



UNIVERSITY
OF OREGON

Academic Extension

Program Review Response

June 2014

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General Comments

The 2013-14 academic year program review cycle was the first review process of this kind for Academic Extension (AE). The effort resulted in many valuable artifacts, including:

- The Self-Study document that serves as convenient orientation tool for new employees, academic partners, administrators, etc.
- Confirmation of strengths of current staffing.
- Enhanced understanding of AE's internal organizational structures, informing short-term decisions about areas in need of additional staffing.
- Documentation of forces converging at this point in time across UO and the broader region that mark this time of transition, including desire for broader UO leadership in shaping the role of AE within UO.

External Review Committee

The External Review Committee phase took place over two months in spring 2014. The site visit took place April 16-18, 2014. There was general consensus by staff and review committee that the format was efficient and effective.

**Report of the
External Review Committee
University of Oregon Academic
Extension**

May 15, 2014

David Grebel, Chair
*Past President, Association for Continuing Higher Education
Director of Extended Education, Texas Christian University*

Anne Heinz
*Dean, Continuing Education
Associate Vice Chancellor, Summer Session, Outreach and Engagement
The University of Colorado, Boulder*

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*Associate Provost and Dean, Continuing Education
The University of Iowa*

The **committee's report is embedded, in its entirety**, into this document to provide a single summary of both the committee's observations and the AE Interim Co-Directors' responses.

We, the AE Interim Co-Directors, appreciate the expertise demonstrated by the committee members, and the depth of understanding they shared as professional colleagues in related areas of their respective institutions. At the same time, we acknowledge that "academic extension" encompasses a very broad array of functions and varies greatly from one institution to another, making it nearly impossible to fully contextualize recommendations based on such a brief time of review.

Observations of the Current State of Academic Extension

The observations described on page 1 of the External Review Committee report are consistent with our views.

We are proud of our current staff and relationships with both academic leaders and faculty. It was rewarding that our shared leadership, and individual strengths, were recognized.

The Academic Extension External Review Team conducted its site visit to the University of Oregon on April 17 – 18, 2014. The purpose of the review is to provide observations concerning the current state of Academic Extension (AE) and make suggestions based on those observations and the team's professional expertise. The following report is divided into two parts encompassing those observations and suggestions.

Observations of the Current State of Academic Extension

AE and its component parts (Conference Services and Continuing Education) operate in a largely decentralized environment within the University. This decentralization has created opportunities for program development but given AE's varying ties to academic units, it has also contributed to an inconsistency in advancing the overall UO mission. Nevertheless, this decentralized structure has enabled the entrepreneurial growth of high quality programming within AE. Part of the current challenge is to channel that growth in a sustainable way that will further embed AE programs and approaches into UO in support of its mission as a comprehensive, residential research university serving a broad range of constituents.

Strengths

During our visit we observed the following strengths in Academic Extension:

Staffing and Support

1. Strong support from current academic leadership.
2. Long-term, talented and dedicated staff.
3. A collaborative work environment which is supportive of the professional development of staff.
4. Strong current leadership in Paul Katz and Sandra Gladney. Paul provides leadership in conducting professional conferences, conference budgeting and management. Sandra provides vision and leadership in program development and skill in cultivating key relationships with academic departments that partner with AE to provide distance and on-line programs and courses.
5. Strong support from engaged faculty.

Programs and Processes

1. AE takes an entrepreneurial approach to program development resulting in the ability to provide flexible and innovative responses to program needs.
2. AE provides a place to test new programs and approaches and generates the resources to incubate important programs.
3. AE's Conference Services provide a comprehensive set of support services for a broad array of local, state, regional and international trade shows and

General Observations

To the extent that AE in some areas appears to “lack” coherence or definable scope, we assert that this is the result of viable and appropriate responsiveness to the diverse needs of our academic units.

Conference Services

Conference Services is an integral component of Academic Extension, serving campus groups and extending services to affiliated organizations nationally, providing University exposure, creating opportunity for student involvement, and critically, generating revenues in support of high-risk Continuing Education programming.

Budget

Budget protection, as noted, is not currently at issue, due to carefully managed program resources and maintenance of the AE program investment pool. The recommendation to provide incentives for program development and provide returns to the Colleges coincides with current planning in AE.

conferences. They have developed a successful financial model and have innovated a number of outstanding web products to support conference program development.

4. AE has developed significant expertise in the design and assessment of online education.

Challenges

General observations

1. Although AE is engaged in a number of excellent programs, they seem to have resulted from the initiatives of particular faculty and staff and lack some institutional coherence and sense of direction.
2. AE has not clearly defined the population that it serves. This lack of definition has not limited AE's work but it has made it difficult to determine its scope.
3. Although the particular faculty who are engaged with AE are strong supporters of its work it is evident that AE is relatively unknown among the broader faculty.
4. Given contemporary distance and on-line education approaches university administrators need to be involved in the AE services.

Conference Services

1. Currently Conference Services is a “bolt on.” Although it is a significant revenue generator it struggles to articulate its benefit to the university beyond creating visibility for the university and providing internships for UO students.
2. Conference Services perceives that it is unable to engage significantly with academic units due to a lack of financial support from the university. We emphasize perception as there are apparently carry over funds.

Budget

1. AE needs a budget model that encourages innovation and balances risk/reward.
 - a. There is currently no budget protection for exposure taken in course development. While currently not an issue as revenue has exceeded expenditures; self-sufficiency at the unit level may limit creativity and risk taking behavior.
 - b. There are currently no budget incentives to develop innovative programming.
 - c. The revenue shares with the university should be reviewed. As currently structured they create a disincentive for some kinds of program activity.

The tuition differential needs to be reviewed. The change of institutional governance, away from an Oregon University System model to an independent governing board, will likely lead to explorations in the next two years of policies, practices, and operations; this could develop new systems regarding tuition models.

Leadership

While AE has been challenged in the past by a “lack of significant participation in higher academic conversations on campus,” progress is well underway to expand AE’s integration through the leadership of the Senior Vice Provost, AE staff participation in key committees, AE’s new program outreach initiatives, and direct engagement from the Interim Co-Directors with multiple offices across campus.

Examples of current such activities in AY 13-14 include:

- AE’s Summer Request For Proposals resulted in 10 program proposals and launching or enhancing 4 projects
 - Summer Sports Law Institute, in Eugene
 - LERC workshops in Climate Change regulations
 - NILI online complement to language preservation and teaching methods
 - Mobilizing Local Culture, institute/graduate course, AAD in Portland
- AE collaboration with UO Libraries to create Instructional Technology Referral Office (InTRO), providing a resource to all UO faculty to navigate decentralized resources for technology-enhanced education
- Sandra Gladney participating in various campus committees including the Intellectual

Property committee for implementation of CBA

- Sandra Gladney proactively connecting with various institutional leaders to explore goals of the respective offices and the role for Academic Extension, e.g. Roger Thompson, Enrollment; Andy Berglund, Graduate School
- Rejoining Education Advisory Board, Continuing and Online Education forum
- Expansion of AE participation in key professional associations, such as University Professional and Continuing Education Association, and its new subgroup for Summit of Online Leaders

d. It was not possible with the provided information to evaluate the financial success of individual activities with the need to balance against reversions.

2. The differential between residential and non-residential tuition and fees must be addressed. Otherwise the disincentive for academic units to collaborate with AE will persist (such as the issues that inhibit collaboration with Arts & Sciences and other schools). This may also affect tuition revenue paid by out-of-state matriculating students.

Leadership

1. The co-leadership of Paul and Sandra has been sufficient for an interim period. However this leadership model will likely be detrimental to AE’s long term mission.
2. A key challenge is AE’s lack of significant participation in the higher academic conversations on campus. This absence is exacerbated by the current shared leadership structure.

Online

1. The purpose and direction for online learning through AE is not well defined. Other than the AIM degree there is no current plan for online to support extension, degree completion, online degrees or other initiatives.
2. AE lacks a systematic approach to online course and program development. Currently, it seems that course and program development are driven by individual faculty interest with little or no direction from schools and colleges.
3. Not unlike a number of other universities, there is ambiguity about who currently has the charge for online learning at UO. The learning management system is overseen by the library, teaching effectiveness and its relationship to online are housed in a separate department while AE has the most robust capacity for design and assessment of online education. The steps taken to develop the INTRO program will help to address this challenge but they lack strategic direction from upper level academic administration.

Suggestions for future directions

Academic Extension’s strength in its staff, programs and infrastructure can be leveraged to make significant future contributions to the University of Oregon and its various constituents. In the sections below we offer some suggestions that we believe will help AE make those contributions. Some of these are drawn from AE’s “Big Ideas” section found in the program review self-study.

Suggestions for future directions

Leadership

Though the Co-Directors have met with considerable success driving Academic Extension forward, and have experienced a partnership of great strength and mutual support, nonetheless, the Co-Directors are anticipating the selection of an Executive Director or Dean.

As a best possible outcome of the External Review, the hope is that Sandra Gladney be more fully recognized at all levels of the University for leadership and experience, and either be appointed the leadership role in Academic Extension, or should a new search ensue, be regarded as an extremely strong candidate.

Online

AE does not seek to have the lead role for the enterprise-wide Learning Management System. There was discussion of the potential to manage a secondary LMS for non-credit activity if the implementation of the new enterprise-wide system, having the priority of serving credit-based course integration, does not prove to be fully functional for non-credit needs.

Leadership

AE has been hampered by a lack of voice and presence in the larger academic conversation at UO. This situation has led to some disconnect with the broader UO mission and limits the university's ability to leverage AE's remarkable strengths. It is important that a single leader participate in those higher level conversations in order to better integrate AE into the university.

It may be prudent for AE to report to a dean rather than an executive director in order to facilitate involvement in those higher level conversations. Regardless of title, the person in that position should have considerable experience in continuing education including significant operational experience. Academic credentials would be an asset.

We believe that UO should seriously consider Sandra Gladney for the role of executive director or dean of AE. Sandra brings the very experience that the university needs in this important position. We understand that her lack of a terminal degree may be problematic if the position is raised to dean. In any case, UO should seek to retain and utilize her talents and experience.

Online and distance education

As noted earlier AE has developed significant capacity and expertise in designing and assessing online education. AE's expertise should be utilized as UO moves forward in its plans for expanding online education.

1. AE should become the hub for online learning initiatives at UO. Significant infrastructure is currently in place but AE will require additional investment in its capacity to coordinate, design and assess online learning. AE will also require investment in student support services such as advising and in the necessary capability to insure compliance with state and federal regulations.
2. AE should be charged with providing additional general education classes online in support of the residential community. These could provide a path to fully online degrees.
3. AE should consider developing online professional certificate programs to fill a need for post-baccalaureate education that does not require a degree. Some of these could build on existing programs in sustainability, education and architecture.
4. AE should be given the lead role on campus for online education including responsibility for the learning management system.
5. AE should take the lead with the INTRO program. This program could support teaching effectiveness efforts such as developing a learning community composed of online instructors.

Community Linkages

AE is in a position to provide leadership for online education. Whether that encompasses a breadth of areas and audiences (e.g. undergraduate gen-ed, non-credit professional development, applied graduate degrees), or a particular area/audience, is yet to be clarified by institutional leadership.

The InTRO project is new and evolving, and its scope should become clearer over AY 14-15. Whether AE should "take the lead" or foster a spin-off unit remains to be determined. Factors could include new leadership in TEP, leadership of the new Dean of Libraries, and clarity about prioritization of online education and/or technology integration for campus-wide mission and strategic position.

Community Linkages

New initiatives are already in progress this academic year, including a pilot OLLI outreach in Florence through collaboration with Lane Community College. Exploratory conversations are underway with residents of Salem and other broad geographic areas, too. On the Central Oregon side of the state, AE's administrative oversight of the Bend Center has fostered collaborative program support beyond the OLLI program site there to include shared resources with Advancement efforts at expanding community connections.

Conference Services

Given the financial health of AE at this time, moving more strongly toward serving campus needs, and subsidizing the true costs of faculty, and administrator, sponsored meetings is possible and potentially very beneficial for the University.

The Conference Services and Continuing Education divisions have thoughtfully considered which services can be integrated for maximum efficiency, such as IT infrastructure for database hardware and server system maintenance. Careful ongoing analysis of unique needs between Conference Services and Continuing Education divisions has consistently led to customized

systems (e.g. registration, finance) enabling more robust systems than generally provided by third party vendor systems; for this reason we are not currently, nor do we seek to be, fully integrated.

AE has established a number of important linkages to Eugene, Portland and other parts of the state through programs directly managed by AE and others supported in a variety of ways. Those linkages can be enhanced through additional programs and through utilizing the Baker Building as UO's face to Eugene.

1. AE should consider whether the Osher Lifelong Learning Institute should be expanded to other locations within the state, analyzing the costs and benefits.
2. AE should develop collaborative opportunities with other UO programs that provide lifelong learning and enrichment opportunities to the community.

Conference Services

Conference Services provides a unique resource for conference and trade show management. They have developed a remarkable suite of tools and expertise that are not currently leveraged to the university's advantage. Conference Services provides a significant portion of AE's non-credit revenue stream.

1. Conference Services should engage with UO thru additional support of campus based academic meetings. Rather than requiring additional funding from UO, a limited amount of funding should be made available through conference services external income.
2. Conference Services and Continuing Education should identify duplicative services and find ways to leverage those services (e.g.: registration, finance).
3. Conference Services should be consolidated into the Baker Building.

Financial

1. The differential between residential and non-residential tuition and fees must be addressed. Otherwise the disincentive for academic units to collaborate with AE will persist (such as the issues that inhibit collaboration with Arts & Sciences and other schools). We understand that the university intends to address this issue in the near future.
2. AE is poised to provide significant expertise to the campus. However, some academic programs that the university may identify as being strategic may require a subsidy.

Summary

Academic Extension is staffed by dedicated and competent personnel who are dedicated to the future development of the department's work in collaboration with the university. It appears that the department is perceived as providing quality programs and services but remains relatively isolated from the university as a whole. The current capability of the department should be better integrated with the university and its academic mission in order to increase the value of its contributions to the University of Oregon and the community.

Financial

AE traditionally accepts responsibility for high-risk programming. AE does and will continue to subsidize programs identified as strategically important given the financial resources required.

Future Recommendations

Now that a self-study model exists for AE, it can serve as a template for future review cycles.