

UPDATE EU STATUS REPORT AND IMPLEMENTATION PLAN

Overview

This report was prepared by the UPdate MSU Extended University (Update EU) Working Group to summarize the status of the primary transitional components and schedule for the Update EU project, which includes the reorganization and transition of multiple online programs and support areas. This work builds on recommendations provided by a Montana State Online Education Task Force that studied MSU's approach for offering and supporting online education. The following action items were identified by the Task Force and were used by the Update Working Group as guide in developing the implementation strategies described in this report.

Action items from the previous Task Force report:

- Move established programs from self-support to a state support business model.
- Create Banner coding so that fully online students can be identified.
- Develop mechanisms so that student services can be offered online.
- Expand support for online and blended course development for both faculty development and course development support.

Montana State currently offers online (credit granting) courses using two different registration and financial systems, identified here as the Registrar system and the Extended University (EU) system. Online courses offered through the Registrar's office are administered using the same system and budgeting processes that are used for conventional face-to-face courses, which are categorized as state-supported courses that are managed by the colleges. Online courses and online academic programs offered through EU currently are administered using an independent accounting system (self-support business model) that originally was established to incentivize the development of self-supported credit granting programs and a wide range of non-credit, professional development and outreach offerings.

The management and support of two parallel course administration systems at Montana State is becoming increasingly complex and inefficient as the quantity of online offerings and distance courses grows at an increasing rate. Duplicative accounting and administration systems are confusing for students and faculty because the systems involve different methods of registering for classes, different fee and tuition tables and different budgeting processes for paying expenses and covering instructional costs. An additional negative consequence of this complex, duplicative system is that non-resident graduate students who register for credit-bearing courses are not counted in our enrollment numbers that are reported to OCHE.

As part of the EU reorganization, for-credit courses and programs currently administered by EU will be moved to the MSU Registrar system, whereas, non-credit outreach offerings will continue to be administered by EU and will constitute the mainstay and focus of EU's operation along with some of the online student support services, for which EU has developed an exemplary reputation. A single system that is administered by the Registrar and managed by the college deans will provide consistency and scalability to efficiently manage future growth of online courses and programs, which are objectives in Montana State's strategic plan. In order

to ensure program quality and effective stewardship of resources, MSU conducts regular internal reviews of all of its academic programs, including online programs, at least once every seven years, in accordance with Board Policy 303.3—Program Review. The reorganization of EU will not impact the substance, frequency or process that MSU follows in reviewing all applicable programs, which includes all programs listed in the “degree and program inventory” maintained by the office of the commissioner of higher education. This inventory includes majors, minors not associated with a major, and certificates of more than 30 credits.

The reorganized model will ensure that all MSU students, whether on-campus or online, are included in the university’s enrollment data and full time equivalency calculations. The transformation of EU is ongoing and scheduled for completion by spring 2016.

The EU working group identified multiple subtasks that require coordinated attention as online academic programs and associated support systems of EU are integrated and aligned with standard practices of Montana State. These subtasks are described briefly in the following paragraphs. A conceptual schedule for the primary components of the transition is provided at the end of this report.

Board of Regents and Commissioner of Higher Education

As part of the EU reorganization, Montana State will provide the Board of Regents and the Commissioner’s Office a written request that describes the restructuring of EU and the transition of EU courses and online programs from a self-supported (EU administered) budget model to a state-supported (Registrar administered) model that is managed by the college deans. Details of Board reporting requirements will be addressed with the Commissioner’s office.

In addition to describing the EU reorganization, the request submitted to the Board will provide supporting documentation for additions or changes to online program fees. As described in the next section, a program-specific analysis and transition planning process will be conducted to evaluate the need for course and program fees. It is anticipated that proposed changes will be presented during the September 2015 Board meeting. The Board request will include both undergraduate and graduate online programs. A separate request will be made to the Board in May 2015 for a distance-learning fee that will be applied to all online courses.

The Montana Board of Regents (Policy 940.20) defines an online program as a degree or certificate program in which 80% or more of the total program is delivered in a technology-enhanced distance learning (e-learning) environment.

A summary list of online degree and certificate programs offered at Montana State is provided in Table 1. The EU administered online programs will be migrated to a state supported model that is administered by the Registrar and managed by the colleges. As indicated in the table, some of the online programs are already administered by the Registrar and consequently will not be effected by this reorganization. No additional funds will be requested from the state as part of the transition of programs from self-support to state-support.

Table 1: Online Degree and Certificate Programs

Online Academic Program	EU ^a	Registrar ^b	College	Board Approval and Details
Undergraduate Programs				
Completion in Liberal Studies (BA)	X		CLS	Program approved by BOR in 2003. Online delivery approved as Level 1 notification in March 2012. No mention of self-support
Minor in Business Administration	X		COB	Online delivery approved as Level 1 notification in Sept 2012.
Graduate Certificates				
Addiction Counseling	X		EHHD	Announcement to the BOR in Nov 2009. No self-support mentioned, <30 credits
Library Media	X		EHHD	Announcement to the BOR in Nov 2009. No self-support mentioned, <30 credits
Montana Dietetics Internship		✓	EHHD	May 2011, Level 1 notification. Indicates no costs because program costs are paid by interns
Native American Studies	X		CLS	Announcement to the BOR in Nov 2009. No self-support mentioned, <30 credits
Northern Plains Transition to Teaching	X		EHHD	Graduate certificate approved as Level I notification in March 2011 as distance delivery
Nursing Education		✓	Nursing	10 credit graduate certificate
Professional Practice of Architecture (not active)	X		A&A	May 2012 Level 1 notification, 15 credit certificate. Notification indicates self-support, approval by campus
Science and Engineering Management (multiple certificates)	X		COE and COB	Approved March 2011 in a Level II proposal with additional related programs
Science Teaching Certificates	X		EU	Sept 2010 Level 1 notification (12 credit certificate)
Graduate Degrees				
Agricultural Education (MS)		✓	Ag.	BOR approved March 2009 for online delivery
AG IDEA consortium graduate courses (no degree)	X		Ag.	Courses only—consortium members enroll at their home institution
Curriculum and Instruction (MEd)		✓	EHHD	Combination of online and campus-based courses
Educational Leadership (MEd)		✓	EHHD	Name change approved May 2008
Family Financial Planning (MS) Gt. Plains IDEA consortium	X		EHHD	Approved May 2001 as a consortium offering with other institutions as distance delivery
Land Resources & Environmental Sciences (MS)	X		Ag.	Nov. 2011, BOR Level 1 approval for online delivery
Master of Science in Science Education (MS)	X		Grad. Studies	May 1996, ITEM 90-2003-R0396. Approved as combination of distance and on-campus delivery modes.
Mathematics Education Option (MS)		✓	CLS	MS in mathematics with a math education option
Nursing (MN and DNP)		✓	Nursing	DNP Level II approved by BOR, Sept. 2012
Professional Masters in Science and Engineering Management (MSEM)	X		COE and COB	Approved as self-support program in March 2011 in a Level II proposal with additional related programs.
Licensure Programs				
Principal and Superintendent Endorsement	X		EHHD	Name change approved May 2008
Professional Development				
National Teachers Enhancement Network (NTEN)	X		EU	A collection of professional development courses for science teachers with no degree or certificate; thus, no requirement for BOR approval.

Footnotes:

^aNo additional funds will be requested from the state as part of the transition of programs from self-support to state-support.

^bThe program or offering is currently administered by the Registrar and managed by the College — no changes are proposed.

Program-Specific Analysis and Transition Planning

Flexibility has been a hallmark of the EU system for establishing and offering courses and programs to local students and to distance students in Montana and across the US. Over time, the core mission of EU has expanded to include an increasing number of credit-granting courses. One goal of the reorganization process is to eliminate parallel administrative processes for online courses, which duplicates and sometimes diverges with the university's course management and budgetary systems. A single system administered by the Registrar and managed by the college deans will provide consistency and scalability for all academic offerings and will better position Montana State for future growth of online courses and online programs.

Online programs were created to address unique learning environments for distance students who seek specific credentials through a learning environment that is often different than the traditional academic programs the university provides for on-campus students. Consequently, online programs and affiliated online courses have the potential to contain nuances and subtleties in the administrative structure related to fees, staffing and resource distribution. To ensure that existing online programs are adequately supported during the reorganization, the administrative structure of each online program will be assessed and a transition plan will be developed to maintain stability of programs during the transition and to evaluate expenses and cost considerations that may necessitate adjustments in program fees.

The program specific analysis was initiated in January 2015, with an anticipated completion in June 2015.

Banner Reconfiguration

The new architecture for managing online education in banner was modeled after the protocol that was developed for administering Gallatin College's offerings. A database re-configuration, a new design to facilitate standard enrollment processes and reporting, and corresponding fee tables for fall and spring courses were successfully tested during the Fall Semester 2014. Outliers to the new coding standards and processes continue to be identified and addressed.

Graduate-level coding protocols and summer fee tables are scheduled for testing in summer 2015. Migrating the database re-configuration and new computer coding into a fully implementable banner operation is scheduled to take place during fall 2015 to enroll students in Spring Session 2016 courses. This transition implementation strategy and schedule will focus the work effort and staffing requirements associated with these changes into one final iteration of banner re-coding, which will expedite system stability and will minimize the duplicative effort involved in addressing outlier situations that occasionally appear in banner. These nonsystematic (one-off) situations require additional re-coding efforts to ensure that the new configuration is robust and fully automated. Full migration of these functions for all undergraduate and graduate online courses are expected to be complete by September 2015, in time for students to register for Spring Semester 2016 courses.

Migration of Transactional Functions and Online Support Services

The EU reorganization will involve the transition of student-related transactional processes including registration and fee payment; and faculty-related processes including course requests, communication to students, and grade collection for distance and online students. Currently, many of these transactional functions for distance students are facilitated by the staff of EU.

The Update EU work group is evaluating and delineating various options for online student support services. It is anticipated that some of the support services will continue to be administered through EU after the reorganization. Representatives of the EU working group will meet with student support offices during spring 2015 and summer 2015 to assist in the coordination of support services for online students and to ensure that service-providers are prepared for the transition. It is the intention that online students will be provided a level of service that is comparable to the services available to on-campus students — resources generated by the proposed online course fee will be used to fund these services. The reorganization of these transactional functions and services are expected to be complete by September 2015, in time to fully implement for Spring Semester 2016.

Distance students are a unique audience—many are working and/or parenting full-time while still achieving a dream of furthering their education. Distance students can live long distances from any campus and from the resources that are readily available to on-campus students. Successfully reaching new students with online programs is part of the MSU Strategic Plan. In order to support this goal, EU will focus on establishing tools and systems that will be transformative for the distance student experience. Ultimately, distance students will have increased opportunities to succeed at MSU, thus increasing recruiting, retention and overall satisfaction. Extended University will work in close collaboration with existing support services and departments with online programs, and will serve as a campus resource for best practices in distance and online delivery practice and policy.

As part of this reorganization, EU has realigned its resources and narrowed its strategic focus to excel in three areas: 1) support the success of distance students; 2) develop and deliver non-credit courses, certificates and programs; and 3) collaborate to build excellence in academic outreach and engagement. Extended University will focus resources on developing and delivering high-quality non-credit workforce, professional development and lifelong learning programs that meet market demand, highlight MSU's strengths and further the land-grant mission. Extended University will continue to collaborate with faculty, centers and campus units to explore and deliver successful academic outreach and engagement programs that integrate learning and discovery, build community partnerships and enhance the research enterprise. The Burns Technology Center will continue to support outreach facilities, explore emerging technologies and pilot their use in teaching, learning and outreach efforts.

Montana State is committed to retaining current staff. However, in order to increase efficiencies and to enhance our level of student support services in this new reorganized system, some staff in EU may relocate to other areas in the institution. For example, an instructional design position will move from EU to the Center for Faculty Excellence. The individual in this position will assist all faculty in incorporating best practices of educational technology and on-line pedagogy into their courses by delivering training/workshops, facilitating faculty learning communities, and providing one-on-one assistance. By locating the position in the Center, the individual will be available to provide assistance to faculty in best-practice pedagogy and use of technology across the continuum of course delivery approaches from online to traditional face-to-face courses. This position will collaborate with the Director, Instructional Technology Services and the Learning Management Systems (currently D2L) personnel located in ITC.

The instructional technology services team will evaluate emerging instructional technologies and identify instructional technology training, and online pedagogically-related assistance that are needed as MSU increases online courses, programs, and uses of technology in the classroom. By locating the position in the

Center for Faculty Excellence, the individual will be available to provide assistance to faculty in best-practice pedagogy and use of technology across the continuum of course delivery approaches from online to traditional face-to-face courses.

A governance structure consisting of an instructional technology advisory council or board will be developed. The advisory council will analyze, evaluate and recommend strategies for the use of informational and instructional technology, and for the role and future of distance education and online delivery of academic courses and programs at MSU.

Migration of D2L Technology Support to the MSU Information Technology Center

Extended University pioneered the use of learning management systems on the Bozeman campus. These efforts started with a local installation of WebCT and then migrated to the current off-campus cloud-based offering from Brightspace called Desire2Learn (D2L). As the capabilities and tools offered by D2L have grown so has the adoption and use on this campus. Currently, D2L is used in both exclusively online courses and as an environment to augment classroom teaching. As of January 2015, there are +15,000 registered users on the Bozeman campus using D2L. In addition to the growth of learning management systems on the Bozeman campus, the platform has become the foundation of the unified approach to learning management systems used by the MSU system. The adoption of this common platform by the MSU affiliated campuses (Billings, Great Falls, and Northern) advantages students in the system by providing a seamless experience in their use of learning management tools.

The growth in adoption and use on the Bozeman and other MSU campuses has led to recognition that D2L is an enterprise system. This status, driven by user adoption, means that this learning management system is as mission critical to the University as our other information technology enterprise systems, including Banner. As EU incubated, matured, and grew, the underlying technology and support requirements for the campus outgrew the capabilities and the mission of the unit. In addition, within the last two years, Montana State has increasingly learned that when problems arise with the D2L environment they usually require troubleshooting and support from the Information Technology Center.

The Information Technology Center has created a new unit focused on supporting the instructional technology needs of the Bozeman campus and the larger four-campus enterprise. Functional units in the current team include classroom instructional technologies, student labs, Scantron grading and faculty evaluations. The learning management system technical support team in EU will transition from working for EU to becoming the centerpiece of this new ITC unit. The integration allows the University to: a) develop a more comprehensive instructional technology strategy, b) integrate and fully leverage campus information technology resources and personnel to resolve D2L issues, and c) promote the continued development of a common system approach to learning management for the MSU system.

Proposed Revenue Distribution Model

Tuition and Fee Structure for Online Courses

MUS Board Policy 940.20 will be implemented to assign tuition rates for nonresident students enrolled in online programs. Policy 940.20 establishes a minimum nonresident tuition rate of 125% of the resident tuition rate for courses that are taken in fulfillment of the degree (or credential) requirements for nonresident students enrolled in an online program. Undergraduate nonresident students in online programs will pay 200% of resident tuition and nonresident students in graduate online programs will pay 125% of resident tuition.

The nonresident tuition rates addressed in Board Policy 940.20 apply to students enrolled in online programs only. Students enrolled in a combination of online and on-campus courses, or students taking online courses that are not associated with an online program, will pay the full nonresident tuition rate.

Students enrolled in any course delivered online or in a distributed learning environment will be charged a Distributed Learning and Online Learning Course Fee (online course fee). The online course fee will be applied to all online courses, not just courses in online programs. Fee revenue will be used to defray the costs of specialized support services for online and distance students. A partial list of additional enhancements necessary to meet the educational requirements of online students include areas of transactional processes, campus information, counseling and advising services, business services and instructional technology. A request to the Board of Regents for this new fee is included collectively with the request for all student fees that will be submitted to the Regents for consideration at the May Board meeting. The online course fee will become effective Fall Semester 2015, subsequent to Board approval. It is anticipated that this fee will not exceed \$45 per student credit hour.

Evaluation of individual EU self-support online programs is ongoing to determine if program fees (in addition to the online course fee) are necessary or need to be adjusted to address program costs and expenses that are not covered by tuition.

Tuition and fee tables for all online programs will be finalized by June 2015.

Transition Plan for Revenue Distribution

An updated approach for funding and administering online courses, online programs and summer school courses will be implemented in phases, beginning in summer 2015 with a target completion in spring 2016. The budget model will impact all for-credit courses and programs that currently are administered by EU and all qualifying summer school courses. When fully implemented, the budget model will consist of two separate components, one for academic year courses and one for summer courses. The following paragraphs describe the revenue—distribution approach that will be used each semester during the transition from a self-funded university extension system to a state-supported model that is managed by the deans and appropriate academic units.

Summer 2015 — Courses administered through the MSU Registrar (excludes EU courses)

MSU will adopt a new model for summer sessions aimed to grow the scope and extent of summer school offerings. Colleges will receive budget transfers calculated at \$141/SCH for Summer Session 2015 undergraduate and graduate courses; excluding internships, independent studies, courses focused on professional paper or thesis development and courses with particular budget arrangements. These budget

transfers are intended to cover the cost of instruction, to incentivize growth in the summer offerings and to support the general priorities of the colleges. Using enrollment figures from Summer Session 2014 as a benchmark, it is anticipated that this financial model will return to the colleges approximately \$0.5M more than was provided in summer 2014 to cover instructor costs. The model will be evaluated after its second cycle.

Summer 2015 — Extended University courses

Courses currently offered through EU (EU courses) will continue to be managed using a revenue-distribution model administered by EU. In time for Summer Session 2016, it is expected that all credit-granting courses currently administered by EU will be transitioned to the MSU Registrar and will be managed by the college deans using an average net student credit hour distribution model, as described in the previous section for non-EU courses.

Fall 2015 — All online courses (EU, non-EU, graduate and undergraduate courses)

No changes to the existing budget model are planned for Fall Session 2015. Courses administered by EU will continue to be administered by EU; however, no additional for-credit courses will be added to the EU roster. All courses administered through the MSU Registrar system will continue with the current AY funding model that is managed by the college deans with departments supporting instructional costs.

Spring 2016 — All for-credit courses (EU, non-EU, graduate and undergraduate courses)

Beginning Spring Semester 2016, all credit-granting online and face-to-face courses (including EU courses) will be managed by the college deans and administered through the Registrar. Base budgets for applicable colleges will be augmented for EU online programs associated with this transition, as appropriate, during the migration of online EU programs to a registrar-administered system.

Fall 2016 — All for-credit courses (EU, non-EU, graduate and undergraduate courses)

The restructuring of EU and the transition of credit-granting EU courses and online programs into a generally funded, state-supported system will be complete by Fall Semester 2016. A two-component funding model (AY and summer) will be operational and the outcome of this transition will be monitored. Modifications to the funding model may occur, as appropriate, based on assessment of outcome data, feedback from stakeholders and any potential re-prioritization of academic initiatives.

Communications

The UPdate EU work group recommends a multi-faceted approach for communicating details about the reorganization of EU and the transition of online programs and credit-granting courses from the EU system to a system that is administered by the Registrar’s office and managed by the colleges. Basic components of the communication plan are summarized as follows.

- 1) **Campus-wide updates** will be provided summarizing progress and major milestones of the reorganization of EU and the transition of online programs, beginning in spring 2015 and continuing until completion of the reorganization in spring 2016. Communications will be provided through the *Update MSU web site*, Deans Council meetings, Faculty Senate and possibly University Council.
- 2) The UPdate EU work group will develop a **campus communication plan** that reaches out to the MSU community to ensure that students, faculty and staff are aware of upcoming changes to admission and registration processes, tuition and fee structure, and transactional services for online programs and online courses
- 3) During spring and summer 2015, representatives of the UPdate EU work group will meet with **program directors and administrators most directly involved with online programs** to ensure that key stakeholders understand the pertinent details of the transition that most directly affects their areas.
- 4) A written request/proposal that describes salient aspects of the reorganization will be submitted to the **MUS Commissioner’s office and the BOR**. The written proposal will be finalized by June 2015.

The following conceptual timeline shows the approximate schedule of activities associated with the primary components of the transition that require coordinated attention as online academic programs and associated support systems of EU are integrated and aligned with standard practices of Montana State. It is anticipated that the timeline will be modified and updated to address new details and unexpected contingencies that arise during implementation of the transition subtasks.

Timeline for Primary Transition Components *Updated: April 2, 2015*

Components of EU Reorganization	Milestone Dates	2015												2016						
		1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	
Project Commencement	May 2014																			
1) BOR and OCHE	Sept 2015					★				★										
2) Program Analyses and Transition Planning	Mar 2015																			
3) Banner Reconfiguration	Sep 2015																			
4) Transactional Functions and Support Services	Nov 2105																			
5) Revenue Distribution Model	Jan 2016																			
6) Communications	Jan 2016																			
Major Transition Components Complete	May 2016																			

Update MSU Online Ed./Extended University Working Group

UPdate MSU is an institutional project composed of 12 Working Groups addressing the following goals:

1. Free up resources currently tied to administrative duties and reallocate them to the Learning, Discovery and Engagement goals of the strategic plan.
2. Better coordinate functions across departmental lines and diminish the duplication of efforts.
3. Examine economies of scale to enhance administrative efficiency and effectiveness.

The Update MSU Online Education and Extended University working group was established by MSU's President and Provost in May 2014. The working group is comprised of the following eleven members:

Member	Department
Martha Potvin, lead	VP & Provost, Academic Affairs
Bob Mokwa, lead	Professor, Civil Engineering
Karlene Hoo	Dean, Graduate School
Kim Obbink	Executive Director, Extended University
Tony Campeau	Registrar
Marilyn Lockhart	Director, Center for Faculty Excellence
Megan Bergstedt	Budget Fiscal Manager, MSU Budget Office
Ron Larsen	Associate Provost
David Singel	Associate Provost
Chris Kearns	VP, Student Success
Jerry Sheehan	Chief Information Officer