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New funding models for innovation

How can institutions restructure financial policies and models to support the innovation required of them?

What does collaboration really look like?

Campus leaders discuss why collaboration is a necessity, as well as best practices for action.





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Reinventing the college bookstore in the online era

Leaders discuss how the college bookstore is becoming a tech-enabled, data-rich cornerstone of campus life.

By Meris Stansbury, Editor

They still sell t-shirts for proud parents and coffee mugs with catchy slogans, but college bookstores are also going through a renaissance of sorts, using technology-supported measures to become an integral cornerstone of campus life.

It's what Ed Schlichenmayer, deputy CEO of the [National Association of College Stores](#) (NACS), and chief operating officer (COO) of [indiCo](#) (a NACS subsidiary), calls a system based on trust equity.

Despite booming online marketplaces for college textbooks—like Amazon, [CourseSmart](#) and [BookFinder.com](#)—“75 percent of course material transactions stay with the college bookstore,” said Schlichenmayer. “And that’s based on the trust equity they’ve built throughout the entire campus community.”

A reinvention’s beginning

According to Schlichenmayer, multiple drivers propelled college bookstores to reimagine how they work with students and faculty to procure needed course materials, including: pressure from online publishing, heavy use of used materials, the surge in rental platforms, and non-traditional wholesale options.

However, one of the major initial motivations to update practices began with the Higher Education Act’s (HEA) suggested guidelines to promote earlier adoption of course materials on campus.

“Five years ago, HEA added a guideline that urged colleges to adopt course materials at an earlier stage,” explained Jenny Febbo, vice president for strategic communications for NACS. “Faculty

were asked to find and choose the materials required for their courses months before a student actually began the course. This gives college bookstores more time to find alternative options to new, printed books, as well as help drive down the overall cost for students by giving them the information they need to comparatively shop and consider their campus budgeting.”

And though the guideline was included in the HEA five years ago, “colleges had a two-year implementation window, so we’re really seeing the uptick in these practices within the last three years,” Schlichenmayer noted.

Incorporating tech-enabled practices

One of the critical ways college bookstores are building trust with the student community is by using an online price comparison tool part of the bookstore’s website.

“A price comparison tool part of the college bookstore’s website is quickly becoming a critical component, and usually consists of a set of subscription-based apps, or a software, that’s integrated with various e-commerce systems,” said Schlichenmayer. “A product’s identifying information is readily available on the online open market and that’s where the tech gathers information.”

Swarthmore College offers just one example of a price comparison tool via a college bookstore website. [The website](#), which writes on its homepage that its main mission is to benefit the campus community, includes a “[Textbook Price Comparison Tool](#)” that includes price information from major online textbook retailers, such as Amazon, [Abebooks](#), and [Half.com](#).

“We strive to get you the lowest price on textbooks. Sometimes, however, another online source can beat our price...let our [tool] do the research for you,” says the tool’s description.

Clicking on the comparison tool, students choose the term, department, course, and then the title/professor of the course.

Randomly selecting Fall 2015, Biology, 030, and “Animal Behavior (Baugh),” the comparison tool shows all books that are required reading for the course. And though Swarthmore’s used version of the required textbook is the cheapest version, new versions of the textbook are cheaper on Abebooks and [Alibris](#) than via Swarthmore. The tool also lets students know when the course material will arrive if ordered immediately from the various sites.

Source	Price	Condition	Notes
SWARTHMORE	\$60.75	USED	From Swarthmore Bookstore
SWARTHMORE	\$81.00	NEW	
ABEBOOKS	\$67.84	NEW	Brand New, Arrives by August 14

“These tools not only help students, it helps faculty,” said Schlichenmayer. “When faculty give bookstores information on their required materials, the bookstore can plug it into the software and see what the price is, as well as comparative shop on similar texts and formats. Bookstores can then give that information to faculty to help them make the most informed choices on their required texts for students, with the goal of ultimately saving students money.

According to the NACS Spring 2015 edition of [their twice-yearly survey on student spending](#), the early-textbook-information practice seems to

be working: the average annual spending from surveyed college students on required materials has dropped from \$701 in 2007-2008 to \$563 in 2014-2015 (down \$75 from 2013-2014’s \$638 average), with “faculty working with campus stores to source less costly materials in use for multiple semesters” listed as one of the major factors contributing to the student spending decline.

Another way Schlichenmayer says college bookstores’ tech-supported practices help faculty make informed course material decisions is by harnessing the data available via digital and online course materials.

“Most people think when you say ‘digital course materials’ that you mean e-books, but higher education has really leapfrogged to interactive, analytics-based digital materials,” he emphasized. “If a faculty member chooses to use a digital textbook that has the capability to monitor data – such as amount of time used by the student, ideas highlighted and looked-up by the student, proficiency on assessments offered by the textbook, etc. – the bookstore can work with the publisher to have access to that data (organized into broad general trends) and let faculty members know which texts are the most used, which are the hardest to potentially comprehend, which help in succeeding on assessments, and more.”

Schlichenmayer noted, however, that not all faculty may want this data, explaining that first the faculty has to choose an analytics-enabled course material, then the bookstore has to gain access to the data (which may include a fee), and “many faculty may see this process and data aggregation as intrusive for not only their course but for their students.”

Though technology may be a support tool, it really all goes back to building the concept of trust equity across the whole campus, said Schlichenmayer.

Outside of faculty and students, college bookstores are also working more closely with often budget-strapped campus libraries.

“We’re seeing more bookstores work in close partnership with campus libraries to figure out which materials the bookstore can supply, and at what cost, versus what the library can rent or lend to students and in what formats; it’s really a more collaborative effort,” he explained.

Looking ahead

In the future, Schlichenmayer says he sees college bookstores looking more into wholesale support for textbook affordability, especially in terms of open educational resources (OER) and online formats, as well as becoming bigger supporters of the institution’s overall academic mission.

“College bookstores will become even more entrenched in campus culture, providing critical

services for students that will help in recruitment, retention and alumni engagement.”

For example, going back to Swarthmore, the college’s bookstore not only sells course materials and the usual fare, but includes a “**technology e-store**,” where, among other things, the campus community can purchase Microsoft Office starting at a reduced price of \$79.98.

“The bottom line is that college bookstores are positioning themselves as a trusted campus partner that really understands student and faculty needs and weaves those needs-based services into the fabric of the institution,” he concluded.

“They’re there to build and maintain mission and brand and will become even more integral to campus life in the next five-to-ten years.” **eCN**



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What does collaboration really look like?

Campus leaders discuss why collaboration is a necessity, as well as best practices for action.

Recently, the term “collaboration” has become higher education’s latest buzzword, with multiple conference speakers **touting its importance**, as well as **everyone** from CIOs to professors exclaiming that collaboration is imperative for supporting, and growing the capabilities of, today’s innovative institutions.

But collaboration is much more than the initial “warm glow” feeling of partnership, says Richard Ray, provost and professor of Kinesiology, Hope College. Meaningful collaboration is about outlining specific group roles, letting go of preconceived notions, specifying measurable deliverables, making personal investments into these collaborative projects and implementations, and much more.

In this thought-leadership piece, leaders from diverse departments and institutions discuss what collaboration really means, the potential benefits of successful collaborations, and how to get started at your department or institution.

[Listed in alphabetical order by last name]

IT tools can help



**By David J. Hinson,
Yeshivah of Flatbush**

Of the myriad challenges faced in running an efficient technology services organization, few are more challenging than keeping everyone engaged and connected

to what’s happening across the entire enterprise, and being able to effectively cover the entirety of the spectrum of customer service response levels (emergencies, on-demand service, equipment

drop-off, ticketing systems, etc.).

At the Yeshivah of Flatbush, we use several collaboration tools to help us manage our real-time communications. Between our campuses, our IT staff is often out-of-reach of a cell signal and rarely in their offices, though they’re usually within range of a solid WiFi signal. Texting is also often more miss than hit.

In this environment, the tool that we rely upon most, for our daily group collaboration and messaging needs, is **Slack**. Our uses for Slack are twofold: First, we use Slack’s feature of channels to communicate where group members are working, and what they are working on, at any given time of day (our #zoho channel); announcing when we arrive or leave a work site (our #whereami channel); or simply sending out a call for lunch partners (our #lunch channel). Second, we use Slack to augment our online help desk ticketing system to rally additional help or expertise to a person or location. As Slack has highly customizable alerts, available on our iOS and Android mobile devices, it allows us to know in real time something of interest that is happening on our channels, or when someone needs to reach us immediately.

Most organizations have a blind spot in their service coverage: knowing where their people assets are at any given time, and being responsive to all of their constituencies in real time.

Slack helps us to fulfill both of these needs, without disrupting our normal work flow.

David J. Hinson is the director of IT at the Yeshivah of Flatbush, in Brooklyn, NY. He is also a former CIO of a small liberal arts college, a seasoned mobile applications developer, and a popular podcaster.

Establish specific, measurable deliverables



By Salwa Ismail,
Georgetown University

As institutions of higher education balance and manage the rising complexities of the dynamic environment that they operate within, collaboration among the different units on campus becomes imperative. However, the strategies for collaboration are still nascent and under development. It becomes essential that the different units with asymmetrical reporting structures and different unit-based goals collaborate efficiently and effectively while balancing the restraints that the different units have based on their organizational structures.

Some of the strategies for successful collaboration and effective partnerships emanate from clear communication. It's always best to ensure that the final goals and outcomes of the collaborative partnership are defined *before* the initiation of the collaboration. Once the final outcomes have been agreed upon, it is extremely beneficial to keep channels of communication open between the different team members involved in the partnership to ensure clear, professional, and respectful exchange of information between them.

Periodic check-ins between the different parties involved should be built into the partnership expectations, along with an upward reporting structure to ensure that the collaboration's deliverables are on task, and are still compliant with the overarching goals. What also helps is to have the team members who are involved in the collaboration be clear on their roles and responsibilities towards the partnership deliverables. Having the team members on the same page helps ensure that conflicts are minimized (if any arise) and also helps ensure efficiency and output of deliverables within the expected timeline.

As partnerships evolve—and include not just intra-campus units, but units from other universities and the outside community—establishing specific, measurable deliverables, along with the functional requirements needed to produce these deliverables, can ensure that the projects and partnerships do not stagnate or create any misunderstandings.

Collaborations between different units can leverage the best resources and expertise to deliver successful results for the institution. And following some of these tips for cooperative partnerships—many from my own personal experiences—can help the institution increase administrative efficiencies and programmatic impact through these combined services and resources.

Salwa Ismail heads the Library Information Technology Department at Georgetown University Libraries.

Inter-institutional collaboration requires personal investment



By Sarah Jewett,
University of Maryland,
Baltimore County (UMBC)

The STEM Transfer (t-STEM) Student Success Initiative is an inter-institutional collaboration between UMBC and four partner community colleges, including AACC, CCBC, HCC, and MC.* A central outcome for t-STEM is to provide direct support for prospective and current transfer students, and to facilitate a successful transition for students between institutions. The initiative reaches students through its pre-transfer and peer mentorship services, as well as its suite of online tools resources that can be utilized by faculty, staff, and students (stemtransfer.org).

This student-focused outcome requires extensive institutional collaboration, the structure and ethos

of which must be explicitly created and intentionally nurtured over time. First, the structures must be grounded in ways that are broad and deep. t-STEM depends on the visible commitment of institutional leaders, as well as the work of intra- and inter-institutional working groups of faculty and staff who thoughtfully guide the direction of the programming, and create the content for the online tools and resources. These team members then consult closely on the graphic design and technical delivery of the online components.

Second, the ethos of the initiative must be rooted in relationships that are honest and trustworthy. There are no shortcuts here. These kinds of relationships require personal investment, professional commitment, shared responsibility, and critical reflection. They also rely on time for collaboration—both face-to-face time to discuss and plan, as well as online time to review and refine material. Threaded throughout these elements is a willingness to confront some of the stereotypes of both two-year and four-year institutions and redirect unproductive tendencies to assume or ascribe blame. Taken together, these processes yield products where student success can take center stage, and everyone's contributions to that goal are visible.

Ultimately, the work of t-STEM is to take the lessons learned from our local partnership, and to translate them into a national model for collaboration between two-year and four-year institutions that integrates services, resources, and technologies.

Note: The STEM Transfer Student Success Initiative is an innovative inter-institutional collaboration funded by a grant to UMBC from the Bill & Melinda Gates Foundation.

*Anne Arundel Community College, Community College of Baltimore County, Howard Community College, Montgomery College, and University of Maryland, Baltimore County.

*Sarah Jewett is executive director of the **t-STEM initiative** at UMBC.*

Strategy doesn't have to mean sacrifice



By Bill Muse, Schreiner University

Collaboration between academic officers, business officers and faculty is the cornerstone to effective leadership at colleges and universities. While this might sound trite, when these three groups of individuals come together to formulate in-depth strategies and seek ways to align priorities and budgets while being nimble enough to incorporate innovations, the result is powerful and effective. This collaboration can lead to higher enrollment levels, academic freedom, and financial viability while ensuring the successful education of students.

A cohesive relationship between the Chief Business Officer (CBO) and Chief Academic Officer (CAO), or Provost, is a good place to start and is essential to developing creative ideas for college programs, while also being able to overcome any inherent prejudices and budgeting issues. The CBO and the Provost must be able to talk through issues to find the commonality of their goals in order to take the first step towards implementing programs and technology to transform the college experience.

While higher aspirations are always welcome, some believe that enhancing educational value while increasing affordability is an oxymoron, with the only result being that one goal is achieved at the expense of another. I'm fortunate to have a solid relationship with Schreiner's Provost Charlie McCormick and together we are always looking for the next big thing. We recently were able to introduce a new undergraduate program that enables students to graduate in three years instead of four and introduce a textbook-intuition model from Rafter. The new technology solution provides students with significant sav-

ings on course materials and ensures that they will have all of their materials by the first day of class. This is all accomplished without sacrificing academic freedom.

The cost-savings from textbooks and transforming the textbook business model is used to fund experiential enhancements like studying abroad and increasing internship and service-learning opportunities that make a degree from Schreiner even more valuable.

While the process of agreeing on an initiative, holding planning sessions, educating the faculty, hosting town hall meetings with students, presenting solutions to the president and winning the board's approval is an ambitious one, the rewards are monumental. Collaboration across all levels of higher education results in a true and memorable impact on students' educational experience.

Bill Muse has served as VP of Administration and Finance at Schreiner University since 2011. Bill previously served as Associate Vice President for University Planning, Budgeting and Analysis at The University of Montana.

Moving past the "warm glow" takes effort



**By Richard Ray,
Hope College**

Collaboration is an idea that most in higher education find attractive. Yet, most efforts at collaboration fail to take root if they do not move beyond the

initial warm glow of inter- or intra-institutional friendliness. The following points can prove helpful in establishing and sustaining fruitful collaborations that serve the needs of all partners and also stand the test of time:

1. Focus as much on the relationship as on the project(s). Collaborators must—above all else—deal with each other in a spirit of honesty. Partnerships usually involve some degree of sacrifice for the accomplishment of mutual goals. Being honest about the nature of those sacrifices is important.

2. Define the project's goals as precisely as possible. Each partner should understand—and be accountable for—the objectives to be pursued. The best objectives are usually those that are measurable according to mutually acceptable timeframes.

3. Specify who will be responsible for each aspect of the project. This is standard stuff for projects that are contained within a single unit or institution, but sometimes overlooked in collaborative efforts. Bear in mind that, depending on the nature of the project, different institutional partners may be responsible for a different number of objectives.

4. Evaluate the relationship regularly. How well are the original goals for collaborating being met? Is the circle of those within the participating institutions being widened, or is the collaboration narrowly "owned" by one or two people? Does the collaboration make financial sense for both partners? What problems have been identified, and how can they be minimized? Have new opportunities been identified?

Every collaboration takes on the "personality" of its participants. Close attention to the human aspects of the collaboration provides the flexibility that is required to make something that is often hard to sustain both successful and productive.

Richard Ray, provost and professor of Kinesiology, Hope College, Holland Michigan, has served as Provost at Hope College since 2010, where he has been a professor of kinesiology since 1982.

Working together means listening to all voices and eliminating the blame game



By Crystal Sands,
Excelsior College

One of the biggest struggles for colleges across the country is in preparing students with the kinds of written and oral communication skills they need as professionals. The National Commission on Writing reported that American companies are spending billions of dollars annually to provide additional training in writing for their employees.

And, as colleges and universities work to provide more and better writing instructions for their students, collaborating on Writing Across the Curriculum (WAC) projects and initiatives becomes a necessity.

The following tips are in no way comprehensive, but summarize some of my biggest lessons from working on WAC initiatives for nearly twenty years, and, hopefully, give those who are working on similar projects some things to consider.

1. We can't solve writing problems with one writing course—or even two—at the beginning of a student's academic career. Therefore, it is necessary to teach writing in all classes, working together to build upon the foundations begun for students in introductory writing courses.

2. The field of writing instruction provides important research about assignment design, process, and the evaluation of writing. Making sure those who are versed in this research have their voices heard at the institutional level is imperative.

3. Writing faculty need to teach and listen when it comes to working with faculty in other disciplines, paying close attention to the writing needs of specific disciplines.

4. WAC committees should take advantage of

free resources that are available. Free writing resources like the Excelsior College OWL provide support that can be used in any course that requires writing. Sharing common resources is a great way to build bridges for faculty—and students.

5. Finally, we have to stop playing the “blame game” when it comes to writing issues. At every level, we need to work to meet our students where they are and provide them with the writing support they need. There are many reasons why students struggle with writing, and we are not helping anyone when writing faculty blame public schools, when faculty in the disciplines blame writing faculty, and so on.

It takes a group effort—and a monumental effort at that—to improve students' writing skills in a way that lasts their lifetimes.

Crystal Sands, PhD, is the executive director of the Excelsior College Online Writing Lab and has been teaching college-level writing and working on writing across the curriculum initiatives for nearly twenty years.

Consider consortia to expand resources

By Karen Talentino, Saint Michael's College



As the challenges to our futures expand and increase in potential impact, it has become clear to many of us that most individual institutions do not have the capacity to develop successful strategic responses completely on our own. For institutions of higher education today, collaborations are essential.

In order to provide a transformative student experience we work across institutional divisions to create an engaging and integrated curriculum and co-curriculum. We accept that students are learning 24/7 and we work together to articulate

learning outcomes and create learning opportunities that acknowledge that fact. We are no longer independent silos of academics, student activities, residence life, financial aid, athletics, and career and health services. A number of schools have combined offices, or created student “hubs” that provide comprehensive, one-stop support for students. Without serious and intentional collaboration, these efforts could not be successful.

With constrained budgets and increased competition for students, most institutions are looking for creative ways to expand resources for student learning by looking beyond campus boundaries and budgets. For example, most, if

tions about how to make the most of any collaborative experience:

- Set aside enough time to work on the collaboration – it will require time, trust and compromise
- Articulate a clear assessment plan and exit strategy
- Learn from successful models – there are lots of them
- Consider collaborations with institutions of all types, not just those that are similar to you
- Be aware of infrastructures and processes that are set up for silos, not collaborations
- Publicize your successes

“The important point is that the professor tried something out and we’re here to support that and honor him or her for it, whether it worked or not. We see this is a great way to push innovation through the educational system.”

not all institutions are members of at least several consortia, which may be aimed at administrative cost-sharing, cross registration opportunities (both local and online), joint academic or student life programs, or any number of other objectives. In addition, many undergraduate colleges have articulation agreements with various universities to facilitate post-graduate education for their students. Inter-institutional collaborations are some of the most exciting initiatives in higher education today and will continue to be an important aspect of cost-savings and expanded opportunity in the future.

Regardless of the type, here are a few sugges-

Although a collaboration can require more effort than going it alone, at its best a collaboration can lead to shared knowledge, enhanced creativity, additional resources and better thinking. A collaboration encourages introspection and clarity of articulation about goals and expectations, creating a greater likelihood of a successful outcome. [eCN](#)

Karen Talentino is a professor of Biology and vice president for Academic Affairs at Saint Michael’s College (VT). She has been an academic administrator and biology faculty member for nearly 40 years at several private liberal arts colleges in New England.

New funding models for in

From new student learning pathways to questioning the merit of the credit hour, and from the move to online learning models, colleges and universities are in innovation warp drive. Unfortunately, most are still under antiquated institutional and state-based policies—how can these models restructure to support today’s institutions? From an in-the-trenches perspective, Paige Francis of Fairfield University argues that the problem is more prevalent, or critical, than in IT, and that only when institutional budgeting transitions from capital expenditure to operating will funding be “as nimble as the technology it supports,” and able to support innovation. From a broader perspective, Martha J. Snyder, a senior associate at a public policy advocacy and consulting firm, believes that one solution is to use new funding models to leverage state appropriations toward innovation and support outcomes-based funding. While most universities have the ability to successfully implement innovative strategies toward student success, more information is available at ecampusnews.com/symposium. There we also welcome your thoughts on this important topic.

– Meris Stansbury, Editor

Funding America’s next top higher-ed IT model

Supporting new IT initiatives needed for today’s institutions means implementing funding models as nimble as the technology they support.

By Paige Francis, CIO at Fairfield University

Current buzzwords for technology are indicative of how we want it to behave in any environment – agile, responsive, integrative, nimble, and streamlined. The good news is that these attributes are now commonly available in many of today’s solutions. Yet implementing these flexible technologies oftentimes proves difficult, not because of the technology itself, but because our funding models are anything but agile and responsive.

Indeed, the technology funding models we use in higher education have handcuffed IT leaders to archaic solutions that hinder our ability to truly

support our institutions’ ability to deliver a first-rate teaching and learning environment in fiscally sound ways.

The Way It Was

Historically, IT teams have built the campus technology environment from the ground-up, implementing hardware builds that require large initial costs followed by routine large replacement costs. Costs so large, in fact, that refresh cycles became the norm – PC refresh, server refresh, backup refresh and the like. These cyclical spend-

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Innovation

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 expenditures to operational dollars
 broader state policy approach,
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 These essays can also be read at



Rethinking state funding policies for innovation

How finance policy and state funding can be restructured to help institutions achieve better student outcomes.

By **Martha J. Snyder**, a senior associate at **HCM Strategists**, a public policy advocacy and consulting firm

Public finance literature makes clear that incentives and alignment to objectives matter. How to best translate this concept into effective policies for higher education that support broader adoption of innovative academic delivery models and spur increased student completion remains largely unresolved. For many states there is a persistent disconnect between how public funds get resourced to higher education and what the state needs in return. This is true of both what the

state invests (level of funding) and how the state invests it (allocation model).

Why Do We Need Innovation in Academic Delivery?

The graduation attainment needs for each state, and the nation as a whole, can not be met by simply increasing the success of “traditional” college students: 18 year old, middle to upper-class, non-minority students. According to Lumina Foundation’s most recent *Stronger Nation* report, the overall attainment rate for the

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ing sprees were paid for as capital expenses, which, as we all know, are planned for well in advance. Very few operational dollars—which are annually and more elastically budgeted for—were needed to maintain these clunky, localized solutions. Outside of staff compensation, operational dollars were traditionally only used for software licensing, training/development, and supplies.

But technology, as its wont, changed, and in the process, so did our funding requirements. Higher education technology departments are moving away from homegrown, large builds, and in-house systems. The cloud has offered up better solutions that are easier to manage for less money. Why buy a cow when I can buy better milk down the block for less money and I don't need to actually feed and house a cow? Why manage numerous computer labs when students would

procedures, empowering us to work smarter and harder on things that have an impact on an institution's core mission and bottom line.

With this trend comes a very real problem. Current expenditures formerly known as capital are now operational. Cloud, out-sourced, remote solutions all typically involve a subscription or routine monthly/annual fee. Not unlike technology as a whole, individual technology solutions today are pervasive, day-to-day, integrated products and services.

In other words, technology is primarily operational.

In a world where suddenly it's not unheard of for a university's technology offering to directly impact recruiting, attracting and/or retaining students, technology matters more than ever. If a higher education institution is not willing to morph its technology funding model to be as nimble as we want our technology to be, IT leaders will be forced to continue with legacy sys-

As a technology leader, you need to be able to identify the innovative versus the archaic, explain the funding dam that is occurring, and identify peer institutions (as well as institutions that your administration seeks to emulate) that fund innovation the way you want your institution to fund innovation.

prefer to use their own devices in their own spaces and I, in turn, could save precious real estate and provide virtually everything the students need for less cost and less maintenance? Why endlessly build and harvest a server farm when I can have someone else host my needs for less, in a more secure environment, with near zero man-hours?

A New Move, a New Problem

We are moving toward a more hosted technology environment, which enables our IT workforce to focus more on refining processes and

tems, regardless of whether or not they further innovation or support the school's core mission.

How to Improve Funding for IT Today

Therefore, the question becomes, "How can funding models be improved so that they support, rather than thwart, innovation?"

There exists no single pill that will remedy our legacy funding models. It is, however, as easy as 1-2-3 to begin an internal dialogue to reform the process within each institution:

1. Understand the issue and the need. This is massive change in process, procedure, and

mindset, and it is imperative that the issues be thoroughly understood. Technology leadership should lead this change process because we have been selling change for decades. Same task, different audience. For years the discussion in higher ed has been selling change to a fearful audience made up of primarily faculty and rank-and-file administration – technology use in the classroom, new solution to better process invoices, and easier ways for advisors to access advisee information. Guess what? We've been successful for the most part.

Technological change has moved for many from scary to routine. So now funding for technology must undergo the same change process. This step involves selling change to the business stakeholders who have investments (both professional and institutional) in legacy business processes where standard response for modification in any way is, "Well, we're just following federal guidelines." But we all know that these guidelines are pliable and interpreted by different institutions in different ways, and that creativity and openness can take down a host of roadblocks.

As a technology leader, you need to be able to identify the innovative versus the archaic, explain the funding dam that is occurring, and identify peer institutions (as well as institutions that your administration seeks to emulate) that fund innovation the way you want your institution to fund innovation.

2. Right people, right time. The initial discussions need to involve more movement over less time. You need a roadmap to innovation, a clear budget model mapped out, and all the main players at the table – internal and external. External includes everyone from leaders from institutions doing it the right way to consultants and even auditors. At the end of these discussions, everyone sitting around the table needs to

Technology exists to provide value, service, and opportunity for improvement for all university departments and stakeholders. Technology can only serve its purpose if it is agile and responsive to the mission it serves. Therefore, it only makes sense that an institution needs to develop a funding model as nimble as the technology it supports.

feel a significant sense of urgency. This is a new team-building opportunity, one that will help break down any legacy silos and proffer continuous dialogue.

3. Embrace collaboration. In technology collaborations we should no longer expect to work in absolutes. Directives and mandates of technology development and implementation are no longer attractive or tolerated, and the same should be true for creating new technology funding models. Expect to collaborate with a healthy dose of give and take throughout all processes.

As an example, just because you sell a new cloud computing initiative that results in an unheard-of operational increase, doesn't mean you won't need to spread it out over three fiscal years instead of jumping all in within one. This is finance and budgeting not **Veruca Salt and her golden goose**.

Technology exists to provide value, service, and opportunity for improvement for all university departments and stakeholders. Technology can only serve its purpose if it is agile and responsive to the mission it serves. Therefore, it only makes sense that an institution needs to develop a funding model as nimble as the technology it supports. **eCN**

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nation is 40 percent. Most concerning are the gaps that exist between the overall rate and specific student groups – with the attainment rate of African Americans at 28.1 percent and Native Americans and Hispanics at 23.9 percent and 20.3 percent, respectively.

The capacity of higher education must be expanded to better serve a more diverse group of students. And, as illustrated in the [2014 SHEF report](#), this must be done on an overall base of state support that has declined per student, resulting in tuition becoming an increasing source of revenue for institutions. According to Moody's, this declining base of support from states is not likely to grow. As a result of this increased reliance on tuition:

- **Costs are increasingly shifting to students.** This makes shorter-time to degree, lower-cost opportunities and pathways (including competency-based and prior learning), and well structured need-based financial aid models even more essential for all students, particularly low-income students;
- **The enrollment and retention incentive for institutions is increased.** As such, adoption of models such as competency-based education or prior learning assessment comes at an increased opportunity cost, absent other non-enrollment based revenue streams.
- **The ability of states to drive change toward outcomes and completion is more limited.** However, state appropriations remain the largest single source of revenue for institutions and can be leveraged in ways that alter the business model.

As documented in the New America Foundation's report, [Cracking the Credit Hour](#), many of these barriers are grounded in the outmoded notion that the credit hour equals learning. The credit hour, therefore, has become the

primary driver and structure upon which higher education – and the funding that supports it – is built. This structure limits the ability for institutions to accelerate the adoption of alternative, innovative, and lower-cost pathways.

What types of Innovations can Expand Capacity and Improve Completion?

Innovations in higher education include those within the traditional model of higher education to those that significantly break down the traditional models and parameters. Examples of this range include:

- **Structured programs designed to take less time with higher success rates.** Examples of this would include degree pathways or accelerated models (such as the [CUNY ASAP](#) model). Under these models, per student costs per term are likely higher, but per student costs per completion are lower and the return on investment is higher.
- **Learning assessed from multiple sources contributing toward and leading to a credential.** This would include competency-based education models that allow students to progress toward a degree through the demonstration of skills and knowledge. These models are not based in the traditional credit-hour construct of postsecondary education allowing students to accelerate at their own pace, once content and competencies are mastered.

Two Ways Finance Policy can Better Support Innovation

Financing locks in *how* we deliver, and *who* delivers, education with no financial rationale for acceleration or collaboration.

Below I focus primarily on state general operating support to institutions, but there are other finance policies that can be examined and better aligned to support adoption of innovative academic models. These include changing institu-

tional tuition and state financial aid policies to support students to take competency-based programs. For example, differential and flat-rate tuition policies can charge students in more flexible ways than purely by credit hours completed.

1. Leveraging state appropriations to advance innovation

This single source of revenue for public institutions generally makes up a greater proportion of revenue for comprehensive or regional four-year institutions and community colleges than that of high-level research universities.

The relatively decreased proportion of revenue from state dollars makes the imperative greater for the state to direct its investment more significantly in a way that will support state priorities and advance objectives not already covered by other revenue sources institutions receive. In simple terms, this would mean states more directly invest in completion of programs and degrees and not solely on FTE or a constant base-plus approach (generally disconnected from any state policy objectives).

2. Outcomes-based funding to support innovation

In an effort to address some of these underlying challenges, several states are turning to a concept called outcomes-based funding. The concept is an evolved and refined form of performance-based funding models, inherently meant to provide incentives for institutions to support completion of degree programs, as well as other priorities, such as enrollment and completion of underserved student populations (for example, adult, low-income, minority).

Outcomes-based funding that results in a significant portion of the state's investment allocated based on degree or program completion, as well as the success of underserved students, can more directly support the adoption of innovative academic delivery models. Directing a significant

source of revenue based on degree completion can change the underlying business model for institutions and create a financial incentive that does not otherwise exist:

- **Support advancement and timely completion of students.** These models can help to decouple an institution's revenue from a purely enrollment incentive. As a result, there is an underlying financial incentive for institutions to restructure academic programs, or adopt more expansive innovative models that help students advance more quickly through programs. Articulation of transfer credit would have a greater financial return for institutions in an outcomes-driven environment so long as the "lost cost" from tuition revenue is offset by returns in state dollars. Similarly, competency-based models would be less costly (and have greater return) for institutions as they would support the advancement and more timely completion of degree programs.
- **Create incentives for institutions to focus on underserved populations.** From a state policy and institution perspective, it costs more to educate less prepared and less resourced students. State finance policies need to finance higher education in a way that encourages institutions to serve these students and recoup the costs. Without this, the costs will limit the scaling of these strategies needed for higher completion and will also not support expanding capacity to serve more students.

Limitations of Today's Outcomes-Based Funding Models

While outcomes-based funding is an increasingly popular concept (some 35 states were developing or implementing some form of outcomes-based funding in fiscal year 2015), there is wide variation in the design and level of funding associated with completion supported by these models.

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As indicated in the HCM report *Driving Better Outcomes*, only two states (Ohio and Tennessee) have seemingly significant portions of their state investment based on student progress and completion. Nearly all other models direct only minimal amounts of state investment based on these measures, with the majority remaining aligned to enrollment or a base allocation calculation. These policies may be enough to focus an institution's attention on student success, but are likely not enough to encourage significant adjustment of the overall business or academic model.

The other notable limitation is one of design. In many cases the student progression measures reflected in the funding models remain largely based on accumulating certain numbers of credits. While these benchmarks support the advancement of students they still provide barriers for institutions to adopt innovative models not inherently based on the credit hour. States

have started to pursue establishment of credit equivalencies that can be used to align these models within the common construct of the credit hour. Nonetheless, continued reliance in whole or part on the credit hour does not provide a clean connection between the innovative model and the finance model trying to support it.

There are certainly barriers to innovation beyond state-level finance. Federal student aid programs grounded in credit hours and more standard measures of academic progress. Accreditation systems as well as programmatic approval processes can also limit openness to innovation.

Further, solving the problem is not as simple as states adopting outcomes-based funding models. True expansion of innovation and capacity will require states to examine the entirety of higher education finance, including how and how much is invested in direct support to institutions; the state investment and design of need-based aid programs to allow students to access and progress through education more flexibly; and how tuition policies are structured. **eCN**

eCN Symposium

eCampus News announces *Symposium*, discourse from higher education professionals on topics of urgency and controversy, with commentary and response from the field published on our web site, ecampusnews.com. We are actively soliciting submissions and response to topics for next year.

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All change: Taking the enterprise into the cloud

As universities migrate enterprise applications to the cloud, change management—not technical challenges—is proving to be the biggest hurdle of all.

By Andrew Barbour

Go ahead and call it: 2015 is the year when higher education finally accepted that the cloud offers advantages its institutions simply can't match. Gone is the suspicion that the cloud is a Wild West of drive-by FERPA violations and nonexistent security; gone is the fear that schools will lose ownership of their data. Today, schools are focused on the upside of cloud deployments for everything from LMSs to SISs—and that upside can be truly significant. But even as earlier fears about the cloud have subsided, new challenges have arisen. These challenges tend to be more organizational than technical, but they are nevertheless forcing complete rethinks in campus IT departments nationwide, and causing major upheaval along the way.

“The challenge that we're hearing from all of our campuses is change management,” said Shel Waggener, senior vice president of Internet2, a nonprofit consortium of higher ed institutions, companies, and education networks focused on advanced networking technologies. “Even those institutions that were early cloud adopters are really struggling with the pace of change management and the impact it's having across areas that haven't had to change for a very long time.”

Ignoring these looming changes is not really an option, however, since few IT university shops can afford to pass up what the cloud has to offer: Cost savings, better performance and uptime, increased flexibility, and tighter security are all quantifiable benefits offered by cloud deployments that are handled properly.

“I don't want to make too blanket a statement, but we just know the cloud works,” said Ted Dodds, CIO and vice president for information technologies at Cornell University. “The value is almost unequivocally there and it's just a matter of how you harvest that value. That doesn't mean everything fits in the cloud, but when we contemplate a new service or business process, we look to the cloud first for a solution.”

Reorganizing IT

But migrating enterprise IT services to the cloud—and managing them there—is far from a fire-and-forget operation. It requires different skill sets, different knowledge, and a different approach. Helping IT staffers—as well as those in departments ranging from legal to finance—manage this transition may have as much impact on the success of an organization's migration to the cloud as the technological underpinnings themselves.

“The technology side of things is really not the issue,” said Dodds. “The impact on campus is much more around how you handle changing from an approach where you build or buy your own solutions—and run them—to basically brokering services provided by others.”

Obviously, the biggest impact of any cloud migration will be felt in the IT department, which at most institutions is currently built around such tasks as server administration, database administration, and desktop support.

“The skill sets we need today and tomorrow are different from the ones that we have in great

abundance on campus today,” said Dodds. “It’s not that we don’t need these skills anymore, but we need a different sort of category. We probably need a smaller number of more senior, deeper technical resources than in the past, and some roles and responsibilities will probably phase out.”

Talk like this inevitably sparks anxiety among IT staffers about job security. “You have to really help people see where the department is heading, otherwise they just see their jobs going away,” said Sue Workman, CIO and vice president of information technology services at Case Western Reserve University, which recently transitioned its PeopleSoft ERP to the AT&T cloud platform. To facilitate the university’s transition to cloud-based services, Case Western is developing training plans to help staffers shift to new positions, as well as a strategic plan that shows what new positions will become available. “Being as proactive as you can is really a good thing,” added Workman.

Cornell recently asked all 700 of its IT staff to do a self-assessment of their skills and then compared those with a list of the skills that the university thought would be needed in the next five years. “There were some significant gaps between the two,” recalled Dodds, adding that the university is now launching professional development and training programs “so that we can move as many of our staff as quickly as possible into this new environment without breaking our operational services that we have to maintain at the same time.”

While staffers can often be retrained to fill new roles, IT departments must also recognize that, in some cases, the new positions will simply not be a good fit for them. A cloud environment requires a new breed of service owners who are responsible for everything from conceiving the scope of a service to developing a P&L, writing a business plan, and then marketing the service. “You can’t take superb technical peo-

ple – people who know how to keep a product tuned and functioning – and suddenly expect them to sprout those capabilities,” said Dodds. “It’s a different dimension: It is a horizontal dimension to what traditionally in IT has been a vertical specialization in technology.”

While restructuring any organization along radically new lines is difficult, the problem is compounded by the tremendous speed at which



these changes are occurring. “Three years ago there would have been no more than a handful of IT organizations on campuses that had job descriptions with explicit cloud responsibilities built into them,” said Waggener. “That is just no longer viable.”

Indeed, there is a certain urgency among colleges now to ensure they have the right staff in place for this new cloud-centric world. “If you don’t have quality people who understand how to inter-operate in cloud environments or in a

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hybrid environment, that's a problem," said Waggener. "In the cloud, if you don't do it right you can really run into difficulties."

Changing the Mindset

Without doubt, some colleges are experiencing difficulty moving IT services to the cloud because their staffs are clinging to an old mindset of how things are done. "I see a lot of institutions mess that up," said Lige Hensley, chief technology officer at Indiana's Ivy Tech Community College, which is saving millions of dollars in the area of analytics alone by utilizing the cloud. "Their brains aren't wrapped around

facing similar challenges. Clearly, IT plays a critical role in enabling institutions to leverage technology to enable business change. It will be interesting to see how IT organizations are able to make the necessary changes as they adopt to new business models," said Connor Gray, Chief Strategy Office of Campus Management.

"Campus Management has already helped many of our clients transition to the cloud by offering a robust set of options - from simple out-of-the-box solutions to more robust cloud solutions that allow for advanced integration with third-party applications. We have also added cloud training at our annual users conference - CampusInsight - to provide IT professionals with actionable insights regarding how to effectively leverage the cloud and to sharpen their skillsets."

"At the same time institutions are facing changes in the model for higher education, IT is facing similar challenges. Clearly, IT plays a critical role in enabling institutions to leverage technology to enable business change. It will be interesting to see how IT organizations are able to make the necessary changes as they adopt to new business models." —Connor Gray, Chief Strategy Office of Campus Management.

how to use the cloud. They're taking an on-premise approach and trying to apply it in the cloud. It doesn't work that way and it's going to cost a whole lot more. You have to shift your thinking."

To assist in this shift, Ivy Tech brought someone from Amazon Web Services to Indiana to do a training session with 15 staff members. "We actually took a fair number of steps to get our folks to understand how best to utilize the cloud technology, because it's not going to get you anywhere if you use it the way you use traditional technology," said Hensley.

Changing campus IT mindsets is a problem encountered by vendors, too.

"At the same time institutions are facing changes in the model for higher education, IT is

Mark Armstrong, Oracle's vice president for higher education product development, noted that it can be difficult for college IT departments to give up the sense of control that comes from maintaining their own systems. He's seen this firsthand as schools migrate their Oracle ERPs to the cloud. "A hands-on approach doesn't work in a cloud environment," he noted. "If an administrator requests a feature change, you cannot just go in and create a patch."

The Need for Standardization

The level of standardization needed in the cloud is one of the most difficult aspects for campus IT shops to accept, according to Armstrong. Before a migration can even begin, the data must first be cleaned up, which can involve significant

effort depending on how it has been collected over time. And once the service is in the cloud, IT staffers must recognize that they cannot simply customize it as they see fit.

In the view of Cornell's Dodds, the propensity of IT shops to customize applications for the perceived unique needs of their institutions is a mistake. "There is a tendency for universities to emphasize how they are different rather than how they are the same—we all want to be our own snowflake," he said. "But, underneath it all, a lot more is the same from university to university than really is a differentiator."

Encouraging universities to accept a level of standardization in the cloud is one of the goals of Internet2's Net+ initiative, which strives to provide its members with access to a suite of scalable cloud offerings specifically tailored to the needs of higher education. Blackboard, Azure, Canvas, and Box are among the dozens of cloud services and applications currently available through Net+, all of which are peer-reviewed by other higher ed institutions for security, accessibility, and performance. "Instead of having universities deploy services with huge diversity locally, they can consume cloud services in a much more common way," explained Waggener.

While some IT shops may chafe at efforts to standardize technical cloud specs, standardization can actually help minimize the upheaval felt in other departments on campus. For instance, Net+ expends a lot of effort negotiating baseline contracts for each cloud service, which can be a real boon for university legal offices that often have little or no experience dealing with cloud contractual issues.


"Once a cloud service is on Net+, it really helps speed up the negotiation phase of a contract," said Workman. "Net+ goes through a real-

ly huge workload to get the contract to a point that they think is sufficient. Universities, on the other hand, don't have a whole team of negotiators available to work six months on every contract."

Whether a school works through Net+ or not, cloud deployments will inevitably cause some disruption in departments that work closely with IT. At Ivy Tech, for example, the finance department struggled with the concept of costing in the cloud. "Internally, our folks were used to us buying an asset like a server that they could list as a capital expense and depreciate over three or five years," said Hensley. "But it doesn't work that way in the cloud—you pay as you go. It took some time for our finance folks to understand the concept of utility computing."

Focus on the Mission

While the organizational changes required by the migration of enterprise services into the cloud can be daunting, the alternative—doing nothing—is not a viable long-term strategy. External pressures for greater security, better performance, and lower costs will ultimately push even the most heel-dragging naysayers into the cloud. As painful as these changes may be, schools must also recognize that the cloud offers a way to free themselves of commodity IT in favor of initiatives that ultimately benefit their institutions even more—and help differentiate them from other schools.

"Seventy percent of our cost structure is people," said Dodds. "If we can find ways to take that 70% and apply it as closely as possible to the mission, then we are doing the right thing for the university." 

Andrew Barbour is a contributing editor for eCampus News.

Admissions turn to AI to transform dormant leads

Los Angeles entertainment schools turn to an artificial intelligence application to help increase new student engagement from zero percent to 19-22 percent over two years.

By Bridget McCrea

Stephanie is a great conversationalist, always willing to follow-up with every student lead and determining a student's interest in attending the school. What some may not know is that Stephanie isn't human.

A for-profit college that offers associate and bachelor degrees in entertainment-related majors, [The Los Angeles Film School](#) and the Los Angeles Recording School both rely on technology to engage and educate students.

Open since 1999, the schools recently started using technology to more effectively connect with prospective students who might have either selected another institution or not attended film/recording school at all.

The initiative dates back to 2013, when Ben Chaib, vice president of admissions and marketing for both schools, learned about a new application that used artificial intelligence (AI) to generate interest and engagement among prospects. "I went to a leads conference in Las Vegas," says Chaib, "where I attended a breakout session and heard someone talking about how he used [Conversica's AI technology](#) to generate more engagement in the auto industry. I was fascinated."

With Conversica's connection to higher education not immediately evident, Chaib started thinking about how well something other than an auto-responder would be at attracting and connecting with new recruits.

At the time, he says the schools' engagement rate on this level was zero percent. The fact that school representatives weren't getting much

engagement via the emails that they were sending out helped cement Chaib's assertion that a new solution was in order.

"Auto-responders are basically just mass, push email marketing pieces. Students just don't respond well to these efforts," says Chaib, who, while at the Las Vegas conference, visited Conversica's booth and asked if he could test out the tool. Los Angeles Film School proceeded to test 10,000 leads that had already been classified as "dormant" (those that were sitting for at least 90 days with zero contacts during that time). "We saw immediate results when we started using the AI tool."

Freeing Up Humans in Higher Ed

Conversica's technology utilizes an artificial intelligence "persona" to interact with hundreds (or thousands) of prospective student leads from interest to intent to attend – and without human intervention.

The AI persona named "Stephanie" (by the school), initiates email conversations with incoming student recruiting leads. Stephanie also reads replies, extracts information, and interprets the student's intention and sentiment based on word classification specific to email marketing.

Carl Landers, Conversica's senior vice president and chief marketing officer, calls Stephanie a "virtual admissions assistant" and says she's especially good at separating the wheat from the chafe and weeding out the tire kickers. "People respond to her because she's very human and lifelike in nature," says Landers, who sees potential applications of AI in various settings in higher education,

where using physical or telepresence robots can be costly and/or difficult to implement.

"We're using AI to solve problems," says Landers. "Our objective is to free up humans from repetitive tasks that can be automated and give them more opportunity to be creative, have human conversations, and connect with people in a real way."

Chaib says one of Stephanie's biggest advantages is the consistent enthusiasm that comes across during her virtual conversations with prospects. "She presents questions that ensure that the prospect has been serviced and that he or she has received all of the desired information," says Chaib. If those aren't reached, the program connects the student with a live representative for further support. "This technology serves as a liaison between the prospect and the admissions rep," says Chaib. "It's a perfect pairing."

A Tiered Engagement Approach

These days, when a new student registers on LA Film School's or LA Recording School's website, he or she receives an email with the appropriate school's name in the subject line. The email includes a few simple questions (i.e., Have you received the requested information? Is this your correct phone number?), and then reaches out in a few more days to confirm more information. The system makes about 6-8 attempts to engage the student in this manner.

"Once the prospective student engages, the system assigns an admissions rep and again confirms the phone number," says Chaib. "Stephanie then follows up about 24 hours later to see if the student needs anything else and to make sure he or she received the requested outreach." If the student hasn't been contacted, Chaib is alerted immediately via email.

This tiered approach to customer engagement – similar to strategies that are being used successfully in the corporate world – has helped increase the schools' engagement on older leads to 19 – 22 percent.

Conversions (turning a prospect into an enrolled student) have also increased, growing from 2-3 percent on average to a current 4-6 percent. In total, Chaib estimates that the tool has helped the schools convert an additional 250 prospects (on top of those students they already signed up in the traditional manner) into students over the last two years.

Excited About the Future

According to Chaib, the schools took a sly approach to introducing the new technology to its admissions reps, knowing that not all of them would readily embrace the new tool. Instead of telling them that they would be using a new application, they let the reps assume that Stephanie was a real person. "We had people asking to take her out to lunch to thank for all of her great work," Chaib says, laughing, "in helping them reach their students more effectively."

Chaib, who eventually brought his team together and told everyone on it that Stephanie was actually a virtual, AI persona, says taking that simple, sneaky approach helped ensure successful adoption of the technology. "People don't feel like they owe anything to a tool," says Chaib, "but when they think they're being held accountable by another human, they reacted differently."

Going forward, Chaib would like to see Conversica evolve into a "full student lifecycle tool" that stays with pupils from the first contact all the way through to graduation. A student who misses a few too many classes during a semester, for example, could receive the intervention necessary to avoid dropping out.

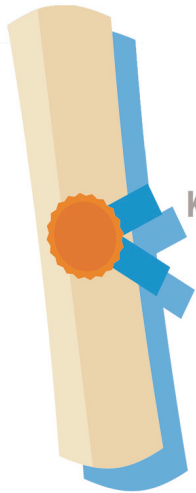
Conversely, the tool could be used to recognize student success and even engage them post-graduation, when they become alumni. "I really see this as a full lifecycle product that can do a lot for us," says Chaib. "I'm excited to see what the future holds." 

Bridget McCrea is an editorial freelancer with eCampus News.

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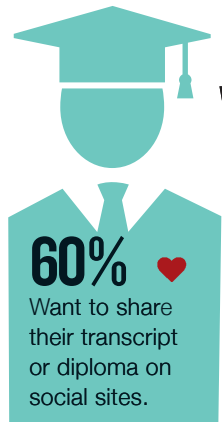
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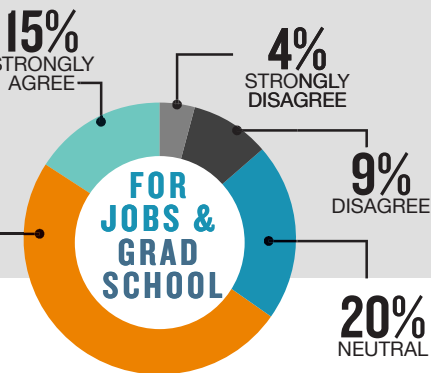


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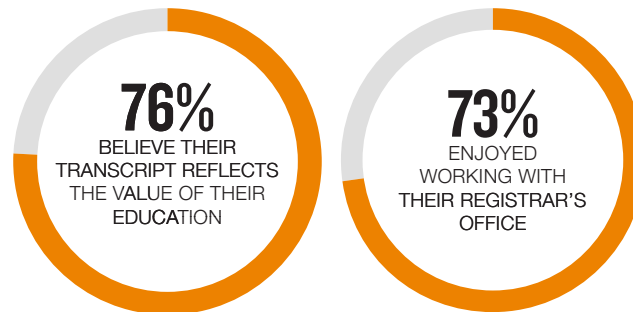
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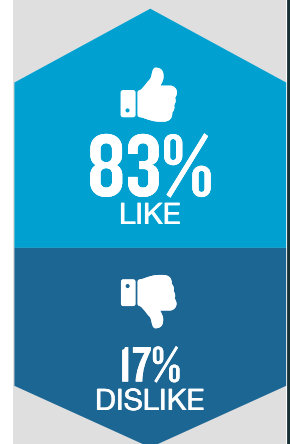
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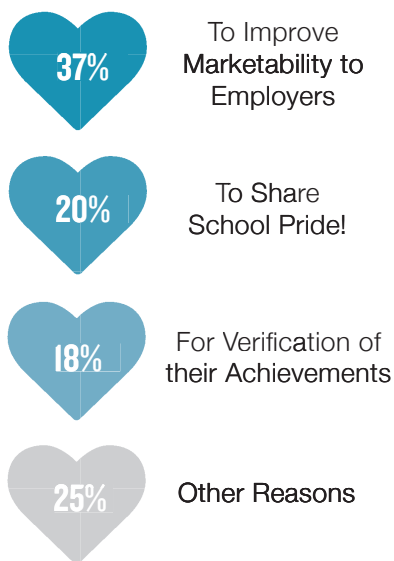
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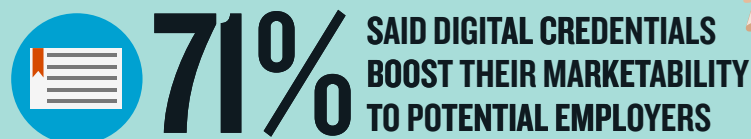
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