Chipola College
- College of Central Florida
- Daytona State College
- Edison State College
- Florida Gateway College (formerly Lake City)
- Florida Keys Community College
- Florida State College at Jacksonville
- Gulf Coast State College
- Hillsborough Community College
- Indian River State College
- Lake Sumter Community College
- Miami Dade College
- North Florida Community College
- Northwest Florida State College
- Palm Beach State College
- Pasco-Hernando Community College
- Pensacola State College
- Polk State College
- Santa Fe College
- Seminole State College
- South Florida State College
- St. Johns River State College
- St. Petersburg College
- Tallahassee Community College
- Valencia College

State University System of Florida

- Florida Atlantic University
- Florida Gulf Coast University
- Florida International University
- Florida State University
- University of Central Florida
- University of Florida
- University of North Florida
- University of South Florida
- University of West Florida

ICUF

- Lynn University
- Saint Leo University

157

Source: Florida Virtual Campus

Florida Statutes Limiting and Regulating the Fees Which can be Assessed on Distance Learning Courses

In 2011, Florida Statute 1009.23 established the Distance Learning Fee, contingent upon the course being greater than 80% distance learning, listed in the Distance Learning Catalog, and directly attributable to the incremental costs associated with distance learning

(16)(a) Each Florida College System institution may assess a student who enrolls in a course listed in the Florida Higher Education Distance Learning Catalog, established pursuant to s. 1004.09, a per-credit-hour distance learning course user fee. For purposes of assessing this fee, a distance learning course is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both.

(b) The amount of the distance learning course user fee may not exceed the additional costs of the services provided which are attributable to the development and delivery of the distance learning course. If a Florida College System institution assesses the distance learning course user fee, the institution may not assess any other fees to cover the additional costs. By September 1 of each year, each board of trustees shall report to the Division of Florida Colleges the total amount of revenue generated by the distance learning course user fee for the prior fiscal year and how the revenue was expended.

(c) The link for the catalog must be prominently displayed within the advising and distance learning sections of the institution's website, using a graphic and description provided by the Florida Distance Learning Consortium, to inform students of the catalog.

(17) Each Florida College System institution that accepts transient students, pursuant to s. 1004.091, may establish a transient student fee not to exceed $5 per distance learning course for processing the transient student admissions application.

In 2012, Florida Statute 1009.24 reinforced the same restrictions on the distance learning fee, and altered language to mandate inclusion on the new Florida Virtual Campus

(17)(a) A state university may assess a student who enrolls in a course listed in the distance learning catalog, established pursuant to s. 1006.73, a per-credit-hour distance learning course fee. For purposes of assessing this fee, a distance learning course is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both.

(b) The amount of the distance learning course fee may not exceed the additional costs of the services provided which are attributable to the development and delivery of the distance learning course. If the distance learning course fee is assessed by a state university, the institution may not assess duplicative fees to cover the additional costs.

(c) The link for the catalog must be prominently displayed within the advising and distance learning sections of the institution's website, using a graphic and description provided by the Florida Virtual Campus, informing students of the catalog.

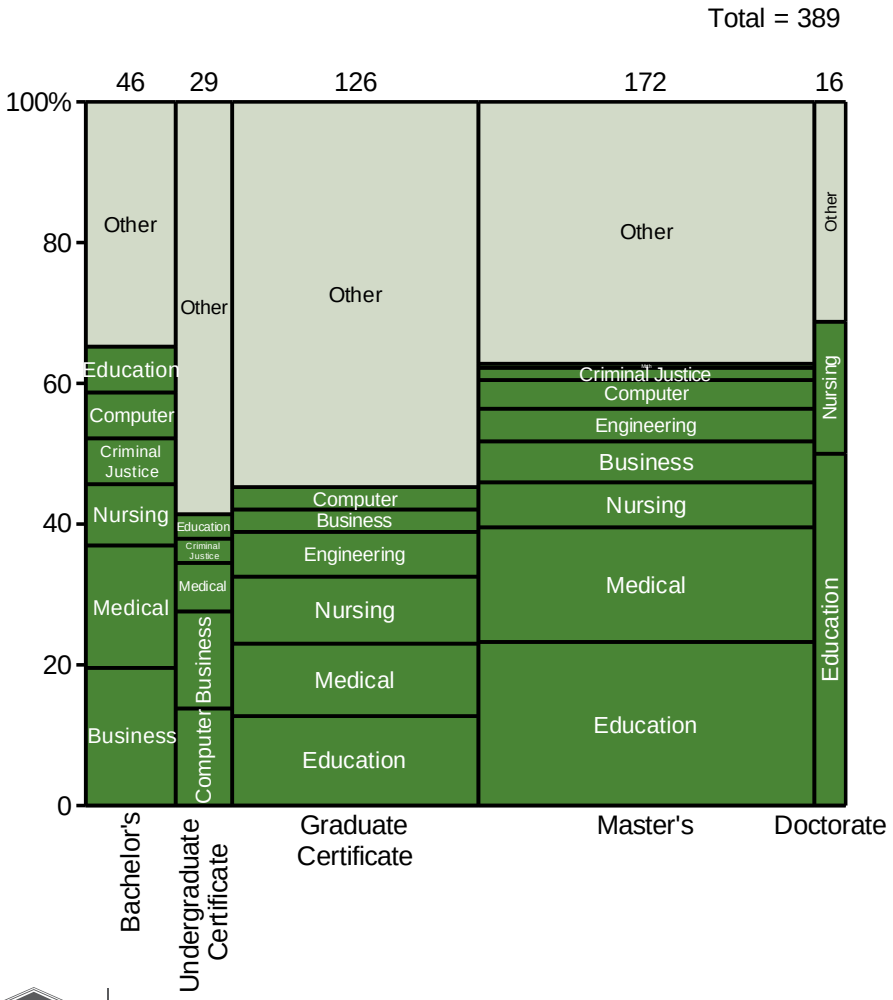
Florida Board of Governors Regulations [7.003(18)(f)] authorizes each university board of trustees to assess a distance learning fee, which will have varied amounts

158

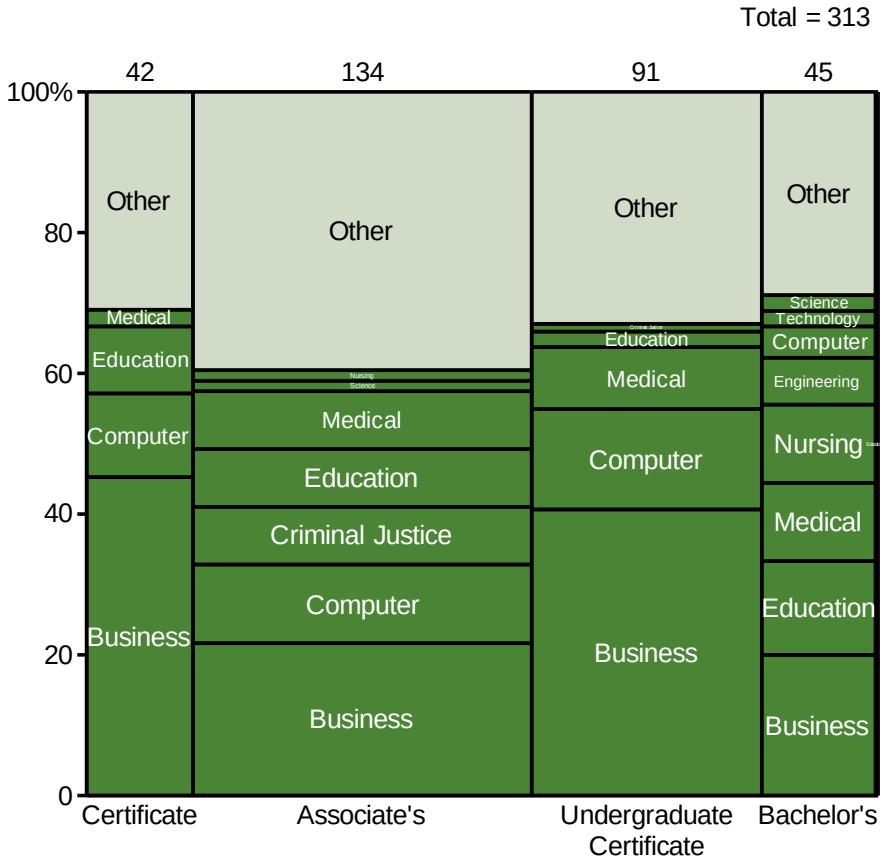
Source: Florida Senate (flsenate.gov)

Florida Virtual Campus
SUS and FCS Online Program Offerings

SUS Online Program Offerings



FCS Online Program Offerings



159

Note: Includes FL distance learning programs listed in the FLVC; see subsequent pages for "other" detail
Source: Florida Virtual Campus

Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (1/3)

1006.73 Florida Virtual Campus

(1) The Florida Virtual Campus is established to provide access to online student and library support services and to serve as a statewide resource and clearinghouse for public postsecondary education distance learning courses and degree programs. The primary purposes of the Florida Virtual Campus are to:

(a) Establish a single library automation system and associated resources and services that all public postsecondary education institutions will use to support their learning, teaching, and research needs.

(b) Enhance and expand educational access and increase public postsecondary education degree attainment across the state.

(c) Address the educational needs of traditional students, place-bound students, time-bound students, and adult learners.

(d) Increase workforce skills and expand professional development opportunities.

(2) The chancellors of the Florida College System and the State University System shall exercise joint oversight of the Florida Virtual Campus and shall establish its governance and reporting structure, administrative and operational guidelines and processes, staffing requirements, and operational budget. All data center services needed by the Florida Virtual Campus shall be provided by a primary data center established pursuant to ss. 282.201 and 1004.649.

(a) In carrying out the purposes of this section:

1. The campus is not an “agency” as defined in s. 20.03(11) and is not subject to chapter 287.

2. The campus shall be deemed to be acting as an instrumentality of the state for purposes of sovereign immunity pursuant to s. 768.28(2).

3. All records of the campus are public records unless made confidential or exempt from law.

(b) The campus shall maintain an unencumbered balance of not less than 5 percent of its approved operating budget.

(c) The campus may secure comprehensive general liability coverage, professional liability coverage, property and casualty coverage, and any other insurance coverage deemed appropriate by the chancellors.

(d) The campus may contract for administrative services with a public postsecondary education institution. The administrative overhead costs charged by the institution may not exceed the actual cost of providing the services and shall require a specific appropriation in the General Appropriations Act.

(3) The Florida Virtual Campus, upon approval of the chancellors of the Florida College System and the State University System, shall have authority to apply for and accept funds, grants, gifts, and services from local, state, or federal governments or any of their agencies or from any other public or private source and is authorized to use funds derived from these sources to defray administrative costs and implement programs as may be necessary to support the services and resources provided by the campus.

(4) The Florida Virtual Campus shall be subject to the audit requirements of s. 11.45 for Florida College System institutions and state universities. The chancellors of the Florida College System and the State University System shall jointly serve as the governing body of the campus for purposes of the audit and all related activities.

(5) The Florida Virtual Campus shall:(a) Develop and manage a library information portal and automated library management tools for use by the Florida College System institutions and state universities. The library information portal and automated library management tools shall include, but are not limited to, the following services and functions *(next page):*

Source: Florida Senate (flsenate.gov)

Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (2/3)

1. A shared Internet-based catalog and a discovery tool that allow a user to search and, if authorized, access the aggregate library holdings of the state's public postsecondary education institutions. The catalog and discovery tool shall allow the user to search the library holdings of one institution, selected institutions, or all institutions and, to the extent feasible, shall include an interlibrary loan function that ensures the authorized user can access the required library holding.
2. An Internet-based searchable collection of electronic resources which shall include, but not be limited to, full-text journals, articles, databases, and electronic books that the Florida Virtual Campus licenses pursuant to s. 1006.72.
3. An integrated library management system and its associated services which all public postsecondary education institution academic libraries must use for purposes of acquiring, cataloging, circulating, and tracking library material.
4. A statewide searchable database that includes an inventory of digital archives and collections held by public postsecondary education institutions.

(b) Develop and manage a statewide Internet-based catalog of distance learning courses, degree programs, and resources offered by public postsecondary education institutions which is intended to assist in the coordination and collaboration of articulation and access pursuant to parts II and III of chapter 1007. The campus shall establish operational guidelines and procedures for the catalog which must:

1. Require participating institutions to provide information concerning the distance learning course to include information on the availability of the course; the type of required technology; any prerequisite course or technology competency or skill; the availability of academic support services and financial aid resources; and course costs, fees, and payment policies.
2. Require that distance learning courses and degree programs meet applicable accreditation standards and criteria.
3. Require that, at a minimum, the catalog is reviewed at the start of each academic semester to ensure that distance learning courses and degree programs comply with all operational guidelines and procedures.
4. Use an Internet-based analytic tool that allows for the collection and analysis of data, including, but not limited to:

a. The number and type of students who use the catalog to search for distance learning courses and degree programs.
b. The number and type of requests for information on distance learning courses and degree programs that are not listed in the catalog.
c. A summary of specific requests by course type or course number, delivery method, offering institution, and semester.

5. Periodically obtain and analyze data from the Florida College System and the State University System concerning:

a. Costs of distance learning courses and degree programs.
b. Graduation and retention rates of students enrolled in distance learning programs.
c. Distance learning course completion.

(c) Implement a streamlined, automated, online admissions application process for undergraduate transient students who are currently enrolled and pursuing a degree at a public postsecondary education institution and who enroll in a course offered by a public postsecondary education institution that is not the student's degree-granting institution. The Florida Virtual Campus shall work with the Florida College System and the State University System to implement this process which requires all Florida College System institutions and state universities to:

1. Use the transient student admissions application available through the statewide computer-assisted student advising system established pursuant to paragraph (d). This admissions application is the only application required for the enrollment of a transient student as described in this paragraph.
2. Implement the financial aid procedures required by the transient student admissions application process.
3. Transfer credit awarded by the institutions offering the course to the transient student's degree-granting institution.

161

Source: Florida Senate (flsenate.gov)

Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (3/3)

4. By December 1, 2012, provide for an interface between the institutional advising system and the statewide computer-assisted student advising system established pursuant to paragraph (d) in order to electronically send, receive, and process the transient student admissions application.

(d) Develop and manage a statewide computer-assisted student advising system which shall support the process of advising, registering, and certifying students for graduation and include a degree audit and an articulation component. The Florida College System institutions and state universities shall interface institutional advising systems with the statewide computer-assisted student advising system. At a minimum, the statewide computer-assisted student advising system shall:

1. Allow a student to access the system at any time, search public postsecondary education institutions, and identify course options that will meet the requirements of a selected path toward a degree.
2. Audit transcripts of students enrolled in a public postsecondary education institution to assess current academic standing, the impact of changing majors or institutions, the requirements for a student to transfer to another institution, and all requirements necessary for graduation.
3. Serve as the official statewide repository for the common prerequisite manual, admissions information for transferring programs, foreign language requirements, residency requirements, and statewide articulation agreements.
4. Provide information relating to career descriptions and corresponding educational requirements, admissions requirements, and available sources of student financial assistance.
5. Provide the admissions application for transient students pursuant to paragraph (c) which must include the electronic transfer and receipt of information and records for:

a. Admissions and readmissions.
b. Financial aid.
c. Transfer of credit awarded by the institution offering the course to the transient student's degree-granting institution.

(e) Coordinate the negotiation of statewide licensing of electronic library resources and preferred pricing agreements, issue purchase orders, and enter into contracts for the acquisition of distance learning resources, student and library support services, electronic resources, and other goods and services necessary to carry out its duties under this section.

(f) Promote and provide recommendations concerning the use and distribution of open-access textbooks and education resources as a method for reducing costs and work with public postsecondary education institutions in developing a standardized process for the review and approval of open-access textbooks.

(g) Provide appropriate help desk support and training and consultation services to institutions and students using the services and resources of the Florida Virtual Campus.

(h) Identify and evaluate new technologies and instructional methods that can be used for improving distance learning instruction, student learning, the efficient delivery of student support services, and the overall quality of undergraduate distance learning courses and degree programs.

(6) Beginning September 30, 2013, and annually thereafter, the chancellors of the Florida College System and the State University System shall jointly publish a report regarding the activities of the Florida Virtual Campus in the prior fiscal year. The report shall include, but not be limited to, information related to the provision of library services and electronic resources, to include those resources licensed pursuant to s.1006.72; distance learning resources; the computer-assisted student advising system; and other provided programs, activities, and services.

(7) All records, personnel, property, existing contracts, and unexpended balances of appropriations, allocations, grants, and other funds of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the College Center for Library Automation, and FACTS.org shall be transferred to the Florida Virtual Campus. The campus shall be the successor in interest to these organizations and shall be responsible for the provision of all services as authorized by this section.

Source: Florida Senate (flsenate.gov)

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

SACS Accreditation Process and Procedures

New Programs at Accredited Institutions (Strategies #1-3)

	Phase 1: SACSOC Notification and Application	Phase 2: Staff Review	Phase 3: Review and Approval by the Committee on Compliance and Reports
Overview	• An institute undergoing substantive change must provide written notification to the President of the SACSOC • A prospectus will then be requested by the SACSOC	• SACSOC Staff reviews the prospectus and recommends a course of action to the president of the SACSOC	• A committee reviews the pending prospectus and evaluates its compliance with SACSOC Academic Standards and Requirements of the Principles of Accreditation
Details	• Prospectus must detail the rationale for change, the assessment of need, evidence of a supported plan, detailed description of the change and the required changes in faculty, school resources etc.	• Two recommendation paths are possible: – Acceptance of the proposal without a site visit – Referral of the proposal to the Committee on Compliance and Reports	• The committee may then approve the proposal with or without a site visit • The committee may also elect to defer action and request additional information, or deny approval of the substantive changes
Timeline	• Written notification must be provided six months prior to the planned implementation start date • Submission of a prospectus must be completed at least three months prior to the planned implementation start date	• A site visit is required within six months of approved Substantive Changes by the Substantive Change Committee	• A site visit is required within six months of approved Substantive Changes by the Committee on Compliance and Reports
Cost	• $300 fee related to the review of the application/prospectus	• Costs and expenses associated with the visit of the Substantive Change Committee	• Costs and expenses associated with the visit of the Committee on Compliance and Reports

Changes requiring *both* notification of and approval by the SACSOC (as outlined above) include:

- Initiating certificate programs for workforce development or other disciplines
- Initiating distance learning or correspondence programs by which students can take at least 50% of a programs credits through delivery in a format other than face-to-face
- Expanding at the institution's current degree level
- Initiating a collaborative academic program with another institution not accredited by the SACSOC
- Initiating coursework, certificates, or programs of study at a different level than those previously approved

164

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Source: SACS

SACS Accreditation Process and Procedures

Collaborative Academic Arrangements (Potentially Strategies #1-3)

- *Collaborative academic arrangements are agreements between institutions accredited by the Southern Association of Colleges and Schools Commission on Colleges (SACSOC) and accredited or non-accredited degree-granting institutions of higher education throughout the world for purposes of awarding academic credits and/or educational program completion credentials, e.g., certificates, diplomas, degrees or transcripts*
  --SACSOC
- Member institutions are responsible for ensuring the integrity of their accreditation and of their education programs when entering into collaborative academic arrangements

- There are three key areas of responsibility when entering a collaborative agreement which must be documented in the prospectus for Application for Substantial Change:

	Ensuring the Integrity of the Collaborative Arrangements	Ensuring the Quality of the Credits Recorded on Transcripts	Ensuring Compliance with Accreditation Requirements
Details	• Disclaimer Statement: Institutions entering agreements with non-SACSOC accredited schools must make that clear when describing their relationship with the partner program/school • Institutional Names on an Academic Credential: students may receive academic credentials from the accredited institution when they receive 25% or more of credits from that institution (33% for graduate level students)	• In the process of evaluating, accepting, and transcripting credits awarded through collaborative academic arrangements, the Member institution must actively evaluate and monitor partner program courses to ensure compliance with The Principals of Accreditation • Transcripts must also list the program / institution from which the credits were earned	• The accredited institution is responsible for making sure the collaborating institution meets the pertinent Accreditation Standards • These include providing documentation on such areas as: academic integrity, institutional mission, faculty, learning resources, program curriculum and program length

- Collaborative academic arrangements are most often referred to as dual or joint educational programs, affiliations, partnerships, consortia agreements, and other similar terms:
  - Joint educational programs are those in which multiple intuitions confer a single program completion certificate; require both notification of and approval by the SACSOC as outlined
  - Dual degree programs are those where students study at two or more institutions and each confers its own completion; these types of programs only require detailed notification of the SACSOC

165

Source: SACS

SACS Accreditation Process and Procedures

New Institution Accreditation Process (Strategy #4)

	Phase 1: Building a Foundation of Understanding	Phase 2: Initial Paper Review	Phase 3: Onsite Review by an Candidacy Committee	Phase 4: Onsite Review by an Accreditation Committee
Overview	• Familiarization with the application process and initial compilation of the application for accreditation	• Review of application by commission staff and peers	• Commission determination of demonstrated compliance by the institution	• Approval by the SACSOC Accreditation Committee of an institutions Application for Accreditation • Continued candidacy may be granted rather than accreditation status
Approval Process	• Documentation of compliance with key Comprehensive Standards; includes financial audit for past three years as available, management letter and budget outline • Following discussion of the analysis of the original submission, institutions are invited to submit supplementary materials to enhance narratives and documentation	• Staff member will review the application and provide written assessment • Institution reviews application assessment and works with SACSOC staff to strengthen weaknesses in document	• Committee of approximately six members evaluates final application and visits campus to evaluate compliance with the key standards and requirements of accreditation • After visit committee provides a report including a direct statement of compliance or non-compliance • If institution is approved, candidacy is granted for 4 years	• Accreditation Committee Visit allows for the committee to evaluate institution compliance with the full list of Standards and Requirements • Committee is made up of ~nine members with evaluators for each relevant topic (i.e., faculty qualifications, Educational programs, Library resources, and student support)
Details	• Part A - Institutional Characteristics: Type of Control, Organizational Chart, Educational Programs detail, methods of delivery detail, Enrollment Data, Faculty qualifications and Resources • Part B – Documentation of Compliance: “makes the case” for the institution by crafting a reasoned argument for compliance with all of the key issues	• Staff member will review the application and provide written assessment • Institution reviews application assessment and works with SACSOC staff to strengthen weaknesses in document	• Candidacy Committee reviews *updated* application one month prior to their visit • The review consists of a three day visit to campus by the Committee • Prior to scheduled visits, commission posts call for third-party comments to which the institution is invited to respond	• Membership is granted when the approved accredited institution has been in operation i.e., has without interruption enrolled students in degree programs through at least one complete degree program cycle, and has graduated at least one class at the level of the highest degree offered by the institution prior to action of the Commission • Accreditation must be confirmed 5 years after being granted initial membership

Source: SACS

SACS Accreditation Process and Procedures

New Institution Accreditation Process (Strategy #4)

	Phase 1: Building a Foundation of Understanding	Phase 2: Initial Paper Review	Phase 3: Onsite Review by an Candidacy Committee	Phase 4: Onsite Review by an Accreditation Committee
Timeline	• Application is submitted to SACSOC for initial analysis and evaluation six – 18 months after attending Pre-Applicant workshop	• One – six months depending on application weaknesses assessed by accreditation staff • Additional waiting period until SACSOC Board meeting (June, December); must allow time for audit of school's most recently completed fiscal year	• Three – six months after approval from Candidacy Committee • Three-day visit by the Candidacy Committee; Institution has 2 weeks to respond to Committee's assessment	• Within six months of being granted Candidacy, visit from SACSOC Representative to consult on preparation for full Compliance Certification • Within 18 months of being granted Candidacy, visit from Accreditation Committee; review of final compliance documents begins a month before the Committee visit • An intuition that has been granted Continued Candidacy will have a second visit from the Accreditation Committee within 18 months of Board Action
Best Practices	• Most applicants establish a Leadership Team to manage and validate the internal institutional assessment of Compliance; President / CEO has overall responsibility and sits on the Leadership Team • The higher the level of detail in the application the better – the links between key issues of compliance and the narrative in Part B is of high importance	• As possible, the application narrative should be as developed *prior* to submission to the SACSOC • After review and analysis by accreditation staff, effort should be paid to ensuring the application is corrected and is free from weaknesses, is articulate, persuasive and provides compelling evidence of compliance	• High levels of preparation and precise execution of scheduled events are highly encouraged – the visit is a chance for the institution to make a strong impression to the members of the committee	• Because the analysis for compliance covers more than twice the number of key issues, schools may elect to expand their Leadership Team to cover the increased workload and demand for expertise • Staff advisory visit can be scheduled to match the institutions preference – earlier allows staff to provide guidance to tasks before they are tackled, later allows for feedback on preliminary work
Cost	• Costs and expenses associated with the preparation and submission of an application	• $10,000 Application Fee	• $2,500 Candidacy Fee • Costs and expenses associated with the visit of the Candidacy Committee	• Costs and expenses associated with the visit of the Accreditation Committee

Source: SACS

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Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Stakeholder Interviews
Primary Research

Primary Research

Stakeholder Interviews

- Dr. Judy Ashcroft – former Dean, University College, USF
- Frances Butler – Legislative Analyst, Florida House of Representatives
- Ruth Ann Balla – Executive Director of the Virtual College, Miami Dade College
- Dr. Bob Bradley – Vice President for Planning and Programs, FSU
- Dave Brill – FL Blue Ribbon Task Force on Higher Education
- Frank Brogan – Chancellor, State University System (SUS)
- Matt Carter – Board of Governors, SUS
- Dr. Tom Cavanagh – Assistant Vice President, Center for Distributed Learning, UCF
- Dr. Bruce Chaloux – CEO, Sloan Consortium; former manager (and creator) of SREB's Electronic Campus
- Dr. Manoj Chopra – Board of Governors, SUS
- Dr. Kathy Cobb – Brevard Community College
- Lynn Cobb – House Deputy Chief of Staff for Policy
- Dean Colson – Chair, Board of Governors, SUS
- Jamelle Connor – AVP, St. Petersburg College
- Sherri Croom –Governor's Office
- John Delaney – Chair, Council of Presidents, President, UNF
- Dr. Cathy Duff – Interim Associate Provost and Associate Vice President, FGCU
- Ann Duncan – President, Vertical Integration
- Dr. Jose Fierro – Dean, Open Campus, Florida State College at Jacksonville
- Dr. Frank Fuller – Florida Senate
- Dr. Myk Garn – Director of the SREB Educational Technology Cooperative
- Rob Gidel – Chair, Board of Trustees, FL Polytechnic University
- Dr. Joe Glover – Provost and Senior Vice President for Academic Affairs, UF
- Randy Hanna – Chancellor, Florida College System
- Tom Hamby – Florida House of Representatives
- Kristie Harris – Budget Director, FL Board of Governors
- Dr. Joel Hartman – Vice Provost and CIO, UCF
- Jane Hayes – Interim Executive Director, Florida Virtual Campus
- Allyce Heflin –Budget Chief, Florida House of Representatives
- Matt Hintze – TutoringZone
- Jan Ignash – Vice Chancellor for Academic and Student Affairs, SUS
- Michael Johnson – Southern Association of Colleges and Schools
- Jason Jones – Director, Institutional Research, SUS
- Dr. Art Kirk – President, St. Leo
- Dr. Scott Kittel – former Education Policy Coordinator, Office of the Governor
- Theresa Klebacha – Staff Director, Education Committee, Florida Senate
- Jana Kooi – President, Open Campus, Florida State College at Jacksonville
- Gene Kovacs – Assistant Vice Chancellor, Information Resource Management, SUS
- Dr. R.E. LeMon – Assoc. Vice Chancellor, Academic and Student Affairs, SUS
- Dr. Andy McCollough – Assoc. Provost for Teaching and Technology, UF
- Dr. Nancy McKee – Assoc. Vice Chancellor, Academic and Student Affairs, SUS
- Kathy Mears – Chief of Staff to Speaker-designate Will Weatherford
- Dr. Ed Moore – President, Independent Colleges and Universities of Florida
- Dr. Pam Northrup – Dean, Associate Provost and Dean of the College of Professional Studies, UWF
- Dr. James Olliver, St. Petersburg College
- Dr. John Opper – Director, Distance Learning, Florida Virtual Campus
- Dr. Monica Orozco – Assistant Provost for eLearning, FAU
- Denise Potvin – Budget Chief, Florida House of Representatives
- Joseph Riquelme – Director, FIU Online
- Dr. Len Roberson – Graduate Dean and Assistant VP for Academic Technology, UNF
- Andrew Rosen – CEO, Kaplan
- Mark Rosenberg – President, FIU
- Dr. Susann Rudasill – Director, Office of Distance Learning, FSU
- Dr. Heather Sherry – Policy Chief, Florida House of Representatives
- Dr. David Shulman – Associate Vice President Online & Instructional Technology, Broward College
- Roary Snider – Policy Chief, Office of the Governor
- Dr. Dave Spence – President, Southern Regional Education Board (SREB)
- Richard Stevens – Director, Academic and Student Affairs, SUS
- Dr. Ron Toll – Provost, Florida Gulf Coast University, representing Council of Academic Vice Presidents
- Dr. Eddie Wachter – DeVry University, Orlando Office
- Dr. Douglas Wartzok – Provost and Executive Vice President, FIU
- Will Weatherford – House Speaker Designee
- Vicki Westergard – Executive Director, eCampus, Web and Instructional Technology, St. Petersburg College
- Cortez Whatley – Florida Student Association, Chair, and Member, Board of Governors

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December 10, 2012

Dr. Frank T. Brogan, Chancellor
State University System of Florida
325 W. Gaines Street, # 1614
Tallahassee, FL 32399

Dear Chancellor Brogan:

The SUS Council of Academic Vice Presidents (CAVP), the Provosts, has followed closely and with great interest the development of the Parthenon Report on Distance Learning. We are appreciative that the CAVP was kept informed of the process and had opportunity to contribute to it.

In a conference call held on 29 November, the CAVP, along with members of their staffs, engaged in a discussion regarding the final report. The consolidated results of that discussion are provided herein as our formal input in support of the planned December 17 meeting of the strategic planning committee of the Board of Governors (BOG). It is our expressed purpose that this input be of value to the BOG as it considers the best strategies to achieve expanded distance learning opportunities in support of the mission and vision of the Florida SUS.

Consideration of 4 options

The CAVP favors Options 2 and 3, individually, as well as the potential of a plan that hybridizes the two options so as to maximize the potential advantage of each.

With regard to Option 4 (separate new university) we have serious concerns regarding the comparative high entry costs, predicted competition with well-established DL programs already in place across the extant SUS institutions, extended path to accreditation, low persistence rates, transfer complications, and expanded bureaucracy.

With regard to option 1 (expansion of DL programs on an institution-by-institution basis), we believe that while such an effort could be mounted, and indeed, each institution has been active In providing DL, this option is limited in achieving various efficiencies and scalabilities as compared to Options 2 & 3.

Remaining questions

It is expected that a document with the scope, scale, and heft of that of the Parthenon Report, answers many questions, leaves some unanswered, and raises new questions. We believe that the following questions require further attention.

1) What is (are) the specific objectives(s) of the effort to substantially expand SUS DL opportunities and how are these objectives to be met?
2) How will tuition cost be established if different from the current rate structure?
3) Will DL students be subsidized as current students?

4) How will current mandated transferability of courses be addressed?
5) How will tracking of students be accomplished?
6) How will revenues and expenditures be shared among the system?
7) How will the preferred option enhance and not threaten the considerable investment in existing extensive DL Offerings across the SUS?
8) Which institution, under same options, will actually award the degree?
9) What accreditation issues may need to be reviewed?

We hope that our feedback is of value to you and the BOG as this important process moves forward.

Respectfully submitted for the CAVP,

Ronald B. Toll

Dr. Ronald B. Toll
Chair, CAVP
Provost and VPAA, FGCU

CC: Jan M. Ignash, Vice Chancellor for Academic & Student Affairs, FL Board of Governors

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The Florida College System

December 10, 2012

Board of Governors Strategic Planning Committee
325 West Gaines Street, Suite 1614
Tallahassee, Florida 32399-0400

Dear Members of the Strategic Planning Committee:

Thank you for allowing me to provide feedback on the report prepared by The Parthenon Group. I have read the findings and recommendations with interest. As you are aware, Florida has made great strides in the use of technology in higher education. As the first Chairman of the predecessor to the Florida Distance Learning Consortium, I have a longstanding interest in this issue and look forward to being an active participant in these discussions. The Presidents of our 28 institutions are also excited about the opportunity to participate in this discussion.

The nation is envious of the strong articulation policy between the Florida College System and the State University System. It is my belief that this strong articulation policy and common course numbering can continue to serve as a strong foundation for Florida continuing to be a national leader in online education.

The Parthenon Group identifies primary objectives for online learning, all of which have been and will continue to be goals of the Florida College System. The Florida College System closely identifies with the objectives as inherent to the mission of each institution and the system as a whole. The Florida College System has, at the core of its mission, a commitment to access by providing a wide range of opportunities for students. Distance education is a critical component of our strategy for providing affordable access and flexibility to a diverse student population.

While there are several areas of the report that I disagree with, I will not use this letter to point out those differences. Regardless of my concerns, I believe the Parthenon Group identified a number of important issues that Florida must address as we move even further into the online learning arena.

I am appreciative that the consultants and your staff sought input from our system throughout the process. Representatives of the Parthenon Group spent considerable time with our staff and I personally spent more than five hours with company officials sharing my thoughts. I am also appreciative of the recognition in the report of the tremendous work that has already been done by Florida's colleges and universities in online education.

While the report identifies four separate options for consideration by the Board of Governors and the Florida Legislature, I do not believe that an issue as complicated as online learning can be put into four distinct categories.

However, the report successfully identifies a number of issues that the state must confront as we look to even further expand online learning. These include, but are not limited to: (i) ensuring state of the art course delivery methods for all online courses; (ii) offering of competency-based or prior learning credits; (iii) sharing of high quality course materials across institutions; (iv) providing adequate support services for online courses; (v) development of back-office functions; (vi) tuition policies; and, (vii) marketing efforts.

While the report identifies a number of institutions nationally that only deliver online courses, I believe any serious discussion must include a thorough exploration of blended courses. A small percentage of students exclusively take online courses, meaning few complete all the credits for the degree by enrolling solely in online coursework. Many students take several online courses in addition to courses delivered in the traditional classroom. Others take blended courses. For example, I received a graduate degree through a blended delivery model from a "top-ten" business school by attending classes for one week at a time, every seven weeks, with online delivery in the interim.

We must also include a serious discussion of the changing landscape of the delivery and financial models. Not a day passes without one reading articles about massive open online courses (MOOCs) and the number of elite universities joining these efforts. While a sustained business model for the MOOCs has not yet been identified, this clearly represents greater availability of higher education to more of our students. I can represent that the Florida College System is actively exploring the possibility of developing open online courses to assist students testing into developmental education.

I believe it is too early in the process to make a recommendation on a particular course of action that Florida should take. I do, however, have some specific thoughts that may be helpful as we explore this

issue. First, Florida as a state has tremendous marketing potential. If our goal is to market online courses across the country or in other targeted markets, the "Florida brand" is golden. I seriously question any added benefit from a marketing standpoint in creating an individual online university or identifying one institution that would provide the predominance of online education. Collectively marketing Florida's higher education system and its courses that are available online and identifiable as transferable through our Statewide Course Numbering System has great potential. While I am sure that time limitations did not allow the report to fully consider this option, I am convinced that the marketing potential of this approach is much greater than the stand-alone approach discussed by the consultants.

Conversation around online learning and working together often leads to a discussion of accreditation issues. Generally, a student has to take at least 25 percent of their courses from the degree-granting institution. The consultants emphasize ease of accreditation with Options 3 and 4. Accrediting agencies are constantly looking at the issue of online learning, including the offering of MOOC's. I know this topic will be part of the discussion at this week's meeting of the Southern Association of Colleges and Schools, Commission on Colleges, in Dallas and I believe this will be a continuing area of discussion by the accrediting agencies. With a statewide common course numbering system and a guarantee of transfer, Florida is in the driver's seat to work with the accrediting agencies to develop a program that works best for our students.

While Option 3 recommends a "lead institution," there are a number of different roles that such an institution could play. In fact, based upon discussions with the consultants, it is clear to me and was confirmed by Parthenon that the "lead institution" does not have to be a degree granting college or university. While there may be some advantages to having the lead institution being a college or university, one of the major roles to be performed by the lead institution is providing back office and design support to faculty members. These functions can be provided by a number of our current institutions or may be split up based upon the individual expertise of the college or university. What is critical is that there be an entity that makes a determination of who can best offer these support services. The back-office design and support activities are absolutely necessary tools for faculty members as they work to design state of the art courses. Limiting it to one institution may not be beneficial to our students in the long run.

One tool being used by several online universities is the issuing of credit for prior experience or for demonstrated competency. Florida has been engaged in this effort for many years, including the awarding of credit for national examinations like Advanced Placement and CLEP, credit for military service, and other demonstrations of prior learning. However, we can do more. Through the use of the Articulation Coordinating Committee, Florida should begin a serious review to determine whether college credit can and should be awarded for MOOC's and the methodology to assess whether a student has achieved the appropriate competencies. Florida is not behind the curve in this area. However, we must continue to work diligently as this area is constantly evolving.

The report does point out a concern in duplication of course development. While I share this concern, I am also sensitive to the desire of faculty members and postsecondary institutions to be able to develop state-of-the-art courses and utilize different delivery models. However, with the state providing approximately 50 percent of the cost of a degree, it is critical to ensure that efficiencies are matched with sound pedagogy through innovation. Allowing only one university or college to be the lead in developing new programs would not necessarily lead to the best faculty members offering the best online courses. A process whereby colleges and universities compete to design new programs that will be available to all institutions appears to be more advantageous to our students.

Florida must be careful to measure and document the success of our online students. Many of the online institutions referenced in the report do not provide completion, retention or job placement data. Florida must carefully incorporate data analysis into the process as we constantly look at the best options for our students and our state.

This discussion must also include tuition. While there are various debates about the cost of online learning, research indicates that the actual cost of delivery from an online-only college or university can be less than online courses offered by traditional universities and colleges. While there are also arguments about the quality of content from different types of institutions, I will not address that issue here. I find that some online-only universities offer high quality instruction that meets the needs of certain students. Florida must, however, look at the tuition rates of at least some of its online courses. I am not recommending that the price of all online courses be reduced to a common level, but, as we move into an ever competitive world and as the issue of student affordability becomes even more important, this issue must be addressed. In addition, I strongly urge a discussion of tuition rates for out-of-state students taking online courses.

As I stated in the beginning, I am uncomfortable suggesting one particular alternative at this time. I believe this discussion, started by the Speaker of the House of Representatives, is one of the most important issues regarding the future of higher education in Florida. My initial reaction is that there is a model between Option 2 and Option 3 that can be developed utilizing the best efforts of faculty and staff from across the state. We have already seen significant success in the merging of the two library automation systems, the online counseling service and the distance learning catalogue into the Florida Virtual Campus.

The activities currently being undertaken by the Florida Virtual Campus could be a part of this effort in order to enhance student success. If the Legislature determines to utilize the Florida Virtual Campus or a similar entity as part of this model, additional statutory changes will have to be made in order to provide for selection of institutions to provide back-office and course delivery support. A significant effort must be devoted to marketing, and we must undertake a hard look at tuition, competency/experiential credits, and course delivery models. This will, by necessity, require legislative authorization to explore certain options.

Regardless of the approach ultimately taken by the state, the Florida College System is steadfast in its commitment to providing high quality, affordable certificate and degree programs. The Florida College System stands ready to work with our colleagues in the State University System to build and fortify Florida's online learning capacity.

Very truly yours,

Randy Hanna
Chancellor
The Florida College System

RH/jac

Cc: Frank Brogan, Chancellor, the State University System of Florida (SUS)
Nancy McKee, Associate Vice Chancellor for Academic and Student Affairs, SUS
John Holdnak, Executive Vice Chancellor, the Florida College System (FCS)
Julie Alexander, Vice Chancellor for Academic and Student Affairs, FCS
Scott Parke, Vice Chancellor for Research, FCS
Kasongo Butler, Assistant Chancellor, FCS
Florida College System Council of Presidents

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INDEPENDENT COLLEGES & UNIVERSITIES OF FLORIDA

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Lake Wales

WEBBER INTERNATIONAL UNIVERSITY
Babson Park

December 5, 2012

Board of Governors
Strategic Planning Committee
State University System of Florida
Board of Governors
325 W. Gaines Street, Suite 1614
Tallahassee, FL 32399-0400

Dear Committee Members:

We have followed the Board of Governor's On-Line Strategy for the State University System's Development with much interest. The passage of the Florida Virtual Campus last year signaled a new commitment to develop on-line learning in Florida. That challenge is critical but Florida's state and independent institutions have impressive resources that can be enlisted. The state should be careful to not develop new options that impede with the already robust market driven options in place.

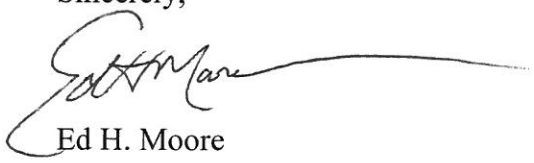
The 20 independent colleges and universities that have fully on-line degree programs would welcome opportunities to partner with state universities and state colleges to boost on-line learning in Florida. Currently, ICUF institutions have nearly 300 fully on-line programs and more than 30,000 fully on-line degree seekers. Those degree programs are comprised of thousands of courses that could be offered to high school advanced placement and dual enroll students. Those degree programs can be tailored for working Floridians and degree completers. The ICUF on-line capacity could be offered in partnerships with school districts and state colleges throughout the state, reaching the currently higher education under-served. Along with the SUS and FCS on-line capacity, Florida has more than 600 fully on-line degree programs. It is an impressive and comprehensive inventory.

We were initially enthusiastic in our discussions with the Parthenon Group. As time passed and drafts evolved, we were disappointed that the final Parthenon Group's Report outlined no role for independent higher education in the options described and dint explore deeply what is really going on already in Florid.

Notwithstanding that, we will continue to hope for options and opportunities to participate. We are enthusiastic and committed to support broader on-line learning opportunities for Floridians, especially for those who are place-bound

or cannot relocate to pursue a degree because of costs, their jobs or their family responsibilities. Because I believe that the Board of Governors shares that goal, we will continue to expect that a plan for all of Florida's on-line resources will emerge. We would welcome a role in an innovative and inclusive Florida On-Line Strategy.

Sincerely,



Ed H. Moore

EHM/mca

STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
Workshop on the Expansion of Online Education
December 17, 2012

SUBJECT: Policy Issues for Online Expansion

PROPOSED COMMITTEE ACTION

For information.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Not applicable.

BACKGROUND INFORMATION

Dr. David Longanecker will identify policy issues that need to be considered in order for the Committee to develop an approach to recommend to the Board for expanding online education in Florida.

Dr. Longanecker is the president of the Western Interstate Commission for Higher Education in Boulder, Colorado. Previously, he served for six years as the assistant secretary for postsecondary education at the U.S. Department of Education, developing and implementing national policy and programs that provided more than $40 billion annually in student aid and $1 billion to institutions. Prior to that, he was the state higher education executive officer (SHEEO) in Colorado and Minnesota.

He was also the principal analyst for higher education for the Congressional Budget Office. Dr. Longanecker has served on numerous boards and commissions and has written extensively on a range of higher education issues. His primary interests in higher education are: access and equity; promoting student and institutional performance; finance; the efficient use of educational technologies; and internationalizing American higher education. He holds an Ed.D. from Stanford University, an M.A. in student personnel work from the George Washington University, and a B.A. in sociology from Washington State University.

Supporting Documentation Included: None

Facilitators/Presenters: Dr. David Longanecker

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STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
Workshop on the Expansion of Online Education
December 17, 2012

SUBJECT: National Landscape of Online Education

PROPOSED COMMITTEE ACTION

For information.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Not applicable.

BACKGROUND INFORMATION

Dr. Bruce Chaloux will describe how other systems, states, and consortia have addressed the policy issues outlined by Dr. Longanecker during the previous presentation.

Dr. Chaloux, a national expert on online learning policy and distance learning, is the Executive Director and CEO of the Sloan Consortium (Sloan-C), an association of individuals, institutions and organizations of higher education engaged in online learning.

Dr. Chaloux joined Sloan-C from the Southern Regional Education Board, where he served as director of student access programs and services. He founded and directed the Electronic Campus, a 16-state consortia of some 300 colleges and universities in the South, that make available more than 40,000 online courses and 2,000 degree programs. In 2005, he led Sloan-C's national effort to assist students and institutions impacted by Hurricanes Katrina and Rita—Sloan Semester—recognized for demonstrating the capacity of online learning to aid students in a crisis.

Previously, Dr. Chaloux served in the Graduate School at Virginia Polytechnic Institute and State University, on the staff of the Virginia State Council of Higher Education and as a faculty member and academic administrator at Castleton State College in his native state of Vermont. He holds a doctorate in Higher Education Administration from Florida State University, a Master of Education from the University of Florida and a

Bachelor of Science from Castleton State. Dr. Chaloux previously served as president of the Sloan Consortium Board of Directors and has been active in many higher education leadership organizations.

Supporting Documentation Included: None

Facilitators/Presenters: Dr. Bruce Chaloux

STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
Workshop on the Expansion of Online Education
December 17, 2012

SUBJECT: Panel Discussion

PROPOSED COMMITTEE ACTION

For information.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Not applicable.

BACKGROUND INFORMATION

Panel members will present their perspectives on the top policy issues discussed by Dr. Longanecker and Dr. Chaloux in the previous presentations. Members are:

Dr. Joe Glover, Provost, University of Florida
Randy Hanna, Chancellor, Florida College System
Dr. Ed Moore, President, Independent Colleges and Universities of Florida
Ms. Susan Pareigis, President, Council of 100
Dr. Eddie Wachter, Dean of Academic Affairs, DeVry University

Dr. Longanecker and Dr. Chaloux will serve as reactants to the discussion.

Supporting Documentation Included: Bios of panel members

Facilitators/Presenters: Governor Rood

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Panel Members

Dr. Joe Glover

Joe Glover has been Provost and Senior Vice President of Academic Affairs since July 2008. Dr. Glover arrived at UF in 1983 as an assistant professor in mathematics. He chaired the Mathematics Department from 1993 to 1998 and served as Associate Dean for Faculty Affairs in the College of Liberal Arts and Sciences from 1998 to 2001. Beginning in 2001, Dr. Glover served as Associate Provost for Academic Affairs for six years and as Interim Provost for nine months. Dr. Glover chaired the Task Force on the Future of the University of Florida, helped develop the university's strategic plan, and represented the university on the executive board of the New World School of the Arts. He served as Interim Dean of the College of Liberal Arts and Sciences in 2007-2008.

Dr. Glover received his bachelor's degree in mathematics from Cornell University and his master's and doctoral degrees in mathematics from the University of California, San Diego. He taught at the University of California, Berkeley, and the University of Rochester before joining the University of Florida faculty. He held a National Science Foundation postdoctoral fellowship at UCSD in 1982. His awards include an NSF-CNRS fellowship held at the Universite de Grenoble II, a CLAS Teaching Award and a mentoring award from the McKnight Foundation. His research in probability theory, stochastic processes, and potential theory has been supported by the NSF, the AFOSR, and the NSA.

Chancellor Randy Hanna

Randy Hanna, Chancellor of the Florida College System, has an extensive higher education background, previously serving as Chair of the Florida State Board of Community Colleges, Chair of the Florida College System Foundation, and as a member of Tallahassee Community College's governing board. Additionally, he served as a member of the Board of Trustees for the University of West Florida and has served as a trustee for Florida A&M University.

Mr. Hanna has served as special counsel to numerous governmental units, has represented clients before state agencies and has worked on numerous projects in the energy and utility areas; and Mr. Hanna was Managing Shareholder of Bryant Miller Olive from 1997 to October 2011.

Mr. Hanna has a B.S. degree from the University of Florida and an M.B.A. from the Goizueta Business School at Emory University, and earned his juris doctorate at Florida State University. Mr. Hanna is listed in the 2007-08 edition of The Best Lawyers in America and has been recognized by Florida Trend Magazine among the state's Legal Elite. He has served as Chairman of The Florida Board of Bar Examiners and as Chairman of the Chamber of the Tallahassee Area Chamber of Commerce.

Dr. Ed Moore

Dr. Edwin H. Moore has been President of the Independent Colleges and Universities of Florida (ICUF), a Tallahassee-based association of 29 private, not-for-profit colleges and universities, since 2003. He also serves as the Executive Director of the Higher Education Facilities Finance Authority in Florida, a statutory body, and as Chief Executive Officer of the Florida Independent College Fund, a non-profit organization.

Prior to his current roles at ICUF, he served in staff leadership positions in the Florida House of Representatives and as President and CEO of the James Madison Institute, a policy research organization, after returning from Illinois where he ran his own consulting firm. While in Illinois, Dr. Moore also served that state in various capacities, such as a member of the Illinois Board of Higher Education, the Governor's Privatization Council and the Illinois K-20 Joint Education Board.

Dr. Moore is a Fulbright Program Scholar and was the keynote speaker for the Taiwan-Florida Higher Education Conference 2010 and has consulted there on matters of higher education. Ed was editor and co-author of a policy book for the Department of State for use in the Balkans titled "*The Power of Ideas.*"

Ms. Susan Pareigis

Ms. Susan Pareigis was appointed President and CEO of The Florida Council of 100 in May 2006. As President, she serves to advise the Council on issues affecting business and to assist in strengthening partnerships to achieve a competitive business climate and a strong economy. The Council is composed of a diverse group of key leaders and has served in an advisory capacity to the Governor since 1961. It promotes policies that ensure a high quality of life for Floridians and the growth of a widely diversified Florida economy.

From 2002 to 2006, Ms. Pareigis served as the Director of Florida's Agency for Workforce Innovation, a $ 1.5B agency that administers the state's workforce development, unemployment compensation and early learning programs. She served on the President's National Hire Veterans Committee, focusing on the employment of separating military men and women. She also served as a co-chair of the Statewide Strategic Plan for Economic Development, "Roadmap to Florida's Future," and was a member of Governor Bush's Growth Management Study Commission.

Ms. Pareigis serves on the Enterprise Florida Board of Directors, Policy Council of the Florida Chamber of Commerce and currently serves as Chairman of the United States Department of Labor's Advisory Committee on Veteran's Employment, Training and Employer Outreach.

Dr. Eddie Wachter

Dr. Wachter serves as the Dean of Academic Affairs for DeVry University in Orlando, responsible for all academic graduate and undergraduate degree programs (DeVry is a for-profit, regionally accredited institution). Dr. Wachter's areas of research include computer processor architecture, computer performance measurement, and the application of animation and simulation to computer forensics. In addition to his academic experience, he has over 15 years experience in the high technology industry in computer systems engineering. He holds a doctorate in Information Systems from Nova Southeastern University, a master's in Mathematics and Computer Science from Virginia Commonwealth University, and a bachelor's in Mathematics from Bridgewater College.

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STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
Workshop on the Expansion of Online Education
December 17, 2012

SUBJECT: Committee Discussion

PROPOSED COMMITTEE ACTION

For discussion.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution.

BACKGROUND INFORMATION

The Board will be recommending to the 2013 Legislature a strategy for the expansion of postsecondary online education in Florida; the Committee is expected to craft a strategy for consideration by the Board.

Committee members will discuss policy issues, Parthenon's options, how best to move this project forward, and expectations for the January Committee meeting.

Supporting Documentation Included: N/A

Facilitators/Presenters: Governor Rood