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Introduction

This self-study summary was developed during Fall 2013 and Winter 2014 as the first phase of an academic-year-long “program review” of University of Oregon Academic Extension. The review process was led by Barbara Altmann, vice provost, UO Academic Affairs.

The Organizational Structure, Services and Programs, and Business Model sections of this self-study describe current and recent activities. Notably, the university is undergoing a marked number of institutional transitions that may well alter the mission and operations of Academic Extension in the coming one to three years; these are addressed in the Emerging Issues section of this self-study. This self-study concludes with a section on Big Ideas, addressing a few key areas of potential transformation for Academic Extension.

Organizational Structure

Reporting and Governance

The Oregon University System (OUS) comprises seven distinguished public universities and one branch campus, reaching more than one million people each year through on-campus classes, statewide public services, and lifelong learning. The Oregon State Board of Higher Education is the statutory governing board of OUS. The OUS Chancellor’s Office carries out the Board’s goals and initiatives and statewide higher education responsibilities for the benefit of Oregon and Oregonians.¹

The University of Oregon, founded in 1876, is the state’s flagship institution. Located in Eugene, an energetic college town, the university offers academic excellence and hands-on learning opportunities in a welcoming atmosphere. Towering trees shade the 295-acre campus, where students, faculty members, and employees from a wide variety of backgrounds share a commitment to preserving the environment and pursuing innovation in more than 260 academic programs that range from Eugene to Portland and from the coast to the mountains.²

The University of Oregon is among the 108 institutions chosen from 4,633 U.S. universities for top-tier designation of “Very High Research Activity” in the 2010 Carnegie Classification of Institutions of Higher Education. The UO also is one of two Pacific Northwest members of the Association of American Universities. The Northwest Commission on Colleges and Universities accredits the University of Oregon. The academic calendar is on the quarter term cycle.

¹ http://www.ous.edu/about
² http://uoregon.edu/about
From approximately 1932 to 1978, Oregon General Extension was a statewide unit within Oregon State System of Higher Education (OSSHE), the precursor to Oregon University System (OUS). In 1978, General Extension was eliminated as a centralized unit of OUS and distributed to institutions around the state. The UO Division of Continuing Education (DCE) was established and housed within UO Academic Affairs. Since 1978, DCE has been restructured and renamed twice: First was a merger with Summer Session into a unit titled Continuation Center (1981-2010) and second was the decentralization of Summer Session and transition to the currently labeled Academic Extension (2010-present).3

While AE is not a credit-granting unit, it does work in close collaboration with many academic units to deliver courses and programs that provide elective credits, regular coursework in a nontraditional delivery mode or location, or facilitate entire degrees. Note that all academic matters are the domain of the academic partner, including selection of instructors, approval of course syllabi, and the like. Processes vary by schools and colleges for vetting and confirming the academic unit oversight.

Today, Academic Extension (AE) is still housed within Academic Affairs, reporting to the Senior Vice Provost, Doug Blandy. He has been in this position since July 2012.

Mission and Naming of UO Academic Extension

The reorganization and transition to the new title of Academic Extension, in 2010-11, was under leadership of Senior Vice Provost Russ Tomlin. An effort was made to document the mission, role, and operations of the organization. This drew upon past practice, current transitions, and aspirations for the future.

The expanded mission of AE was modified to emphasize the entrepreneurial nature of program development and affirm the position within Academic Affairs as support to the core educational mission of the institution.

The mission of UO Academic Extension is to advance the general UO missions in education, research, and service by extending UO faculty expertise into new markets and populations. AE is a venue for creative and entrepreneurial academic engagement by UO faculty into broader markets and communities. This includes wider geographical, demographic, and social distribution, including but not limited to nontraditional and place-bound students, K-12 service, professional education and development, alumni and retirees, and individuals in professional transition.4

This “Principles” document was rather extensive, valuable for transparently establishing AE’s place within Academic Affairs and affirming the role and nature of activities. However, many of the operational details were aspirational in nature, and/or do not acknowledge the variety of program details that need to be flexible to be successful in achieving the shared goals. The document could be shortened to prevent over-prescribing infrastructure and avoid confusion to campus partners.

3 http://academicextension.uoregon.edu/about/history.php. For a more in-depth history of Extension, please refer to Appendix 1, History of Extension.
4 http://academicaffairs.uoregon.edu/what-academic-extension
The land, sea, air and space grant institution within the Oregon University System is Oregon State University (OSU), in Corvallis. The mission and tradition of “extension service” to the state is delivered admirably by that sister institution. The renaming of our unit to Academic Extension has brought positives and challenges. On the one hand Academic Extension is a brand that reflects the location of our unit within Academic Affairs, with a mission of service to the array of professional schools and college of arts and sciences that make up the UO. On the other hand, the brand can easily be confused with OSU Extension Service.

As an auxiliary unit in a decentralized AAU R-1 university, and housed in Academic Affairs, we are working to clarify our role in the institution’s mission as envisioned by the new president, determining how best to support the university’s mission in endeavors where our efforts are both needed and wanted. AE has a history of success in implementing programs quickly, with attention to quality; however, with a clear direction from senior leadership, there is much more that could be created and delivered for the benefit of the UO.

**AE Leadership**

1978—1981 Led by Richard Schmenke, originally the Summer Session director, and then the first leader in the Continuation Center, which combined Continuing Education, Community Education, and Summer Session.

1981—2010 With Dr. Schmenke’s retirement, the two program directors, Ron Trebon with Summer Session and Curt Lind with Continuing Education and Community Education, were appointed as codirectors of the Continuation Center. This leadership team remained in place until Ron Trebon’s retirement in 2010, though throughout their tenure as codirectors, Ron Trebon continued to concentrate on Summer Session affairs and Curt Lind concentrated on Continuing Education and Community Education. In 2010, Curt Lind became the senior director for the newly named unit, Academic Extension, which truly unified the leadership for Summer Session, Community Education, and all Continuing Education.

During this time, Curt Lind developed a management team consisting of himself, the two Associate Directors, Sandra Gladney and Paul Katz, and the Director of Fiscal Services, Karri Pargeter. This team was found to be quite effective, in particular during the integration of Summer Session and ancillary programs into Academic Extension.

2013—2014 Curt Lind’s retirement in June 2013 instigated the appointment of the associate directors to positions as interim codirectors for Academic Extension, initially thought of as the proper solution for unit leadership while a new position, executive director of Academic Extension, was to be searched.

The interim codirectors, working closely with the senior vice provost for Academic Affairs, have been not only maintaining the operations of Academic Extension, but have also been
given the charge to continue the unit's development. They have pushed hard at the
boundaries of past scope and practice, enhancing broader communications with campus
partners, continuing to support and anticipate new initiatives, all while working diligently
to integrate the new Collective Bargaining Agreement.

The interim codirectors work extremely well together, enhancing each other's aptitudes
and enriching the leadership capabilities with broader scope of perspective and
proclivities. The Management Team, which includes the director of Fiscal Services,
continues to be a highly functional group.

The new executive director position describes a strong external component, defining a
position and personality immediately able to expand opportunities and morph Academic
Extension into a fully accepted, respected, critical component of this institution's
mission. The current leadership is poised and starting to move in these directions, but the
process will not be as immediate as might have originally been anticipated.

**Staffing**

AE employs between seventy and eighty individuals depending on the time of year, with
fluctuations largely due to program-related temporary and student staffing. These
employees total approximately fifty FTE, split evenly between the Continuing Education and
Conference Services portions of the organization.

The organizational chart, found in Appendix 2, AE Organizational Summary, will reveal a
relatively flat hierarchy for an organization of this size. This stems from several factors,
including: a legacy of personnel structures created when the unit was much smaller in scale,
and not adjusted for the tenfold growth we have experienced over the past thirty years; the
leadership style of the past director; and an organizational culture that encourages
teamwork and values individuals with broad skill sets.

AE benefits from a core staff of dedicated professionals, many of whom have been employed
fifteen or more years with the organization. While the UO has long been below the salary
compensation of its comparator institutions, conversely its benefits package has been
relatively high. Within the geographic setting of Eugene/Springfield, the UO has been a
prized place of employment. In addition to this broader setting, the AE unit has been valued
for the respect given to the individual, support of continued education and professional
development, and encouragement to grow and expand individual interests and capacities.

As the organization grows, it may prove difficult to sustain the culture that has led to past
success. This may be due to distributed staffing, the need for specialized skills in new hires,
and the like. AE's focus on the success of individuals in a team environment makes it a
highly desirable place to work; our job announcements routinely receive dozens of
applicants, and we have no trouble hiring qualified staff. However, the lower compensation
we are able to offer compared to our peer institutions makes us a less appealing option for
those with competing offers, particularly for specialized skill sets. In situations where we
might be charged with ramping up staffing quickly, e.g. for new online initiatives, we might have to hire employees away from other units across campus to get the skill sets needed.

**Physical Plant**

AE’s main office and classroom facilities are located at the Baker Downtown Center in Eugene, with a significant number of Conference Services employees currently occupying leased office space across the street at the 10th and Mill building. AE currently occupies suites 110, 220, and 230 in the Baker Center, plus four meeting rooms located on the first floor. These four meeting rooms together offer approximately 3,000 square feet of meeting and classroom space, and can be arranged into multiple configurations to suit program and client needs.

It is important to note that the Baker Downtown Center represents an ideal location for Academic Extension to be the “Gateway” between the community and the university. To this end, the current drive is to enable other units on the first and second floors of Baker Center to move into other campus locations, thereby expanding and defining the Baker Downtown Center as AE. Efficiencies gained from simply bringing staff from the 10th and Mill Building back into Baker Center promise to be significant, and branding the building as the “Gateway” will dramatically enhance the community reach for Academic Extension.

The University of Oregon in Portland serves the educational, professional development, and personal enrichment needs of the local community. The White Stag Block, located at 70 NW Couch Street in the Skidmore-Old Town Historic District, is home to the UO Duck Store, several program offices, and classrooms. AE maintains an office in the White Stag Building in Portland, and two employees (1.6 FTE) work out of the Portland office, with one full-time telecommuter also based in Portland.

In 2012, AE was tasked by the provost’s office with managing the facility at the UO Bend Center. Programmatic activities in Bend include the Osher Lifelong Learning Institute’s Central Oregon group, and several Educational Leadership and Development master’s degree program classes meet every term in the AE classrooms at the Bend facility. There is increasing interest by other UO programs to use this space, for example Oregon Executive MBA connecting via video from Portland. There is one full-time UO employee at the Bend Center, with .25 FTE allocated to AE, while UO Advancement accounts for .75 FTE.

**Services and Programs**

The overall AE operation maintains systems that cover broad categories including program development and fulfillment, registration and payment processing, website design and development, graphic design and print publication, financial services, etc.

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6 [http://academicextension.uoregon.edu/about/locations/white_stag.php](http://academicextension.uoregon.edu/about/locations/white_stag.php)
7 [http://academicextension.uoregon.edu/about/locations/centraloregon.php](http://academicextension.uoregon.edu/about/locations/centraloregon.php)
Due to the unique nature of their respective services and programs, Continuing Education and Conference Services operational support services and programs are identified separately. This should not be misconstrued as mutually exclusive operations: many of the academic unit partnerships, as well as synergies gained from external agency and association contacts, benefit from overlapping activities.

Of particular note, after more than twenty-five years using Acius’ 4th Dimension as the database platform supporting AE operations, AE is now in the midst of a five-year database transition to open-source software: Linux, Apache, PHP and PostgreSQL. Details of the database systems and transition can be found in Appendix 3: UO Academic Extension Web Development and Database Design.

**Continuing Education**

Academic Extension Continuing Education takes an entrepreneurial approach to the higher-education marketplace, delivering the University of Oregon’s world-class content to audiences both near and far. We respond to inquiries from UO departments, community members, and organizations, and proactively seek to develop and deliver new programs. Collaborating with a variety of stakeholders both internal and external to the university, we bridge the university and the community, bringing the best of both worlds to the table.

**Operational Support Services**

**PROGRAM DEVELOPMENT AND MANAGEMENT**
- Partner with academic departments to plan and implement new programs
- Conduct market scans to assess new program viability
- Coordinate communications between project stakeholders
- Create and monitor cost-recovery budgets
- Strategic planning to grow existing programs
- Serve as central communication point for multiple cross-unit programs
- Assess venues for appropriate content and delivery mode
- Collaborate with internal and external clients, partners, agencies
- Coordinate contractual agreements
- Create and oversee marketing and communications plans

**INSTRUCTIONAL DESIGN**
- Credit and noncredit course development
- Design new courses aligned with best practices in Blackboard LMS, WordPress, etc.
- Evaluate and improve existing courses
- Quality Matters-certified master reviewer
- Communicate best practices in online learning to faculty

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8 For an example of our proactive approach to program development, please see Appendix 4: AE Call for Proposals, Summer 2014.
REGISTRATION SERVICES

Registration
- Registration processing—web, phone, fax, and mail
- Multiple payment options—check, cash, purchase order, Visa, MasterCard, Americorps, and other tuition assistance plans
- Onsite registration services
- Automatic registration e-mail confirmation
- Attendee registration materials assembly and preparation
- Badge processing—design, production, distribution
- Certificates of participation verified, generated, and distributed—secured electronic PDF or hard copy

Data Entry and Data Management
- UO Registrar approved for nonstandard terms
- Average of 250 CRNs created every quarter term
- Secure database to track patrons, registration, courses, certificates
- Coordinates with offices on campus—Registrar, Business Affairs, Student Billing
- Provides enrollment reports to program managers and clients
- Sends e-blasts from database or Constant Contact to participant and inquiry lists
- More than 12,000 contacts for all programs
- Liaison with academic departments and university services

CUSTOMER SERVICE

Phone
- Phones staffed Monday–Friday 8:00 a.m.–5:00 p.m.
- Toll-free and local numbers
- Registration by phone
- Answer general program questions

E-mail
- E-mails answered within 24 hours
- Monitor and respond to e-mail inquiries for multiple programs

FISCAL SERVICES
- Creates and reconciles annual budgets
- Manages UO Foundation accounts
- Manages and reports grant accounts
- Reconciles customized program collaboration budgets
- Payroll—OA, Classified, GTF
- Payroll—term-based adjunct instructors, students, etc.
- Personnel matters; liaison to HR, AAEO, and Unclassified Personnel Services
- Travel approval and reimbursement
- Invoices
- Personal Services Contracts

ADVOCACY AND OUTREACH
• Education fairs and tradeshows
• Open house events
• Campus committees

WEBSITE DESIGN AND DEVELOPMENT
• Website design, development, and programming
• Database integration and online registration
• Website maintenance and management
• Basic search engine optimization
• WordPress site creation and maintenance
• Adaptive technology optimization
• Website integration with social media
• Content writing and development

MARKETING AND ADVERTISING
• Print and online advertising development, research, and coordination
• E-mail marketing design and execution
• Social media marketing coordination and development
• Google AdWords and Analytics e-marketing
• Promotional product implementation

GRAPHIC DESIGN AND PRINT PUBLICATIONS
• Print publication design and execution
• Digital and offset print production
• Accessible digital publications creation
• Trade show materials and event signage
• PowerPoint presentation design and creation
• Certificate design, creation, and distribution
• Interactive PDF development
• Workshop and classroom materials development
• Original image acquisition
• Digital image archive maintenance and management

MEETING FACILITIES
• Multiple sites across Oregon
• Audio-visual and video conferencing equipment available
• Room setup and tech support onsite

Current Program Activities

Academic Extension has a history of being engaged with an eclectic array of programs that could be conceptualized as belonging to four categories: (1) services to support the institution that transcend individual academic unit partnerships; (2) programs that are predominantly under AE direction; (3) programs that are consortial in nature and in which AE has significant leadership and/or managerial roles; and (4) programs in which the academic unit has primary visibility and AE is a relatively quiet "behind-the-scenes" partner providing necessary infrastructure. Areas that fall into the first three categories have
expanded descriptions below. Programs in the last category are only listed.

**Program Support to the Institution**

**Community Education Program** (CEP) allows access to UO credit courses as a nondegree student. CEP students can take up to 8 credits (graduate or undergraduate) per quarter term during the academic year (more in summer session). These credits are recorded on a UO transcript, and count towards a degree if the student decides to matriculate at a later time.\(^9\) The Community Education Program is a crucial support to AE’s mission to make the resources of the University of Oregon available to all Oregonians and to a wider national and international audience. There are approximately 2,500 CEP students each year at the UO.

Prior to 2010, a centralized *Summer Session* office, housed in the former Continuation Center, managed all Summer Session activities. A change in both academic and budget management moved the oversight of summer session to the schools and colleges. AE retained the charge of providing central coordination and general promotion on behalf of all UO, and providing a single point of inquiry for prospective students.\(^10\)

**Distance Education** in the form of online delivery began in the mid-1990s. Academic Extension partners with academic departments across the UO campus to offer approximately sixty titles in the undergraduate curriculum, largely serving General Education requirements.\(^11\) While the academic department retains responsibility for selecting, recommending, and evaluating faculty, Academic Extension provides support for instructional design and best practices in online learning; technology support for students and instructors; and administrative support for instructor contracting and payroll. Approximately 4,000 students took a course online during the 2012-13 academic year. Enrollment trends are depicted in Appendices 5 and 6, Online Enrollment by Academic Year and Online Education Enrollment Trends.

**AE-Directed Programs**

The **Applied Information Management** (AIM) Program is a master’s of science degree that takes an applied, multidisciplinary approach, preparing students with a big picture perspective on managing information in a wide variety of organizations and positions. In 1985, Tektronix managers met with academic leaders and created a first-of-its-kind initiative to ensure that their managers had the skills and knowledge to excel in the rapidly changing information environment. The result was the AIM Program—now a successful and prestigious master’s degree with award-winning instructors, and a worldwide reputation. Today, AIM is well known for its applied approach and teaching students real-world skills they can put to use immediately in the workplace. AIM departs from traditional information

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\(^9\) [http://cep.uoregon.edu](http://cep.uoregon.edu)
\(^10\) [http://uosummer.uoregon.edu](http://uosummer.uoregon.edu)
\(^11\) [http://de.uoregon.edu](http://de.uoregon.edu)
technology programs by incorporating a variety of disciplinary perspectives, including educational technology, information science, communications, visual design, and library science. The curriculum covers four distinct but related areas: information management, information design, business management, and applied research. This comprehensive outlook gives students invaluable skills to truly excel in their careers. The Interdisciplinary Studies: Individualized Program (IS:IP) curriculum format is academically housed in the Graduate School.

Osher Lifelong Learning Institute (OLLI) in Eugene-Springfield was originally established in 1993 as Learning in Retirement. A sister site was established in Central Oregon in 2003 as the Silver Sage Society. In June 2004, the San Francisco-based Bernard Osher Foundation selected the University of Oregon to become the first Northwest institution in the Osher Lifelong Learning Institute network. OLLI-UO is an intellectual and social community of engaged adult learners, connecting members to the brightest minds and ideas, including emeritus and current faculty from the UO and other universities as well as professionals from the community. Learners from all backgrounds and levels of education are welcome to join, and previous affiliation with the University of Oregon is not required for membership. Annually, approximately 600 members participate.

Road Scholar, offered by Elderhostel, Inc., has been an AE program in conjunction with the Oregon Bach Festival for over 25 years.

Sustainability Leadership Workshops and Certificate Program offers a series of onsite and online workshops that address the latest topics on sustainable economic, social, and environmental systems for both the public and private sectors. This series of noncredit professional development workshops are designed to provide practitioners with tools to develop sustainable living and working environments. There are no prerequisites and the workshops can be taken in any order. To be awarded the Sustainability Certificate, participants must complete ten one-day workshops (65 contact hours) of training. Continuing Education Units (CEUs) and academic credit are available for all sessions. A credit option for each workshop is available through partnership with the UO School of Architecture and Allied Arts.

Programs Managed by Consortia

Cinema Pacific Film Festival is an annual spring festival of film and new media from Pacific-bordering countries. A unique component of Cinema Pacific is that it is a “teaching festival,” engaging the active participation of undergraduates and graduate students in its administration. A team of a dozen graduate and undergraduate students, who serve as staff interns in the winter and spring terms, meet twice weekly with festival staff and participate

12 http://aim.uoregon.edu/about/index.php
13 http://osher.uoregon.edu/about/history.php
14 http://academicextension.uoregon.edu/roadscholar
15 http://sustain.uoregon.edu
16 http://cinemapacific.uoregon.edu
in festival planning and implementation.

The festival is featured in *US News & World Report*’s 2013 “Best Colleges” entry on University of Oregon, which states, “Students interested in the arts have a […] vast array of events to choose from at UO and the surrounding community, from the Oregon Bach Festival to the Cinema Pacific Film Festival.” Over thirty programs of screenings, guest artists, and live performances are presented during the festival in Eugene every April, supplemented since 2013 with several programs at the White Stag and Northwest Film Center in Portland. Each year, a national cinema from the Asian Pacific and Pacific Americas is featured, alongside work from Oregon and the U.S. West Coast. In its focus on Pacific Rim national cinemas, the festival advances the university’s mission, which values “a commitment to international awareness and understanding, and to the development of a faculty and student body that are capable of participating effectively in a global society.”

The Oregon Folklife Network (OFN) was formed in 2010 to serve as a hub for statewide folklife activities in partnership with the Oregon Arts Commission, Oregon Cultural Trust, Oregon Historical Society, Oregon State Library, and Oregon Heritage Commission, along with community partners, including Oregon Tribes, community-based cultural organizations, museums, regional cultural alliances, local arts agencies, K-12 schools, universities and colleges, and public libraries. Headquartered at Knight Library on the University of Oregon campus, the university also provides financial and collaborative support from the Folklore Program, Special Collections and University Archives, the Arts and Administration Program, the School of Architecture and Allied Arts, College of Arts and Sciences, the Graduate School, Academic Affairs, and the Office of Equity and Inclusion. While UO Libraries and the Folklore program provide academic and curricular guidance, Academic Extension serves as OFN’s administrative home, providing fiscal services, program guidance, and strategic planning.

Substance Abuse Prevention Program (SAPP) provides both credit and noncredit courses in the areas of alcohol and other drug prevention, intervention, treatment, and recovery, as well as related topics. The typical SAPP instructor has extensive applied experience working with clients, organizations, and communities. Most instructors hold advanced degrees and certifications or licenses in their area of expertise. Students, professionals, and community members may take SAPP courses to broaden their knowledge base, earn college credit, or complete requirements toward the Oregon Certified Prevention Specialist (CPS) and the Oregon Certified Alcohol and Drug Counselor (CADC) credentials through the Addiction Counselor Certification Board of Oregon (ACCBO). The program is academically housed within the department of Counseling Psychology and Human Services, in the College of Education.

*Department Directed with AE Assistance*

17 [http://uoregon.edu/our-mission](http://uoregon.edu/our-mission)
18 [http://ofn.uoregon.edu/](http://ofn.uoregon.edu/)
19 [http://sapp.uoregon.edu](http://sapp.uoregon.edu)
College of Education
- Educational Methodology, Policy, and Leadership MS in Canada
- Educational Methodology, Policy, and Leadership—Eugene, Sherwood, Bend
- Initial Administrator Licensure (IAL)
- Continuing Administrator Licensure (CAL)
- Reading Endorsement Program
- Professional Development for Educators

College of Arts and Sciences
- Northwest Indian Language Institute
- Anthropology Field School
- Master’s Industrial Internship
- K–12 Science Outreach
- Remedial Math
- Urban Ducks

School of Architecture and Allied Arts
- Architecture Academy
- Design Camp
- Historic Preservation Field School
- Professional Outreach and Development for Students (PODS)
- Studio Arts and Professional Tools

New Developments in Summer 2014
- Oregon Law Summer Sports Institute
- Arts and Administration (AAD)—Mobilizing Local Culture

Other Partnerships and Sponsorships
- Inside-Out Prison Exchange Program
- Labor Education and Research Center (LERC)—Carbon Pricing Policy Workshop
- Mindfulness-Based Stress Reduction (MBSR)
- University of Oregon Courses for High School Students (UOCHSS)

Conference Services

In its early stages Conference Services assisted university faculty by providing administrative support for meetings and conferences with registration and tradeshow development. The organization also began to tackle technology training. Active involvement in computer training lent itself to ongoing interactions with the technology industry, and by 1983, lasting links were formed with hardware and software manufacturers. In addition, more generalized educational programs fostered relationships with suppliers and associations in the field of education.

Conference Services planned several successful conferences during this period, and in 1986 supported its first national tradeshow (discussed in more detail below in Case Study 1). That tradeshow is now in its twenty-eighth year of association with Conference Services.
Today, the symbiotic relationship between the university and the business community continues to flourish. At this time services are provided for a variety of meetings that host twenty to 20,000 education professionals.

As a part of this extended community, Conference Services plays a significant role in bringing name recognition to the University of Oregon, while providing high-quality staff, technology, and experience in support of diverse clientele.

Below is a summary of support capacities by service area.

**Operational Support Services**

**REGISTRATION MANAGEMENT**
- Registration processing—web, phone, fax, and postal
- 800 and direct line phone service
- Flexible data capture and pricing structure
- Multiple payment options—checks, cash, PO, Visa, MC, Amex, and EFT
- Automatic registration acknowledgment via e-mail
- Online registration re-access (modify attendee registration options)
- Comprehensive attendee confirmation materials—web and e-mail based
- Registration reports—secure, online, real-time
- Attendee registration materials assembly and preparation (packet prep)
- Badge processing—design, production, distribution
- Lead generation system
- Onsite operations—staffing, training, logistics

**EXHIBIT MANAGEMENT AND SALES**

**Sales service areas:**
- Exhibit space, sponsorship, advertising, and meeting room sales
- Full service sales force and industry research team
- Database maintenance and development
- Multiple preconference campaigns (mail, e-mail, phone, social media platforms)
- Sales collateral—the development, production, and distribution of all materials used to promote the event to potential exhibitors, sponsors, and advertisers
- Onsite sales meetings for future events

**Exhibit management service areas:**
- Customer service support—phone, e-mail, and web
- Booth application and contract development—development and delivery of exclusively web-based form
- Payment processing—check, Visa, MC, Amex, EFT
- Booth assignment and exhibit contract management—web and e-mail fulfillment
- Floor plan management—design, development, and maintenance
- Online floor plan and exhibitor search tool—design, development, and maintenance of web-based, dbase-driven interactive environment for exhibitor and attendee use
• Meeting room sales and facilitation (B2B and attendee)—location identification and space design, sale of space, and matchmaking service
• Advertising and branding opportunities—identification of opportunities, sale of options, and order fulfillment and delivery
• Exhibitor services manual—contract negotiation and arrangement with primary general services contractor and other third-party suppliers
• Exhibitor services website—design and maintenance of comprehensive web-based resource for exhibitor planning purposes. Features include access to communications and notices, the capacity to order special services and options, access to third-party provider information, staff registration, view account summary, and pay account balance
• Exhibitor logistics communications, notices and reminders—exclusive digital delivery (e-mail, web, and text)
• Exhibit publications—the facilitation and production of exhibitor-related information for all delivery models of conference collateral, including printed programs, mobile apps, and web platforms
• Lead generation system—sale and fulfillment
• Onsite operations and support
• Postconference maintenance and follow up

PROGRAM DEVELOPMENT
• Session proposal and review—web-based system
• Presentation scheduling
• Integrated web-based program search tools
• Personal planner and mobile app integration
• Speaker communications
• Full-service speaker management website
• Integration with external conference apps

MEETING PLANNING
• Site selection
• Facility logistics—food and beverage, meeting room assignments and sets
• Speaker logistics—audio-visual, equipment, communications, and handouts
• Vendor and subcontractor coordination—hotels, facilities, and providers
• Onsite support

WEB DEVELOPMENT AND DATABASE DESIGN
• IT Infrastructure and Services—support and maintenance
• Website—front-facing web design, development, and maintenance
• Inter-system integration
• Back-of-house systems
• Database customization and integration—Master Event Database (MED)
• Customized systems development—4D attendee and exhibits systems
• Mobile app and web-optimized site development

MARKETING AND PROMOTIONS

Identification of sellable opportunities:
• Exhibit space
• Meeting rooms
• Sponsorship opportunities—definition and development of sponsorship packages in consultation with the client
• Promotional vehicles and messaging—identification and development of promotional opportunities available for rent or purchase at events. Opportunities include:
  o print advertising
  o signage, banners, and clings
  o video messaging
  o mobile app ads (display and notification-based)
  o web-based ads (display ads, headline banners, floor plan rollovers and pop ups and literature downloads)
  o games, raffles, and other incentivized activities to foster attendee traffic and exhibitor interaction

Process for marketing sellable opportunities and order fulfillment:
• Material development—design and creation of print, PDF, front-facing websites and e-mail communications to promote sellable opportunities
• Messaging campaigns—design and facilitation of postal, e-mail and phone outreach offering opportunities based on the company's desired promotional outcomes and goals onsite, and its budget
• Website design and database integration—design and development of all front-facing web pages promoting opportunities, and development of all order forms and back-end systems to upload artwork and other creative materials for order fulfillment.

GRAPHICS AND PUBLICATIONS
• Materials design—integration of current look and feel or development of new look
• Publication development—programs and other promotional materials (print, PDF, and online)
• Digital delivery—web-based and mobile platforms
• Supplier negotiation
• Production and delivery facilitation

INTERNAL SUPPORT: ACCOUNTING
• Payment and refund processing
• Invoicing and collections service
• Account reconciliation and client reporting
• Payment distribution
• Historical recordkeeping

INTERNAL SUPPORT: PHONE CENTER
• Centralized customer service center
• Phone support and live chat service

INTERNAL SUPPORT: DATA MANAGEMENT
• Patron data—management, data entry, review, and quality control
• Reporting—secure, comprehensive, and real-time
INTERNAL SUPPORT: OPERATIONS AND LOGISTICS

*Graphics, decorations, and logistics service areas:*

- Project management—timeline development and fulfillment for overall project
- Floor plans—design, development, and management of all areas of the facility (or facilities) in use by the event in consultation with the client
- Furnishings and decoration—selection and order facilitation for all necessary conference areas and space use
- Structures—design and order facilitation of custom structures
- Graphic design and management—facilitate the design, order process, and successful delivery of signs, structures, and other large-scale formats such as hanging messaging, props, major entrances (exhibits, keynotes and spotlight sessions), staging, and sponsor messaging
- Meetings—face-to-face and phone meetings, and site visits with clients, contractors and facilities, to develop designs and ensure intended plans and use of space are appropriate to the venue
- General contractor liaison—interface with contractors and clients in the design, facilitation, and fulfillment of all orders
- Facility logistics—interface with the building to coordinate approval of space use
- Onsite management and fulfillment—oversee successful event installation
- Data management and record keeping—track orders and maintain historical logistics and graphics records for the event

*Current Program Activities*

AE Conference Services provides a variety of support services from the above menu to between fifty and sixty-five events per year. Following are three case studies to illustrate the breadth and depth of program fulfillment.

**Case Study 1: International Society for Technology in Education Annual Conference**

For almost three decades, the *International Society for Technology in Education* (ISTE) has worked with Conference Services in the production of its annual meeting, now titled the ISTE Conference and Expo. Through the years Conference Services’ role in that relationship has evolved from basic service provider to significant partner.

In 1984, David Moursund, professor in the UO College of Education and then executive officer for ISTE, contacted our department about producing a tradeshow for an annual conference that the ISTE office had been hired to help administer.

ISTE was one of the dozen member organizations from the ed tech field that comprised the National Educational Computing Association (NECA). As a leading member of NECA, ISTE was contracted to guide the development of the program content and to build the exhibit component for the National Educational Computing Conference (NECC)—the event owned and operated by NECA. Each year, NECC was organized and produced by a combination of support groups: the NECA board, a local steering committee (comprised of members of the community where the conference took place), and ISTE. At the time David Moursund
contacted us, ISTE’s operational center was housed at the University of Oregon—a natural fit for our university-based conference services department.

The first year of managing the exhibit for NECC was 1987. The event hosted 2,000 educator attendees, and the tradeshow had 187 booths occupied by 135 companies from the fields of ed tech, publishing, and software development. The event continued to grow each year, and with this growth came more responsibility for Conference Services.

In 1994, Conference Services added to the scope of work: attendee registration management; operations and logistics support, including floor plan design for all public space functions; event-wide decorations; and all signage development needs for the program team.

In 1997, web-based registration was implemented for NECC, as were more design elements of the public-facing conference website in 1999. In 1998, Conference Services provided support for the conference program by building all tools required to accept proposal submissions and to facilitate the peer review process in a web-based environment.

Currently, Conference Services is involved in the production of all public access pages, registration and volunteer forms, program content search tools, conference planners, exhibitor floor plan search and services environments, mobile app integration, and complete web-based database development and support.

Ultimately, NECA disbanded and NECC became the official membership meeting for ISTE. The gradual transition of the conference name from NECC to ISTE began in 2008 and became complete in 2010 just after NECC’s thirtieth anniversary. Along with this change has come a transition in leadership and shifts in the ISTE conference team. Conference Services now partners with ISTE and their new organizational structure to produce an event which hosts 18,000 educator and industry leaders from the ed tech field, and provides an exhibit with more than 500 companies and 1,300 booths. The ISTE conference is the largest educational technology conference in the United States; the program offered and the exhibit are the largest in the world.

While the general areas of service provided have not changed much over the years, the accepted platforms and delivery models required for fulfillment, along with the depth of service, have evolved significantly, encouraging growth in the technology arena.

Today’s relationship is one that is deeply integrated and involves an expansive scope of services. Our partnership has evolved in an almost symbiotic fashion to the mutual benefit of both organizations. The developments associated with work done for, and with, ISTE have directly benefitted the work being done for all Conference Services-supported events.

Case Study 2: California Charter Schools Association Annual Conference

The California Charter Schools Conference, hosted by the California Charter School Association (CCSA), supports charter schools educators and administrators in the state of California. It has grown from fewer than 2,000 attendees in 2004 to a projected attendance of 3,500 in 2014. Conference Services currently manages registration, facilitates program
selection, and manages the exhibit. This work culminates in the production of a data-integrated conference website and mobile application, final program, and onsite signs and structures.

Conference Services provided registration support in 2004, and in 2005 the role increased to include online presentation submission and review (tools required to accept proposal submissions and to facilitate the peer review process in a web-based environment) and data management. In 2006, the CCSA Conference co-located with the National Charter Schools Conference. At the close of that conference year, the conference director left CCSA to work for the National Alliance of Charter Schools. Conference Services was retained for both the role on the CCSA event and to work on the National Charter Schools event.

As a result of the 2006 leadership transition, the scope of work increased broadly. In addition to data management, exhibits sales and management, presenter logistics (presenter communications, AV coordination, and room signs), full website design and coordination, final program creation, and signs management were added to the portfolio of services. Conference Services also provided generalized leadership, tasked with thinking globally about the needs and aims of the event with respect to the program creation, its incorporation into the exhibits, and the potential growth of the attendee and exhibit base.

This past year brought a new director to the event. Conference Services continues in its current roles, while stabilizing the workflow, and is now able to focus on new event priorities. Currently, Conference Services is escalating mobile conference applications alongside technology changes, and supporting a considerable effort to integrate social media fully into the event experience.

**Case Study 3: American Association for Italian Studies Conference**

The American Association for Italian Studies (AAIS) has an annual event of approximately 350 people that takes place in a different city in the United States or Europe each year. In 2013, the UO Department of Romance Languages hosted the event at the Valley River Inn (VRI) in Eugene, Oregon, with Conference Services providing meeting planning support. The event was led by a host committee. Conference Services staff participated in committee meetings and coordinated with individual committee members on the various aspects of the project. Conference Services’ graphics and publications and web development departments created a conference look for the event, and built the conference website, marketing poster, final program, and packet cover based on that look.

Conference Services managed registration and session logistics, and coordinated space use and AV with VRI. In addition, Conference Services staff arranged onsite logistics with the support of Romance Language student volunteers, coordinated and managed transportation from VRI to the UO for special events associated with the conference, and arranged ancillary hotel blocks for registrants. Students stuffed packets, handed out badges and materials, monitored bus transportation, and monitored rooms with Conference Services leadership. While AAIS was a one-time event, it is illustrative of the support provided to UO departments, enabling events to come to campus when the administrative resource to put on the events is not available within academic departments.
Business Model

There are three basic tuition and fee structures at OUS institutions: the regular academic year, summer session, and continuing education programs. Under existing policy, each of the three tuition structures is separate with its own unique rate setting process. The Academic Year and Summer Session tuition and fees are set by the Board of Higher Education, while Continuing Education rates are set by the institutions.

As defined in the OUS Fee Book 2013-14:

Continuing Education, Extended Programs, and most Distance Education courses fall within the category previously referred to as self-support. Continuing Education courses are offered through special campus programs not generally available during the academic year or summer session. Tuition and fees for Continuing Education are assessed regardless of residency or course load. Rates are set at levels necessary to cover (at a minimum) the direct costs of providing the course plus an indirect cost recovery for administrative overhead costs. Tuition and fees are charged to participating students apart from enrollment fees paid for other courses. Assessment of Resource Fees for Continuing Education courses is an institutional decision.

Most Academic Extension programs are sustained by a per-course self-support fee that replaces tuition, and most AE programs do not receive state dollars.

During the fiscal year ending June 30, 2013, Academic Extension brought in gross revenue of approximately $12 million. Of that, $9 million (75 percent) was from credit activity, $2 million (17 percent) noncredit, $780,000 (6 percent) in state support, and $190,000 (2 percent) in grant funds. Of the revenue earned by AE, $2.8 million (23 percent) was transferred back to our academic partners for their departmental use.

Due to the organizational and fiscal restructuring that brought a portion of the Summer Session operation into Academic Extension in 2010-11, it is difficult to report data that reflect multiyear trends. However, based on the areas that can be readily compared, and with consideration of FY 12 actuals and FY 14 projections, the FY13 data can be viewed as “typical.”

Emerging Issues

Online and Hybrid Offerings

The UO began offering online courses in the mid 1990s. For a few years there was slow but steady growth in the number of course titles available to undergraduate students, providing flexibility and access predominantly to current degree-seeking students. Relative to

regional peers, the UO was modestly leading the trend. However, since the early 2000s, local peers (e.g. Oregon State University) and AAU peers (e.g. Indiana University, University of Washington) have significantly outpaced the incremental growth at the UO. Please see Appendix 7, Sample Comparator Schools Ranked by Online Courses, for a snapshot of the UO’s standing in this area.

With one fully online graduate degree (Applied Information Management, MS) and a collection of general education-satisfying undergraduate courses, the university has momentum for success. AE has demonstrated success in online learning with innovative and flexible funding models, market-driven programming, and commitment to the UO mission, and can provide a framework for significant growth. Additionally, the UO has content areas that would readily migrate to an online format, matching the institutional identity with content (examples might include the undergraduate BS in general social science, or graduate interdisciplinary applied programs addressing sustainability, design, sports, law, and/or business). However, lack of integration with the university’s mission and strategic priorities, to date, has limited the capacity for resources to coalesce for success in reaching new markets.

Recent success in UO Duck Athletics has brought national and international renown to the UO brand, and the ever-increasing market of potential students means the UO does not have to create a market but merely to identify a share of the larger known market. While poised to move forward with increasing online offerings, particularly for traditional credit-based curriculum such as minors, bachelor’s and master’s degrees, we face the considerable obstacle of current internal curriculum review systems, which are not currently optimized to allow growth of online and hybrid formats.

**Enterprise Learning Management System**

When the UO’s current learning management system (LMS), Blackboard, was established in 1999, institutional policies guided implementation that limited access to students and faculty with active employment or student records in Banner. This effectively precluded use for many activities in Academic Extension, e.g. the capacity to serve noncredit programs, which includes guest presenters with no instructor contract (paid on Personal Services Contract) and participants not in Banner (registered in AE’s noncredit system). Existing program areas that are in need of this functionality include Osher Lifelong Learning, and many industry sectors of professional development workshops that are not credit bearing.

Nationally, extension units often built or acquired separate learning management systems due to the variations in their student populations. AE has not done so on a scale beyond small experiments (e.g. Blackboard Collaborate, Course Sites). AE seeks to acquire this capacity through involvement in the process currently underway for selecting a new iteration of the enterprise-wide LMS, making a secondary system in AE unnecessary. The required topics/functions were identified in the ”Request for Information” phase of the project, and there is a working presumption that all the systems in consideration will
readily accommodate all the types of functionality and implementation needs unique to AE.\textsuperscript{21}

If the new LMS iteration continues the practice of restricting access by UO employment and enrollment status—either by policy choice or due to prohibitive costs of technical implementation—it would not fully meet AE’s needs. That the new LMS selection might be implemented in a way that accommodates the full range of AE needs is the intention, but it is uncertain at this time whether it will be the reality at the end of the process. Multiple units are working to clarify and coordinate the policies and implementation procedures for the new iteration of the enterprise-wide LMS at the UO.

**Certificate Programs**

Various UO leaders and market research indicate that certificate programs are an appropriate credential with which AE can make its mark in the higher education landscape. However, there is a lack of clarity as to the specific nature and purpose of a certificate as appropriate to the UO.

- A “certificate of participation” is effectively noncredit, and could be shaped by the university in establishing criteria of completion. (AE currently has this in place with the Sustainability Leadership program.)
- A broker or third-party vendor model is available, wherein UOAE becomes sanctioned to deliver industry-established curriculum, e.g. Microsoft certifications.

Depending on the content, both of these models may compare closely to community colleges or professional association education programs, and are perhaps not the best context for the UO. Also, some content that could sell well might not have a readily identified academic home unit for endorsement, which to date has been a criteria for fit at UO AE.

What might be most appropriate for an AAU institution would be online delivery of post-baccalaureate/graduate certificates that can either stand alone as a credential or provide a supplement or pipeline to a full graduate degree. However, there are multiple administrative obstacles to delivering certificate programs quickly to market due to lengthy academic review processes. Additionally, there is often the misperception that a student does not have to go through the formal graduate application process, particularly since the UO has an “open enrollment” model via CEP. However, this might not be accurate under current UO policies and would need to be developed collaboratively with various units.

**AE as Gateway to UO**

The UO Baker Downtown Center (BDC) is comprised of multiple buildings that house several UO offices and service centers. The primary public “face” of BDC is the southwest corner, located at 975 High Street. Academic Extension (AE) currently occupies suites 110,

\textsuperscript{21} [http://blogs.uoregon.edu/lmsreview/]
220, and 230 with administrative and operations staff, as well as managing four meeting rooms located on the first floor.

Several features of BDC provide an ideal fit for the programs and staff within Academic Extension as they implement the mission of AE.

- Location near to both campus and downtown commercial district, thus serving as a “gateway” for the university to connect to the city corridor
- Location is easily found by newcomers
- Street level (single floor) access for program attendees
- ADA-accessible entry doors and restrooms
- Multiple meeting spaces that are flexible for room size, lighting controls, AV equipment, and configuration of furnishings
- Adjacent parking for program attendees
- Adjacent EmX (bus-rapid-transit) stops, providing easy access to campus and main Lane Transit District station

Additionally, the operations of AE are most efficient when the physical location enables:

- Meeting rooms located adjacent to program staff who lead and support all aspects of those programs
- Location of all staff in one facility for streamlined operations, including:
  - program and operations staff readily accessible to respond to “walk-in” customers, program production meetings, hosting “off-campus” events, etc.
  - network configurations for UO IT systems and support
  - storage and archiving of shared program materials

AE services and operations would improve with the addition of space to relocate the portion of AE staff currently at Tenth and Mill, and at least one more thirty-seat classroom. This can only be achieved by relocating two other administrative groups housed at BDC.

**UO Senior Leadership**

The UO is currently in the process of transitions on several senior leadership levels. Our President is entering his second full year in the position and is beginning to implement organizational changes, preparing to mount the largest university-wide fundraising campaign to date, with a focus on academics. The Provost search has been in process for nearly a year with the permanent hire just announced February 13, 2014. Multiple deanships are filled by faculty serving as interim, with searches for permanent replacements currently or soon to be in process, including College of Education, School of Journalism and Communication, College of Arts and Sciences, and Libraries.

Interim status can feel like limbo, and while AE has maintained forward momentum on many program initiatives, some faculty and unit leaders are hesitant to venture into new programmatic territory in a time of impermanent leadership.
Collective Bargaining Agreement

After well over a year of communication and negotiation, the first collective bargaining agreement with faculty was recently ratified; implementation is underway, and reclassification work will continue through this academic year. This process includes the creation of a new faculty type, Career Non-Tenure Track, which requires new position descriptions, promotion and retention protocols, and clarification about faculty status when academic core programs and outreach programs interface.

One concern at AE is that changes compelled by CBA implementation may devalue the administrative and fiscal services formerly provided by AE as those systems are integrated within the academic units. At the same time, increased costs and new processes associated with implementing the CBA may serve to reveal new values associated with AE operations.

UO Institutional Board

Our institution was recently approved for a new independent governing board that is being organized this year and will be fully authorized next fiscal year. The process of orienting this new board brings opportunities for self-study and preparation for potential new priorities and systems in the future. The new perspectives may well bring awareness of the business-like nature of AE and recognition of this unit’s unique role on behalf of the UO, resulting in clarity of direction and a high level of growth and activity in AE.

Big Ideas

While there are many new directions possible for AE, the current management team has selected three areas to prioritize for illustrating potential major transformations.

Online and Hybrid Offerings Increased through Centralized Infrastructure

Organizations within higher education that serve adult degree programs, and continuing education broadly, have long understood the value of nontraditional delivery modes, such as programs offered during evenings, weekends, summer intensives, and at off-campus locations including satellite campus classrooms, K-12 classrooms, and corporate training facilities. Various state systems in particular have used emerging technologies throughout the decades, from nineteenth-century reading circles enabled by rural postal service and transcontinental railroad, to the twentieth-century progression of phone, satellite video, ISDN two-way video, Internet text, and streaming video, now accessible on myriad responsive platforms and integrated with social media.

http://newuoboard.uoregon.edu
This trend can also be observed in the transition of stalwart professional associations such as the University Professional and Continuing Education Association (UPCEA) launching a sold-out Summit for Online Leadership and Strategy in January 2014, and the highly valued member-driven research sessions about quality online learning at the annual conference of the Association for Continuing Higher Education (ACHE). This sector’s involvement in online programs is also evidenced by the Education Advisory Board’s (EAB) newest forum, Continuing and Online Education (COE), which provides members with “research and market intelligence for continuing, professional, and online education executives and their teams.”23 (Note: AE has long been an active member of ACHE, is now a member and active participant in UPCEA, and at the time of finalizing this self-study the process is underway to join the EAB.)

As noted at the EAB forum for COE in 2013, the question is “not whether, but how” to expand online. Elements to consider include curriculum level (undergraduate, graduate, professional development), students served (flexibility for campus-based students, outreach to new locations, targeted collaborations with industry sectors), the organizational model within the institution (department-driven, centralized shared services, independent online school), fiscal model, learning management system, and clarity of mission from senior level administrators.

Best practices consistently emphasize that institutional priorities and goals should drive engagement with technology, and it is this decision point at the UO that may shape our next steps. At the time of this writing, there is interest from the university’s senior leadership in developing online courses that fulfill general education requirements. There is a solid foundation already in place, with sufficient diversity in online courses already being offered to enable students to complete both the general education “group” (arts and letters, social sciences, sciences) and multicultural requirements for the bachelor’s degree. Logical next steps would be to:

- Add additional subject areas to give students more choice in completing these requirements via online delivery.
- Develop online formats for other core bachelor’s degree requirements including Writing 121, 122, 123, and a math sequence.
- Develop online formats for one or more language courses.

Following that, the logical next step is to enable completion of an undergraduate degree fully online. The General Social Sciences degree has a track in Applied Economics, Business, and Society that only needs six courses to be developed to enable a student to complete the major online.

Additional program areas that seem ripe for development include applied graduate programs for early-service and in-service professionals. Such programs could build on the success of the Applied Information Management Program academic and instructional design team, and are encouraged by Kimberly Espy, the university’s vice president for research and innovation, and dean of the Graduate School.

Jay Halfond and others at Brown University are currently studying online learning organizational models. Current indications are that mature and successful online infrastructures are:

- Housed in, or collaborate closely with, the continuing education/outreach unit;
- Charged “from the top” to manage online infrastructure centrally for the entire institution; and
- Led by a senior online learning administrator.

AE is poised to make this transformation. Following a directive and given the authority to do so, operational next steps must be investment in increased staffing for the design and production of courses, staffing for student services (e.g., advising), more sophisticated monitoring of compliance with federal policies for state authorizations, student identity verification, and so on.

As noted, this is an active topic at the UO and is currently being researched, with ideas in development and proposals in process at the time of this writing. The pace of this development is rapid enough that there will likely need to be a status update at the time of the External Review Committee visit on April 17-18, 2014.

**Lifelong Learning Programs Expanded through UO Collaboration**

Given the breadth of current UO activities, as well as trends in inquiries we receive, there is potential for a significant increase in the university’s connections with a much broader community through a lifelong learning framework.

There are several program areas across the UO that serve the interests of individuals seeking personal enrichment later in life. Some are managed in Academic Extension, including the Osher Lifelong Learning Institute (OLLI) and Road Scholar. Other UO activities include:

- Insight Seminars, housed in UO Libraries
- Senior Audit, a special classification for Oregon residents age 65 or older who are not seeking academic credit or working toward a degree but seek to participate in a regular university course
- Alumni Association programs, intermittently providing guest lectures and group activities
- Intermittent outreach programs at various UO research centers and off-campus facilities, such as the Oregon Institute of Marine Biology and Pine Mountain Observatory

As previously noted, the UO-OLLI membership includes program sites in Eugene/Springfield and Central Oregon. Recently there have been increasing requests from current and prospective members to bring programming to other regional locations.

- A few events have already been held in Florence, Oregon, and a trial partnership with Lane Community College is in development for Spring 2014.

24 [https://library.uoregon.edu/administration/insightabout.html](https://library.uoregon.edu/administration/insightabout.html)
• Requests for Salem-area programming have been made by community members there who sought participation at the Institute for Continued Learning at Willamette University but discovered there is a membership cap and, currently, a waiting list for that program.
• A small but steady trend of inquiries arrives monthly, seeking online and/or video interactivity for lifelong learning programming.

Several factors could be aligning to spark significant growth in the UO lifelong learning framework as a gateway to participating in the UO.
• With the recent reorganization of UO Advancement, new leadership and integrated communications may soon be in place to formalize partnerships for programming and outreach of existing programs.
• Expanded programming could generate new “friends” of the UO, further engaging not only traditional alumni and fans, but also communities in broader geographic locations, particularly those who relocate to Oregon.
• A new LMS may standardize online and video capacity, providing place-bound individuals access to UO programming.
• Integrated programming could aid in marketing costs and serve to sustain or boost attendance per individual program.

Conference Services’ Support to Campus and Value to Community

As already described in some detail, AE offers a full array of technologically advanced conference services, built on many years of national experience. The issue, or opportunity, here is related to the minimal service currently provided to the UO’s colleges, departments, and faculty. Currently, faculty willing to consider hosting their professional meetings face serious obstacles, including the time and energy required for this type of undertaking and the challenge of producing an event, a job which falls well outside their academic area. Faculty are usually most interested in and equipped for program development, and the workload represented by conference hosting duties can be daunting.

Though AE Conference Services is ideally situated to support faculty-sponsored meetings, we are rarely called upon due to the self-support charges for our services. What has been explored in the past, and is still worth considering, is the question of central support for conference services supplied to faculty events. Providing faculty with sophisticated, thorough meeting planning assistance, along with all the administrative support features we offer, could greatly increase faculty interest in bringing events to Eugene.

The value inherent in this type of growth is manifold, from the simple efficiencies of extending existing services, to increased student access to professional meetings, and the value to UO faculty and staff of interacting with nationally renowned speakers. An additional and important impact on community relations is the value of bringing participants into Eugene to make use of area hotels, attractions, restaurants, and so on.

Finally, looking far down the road is the notion of turning the Baker Downtown Center into a conference center. The hope is that the university will have dedicated the Baker
Downtown Center as the AE "Gateway" to the community, and that future expansion would yield a conference center in this location. Though just a dream at this time, the idea of replacing the existing building with a new structure that would incorporate community space, classrooms, conference facilities, advanced technologies, and faculty and administrators, may well be seen as a reasonable adaptation to the changing, growing landscape for AE.

One exciting aspect of this kind of development is the synergy between existing conference services, the potential to make Eugene a popular location for academic and association meetings, and the existence of the Baker Downtown Center, ideally located to serve as a venue and hub for the university's outreach mission.

**Summary**

Academic Extension and the University of Oregon are at a time of significant transition. The valuable history of success in AE, and current positioning relative to emerging opportunities, positions AE to be in a new role of service and leadership for the entire institution. At the time of this writing (late February 2014), the top indicators suggest that the short-term priority will be for AE to craft a next-generation infrastructure for online and hybrid programs. What additional or competing priorities may emerge for AE will likely unfold in the brief span of the ensuing six to twelve months.

The phase of this program review that brings in external reviewers is welcomed as a rare opportunity to have illumination from informed peers who are focused exclusively on UO AE and its context.
Appendices List

1. History of Extension
2. AE Organizational Summary, January 2014
3. UO Academic Extension Web Development and Database Design
4. AE Call for Proposals, Summer 2014
5. Online Enrollment by Academic Year
6. Online Education Enrollment Trends
7. Sample Comparator Schools Ranked by Online Courses
Continuing Education Enriches Lives and Stays True to Its Founding Mission into the Next Century

Turning 100 years old is a celebration of history, achievement, and change. The University of Oregon’s Academic Extension—known over the years as the Extension Division, Continuation Center, and Continuing Education—hit its century milestone this past fall. In its 100-plus year history, Extension has stayed true to its mission of bringing the university to the people of Oregon.

When the Extension division was officially established in 1912, it was at the urging of then-president Prince Lucien Campbell. Campbell enlisted a philosophy professor on leave from the University of Michigan to find out what Oregonians wanted from their university. The answers would soon come to include traveling lecture series, a film and slide service, community welfare projects, teacher reading circles, and formal instruction on topics from comptometer operation to debating.

From its beginnings in Portland, Extension offered courses in English, math, and drawing to employees of the Portland Railway, Light & Power Company. Regular teaching began in 1913, and the Portland Center was organized in 1917. Portland, though, was geographically inaccessible by much of the state, and as early as 1895, hundreds of homes throughout Oregon became classrooms for correspondence students.

In 1932, Extension merged into a statewide unit within the Oregon State System of Higher Education (OSSHE), the precursor to Oregon University System (OUS). The statewide unit was known variously as General Extension or Division of Continuing Education (DCE). In 1978, General Extension/DCE was eliminated as a centralized OSSHE unit and distributed to institutions around the state, and UO DCE was established.

Extension found a new home at the Beaver-ton CAPITAL Center in 1985. In 1987, UO Portland Center was established in the Willamette Block building in Portland at 2nd and Yamhill.

In 2003, UO Continuing Education programs vacated CAPITAL Center and consolidated in UO Portland Center in the historic Old Town district at 2nd and Yamhill. In 2008, Continuing Education relocated to the White Stag Block, joining academic partners in the fields of business, architecture, journalism, and product design, where the Portland campus is located today.

Correspondence courses eventually went the way of the comptometer, but the learn-at-home experience remained in high demand. By the late 1990s, technological advances meant new opportunities for nontraditional learning. Academic Extension first began offering online courses in the academic year 1996-97, with an enrollment of 34. In this 2012-13 academic year, the Distance Education program had an enrollment of 3,745.

Classes in bird study, citizenship, or practical electricity are no longer offered through Extension, but many subjects have remained of interest to students over the years. With assistance from the Extension Division, the UO Department of Botany campaigned in 1921 to preserve wildflowers, trees, and shrubs along highways and parks. Academic Extension now supports the creation and maintenance of sustainable living environments through the Sustainability Leadership and Certificate Program. Since 2003, over 1,300 students have participated in the...
program, with more than 100 certificates of completion awarded.

In the 1920s, Extension encouraged teachers to become students as well, offering special reading circle courses in secondary school methods, teaching for inexperienced teachers, rural school management and health education, and educational psychology. Today, Academic Extension offers Professional Development for Educators courses through multiple program collaboration with the College of Education.

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Today, Academic Extension offers Professional Development for Educators courses through multiple program collaboration with the College of Education.

Academic Extension continues to welcome professionals from other fields as well. The Applied Information Management (AIM) Program was created for working professionals looking to complete a master’s degree while employed full time. The program began onsite in the Portland Center and eventually went completely online. Two hundred ninety-one master’s degrees have been earned through AIM to date.

Intent on serving students from a broad range of age and experience, early Extension faculty handbooks emphasized the differing needs and interests of Extension students. True to that understanding, Academic Extension today offers opportunities for every kind of student, even those without the time or interest to be formally enrolled. Through the Community Education Program, nontraditional students can take regular UO courses without being admitted to the university.

In 1994, it became clear that an extended student body should include mature adults as well as young people and professionals, and Learning in Retirement was begun. This program became the Osher Lifelong Learning Institute (OLLI), a vibrant community of adults learning for their own personal enrichment. OLLI–UO is part of a national network of 120 lifelong learning institutes that receive funding from the Bernard Osher foundation. Through noncredit lectures, short courses, and study and discussion groups, OLLI–UO provides both a community and opportunity to learn with peers.

In 2013, Academic Extension continues to create new educational opportunities and further develop its network of campus partners to embrace change and envision growth for a diverse community. Academic Extension carries the founding mission of Extension into another century, making university education available to all Oregonians.

Extension leaflet promoting statewide campaign to protect native plants

In 2013, Academic Extension continues to create new educational opportunities and further develop its network of campus partners to embrace change and envision growth for a diverse community. Academic Extension carries the founding mission of Extension into another century, making university education available to all Oregonians.
University of Oregon
Academic Extension

January 2014

University of Oregon Academic Extension (AE) serves as the principal information source and coordination point for many outreach efforts related to all areas of the university, including schools, colleges, centers, departments, academic divisions, and individual faculty. AE works closely with academic partners from across campus to deliver both credit and non-credit programs that serve communities and citizens across business, the arts, education, government, and social service sectors, in response to audiences locally, regionally, and worldwide.

UO Academic Extension was founded in 1912 as the UO Extension Office with the mission of bringing education opportunities to the entire state. That goal is carried on today with Online Education, Summer Session, Continuing Education, and Lifelong Learning courses through a variety of subjects. Currently, AE has offices in Eugene, Portland, and Bend, and a virtual presence beyond. Most AE programs are self-support and fee-based; they do not use state dollars. Academic Extension reports to the Office of Academic Affairs.

ACADEMIC EXTENSION PRIMARY STAFF CONTACTS
Sandra Gladney, Interim Co-Director
Paul Katz, Interim Co-Director
Karri Pargeter, Director of Fiscal Services
Organizational Highlights

- Worked with 34 academic departments
- Generated approximately 700 CRNs, serving approximately 7,500 students
- Managed professional development and lifelong learning programs, serving approximately 1,500 individuals

* Spring 2014 data are projected, not actual.

Employee Total: 35–41
- Officers of Administration: 24–28
- Academic Directors: 1
- Classified Staff: 6–8
- Students: 4–6
GENERAL ACCESS TO CREDIT COURSES
Community Education Program (CEP)
Distance Education
Summer Session

REGULAR ACADEMIC YEAR CREDIT PROGRAMS
Degrees and Licenses
Applied Information Management (AIM) Program
Educational Methodology, Policy, and Leadership MS in Canada
Educational Methodology, Policy, and Leadership—Eugene, Sherwood, Bend
Initial Administrator Licensure (IAL)
Continuing Administrator Licensure (CAL)
Reading Endorsement Program
Materials Science Institute (MSI)
Center for Sustainable Materials Chemistry
K–12 Science Outreach
Master's Industrial Internship
Special Programs
Cinema Pacific
DIVA's Behind the Lens Seminar
Oregon Folklife Network (OFN)
Professional Outreach and Development for Students (PODS)
Remedial Math
Studio Arts and Professional Tools
Substance Abuse Prevention Program (SAPP)

SUMMER SPECIAL PROGRAMS
Anthropology Field School
Architecture Academy
Design Camp
Historic Preservation Field School
Northwest Indian Language Institute
Oregon Writing Project
Urban Ducks

PROFESSIONAL DEVELOPMENT
Professional Development for Educators (PDE)
Substance Abuse Protection Program (SAPP)
Sustainability Leadership Workshops and Certificate Program

LIFELONG LEARNING
Osher Lifelong Learning Institute (OLLI)—noncredit academic offerings for mature adults
Road Scholar—summer program in conjunction with the Oregon Bach Festival
Senior Citizen Auditors—Oregon residents, sixty-five and older are eligible

NEW PROGRAMS
Oregon Law Summer Sports Institute
Arts and Administration (AAD)—Mobilizing Local Culture

PARTNERSHIPS AND SPONSORSHIPS
Inside-Out Prison Exchange Program
Labor Education and Research Center (LERC)—Carbon Pricing Policy Workshop
Mindfulness-Based Stress Reduction (MBSR)
University of Oregon Courses for High School Students (UOCHSS)
REGISTRATION SERVICES

Registration
Registration processing—web, phone, fax, and mail
Multiple payment options—check, cash, purchase order, Visa, MasterCard, Americorps, and other tuition assistance plans
On-site registration services
Automatic registration e-mail confirmation
Attendee registration materials assembly and preparation
Badge processing—design, production, distribution
Certificates of participation verified, generated, and distributed—secured electronic PDF or hard copy

Data Entry and Data Management
UO Registrar approved for nonstandard terms
Average of 250 CRNs created every term
Secure database to track patrons, registration, courses, certificates
Coordinates with offices on campus—Registrar, Business Affairs, Student Billing
Provides enrollment reports to program managers and clients
Sends e-blasts from database or Constant Contact to participant and inquiry lists
More than 12,000 contacts for all programs
Liaison with academic departments and university services

CUSTOMER SERVICE

Phone
Phones staffed Monday–Friday 8:00 a.m.–5:00 p.m.
Toll-free and local numbers
Registration by phone
Answer general program questions

E-mail
E-mails answered within 24 hours
Monitor and respond to e-mail inquiries for multiple programs

FISCAL SERVICES

Creates and reconciles annual budgets
Manages foundation accounts
Manages and reports grant accounts
Reconciles customized program collaboration budgets
Payroll—OA, Classified, GTF
Payroll—term-based adjunct instructors, students, etc.
Personnel matters; liaison to HR, AAEO, and UPS
Travel approval and reimbursement
Invoices
Personal Services Contracts

ADVOCACY AND OUTREACH

Education fairs and tradeshows
Open house events
Campus committees

WEBSITE DESIGN AND DEVELOPMENT

Website development, design, and programming
Database integration and online registration
Website maintenance and management
Basic search engine optimization
WordPress site creation and maintenance
Adaptive technology optimization
Website integration with social media
Content writing and development

MARKETING AND ADVERTISING

Print and online advertising development, research, and coordination
E-mail marketing design and execution
Social media marketing coordination and development
Google AdWords and Analytics e-marketing
Promotional product implementation

GRAPHIC DESIGN AND PRINT PUBLICATIONS

Print publication design and execution
Digital and offset print production
Accessible digital publications creation
Trade show materials and event signage
PowerPoint presentation design and creation
Certificate design, creation, and distribution
Interactive PDF development
Workshop and classroom materials development
Original image acquisition
Digital image archive maintenance and management

MEETING FACILITIES

Multiple sites across Oregon
• Eugene
• Portland
• Bend
Audio/Visual and video conferencing equipment available
Room set up and tech support on-site
Organizational Structure
Conference Services Division

**MANAGEMENT**
- Exhibit Management & Sales
- Registration Management
- Program Development
- Meeting Planning
- Marketing & Promotions
- Web Development & Database Design
- Graphics & Publications

**SUPPORT SERVICES**
- Accounting
- Data Management
- Operations & Logistics
- Phone Center

**EMPLOYEE TOTAL: 33–41**
- Professional Staff: 20
- Support Staff: 3–6
- Students: 10–15
Services by Department

EXHIBIT MANAGEMENT AND SALES
Sales service areas:
• Exhibit space, sponsorship, advertising and meeting room sales
• Full service sales force and industry research team
• Database maintenance and development
• Multiple pre-conference campaigns (mail, email, phone, social media platforms)
• Sales collateral — the development, production and distribution of all materials used to promote the event to potential exhibitors, sponsors and advertisers
• Onsite sales meetings for future events

Exhibit management service areas:
• Customer service support — phone, email and web
• Booth application/contract development — development and delivery of exclusively web-based form
• Payment processing — check, Visa, MC, Amex, EFT
• Booth assignment and exhibit contract management — web and email fulfillment
• Floor plan management — design, development and maintenance
• Online floor plan and exhibitor search tool — design, development and maintenance of web-based, dbase-driven interactive environment for exhibitor and attendee use
• Meeting room sales and facilitation (B2B and attendee) — location identification and space design, sale of space and matchmaking service
• Advertising and branding opportunities — identification of opportunities, sale of options and order fulfillment and delivery
• Exhibitor services manual — contract negotiation and arrangement with primary general services contractor and other third party suppliers
• Exhibitor services website — design and maintenance of comprehensive web-based resource for exhibitor planning purposes. Features include access to communications and notices, the capacity to order special services and options, access to third party provider information, staff registration, view account summary and pay account balance.
• Exhibitor logistics communications, notices and reminders — exclusive digital delivery (email, web and text)
• Exhibit publications — the facilitation and production of exhibitor-related information for all delivery models of conference collateral, including printed programs, mobile apps and web platforms
• Lead generation system — sale and fulfillment
• Onsite operations and support
• Post-conference maintenance and follow up

REGISTRATION
• Registration processing — web, phone, fax and postal
• 800 and direct line phone service
• Flexible data capture and pricing structure
• Multiple payment options — checks, cash, PO, Visa, MC, Amex and EFT
• Automatic registration acknowledgment via email
• Online registration re-access (modify attendee registration options)
• Comprehensive attendee confirmation materials — web and email based
• Registration reports — secure, online, real-time
• Attendee registration materials assembly/preparation (packet prep)
• Badge processing — design, production, distribution
• Lead generation system
• Onsite operations — staffing, training, logistics

PROGRAM
• Session proposal and review — web-based system
• Presentation scheduling
• Integrated web-based program search tools
• Personal planner and mobile app integration
• Speaker communications
• Full-service speaker management website
• Integration with external conference apps

MEETING PLANNING
• Site selection
• Facility logistics — food and beverage, meeting room assignments and sets
• Speaker logistics — audio visual, equipment, communications and handouts
• Vendor and subcontractor coordination —hotels, facilities and providers
• Onsite support
MARKETING AND PROMOTIONS
Definition of sellable opportunities:
• Exhibit space
• Meeting rooms
• Sponsorship opportunities — definition and development of sponsorship packages in consultation with the client
• Promotional vehicles and messaging — definition and development of promotional opportunities available for rent or purchase at events. Opportunities include:
  • print advertising
  • signage, banners and clings
  • video messaging
  • mobile app ads (display and notification-based)
  • web-based ads (display ads, headline banners, floor plan rollovers and pop ups and literature downloads)
• games, raffles and other incentivized activities to foster attendee traffic and exhibitor interaction

Process for marketing sellable opportunities and order fulfillment:
• Material development — design and creation of print, PDF, front-facing websites and email communications to promote sellable opportunities
• Messaging campaigns — design and facilitation of postal, email and phone outreach offering opportunities based on the company’s desired promotional outcomes and goals onsite, and its budget
• Website design and database integration — design and development of all front-facing web pages promoting opportunities, and development all order forms and back-end systems to upload artwork and other creative materials for order fulfillment.

WEB DEVELOPMENT AND DATABASE DESIGN
• IT Infrastructure / Services — support and maintenance
• Website — front-facing web design, development, and maintenance
• Inter-system integration
• Back-of house systems
• Database customization and integration — Master Event Database (MED)
• Customized systems development — 3D attendee and exhibits systems
• Mobile app and web-optimized site development

GRAPHICS AND PUBLICATIONS
• Materials design — integration of current look / feel or development of new look
• Publication development — programs and other promotional materials (print, PDF and online)
• Digital delivery — web-based and mobile platforms
• Supplier negotiation
• Production and delivery facilitation

SUPPORT DEPARTMENTS
ACCOUNTING
• Payment and refund processing
• Invoicing and collections service
• Account reconciliation and client reporting
• Payment distribution
• Historical recordkeeping

DATA MANAGEMENT
• Patron data — management, data entry, review and quality control
• Reporting — secure, comprehensive and real-time

OPERATIONS AND LOGISTICS
Graphics, decorations and logistics service areas:
• Project management — timeline development and fulfillment for overall project needs
• Floor plans — design, development and management of all areas of the facility (or facilities) in use by the event in consultation with the client
• Furnishings and decoration — selection and order facilitation for all necessary conference areas and space use
• Structures — design and order facilitation of custom structures
• Graphic design and management — facilitate the design, order process and successful delivery of signs, structures and other large-scale formats such as hanging messaging, props, major entrances (exhibits, keynotes and spotlight sessions), staging and sponsor messaging
• Meetings — face-to-face and phone meetings, and site visits with clients, contractors and facilities, to develop designs and ensure intended plans and use of space are appropriate given the venue
• General contractor liaison — interface with contractors and clients in the design, facilitation and fulfillment of all orders
• Facility logistics — interface with the building to coordinate the approval of space use
• Onsite management and fulfillment — oversee successful event installation
• Data management and record keeping — track orders and maintain historical logistics and graphics records for the event

PHONE CENTER (CUSTOMER SERVICE)
• Centralized customer service center
• Phone support and live chat service
## Education & Nonprofit Client/Event List

**CONFERENCES ANNUALLY: 50–65**

**SIZE OF AUDIENCE:** Ranging from 65–18,000 pp

<table>
<thead>
<tr>
<th>Client or Event (years of service)</th>
<th>Exhibit Management &amp; Sales</th>
<th>Registration Management</th>
<th>Program Development</th>
<th>Meeting Planning</th>
<th>Marketing &amp; Promotions</th>
<th>Web Development &amp; Database Design</th>
<th>Graphics &amp; Publications</th>
<th>Support Services</th>
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<tr>
<td>American Association for Italian Studies (1 year)</td>
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</tbody>
</table>
UO Academic Extension Web Development and Database Design

• IT Infrastructure and Servers—support and maintenance
• Website—front-facing web design, development, and maintenance
• Inter-system integration
• Back-of-house systems
• Database customization and integration—Master Event Database (MED)
• Customized systems development—4D attendee and exhibits systems
• Mobile app and web-optimized site development

IT Infrastructure / Servers
Our data systems evolve over time as new and superior systems become available at reasonable cost. On average, we get a three- to five-year useful life from our servers. At the moment, we use Dell- and HP-based servers hosted on the UO network to provide the bulk of our data-processing capacity. We operate five primary servers—e-mail, file-contact-and-calendar sharing, web development, live web, and a failover and backup web server. In addition, we perform nightly offsite backups to remotely mounted storage provided by UO network services. All servers are supported by two-hour uninterruptible power sources (UPS).

Our primary backend software systems are open-source: Linux, Apache, PHP, and PostgreSQL. These systems have proven to be powerful, reliable, and extremely low-cost to set up and maintain. Our in-house IT staff is able to meet the majority of our systems-management requirements, but we occasionally engage contractors to provide specific expertise on these systems.

Website—front-facing web development
Our staff builds public web-based interfaces for client organizations based on consultation with them to negotiate specifications. The types of websites and interfaces we build are manifold, but the most common are:

• Program website
• Online shopping cart
• Conference website
• Conference program browse and search
• Registration
• Call for Presentation—Submission and review
• Volunteer signup—Team and task selection, confirmation
• Exhibit management—Tradeshow exhibitor portal
• Conference planner

The clients we work with have widely varying needs and expectations regarding the websites they ask us to build on their behalf. In many cases, the organization will provide
existing graphic elements, logos, or even full websites from which to take design cues, and our programmers and designers are then tasked with matching or extending the existing design.

**Inter-system integration**

In a number of cases, partner organizations have existing data systems with which we must exchange information in real time, as a user is interacting with our front-facing web pages. For example, a user registering for an event may be offered an opportunity to renew their membership benefits with the organization hosting the event. To confirm that the registrant is a current member, during the course of the user’s registration, we will perform a server-to-server remote lookup on the host organization’s membership system using a secure API that they provide and document.

**Back-of-house systems**

The front-of-house systems tend to have fairly short lifespans, often being significantly refreshed or completely rebuilt annually to reflect changes in web-interface trends or evolving marketing. Back-of-house systems, on the other hand, are much longer-lived, and are significantly more complex. The information captured via our front-facing websites is collated, reviewed, edited, processed and reported via these systems.

**Database customization and integration—Master Event Database (MED)**

The MED is a modern web-based system designed with a backplane-architecture that is essentially the foundation that supports and encompasses event management modules. The MED will eventually be deployed organization-wide for AE; current early-phase development is led by Conference Services. Both staff and client organizations log into the MED to browse, search, edit, organize, and report the information flowing in via the front-facing systems.

Currently the modules supported in the MED are:

- Attendee Registration (this module is partially supported in the MED, and partially in the legacy 4D Attendee Registration system described below).
- AV—Audio-visual equipment orders
- CRM (Customer Relations Management)—Track the customer’s participation across modules and events.
- Conference Program—Manage the event’s call-for-proposals, proposal peer-review process, sessions, speakers, etc.
- Cross-module Reporting
- Exhibits—Manage the event’s trade-show setup, floor-plan, exhibitors, etc. (This module is partially supported in the MED, and partially in the legacy 4D Exhibits system described below)
- Volunteer—Manage volunteer teams, tasks, assignments and communications

The MED is designed to allow new modules to be added without difficulty as they come online. It provides a standardized security and access control framework, and a uniform user interface.
Customized systems development

4D attendee registration system
This legacy system was until recently the sole repository and management platform for all attendee registration data and registration setup. It is built on the 4th Dimension database, a proprietary database development platform and language, and is primarily used to support attendee registration. The 4D Registration system is one of our oldest, predating the Internet as a public platform.

As business began to move overwhelmingly to the web some years ago, our staff built custom software libraries to allow 4D to be used in conjunction with our web server, significantly extending its life cycle.

4th Dimension as a platform has proven to be extremely flexible and extensible, but it is no longer a leader in the market, and is not as stable and reliable as modern lower cost (and free) open-source alternatives. Given that, we have been working to migrate the functions previously handled by this system to the MED. A significant milestone in that migration was reached in late 2013, when we transferred the processing of Conference Services' attendee registration data from this system to the MED.

Currently, the 4D Attendee Registration system is used to configure the data structures that define an event's registration options, such as the name of the event, dates, prices, sellable options, etc. Eventually, these setup processes will be migrated to the MED, and this system will be decommissioned.

4D exhibits system
This system is used to store, configure, process, and report an event's exhibit related data and settings. Similar to the 4D Conference system, this is a legacy system based on the 4th Dimension platform, and is of similar vintage. It has also been extended via custom software so that it may communicate with the web.

As with the 4D Attendee Registration system, plans are underway to do a stepwise migration of functionality away from this system to the MED. This process will begin in earnest in late 2014 to early 2015.

Mobile app and web-optimized site development
Conferences and programs increasingly use mobile apps (phones and tablets) to deliver timely, targeted information to their audience. We have seen a dramatic shift in this direction in recent years, to the point that printed communications previously used to make conference information available to attendees are in many cases no longer offered or reduced in scope.

While we don't offer in-house mobile application development, we quite often act to guide and support our client's work with an outside app developer. Our role is to facilitate and clarify communication between the app developer and event management, help them define and specify the app, and to construct conduits for event-specific information intended for app upload. For example, lists of conference sessions, presenters, exhibitors, and attendees
are available to the conference team, but are constantly in flux as the event is prepared. That data must be specifically formatted and delivered on a scheduled basis to the app provider—in some cases in real time via server-to-server API as changes are made to the information.

In addition, there is often interaction between web-based attendee information made available via the event website, and similar information made available to them via their handheld device. For example, an event planner, when an attendee indicates in advance which sessions they plan to attend. While the attendee might initially establish their planner via their computer browser at home or work, they would like to seamlessly transition to using that same information via their mobile device when they travel to the event. Our staff works with the app developer to create API interactions that allow this transition.
Call for Proposals
UO Academic Extension
Summer 2014

UO departments, centers, academic divisions, and individuals are invited to submit proposals for new programs that would benefit from collaboration with UO Academic Extension and are to be delivered in Summer 2014.

The mission of University of Oregon Academic Extension (AE) is to advance the general UO missions in education, research, and service by extending UO faculty expertise into new markets and populations. AE is a venue for creative and entrepreneurial academic engagement by UO faculty into broader markets and communities. This includes wider geographical, demographic, and social distribution, including but not limited to nontraditional and place-bound students, K-12 service, professional education and development, alumni and retirees, and individuals in professional transition.

New program initiatives could draw from a diverse array of formats, locations, delivery modes, and audience needs, available as either credit or noncredit, to serve communities and citizens across various industry sectors and educational pursuits. Current examples include institutes, field schools, intensive workshops for professionals, subject-specific workshops, lifelong learning, and much more. A brief listing of types of assistance Academic Extension can provide is provided on the next page.

Summer term allows students, instructors, and community members the opportunity to learn about a new topic or work on a project that is not typically available during the academic year. Dates for Summer 2014 are June 23 to September 5.

Note: While this call is for projects to be held in Summer 2014, AE is available to assist with development and delivery of activities and programs year-round.
APPLICATION PROCESS
Applicants are encouraged to consider one- or two-year proposals. The second year of funding for two-year proposals will be contingent upon demonstrated progress during year one.

Submission materials:
PHASE ONE: Preliminary Proposals submission materials:
- Short description (max one page) of proposed project including potential target audience, delivery location/format and anticipated funds and resources needed.

PHASE TWO: Projects will be identified from initial proposals and invited to submit more detailed materials for the final selection phase. These materials will include
- Description of proposed program/project
- Approximate size and scale (e.g. participation, instructional needs, physical space)
- Target audience(s)
- Development and delivery time line
- Sample projected budget (including requests for start-up funds)

Proposal submissions should be sent as PDF attachments via e-mail to aeprograms@ce.uoregon.edu.

Time line:
Friday, November 15, 2013—For optimal consideration materials must by submitted by 5:00 p.m. Other proposals may be considered after this date if additional requests can be accommodated.

Friday, December 13—Proposal(s) selected and campus partner(s) notified. Invited proposals will submit project details by January 3. Final selections will be notified by Friday, January 10.

Monday, June 23—First day of summer term.

Questions:
Please send any questions to aeprograms@ce.uoregon.edu and an Academic Extension staff member will get back to you.

ACADEMIC EXTENSION
The Academic Extension office is equipped to provide scaled levels of assistance for programs, including the following:

Registration Services
- Registration processing
- Certificates of participation

Data Entry and Data Management
- Secure database
- Liaison with academic departments and university services

Customer Service
- Phone
- E-mail

Fiscal Services
- Customized program budgets
- Payroll
- Personal Service Contracts

Advocacy and Outreach

Website Design and Development

Marketing and Advertising
- Print and online advertising
- E-mail and social media design and execution

Graphic Design and Print Publications
- Print publication design and execution
- Interactive PDF development

Meeting Facilities
- Multiple sites across Oregon—Eugene, Portland, and Bend
- Audio/Visual and video conferencing equipment available

GENERAL INFORMATION
http://academicextension.uoregon.edu
541-346-4231

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UO Online Enrollment by Academic Year
(Duplicated Headcount)

UO Online Education Enrollment Trends

Academic Year

- **Number of sections (CRNs)**
- **Unique titles**

Total Enrollment for Year

- **2008–09** (5765)
  - Fall: 46
  - Winter: 60
  - Spring: 147

- **2009–10** (5994)
  - Fall: 62
  - Winter: 60
  - Spring: 164

- **2010–11** (6310)
  - Fall: 69
  - Winter: 62
  - Spring: 181

- **2011–12** (7421)
  - Fall: 91
  - Winter: 69
  - Spring: 214

- **2012–13** (8410)
  - Fall: 91
  - Winter: 69
  - Spring: 263

Sections and Titles

- **2008–09** (5765)
- **2009–10** (5994)
- **2010–11** (6310)
- **2011–12** (7421)
- **2012–13** (8410)
# Online Education at UO AAU Peer Schools

<table>
<thead>
<tr>
<th>AAU Public Institutions</th>
<th>Centralized / Decentralized</th>
<th>Online Courses</th>
<th>Online Undergrad Degrees</th>
<th>Online Graduate Degrees</th>
<th>Online Certificates</th>
<th>MOOCs</th>
<th>Fee Structure</th>
<th>Residency Differential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indiana University</td>
<td>Centralized (Indiana University Online)</td>
<td>Over 100</td>
<td>5 fully online, 9 degree completion</td>
<td>2 Doctoral, 22 Masters</td>
<td>25 UG, 23 GR</td>
<td>Yes, Google's Course Builder</td>
<td>Tuition varies by program</td>
<td>Yes</td>
</tr>
<tr>
<td>The University of North Carolina at Chapel Hill</td>
<td>UG Centralized (Carolina Courses Online), GR Decentralized</td>
<td>Over 100</td>
<td>None</td>
<td>2 Doctoral, 3 Masters</td>
<td>6</td>
<td>Yes, Coursera</td>
<td>Separate tuition</td>
<td>Yes</td>
</tr>
<tr>
<td>University of Colorado Boulder</td>
<td>Centralized (Continuing Education), + Center for GR Engineering</td>
<td>Over 100</td>
<td>None</td>
<td>5 Masters</td>
<td>1 GR</td>
<td>Yes, Coursera</td>
<td>Separate tuition</td>
<td>No for UG, Yes for GR</td>
</tr>
<tr>
<td>The University of Iowa</td>
<td>Centralized (Continuing Education)</td>
<td>Over 100</td>
<td>1 fully online, 2 degree completion</td>
<td>None</td>
<td>2</td>
<td>Yes (minimal); Open Courses</td>
<td>Tuition varies by program</td>
<td>No</td>
</tr>
<tr>
<td>University of Washington</td>
<td>Centralized (Professional and Continuing Education)</td>
<td>50-100</td>
<td>2 degree completion</td>
<td>15 Masters</td>
<td>40</td>
<td>Yes, Coursera and edX</td>
<td>Separate tuition</td>
<td>No</td>
</tr>
<tr>
<td>University of Virginia</td>
<td>Centralized (School of Continuing and Professional Studies)</td>
<td>50-100</td>
<td>None</td>
<td>7 Masters</td>
<td>3 UG, 8 GR</td>
<td>Yes, Coursera</td>
<td>Separate tuition</td>
<td>Yes</td>
</tr>
<tr>
<td>University of Oregon</td>
<td>Centralized and Decentralized</td>
<td>50-100</td>
<td>None</td>
<td>1 Masters</td>
<td>None</td>
<td>No</td>
<td>Varies</td>
<td>Varies</td>
</tr>
<tr>
<td>University of California, Santa Barbara</td>
<td>Decentralized</td>
<td>Limited</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>No</td>
<td>Not found</td>
<td>Not found</td>
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</tbody>
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