Higher Education Needs Assessment
Request for Proposal

Presented to the Board of Regents, State of Iowa

Steve Stembridge
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Pearson Strategic Partnerships
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Dr. Robert Donley
Executive Director and Chief Executive Officer
Board of Regents, State of Iowa
11260 Aurora Ave.
Urbandale, IA 50322

October 7, 2015

Dear Dr. Donley:

It is my pleasure to provide the enclosed narrative and referenced materials to the Iowa Board of Regents in response to the *Higher Education Needs Assessment Request for Proposal.* Pearson's meaningful presence in the state of Iowa, core competency in the market research and consulting activities needed, and the methodologies described within this response meet all of the specified requirements within the RFP and will greatly benefit the Board of Regents and the students and citizens of Iowa.

Pearson is positioned to be the most effective partner with the Iowa Board of Regents. Pearson will work closely with the Iowa Board of Regents to determine the current and long-term demand for various undergraduate and graduate degree programs and certificates in the greater Des Moines area. Pearson will also assist in determining the optimal location for a Regents Resource Center. Importantly, Pearson is uniquely aligned on all aspects of the RFP, detailed within this response, which includes collecting and analyzing primary and secondary data, conducting stakeholder interviews, focus groups and surveys. We will use all of the intelligence gathered to provide fact-based and reliable recommendations to the Board regarding the types of programs, site location, and delivery modes that will make the new Regents Resource Center a successful and substantial addition to the higher education landscape in the state of Iowa.

Pearson has deep and meaningful connections with the state of Iowa. Pearson has a presence in Iowa City, and two of our team members assigned to this project have more than 40 years (combined) experience in higher education in the state of Iowa.

In summary, you will find the attached response to the proposal provides a thorough and detailed plan for the project.

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Thank you for the opportunity to present our ideas and solutions. We look forward to proving our strategic value to you and the Iowa Board of Regents. Please do not hesitate to contact me if you have any questions.

Best Regards,

Steve Stembridge
Executive Director

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PROPOSAL RESPONSE

1. Basic Data on Bidder:

   a. Name, telephone number and address, including email of Bidder.

   Pearson

   2510 North Dodge Street

   Iowa City, IA 52245

   Steve Stembridge

   Executive Director | Strategic Partnerships

   steve.stembridge@pearson.com

   Cell: (952) 797-3621

   Office: (651) 756-8816

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b. Name and title of individual authorized to bind the Bidder and submit the proposal.

Chris Shenk
SVP, Sales & Business Development

c. Name e-mail address and telephone number of person the Board may contact during the proposal evaluation process.

Steve Stembridge
steve.stembridge@pearson.com
Cell: (952) 797-3621
Office: (651) 756-8816

d. Form of business - e.g. sole proprietorship, partnership, corporation, Not-for Profit organization. If a non-Iowa corporation, indicate state of incorporation.

Pearson Education is a corporation incorporated in the State of Delaware.

e. Whether the business is owned or controlled by a parent corporation. If yes, provide the name and address of the parent corporation, nearest offices and managing office where the project staff assigned to this project will be located.

Pearson Education, Inc.
330 Hudson Street
New York, NY 10013

f. Whether the Bidder is a small business or certified targeted small business as defined in Iowa Code (2015) section 15.102.

No.

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2. Executive Summary – this part of the response to the RFP should be limited to a brief narrative highlighting the bidder's proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The summary should describe the following:

   a. Bidder's understanding of Regents' needs.

   b. Scope of services being proposed.

   c. Qualifications and Experience in higher education research and needs assessments.

   d. Brief List and Description of Similar Projects Completed (client, scope and duration of assessment, outcome, and client contact name).

   e. High Level Project Execution Plan.

The Pearson Higher Education strategic consulting group understands the Iowa Board of Regents seeks to determine the current and long-term demand for various undergraduate and graduate degree programs and certificates in the greater Des Moines area. And, determine the optimal location for a Regents Resource Center (RRC) from which to deliver the majority of the educational programs in the metro area.

The services our team will provide include collecting and analyzing primary and secondary data, conducting stakeholder interviews, focus groups, and surveys. We will complete market research for the proposed RRC and comparatively analyze similar higher education centers and markets. We will investigate regional and national trends and provide well-informed recommendations for program offerings, optimal locations, and delivery modes to maximize student enrollment (page 10).

Our team is excited to share and apply its deep experience in higher education marketing and research as well as corporate marketing and research. Two members of our team have extremely close ties to Iowa higher education and together have more than 40 years of higher education experience in Iowa. Their experience includes extensive work with all sectors of Iowa higher education and on inter-institutional projects involving close work with Regent institutions and on state-wide initiatives such as the Iowa Communications Network.

Our team has deep practitioner experience and extensive subject matter expertise in higher education institutional strategy and operations, teaching and learning, and educational and administrative technologies. Our team combines this experience with rigorous research and analytic methodologies to provide objective strategic guidance and data-informed recommendations. In particular, we work with institutions to evaluate and improve performance, analyze institutional and market data, and identify and execute on high-leverage growth strategies.

In the past four months, our Consulting Services team has begun or concluded engagements with four institutions of various sizes which reflect the range of expertise and capabilities our team can provide:

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- A small, technical college in Canada to develop a digital transition strategy and explore opportunities for the possible launch of competency-based education programs,
- A mid-sized community college in the Midwest to evaluate their existing online program portfolio, recommend programmatic revisions and enhancements to the student academic experience, and advise on the planning for growth of blended and face-to-face programs at a satellite campus,
- A large community college system in the South to guide technological investments and implementation to support a major re-launch of the state's workforce education training programs,
- A six-campus community college system in the Mid-Atlantic to integrate data and systematic program review processes into its academic program strategic planning, as well as the facilitation of an innovation retreat with the college Cabinet to identify key risks and opportunities and begin outlining plans to address them in the next three years.

For the purposes of conducting location analysis required in this project, Pearson proposes working with the Atwell Group, a national consulting, engineering, and construction company with deep experience in location analytics, GIS, and data mining. A description of Atwell Group location analysis services and resume of the lead consultant and GIS coordinator for the location analysis portion of this project is included with other Pearson Team members. Additional examples of work and projects, including higher education projects, are included in *Appendix A*. Atwell Group consultants will function as part of the Person team and all work on this project will be supervise by the Pearson lead consultant and project manager, including work performed by the Atwell Group.

A well-organized, detailed methodological approach will efficiently guide the execution of our work (<mark>page 15</mark>). After conducting a kickoff session with Board of Regents project staff to outline all necessary details and logistics for this project, our team will develop a detailed project plan in consultation with the Board of Regents and subject to its approval. The project plan will include project milestones and deadlines for key deliverables. We will provide regular project updates and activity reports as agreed upon in the project plan. And, we will complete project deliverables and milestones according to an agreed upon schedule in the project plan.

3. Company Background – the following information is requested to evaluate the Bidder's financial stability and ability to support the commitments set forth in response to the RFP. Please include at a minimum the following:
    a. How long the company has been in business.

    Pearson Education, the global leader in education content, technology, and services, reaches more than 130 million learners worldwide. We trace our beginnings back to 1724. Our customers represent every segment of education—education associations and organizations, corporations, for-profit colleges and universities, public and
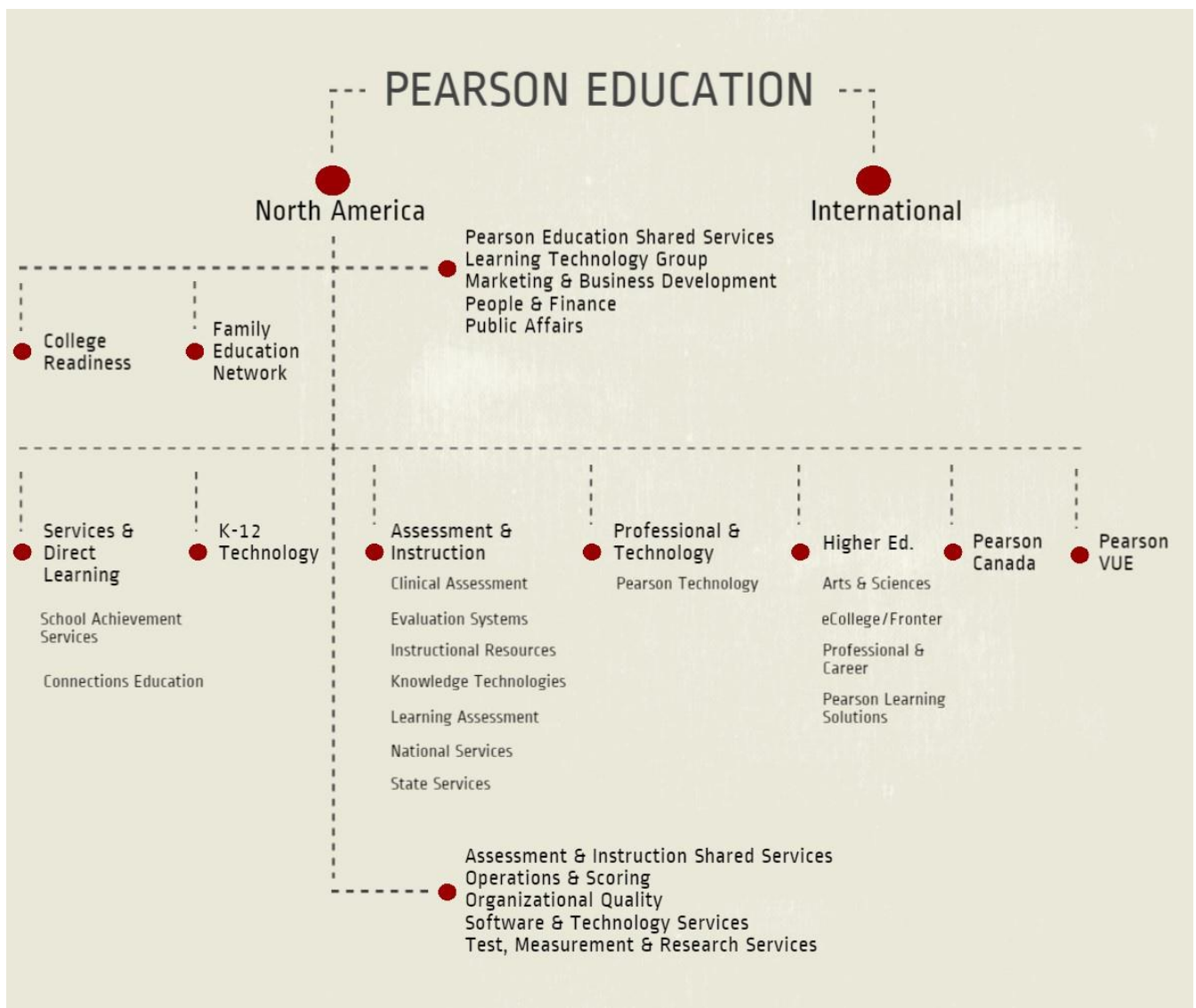
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private not-for-profit colleges and universities, community colleges, and both public and private K-12 schools—thus enabling the Board to benefit from innovative research and development spread over a large customer base.

b. A brief description of the company size and organizational structure.

Pearson's more than 40,000 people serve all manner of education providers. Pearson Education provides learning materials, places of learning, technologies, assessments, and services that help people everywhere aim higher and fulfill their true potential.

Though we generate approximately 60% of our sales in North America, we operate in more than 70 countries. For example, our offices are in Australia & New Zealand, India, Europe, North America, South/Latin America, Asia & Pacific, Africa & the Middle East, and the United Kingdom.

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c. How long the company has been working with 1) higher education clients; 2) government clients; 3) commercial clients performing similar services.

Pearson is a pioneer in developing and delivering innovative solutions, and has provided learning and instructional design services for more than 35 years. Our content, technological, and advisory resources are comprehensive, allowing us to provide a full range of support in building and delivering high quality online programs. Furthermore, because of our size as a company and our vast client network, we work with many third parties to provide additional resources to ensure that our customers benefit from the most effective solutions to meet their needs. Pearson has partnered with hundreds of institutions to develop and implement learning management systems; content management systems; media-rich, highly interactive custom courses delivered in online and blended formats; and full scale online programs.

Pearson offers a dedicated team with more than 20 years of association and organization experience. We have developed pricing options and contracts that can be crafted to fit non-profit organizations. We understand how to assist non-profit organizations in building programs that can drive non-dues revenues, increase membership, reduce training expenses, and expand learning outcomes within an association's educational offerings.

Please also refer to http://timeline.pearson.com/ for information on Pearson's timeline beginning in 1724.

d. Recent annual financial report or bank references for evaluation of financial capability to satisfactorily complete the requirements of this RFP.

Vendor financial viability is an important consideration when selecting a business partner. With revenues of $9 billion annually, the company's stability is unmatched in the educational marketplace and Pearson's more than 40,000 employees serve all manner of education providers. As a publicly traded company (NYSE symbol: PSO), all Pearson financial reports are available at http://www.pearson.com/investors/.

4. Qualifications and Experience
a. Additional information deemed pertinent to 2c above.

Regarding 2c, all pertinent information regarding qualifications and experience has been provided throughout the proposal.

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Select work samples and other information for the Atwell Group are included in *Appendix A*. In particular some example map visualizations from two select projects are included. In the first, the GIS Map shows site selection attributes for placement of solar panel facilities. Site selection criteria have been integrated with GIS maps to provide a visual summary of key geographic and other data. In the second example, the map represents site selection criteria that integrates a variety of data layers including migratory patterns for bird species, land use, wetlands designations, and FEMA flood plain categorizations. The proposed location analysis section of this project would similarly integrate a variety of data sets as determined in the engagement discovery and stakeholder phases to evaluate the proposed and additional locations in the Greater Des Moines area.

b. A list of personnel to be assigned to this RFP, their functions in the project, length of tenure, and a detailed resume of each.

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The following Pearson consultants will be assigned to this project fulfilling roles as outlined below.

- **Paul Bowers, Strategic Consultant**—Lead Project Consultant, Situation Analysis, Stakeholder Analysis, Project Management. Joined Pearson 01/2015.
- **Steve Rheinschmidt, Strategic Operations Consultant**—Stakeholder Analysis, Community Profiling, and Academic Analysis Lead. Joined Pearson 09/2012.
- **Keith Lewandowski, Academic Operations and Administration Consultant**—Program Feasibility and Marketing Analysis Lead. 01/2015.
- **Lindsay Baun, Strategic Consultant**—Location Analysis Consultant. Joined Pearson 03/2015
- **Daniel Goldsmith, Consultant Manager**—Quality Assurance, Location Analysis, Program Feasibility and Marketing Analysis Support. Joined Pearson 01/2015.

Paul Bowers, Strategic Consultant, Learning Strategy

Paul has worked at the forefront of higher education innovation for 30 years. His robust experience with online learning includes academic program development, marketing, student services, faculty professional development, enrollment management, process development and systems, and budget management and forecasting. He has experience as a higher education executive, overseeing Cleveland State University's online learning program, and serving as VP of Professional and Graduate Studies at Hiram College. Paul has also worked in the business world, providing strategic consulting on how to grow adult and online learning programs, leading Blackboard's Strategic Consulting business. Paul has served on the Board of the Instructional Management System (IMS, now IMS-Global), the Board of Advisors for the Monterey Institute NROC open courseware project, and on the Iowa Educational Telecommunications Committee, the educational oversight body for the Iowa Telecommunications Network, one

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of the largest distance learning networks in the world. He is has a BA in Theatre and an MA in Broadcasting from Hiram College.

Steve Rheinschmidt, Strategic Consultant, Institutional Performance

Steve is an expert in program strategy and management, change leadership, scalability, sustainability, and student retention and success. Prior to joining Pearson, Steve was the Executive Director of the Iowa Community College Online Consortium (ICCOC), a voluntary, self-supported partnership between seven Iowa community colleges to offer online courses and degree programs and provide comprehensive student support services. In 2010, he was one of 30 distance education leaders from the US and Canada invited by the Bill and Melinda Gates Foundation to participate in a day-long conversation focusing on quality measures in, and the future of, online education. This team's work contributed to framing Next Generation Learning Challenges Grants. Steve has served on the advisory boards for IMS Global Learning Consortium, Monterey Institute for Technology in Education/NROC, WCET's Educational Consortia Common Interest Group, and the Iowa Statewide System for Online Learning. His additional experience spans more than two decades as a community college practitioner including admissions, academic advising, institutional marketing, athletic director, coach, TRIO, and online student services.

Keith Lewandowski, Strategic Consultant, Institutional Performance

Keith has held several roles in higher education in the areas of marketing, admissions, and research, most recently serving as the Director of Marketing and Admissions for Wentworth Institute of Technology's College of Professional and Continuing Education. Prior to his tenure at Wentworth, Keith worked in both research and marketing positions at Eduventures, a higher education research and consulting firm. He began his career in higher education working as a Research Assistant at the Institute for Community Inclusion, an academic research center at the University of Massachusetts, Boston. Keith's areas of specialty include academic program development, administration, and strategic planning. He holds a BA in Political Science from the University of Massachusetts, Amherst and an MA in Applied Sociology from the University of Massachusetts, Boston.

Daniel Goldsmith, Consulting Manager, Institutional Performance

Daniel leads the Institutional Strategies team for Pearson Consulting Services. Daniel is an experienced consultant specializing in using advanced analytical techniques to solve complex challenges. For the past 10 years, he has worked with leading private and public sector organizations to identify new opportunities, manage critical challenges, and transform organizations. Prior to joining Pearson, Daniel worked in higher education at Eduventures, where he helped develop the firm's educational technology practice, at the MIT Sloan School of Management, where he conducted research on strategy, management, and digital business. He has also worked outside education at the United States Senate, in private equity, and as a management consultant for a global strategy firm. He completed an MBA at the Brandeis International Business School and a BA in government from

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the University of Virginia, and has published more than 15 peer-reviewed articles on management and quantitative methodologies.

Gerald M. DiGiusto, Ph.D., Director, Pearson Higher Education Consulting Services

Gerry has worked in higher education, both in the US and Europe, for nearly 20 years as a teacher, researcher, and consultant. Prior to joining Pearson, he was Managing Vice President, Research & Data at Eduventures, an information services and consulting firm serving clients in higher education. In his consulting work, Gerry has focused on institutional strategy and growth planning, implementation of innovative educational delivery models, development of successful online degree programs, restructuring of teacher training programs, and enrollment management operations and strategy for public and private institutions. Earlier in his career, he was a professor of political science and international relations at Bowdoin College and Princeton University. He earned his BA at Bowdoin College and his MA and Ph.D. at Duke University.

LOCATION ANALYSIS PARTNER

Should Pearson be selected as the provider for this project, Pearson proposes working with the Atwell Group to provide location analytics expertise and data analysis. Atwell Group is a nationally recognized leader in GIS, location analytics, and business intelligence. The lead consultant for location analytics for this project would be Michelle Bacon from the Atwell-Group.

Michelle Bacon, GIS Coordinator, Surveying & Mapping

As GIS Coordinator, Michelle plans, organizes, coordinates, and participates in the development and implementation of various geographic information systems; directs and participates in the long-term development and enhancement of GIS information technology to meet client mapping and end user service objectives; supervises and performs GIS modeling duties; and provides expertise, direction, support, assistance, and guidance for business operations to Atwell staff and clients. She collaborates directly with the leadership team and decision makers in other departments to identify, recommend, develop, implement, and support cost-effective geospatial technology solutions for all aspects of the organization. Michelle also identifies emerging information technologies to be assimilated, integrated, and introduced within the company, and acts as a liaison with related external clients and organizations.

Resumes have been provided in *Appendix B.*

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c. Information concerning terminations, litigation and debarment. Bidder shall provide answers to the following questions:

i. During the last five (5) years, has the Bidder had a contract for services terminated for any reason? If so, provide full details related to the termination.

No contract has been terminated in the last five years.

ii. During the last five (5) years, describe any order, judgment or decree of any Federal or State authority barring, suspending, or otherwise limiting the right of the Bidder to engage in any business, practice, or activity.

Pearson is, to the best of our knowledge, not currently under suspension or debarment by any state or the federal government of the United States. To the best of our knowledge, Pearson is also not tax delinquent with any state Department of Revenue or state Department of Labor and Industry. Pearson acknowledges that, if currently under suspension or debarment, or if owing delinquent taxes, this proposal may not be accepted or considered.

iii. During the last five (5) years, list and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the Bidder to perform the required services. The Bidder must also state whether it or any owners, officers, or primary partners have ever been convicted of a felony. Failure to disclose these matters may result in rejection of the bid proposal or in termination of any subsequent contract. This is a continuing disclosure requirement. Any such matter commencing after submission of a bid proposal, and with respect to the successful Bidder after the execution of a contract, must be disclosed in a timely manner in a written statement to the Board.

We know of no pending litigation or administrative actions against Pearson that will materially impact our ability to provide the services described in this RFP response.

iv. During the last five (5) years, have any irregularities been discovered in any of the accounts maintained by the Bidder on behalf of others? If so, describe the circumstances of irregularities

No.

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5. Statement of Scope – A clear statement of scope is required from each bidder that demonstrates their understanding of this project and how their past engagements provide them with the insight/skills/tools needed to complete this work.

General Scope and Approach

Pearson understands that the American Institute of Business (AIB) located in in Des Moines has closed operations and has gifted the 20-acre campus to the University of Iowa for use as a Regents Resource Center. Consequently, the Iowa Board of Regents seeks to:

- Determine the current and long-term demand for various undergraduate and graduate degree programs and certificates in greater Des Moines.
- Determine the optimal location in the Des Moines metro area for a Regents Resource Center (RRC) from which to deliver the majority of the educational programs.

Pearson Consulting proposes to undertake the research necessary to provide the Board of Regents with data, information, and recommendations to assist in determining the optimal location and undergraduate and graduate degree programs that best meet the local demands of prospective students and employers in the Des Moines metropolitan area.

Specifically, Pearson consultants will conduct a rigorous needs assessment and provide the Board of Regents with a complete Higher Education Needs Assessment for the proposed RRC located in Des Moines with the following key components:

- **Situational Analysis** (RFP sections C.5)—An environmental scan of local and regional factors affecting the location of an RRC and program offerings, including a comparability analysis of 3-5 similar higher education markets with similar centers located in urban/suburban settings.

- **Regents University Needs Assessment and Program Identification** (RFP sections C.1.1, C.2, C.5)— Stakeholder analysis from individual and small group interviews with key academic leaders at the three state universities and a review of relevant documents and data to determine a list of proposed programs and assess program needs and opportunities for the RRC.

- **Community Profile and Needs Assessment** (RFP sections C.1.2, C.3, C.5)—A summary of key economic, demographic, geographic, and other relevant information from public sources and stakeholder interviews and surveys useful to evaluating program demand, location suitability, and learner preferences.

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- **Learner Profiles and Needs Assessment** (RFP sections C.1.2, C.4, C.5)—A profile and segmentation of prospective students and their perceptions, preferences, and other needs for accessing education programs proposed for the RRC, including demand, program delivery mode, format, scheduling, and motivations.

- **Program Market Analysis** (RFP sections C.3, C.5)—Evaluation of market demand for specified programs proposed for the RRC including assessment of primary and secondary data sources along with recommendations for program viability and market sizing.

- **Location Analysis** (RFP sections C.3, C.5)—Analysis of the proposed RRC location and including demographic and geographic analysis including proximity to work, home, commercial and retail establishments, and the interstate; availability of convenient and free parking; ready access to public transportation; and safety. The location analysis will also include a comparative analysis of other potential locations in the Des Moines metropolitan area as well as identification of program specific location considerations.

- **Answers to Additional Research Questions** (RFP section C.4)—Additional research questions identified in Section C.4 of the RFP will be generally addressed in the other components of the Needs Assessment Report as appropriate. Any remaining research questions not otherwise addressed will be included in this component.

Data Collection Methods

Pearson consultants will complete the Higher Education Needs Assessment for the proposed RRC in Des Moines through a number of research and analysis methods including:

- Stakeholder interviews conducted in person and via phone, including at least one day of scheduled interviews at each of the three university campuses, plus three additional days for other in person stakeholder interviews in the Des Moines Metropolitan area, and up to two additional days of phone interviews.
- Stakeholder focus groups, primarily with prospective and current students, and employers and business leaders.
- Review of existing data and information about current programs and other internal and external scanning data.
- Review and analysis of comparative national data for information related student preferences for program modes, formats, schedules, and other relevant data.
- Comparative data and profile analysis for 3-5 similar urban/suburban higher education centers and market.
- Surveys of prospective and current students, parents, employers, and businesses (survey instruments to be developed in coordination with Board of Regents project staff).
- Initial market data analysis, including secondary data to evaluate up to 20 programs for general viability and market sizing.

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- Further competitive analysis of up to 10 programs to further determine program viability, including primary data and further analysis of secondary data.
- Location analysis within a Geographic Information System (GIS) of the AIB and up to three additional locations combining geographic and demographic data analysis to determine optimal locations.
- On-site location review for the proposed AIB site and up to three additional locations.
- Recommendations for optimal location(s), priorities for program offerings, program scheduling and modalities, and other program characteristics related to student needs.

Deliverables

The deliverables for this project will include:

- Completed Higher Education Needs Assessment Report, including components specified under General Scope and Approach above.
- An Executive Summary included with the Higher Education Needs Assessment Report.
- All supporting data, including survey results, interview summaries, market analysis data, and GIS analysis results.
- Detailed project plan, based upon input and collaboration with Board of Regents project staff.
- Interim findings for program selection and viability, comparative analysis of similar higher education centers, and summary of stakeholder analysis.
- Interim and final presentation and handouts of results and findings as presented to the Board of Regents during the project.

Timelines

Anticipated project completion, within four months of approved and finalized project plan. More detail on a proposed project schedule will be address in the next section.

Assumptions

The Board of Regents will be responsible for:

- Coordinating and organizing availability of faculty and staff at the three Regents universities and providing names, titles, and contact information, based upon the project plan.
- Providing available contact information for area businesses and employers, key policy-makers, and other educational providers and assistance in making contact to schedule and organize interviews.
- Reviewing a list of proposed or desired programs for initial market evaluation as identified in stakeholder discussion. This proposal specifies up to 20 programs for initial market demand analysis, with up to 10

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programs for further analysis. Additional programs can be evaluated with adjustments to the overall scope, cost, and timeline.

- Providing any required information or data about existing programs offered at the university and other appropriate internal scanning documents or data.
- Responding to questions or communication necessary for completion of the project within appropriate time frames to ensure timely project completion.

Pearson consultants will be responsible for:

- Conducting a kickoff session with Board of Regents project staff to outline all necessary details and logistics for this project.
- Developing a detailed project plan, in consultation with the Board of Regents and subject to its approval with project milestones and deadlines for key deliverables.
- Providing regular project updates and activity reports as agreed upon in the project plan.
- Completing project deliverables and milestones according to a schedule agreed upon in the project plan.

Pearson Engagements and Experience

Pearson has developed and implemented solutions to enable thousands of higher-education institutions, community colleges, K-12 schools, and other education organizations enhance and power their academic experience and operations. The size and scope of our engagements ranges from some of the largest programs in the world, including state consortiums and multi-campus environments, to medium and small-scale programs offered by various public and private institutions. Our Educational Partners serve traditional 4-year higher education students at both the graduate and undergraduate levels, as well as career-oriented, non-traditional students striving to balance personal, professional, and educational challenges.

Pearson Consulting Services offers a diverse range of academic consulting capabilities to help higher education institutions and their leadership address crucial strategic challenges and seize opportunities to improve the student experience, drive improved learner outcomes, and keep pace with the changing educational landscape. Our team has deep practitioner experience and extensive subject matter expertise in higher education institutional strategy and operations, teaching and learning, and educational and administrative technologies. Our team combines this experience with rigorous research and analytic methodologies to provide objective strategic guidance and data-informed recommendations to help institutional leaders navigate their greatest challenges and seize their greatest opportunities. In particular, we work with institutions to evaluate and improve performance, analyze institutional and market data, and identify and execute on high-leverage growth strategies.

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In addition, Pearson provides a full set of online program management services for more than 50 higher education partners with more than 250 programs currently under management. Pearson conducts extensive program market research to identify programs with growth potential and to determine program viability, market sizing, competitive analysis, and enrollment forecasting. The market feasibility studies combine quantitative research from primary and secondary sources including IPEDS, Bureau of Labor Statistics, and Google Searches, as well as competitive and peer group analysis.

In the past four months, our Consulting Services team has begun or concluded engagements with four two-year institutions of various sizes which reflect our familiarity with the community college sector and the range of expertise and capabilities our team can provide:

- A small, technical college in Canada to develop a digital transition strategy and explore opportunities for the possible launch of competency-based education programs.
- A mid-sized community college in the Midwest to evaluate their existing online program portfolio, recommend programmatic revisions and enhancements to the student academic experience, and advise on the planning for growth of blended and face-to-face programs at a satellite campus.
- A large community college system in the South to guide technological investments and implementation to support a major re-launch of the state's workforce education training programs.
- A six-campus community college system in the Mid-Atlantic to integrate data and systematic program review processes into its academic program strategic planning, as well as the facilitation of an innovation retreat with the college Cabinet to identify key risks and opportunities and begin outlining plans to address them in the next three years.

In addition members of the Pearson Consulting Services team bring years of experience with higher education institutions, educational services providers (including market research and analysis for education), and corporate and retail businesses. Two members of the Pearson consulting team have more than 42 years' experience working in higher education in Iowa including extensive work with all sectors of higher education and on inter-institutional projects involving close work with Regent's institutions and on state-wide initiatives such as the Iowa Communications Network. One is a graduate of the University of Iowa. Other members of the team have deep experience in both higher education and corporate marketing and research, including program viability analysis and retail location analysis.

6. Methodology – A clear description of the methodology to be used to meet the requirements of this project.

Project Methodology

The following table provides a summary of key components of the Higher Education Needs Assessment Report and methodological approach for each.

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Component	Purpose	Methodology	Work Products
Situational Analysis Sec C.5	• Establish context and relevant background information. Reiterate the purpose and outcomes of the needs assessment • Identify existing data relevant for program and location analysis	Review existing documents, data, and relevant regarding the universities, community, and region	• Summary of findings and relevant data • Selection of existing data to be integrated with program and location analysis
Regents University Needs Assessment and Program Identification Sec C.1.1 Sec C.2 Sec C.5	Assess the general needs and goals of the universities for an RCC, identify specific programs for market analysis, target potential student populations, identification of program partners	• Stakeholder interviews individually and in small groups • Review of current program and enrollment data	• List of programs for market evaluation • Summary of individual program needs and requirements • Summary of target student populations by program • Summary of general needs and observations
Community Profile and Needs Assessment Sec C.1.2 Sec C.3 Sec C.5	Identify and assess relevant demographic, geographic, and economic data for the Greater Des Moines area, including the eight contiguous counties, Identify local employer needs, assess response of potential program partners and other educational providers, identify and assess key policy issues affecting establishment of the RCC, identify other local needs or conditions that could impact the RCC.	• Stakeholder interviews • Program partner interviews • Focus groups • Employer surveys • Review of existing public data and information	• Summary demographic profile for the Greater Des Moines region, by county, and by sector within Des Moines • Summary of stakeholder interviews, focus groups, and surveys
Learner Profile Needs Assessment Sec C.1.2 Sec C.4 Sec C.5	• Identify learner-focused preferences and needs for programs, program delivery modes, formats, scheduling, and other preferences. • Identification of motivations for students seeking programs at RRC	• Survey of current and prospective students • Survey of parents • Focus groups with current and prospective students • Comparison with national data on learner preferences and motivations	• Summary and analysis of survey data and focus groups • Analysis of student preference for on-campus or RRC attendance and potential impact on campus programs • Analysis of national data compared to survey and focus group data • Recommendations for programs, program delivery modes, formats, and scheduling and other learner-focused preferences

Component	Purpose	Methodology	Work Products
Program Market Analysis Sec C.1 Sec C.5	Evaluate market demand for programs identified as possible offerings at the RCC	Secondary Data collection and analysis or market data, in-depth profiling and competitive analysis, market sizing	• Phase one analysis of initial viability of up to 20 programs • Phase two analysis of up to 10 programs based on phase one results
Location Analysis Sec C.3 Sec C.5	Evaluate proposed AIB location in comparison to other general locations in the Greater Des Moines Area	• Various demographic and geologic information within a GIS environment • Integration and analysis of results from surveys, focus groups, and stakeholder analysis interviews	• Comparative and multivariate analysis of AIB and other locations • Maps and visualizations of data analysis summary • Database of all GIS location analytics data • Location recommendations by proposed program

Additional Methodology Detail

Pearson proposes the following methodologies in response to each of the four criteria in section C of the RFP.

C.1 DEMAND FOR EDUCATIONAL PROGRAMS IN GREATER DES MOINES

Upon identification of the complete program list through the stakeholder analysis phase, Pearson proposes a two-phased market research approach to evaluate demand for educational programs. Phase One will allow for an initial evaluation of multiple programs while Phase Two will provide a deeper analysis of the strongest opportunities for development, based on The Board of Regents' review of Phase One analysis. The rationale behind the two-phased approach, outlined below, is based on speed, efficiency, and cost containment.

In Phase One, Pearson will collect and analyze key market indicators via secondary research for each program and provide a recommendation to The Board of Regents regarding the strength of opportunity for each program. The intended outcome is to provide a ranking of program ideas by strength of opportunity so that deep-level research and analysis (Phase Two) is dedicated only to the most promising programs.

- Phase One data collection and analysis:
  - Conferment trends *(as available)*
  - Competitive environment summary (e.g. number of providers)
  - Most common related occupations
    - Median salary
    - Requisite education
    - Projected labor demand

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- Projected credential inflation
- Brief literature review for insight into field

In Phase Two, Pearson will conduct more extensive research for those programs which The Board of Regents would like to further scrutinize for potential development, given the outcome of Phase One work. During this stage Pearson will integrate Phase One and Two research findings to provide an overall evaluation on the strength of the opportunity for program development.

For each program evaluated in Phase Two, Pearson will also provide actionable recommendations on how The Board of Regents can successfully launch, grow, and sustain enrollment should it pursue development. More specifically, Pearson will recommend: market differentiation strategies; pricing strategy; suggested curricular options that will provide both high quality outcomes as well as serve as a source of differentiation; and any other strategies that may help The Board of Regents to grow enrollment at its proposed RRC site.

Finally, Pearson will estimate enrollment size for each program, accounting for total market size, enrollment levels among existing providers, and The Board of Regents' brand recognition locally.

The results of Phase Two analysis will provide all of the needed inputs to make a data-based decision regarding program launch as well as to provide a wealth of supporting data needed during the go-to-market stage.

- Phase Two Data collection and analysis:
  - Survey current and prospective students and parents of current and prospective students
  - Interviews with select, relevant industry contacts
  - Interviews with additional internal and external stakeholders as requested
  - In-depth profiling of 10 -12 competitors, to include:
    - Cost
    - Positioning
    - Delivery mode(s)
    - Program length
    - Program format(s)
    - Target audience
    - Partnerships *(where available)*
    - Coursework
    - Programmatic accreditation *(where applicable)*
  - Estimated student market size

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Assumptions

- The initial market evaluation will include up to 20 distinct programs. The secondary evaluation will include up to 10 programs. Additional programs can be included at both levels, but would require a change of scope and additional cost.

- All program evaluations for both phases will be conducted as a group. After an initial list for each phase is finalized, additional programs would require a change of scope and additional project cost.

C.2 DEMAND FOR DES MOINES RRC AMONG MAIN CAMPUS PROGRAMS

As part of the larger stakeholder analysis phase of work, Pearson will conduct in-person meetings with appropriate Provosts and Vice Provosts, Deans and Associate Deans, and other academic leaders on the three university campuses to discuss their interest in an RRC located in greater Des Moines and the value to their programs. The goal of these conversations will be to elicit input on potential program offerings, other opportunities for experiential learning or partnerships, and key requirements for programs. Pearson consultants would also work with the Board of Regents to develop a brief RFP document for Colleges and departments to formally propose programs for the RRC and provide uniform information and general data useful to the initial market evaluation. The results of this part of the stakeholder analysis will be used to generate a list of proposed programs for initial evaluation as outlined above.

In addition to assessing overall demand on campuses, Pearson consultants will use data collected throughout the project from surveys and stakeholder conversations to test assumptions about perceived needs for proposed programs and potentially identify other possible program areas for consideration.

C.3 LOCATION OF RRC

Data for evaluation of the RRC location will come from a variety of sources, including:

- Prospective and current student focus groups.
- Employer and business leader interviews.
- Stakeholder conversations with campus leaders, other potential educational partners.
- Surveys of employers, parents, and prospective and current students.
- Analysis of demographic and geographic data using GIS technology.
- Other relevant economic data.
- Proximity to potential educational partners.
- Results from campus leader stakeholder discussions, particularly for program specific needs or requirements.

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Survey data will be used to identify key factors influencing location for current and prospective students. Other stakeholder conversation will help identify other needs related to location. Geographic information within a GIS will help identify proximity to businesses, freeway exits and traffic corridors, and location police, fire, and safety locations. GIS analysis will also recognize concentrations of populations with certain demographic characteristics to further distinguish proximity to desired student populations, as well as aid in establishing the appropriate database for geographic mapping. Pearson consultants will also gather other information regarding traffic patterns and accident rates, crime statistics, the availability of parking and public transportation, and other relevant factors. Pearson will create a matrix that compares locations based on several factors incorporated in a cost path analysis performed within a GIS. Ultimately the GIS analysis will provide recommendations on the weighting of factors and a scoring methodology to rank location suitability.

Assumptions

- This proposal will include evaluation of up to three locations in comparison to the AIB location. Additional locations can be included with a change of scope and project cost.
- The Board of Regents can identify additional locations for purposes of this project. The results of Pearson research will yield comparison to three other locations and can provide recommended communities as possible locations.

C.4 ADDITIONAL RESEARCH GOALS

The diverse research methodologies proposed for this project – surveys, focus groups, stakeholder conversations, and external scanning data – provide the means to address questions regarding the preferences of prospective and current students for program delivery mode, format, and scheduling as well as other similar questions. In addition, one purpose of the comparative analysis of 3-5 other similar markets and higher education centers is to learn what effective practices and trends have emerged in other cities. Similarly, Pearson will assemble and review other available national and regional research that can provide a basis for recommendations about program delivery, support for students, and other operational aspect of the proposed RRC.

Project Work Plan

The proposed project involves complex analysis of a variety of factors affecting the desirability of programs and location for the proposed RCC with a diverse array of stakeholders. To effectively manage the collection and analysis of data, Pearson proposes six phases to this project. Although these phases are somewhat sequential, they will run concurrently through some portions of the project. These project phases include:

Planning · Review Existing Data · Stakeholder Analysis · Research · Analysis · Final Report
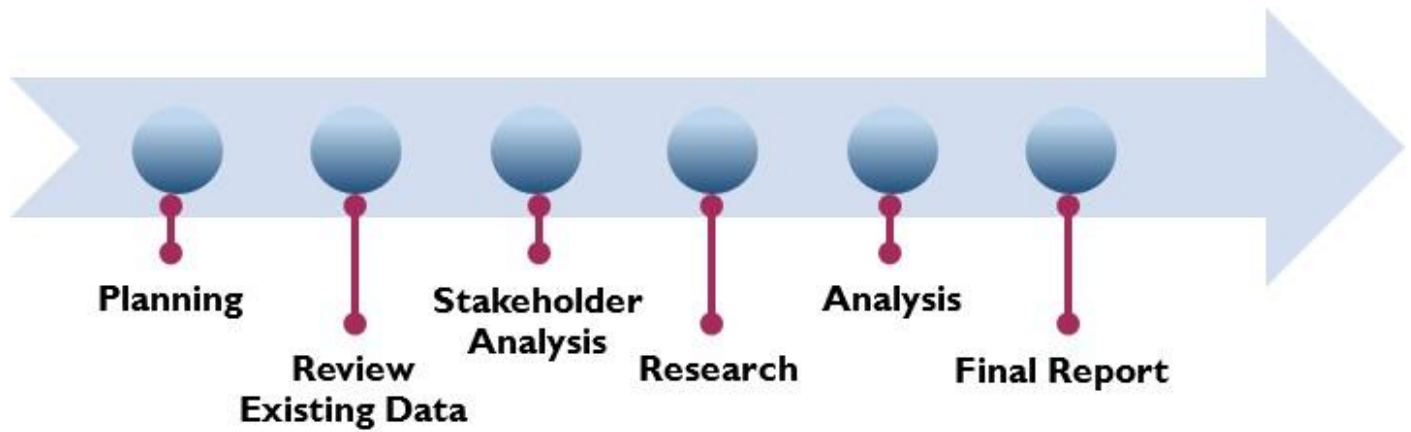
The **planning phase** will consist of developing a project plan identifying key targets for both programs and prospective stakeholders, finalizing logistical details, identifying existing data and documents for review, and establishing key project milestones. Critical in this phase of the work will be the design of survey instruments and clarification of key questions to pose in interviews and other conversations.

Next, a careful **review of existing data** and available information about the universities, key policies, student populations, and potential locations will provide the team the necessary background to engage subsequent stakeholder conversations and further research activity.

The **stakeholder analysis phase** will begin with in-person interview, focus groups, and phone conversations and will continue with surveys to prospective and current students, parents, employers and businesses, and others as determined in the planning phase. The first priority in this phase will be to engage campus academic leaders to determine the proposed programs and opportunities or requirements associate with each. The next priority will be to also engage other educational providers to further assess opportunities for collaboration and partnership relative to the proposed program list.

General goals of this phase will be to gather qualitative date and responses to the location of the RCC, proposed programs, potential modes of delivery and schedules, and other business and community perceptions about the value of the RCC to the Des Moines area. Since much of this work will be on-site, the location site surveys would also be included in this phase of the work.

The core of the **research phase** will be to gather relevant market data to evaluate proposed programs, assemble geographic, demographic, and economic data to assess RCC location options, and to collect data on additional questions related to prospective student preferences and perceptions for educational programming.

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The **analysis phase** will focus collating qualitative and quantitative results from the previous phases and identifying key findings supported by the data. The analysis will address the two key goals for this project – to evaluate demand for programs potentially offered through the RCC and determine the optimal location for the proposed RCC. The analysis will support Pearson's recommendations for both programs and optimal location along with additional findings and recommendations that could enhance the success of an RCC located in the Des Moines metropolitan area.

The **final report** will consist of a formal presentation of findings and recommendations to the Board of Regents followed by submission of the Higher Education Needs Assessment Report which will include and executive summary of key findings and results and a detail report for each of the four areas outlined in section C of the RFP. The final report will also include in appendices all of the data from surveys, interviews, document review, market analysis, location analysis, and other research conducted as part of this project.

Project Timelines

Pearson proposes a timeline for this project of 16 weeks. The additional 4 weeks will be necessary to allow for sufficient time to develop survey instruments, identify target lists and contact information, and to provide a reasonable time frame for a good return rate. The work plan also proposes four on-site visits and the 16-week project schedule allows time to coordinate interviews and focus groups and presentations for site visits. The following chart outlines an initial proposed work plan for this project with key activities and deliverable.

Project Components and Milestones	Month 1				Month 2				Month 3				Month 4			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Project Initiation																
Milestone: Project Kickoff and **Site Visit 1**			◆													
Milestone: Final Project Work plan			◆													
Situational Analysis																
Milestone: Summarize key demographic, and geographic data			◆													
Milestone: Select data for integration into other analyses				◆												
Milestone: University Stakeholder Interviews - **Site Visit 2**				◆												
Milestone: List of programs for market evaluation					◆											
Milestone: Summary of program needs and requirements						◆										
Milestone: Summary of target student populations by program						◆										
Milestone: Summary of general needs and observations							◆									
Community Profile and Needs Assessment																
Milestone: Summary profile for Greater Des Moines			◆													
Milestone: Findings of stakeholder interviews and surveys								◆								
Learner Profiles and Needs Assessment																
Milestone: Learner Stakeholder Interviews: **Site Visit 3**							◆									
Milestone: Findings from student survey data and focus groups											◆					
Milestone: Analysis of student preferences and national data											◆					
Milestone: Recommendations program delivery modes													◆			
Program Market Analysis																

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Milestone: secondary data analysis of initial viability					◆									
Milestone: additional data analysis of selected programs							◆							
Location Analysis														
Milestone: Comparative analysis of AIB and other locations							◆							
Milestone: Location recommendations by proposed program								◆						
Final Report and Presentation														
Milestone: Draft Report presentation								◆						
Milestone: Board presentation – Site Visit 4										◆				

7. References – Please provide the contact information and client background for three client references. Submit references for clients that are most similar to the services being proposed for the Board.

North Dakota State College of Science	
Contact	Christine Ahlsten, Distance Education Director
Phone	(800) 342-4325 ext. 3-2238 or (701) 671-2238
E-mail	christine.ahlsten@ndscs.edu
Background	North Dakota State College of Science (NDSCS) had a stated goal of growing online enrollments - both by reviewing current programs and operations, such as student retention, as well as launching new online programs. We provided a structured, data-driven approach to evaluate the drivers of online growth, such as conferral and labor market trends, assessed NDSCS operations, and developed strategic recommendations, including new data-driven approaches to identify and intervene with non-participating online students.

Ohio University	
Contact	Hugh Sherman, Ph.D., Dean
Phone	(740) 593-4489
E-mail	shermanh@ohio.edu
Background	Supporting eight fully online degree programs. Services include Market Feasibility and Research; Marketing; Recruitment; Retention and Student Support; 24/7 Help Desk Support; Instructional Design and Course Development; Faculty Education and Support.

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Maryville University	
Contact	Chuck Gulas, Dean, Walker College of Health/Professor of Physical Therapy
Phone	(314) 529-9474
E-mail	cguls@maryville.edu
Background	Supporting eight fully Online Degree Programs. Services include Marketing, Recruitment, Student Support Services, Instructional Design & Course Development, Faculty and Instructor Training, 24/7/365 Helpdesk.

8. Sample Documents – Submit sample documents of the type of analysis the Board can expect from the work your firm is proposing to do.

Please refer to *Appendices C-E.*

9. Cost of Services – Submit a comprehensive price proposal that outlines rates and hour by each phase and any other costs incurred.

    a. A comprehensive price proposal should be submitted on the basis of "not-to-exceed pricing" for this project. Under a not-to-exceed pricing arrangement, the contractor is compensated for hours and expenses incurred up to a ceiling amount. If additional effort is required, the bidder is expected to complete this effort at no additional cost to the Board. If less effort is required than the contract price, the Board would not be billed for the work.

    Please refer to the information below.

    b. Billings would take place at the completion of key milestones/deliverables. The Board expects bidders to propose a milestone/deliverable schedule that should assume that the Board will retain 10% of every invoice which would be released at the acceptance of the final deliverable.

    Project Pricing

    The following pricing schedule includes all costs for this project. All consulting time and labor will be billed on a not-to-exceed basis. Data acquisition costs reflected in this proposal are based on a reasonable estimate of what might be needed to perform location analytics. Similarly, the additional expense items for each phase are based on anticipated travel and on-site times necessary for this project as outlined in the proposal. Costs for both of these items will be billed at actual costs rather than on a fixed-fee, with a not-to-exceed limit as estimated in the cost table. Should this project be awarded to Pearson, assumptions that form the basis of these estimates can be revisited and revised based on further clarification of needs on the part of the Iowa Board of Regents.

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Consulting Services	Product Code	Hours	Fees
Iowa Board of Regents **Higher Education Needs Assessment**	**Custom** **Consulting**		
Planning and Initial Data Collection			
Situational Analysis		90	$18,000
Community Profile		60	$12,000
Stakeholders Analysis			
Marketing Analysis		90	$18,000
Location Analysis		100	$20,000
Project Management		80	$16,000
Planning and Data Collection Hours and Fees		420	$84,000
Planning and Data Collection Expense Estimate			$7,000
Location Analysis Data Acquisition			$15,000
Research and Stakeholder Analysis			
Situational Analysis			
Community Profile			
Stakeholders Analysis		185	$37,000
Marketing Analysis		280	$56,000
Location Analysis		60	$12,000
Project Management		40	$8,000
Research and Stakeholder Analysis Hours and Fees		565	$113,000
Research and Stakeholder Analysis Expense Estimate			$24,750
Needs Analysis and Recommendations			
Situational Analysis			
Community Profile			
Stakeholders Analysis		20	$4,000
Marketing Analysis		30	$6,000
Location Analysis		60	$12,000
Project Management		40	$8,000
Needs Analysis Hours and Fees			$30,000
Needs Analysis Expense Estimate			$2,250
Subtotal Hours and Fees			$227,000
Subtotal Expense Estimate			$49,000
Total Fees and Expense Estimate		985	$276,000

Proposed Billing Schedule

Per requirements in the RFP, Pearson proposed the following billing schedule for services fees based upon deliverables outlined in the following table.

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Project Phase	Deliverables	Amount
Planning and Initial Data Collection	Situational Analysis Report Target Programs and Populations summary Summary Demographic profile for Greater Des Moines	$ 74,910
Research and Stakeholder Analysis	Summary Stakeholder Analysis and Survey results Summary Learner Profile and Survey Results Phase One of Market Analysis Creation of GIS Location Analysis Database	$ 74,910
Needs Analysis and Recommendations	Phase Two of Market Analysis Location Analysis Initial Draft of Final Needs Assessment Report	$ 74,910
Total		**$ 227,000**

Expense items for travel and data acquisition will be billed at actual rates monthly as accrued.

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ASSURANCES, REPRESENTATIONS AND AUTHORIZATION TO RELEASE INFORMATION

The Bidder hereby assures and represents with respect to this proposal that:

1. It possesses legal authority to submit this proposal; that a resolution, motion or similar action has been duly adopted or passed as an official act of the Bidder's governing entity authorizing the submittal of this proposal, including all assurances, representations contained herein, and directing and authorizing the person signing below to act in connection with the application and to provide additional information as may be required.

2. It will comply with all applicable federal and state equal opportunity and affirmative action requirements.

3. All statements and information made or furnished to the Board are true and correct in all material respects. Bidder has not knowingly made any false statements in its proposal. Bidder acknowledges that supplying any information determined to be false, misleading or deceptive will be grounds for disqualification from consideration.

4. Bidder hereby authorizes the Board to obtain information regarding its performance on other contracts, agreements or other business arrangements, its business reputation, and any other matter pertinent to evaluation and the selection of a successful Bidder in response to this Request for Proposal. It authorizes the Board to research the company's history, make credit checks, contact the company's financial institution, contact former and current clients of the company, and perform other related activities necessary for reasonable evaluation of this proposal.

   - The Bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The Bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the Board or may otherwise hurt its reputation or operations. The Bidder is willing to take that risk.

   - The Bidder hereby releases, acquits, and forever discharges the State of Iowa, Board of Regents, their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions, and references obtained by the Board in the evaluation and selection of a successful Bidder in response to this Request for Proposal.

   - The Bidder authorizes representatives of the Board to contact any and all of the persons, entities, and references which are, directly or indirectly, listed, submitted, or referenced in the undersigned's proposal submitted in response to this Request for Proposal.

- The Bidder further authorizes any and all persons or entities to provide opinions with regard to the undersigned's performance under any contract, agreement, or other business arrangement, and any other matter that is pertinent to the evaluation of the undersigned and is lawfully disclosable. To the extent that: a) the matter disclosed is not subject to any state or federal law governing trade secrets or similar or other protections regarding the confidentiality of data; b) other federal or state law or regulation governing student data privacy or confidentiality, including but not limited to FERPA; and c) the information disclosed is not subject to a non-disclosure agreement with the undersigned, then the undersigned hereby releases, acquits and forever discharges any such person or entity and their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to references supplied to the Board in the evaluation and selection of a successful Bidder in response to this Request for Proposal.

- A photocopy or facsimile of this signed Authorization is as valid as an original.

_____
Signature

Chris Shenk, SVP, Sales & Business Development
_____
Type or Print Name, Title

October 7, 2015
_____
Date

This form must be signed by an authorized representative of the Bidder and submitted to the Board along with Bidder's proposal.

RFP: Higher Education Needs Assessment for the Des Moines Area
ENTITY: Board of Regents, State of Iowa
RFP RELEASE DATE: September 11, 2015

APPENDICES

PEARSON

ATWELL

GIS & MAPPING SERVICES

WHY ATWELL?

- Local expertise, national reach
- Industry knowledge
- Dedicated experts and teams
- Full-service resources
- Aggressive, passionate professionals
- Nimble, flexible structure

CAPABILITIES

Data Modeling & Analysis

- Site Suitability & Constraint Modeling
- Market Analysis
- Site Selection
- Developable Land Analysis
- Land Use Analysis/Planning

Asset Management

- Site & Property Management
- Utility Location & Management
- Real Estate Portfolios
- Infrastructure & Energy Systems
- Custom Asset Management Systems
- Land Acquisition & Right-of-Way Process Management

Project Management Services

- GIS Consulting & Support
- Presentation Materials for Agency Reviews & Permits
- GIS Data Integration
- GIS Application Development
- Data Conversion & Migration
- Data Management & Mapping Solution (PIVIT™)

VISUALIZING VALUE

Today more than ever, real estate and development professionals need timely, targeted information to formulate and evolve their development and management strategies.

The use of Geospatial Information Systems (GIS) compiles data so it can be viewed and interpreted to reveal relationships and trends. It can also combine traditionally fragmented data into an integrated asset management solution.

Atwell offers a dedicated GIS consulting, analysis and mapping team that supports our clients involved in the development of large land parcels, multiple locations or the ongoing management of property portfolios.

SOLUTIONS THAT SURPASS

Real-Time Modeling Resource

Atwell's natural resource and GIS teams partnered to help a regional electric cooperative with a transmission line project in Oklahoma. In mid-construction, the client was seeking recommendations on where to locate diverters on the lines and poles to avoid impacts to whooping cranes during migration.

Using verified crane migration sightings from the US Fish and Wildlife Service (USFWS) and a land cover analysis process, the team was able to model potential "stop-over" locations for whooping cranes during migration and advise the client on construction activities without slowing down construction efforts.

Watershed Management Study

Atwell assisted in the preparation of a web-based educational tool that explored the environmental watershed changes in response to different development patterns. The regional study looked at traditional development versus conservation and sustainable development options in residential, commercial and industrial land uses.

The best management practices were identified and applied to the overall watershed in order to assess the complete effect of potential changes in nutrient loads, stormwater volume and development costs.

Higher Education Experience

Schoolcraft College, Garden City Campus
Livonia, Michigan
For nearly 20 years, Atwell has provided the college with pavement rehabilitation services including the design and replacement of their entire parking field on both campuses comprised of walkways, parking lots and driveways to accommodate more than 3,000 vehicles.

Cleveland State University | Cleveland, Ohio
Atwell was retained to prepare a Clean Ohio Revitalization Fund (CORF) grant application for the redevelopment of 1.735-acres of land located on the eastern edge of downtown Cleveland, in the heart of Cleveland State University. A $2 million CORF grant was requested through the redevelopment-ready track, to prepare the property for mixed commercial, institutional, and residential use.

Kettering University Incubator Building
Flint, Michigan
Atwell provided land planning, land surveying, civil engineering and entitlement approvals for this laboratory facility and associated parking. The building is designed for the support of scientific and technology "startup" companies that need dedicated research laboratories in the first three to four years of their existence. Atwell also provided value engineering to help minimize construction costs.

Adrian College | Adrian, Michigan
Atwell provided full engineering design for a campus ring road, as well the replacement of the majority of parking lots and walkways.

Wayne State University School of Mortuary Sciences | Detroit, Michigan
Atwell provided a Phase I Environmental Site Assessment of the buildings and property located at 627 and 628 W. Alexandrine Ave. on the WSU Campus in Detroit.

Eastern Michigan University – University House
Ypsilanti, Michigan
Atwell provided a boundary survey and layout services for underground utilities and a retaining wall for University House, the president's residence and a campus meeting facility. Atwell also provided construction layout and staking and topographic survey for underground steam tunnel as well as other parking lot improvements.

Eastern Michigan University Tank Farm Ypsilanti, Michigan
Atwell coordinated the removal of multiple 10,000-gallon underground storage tanks in the EMU Maintenance Garage area.

Kent State University | Ashtabula, Ohio
Atwell provided civil engineering and landscape architecture services to facilitate development of this new Health and Science Building.

Oakland Community College | Michigan
Atwell provided an overall campus survey for the Highland Lakes Campus including full topographic and boundary surveys for use with future projects including new development, renovations and expansions. Additionally, Atwell provided surveying, engineering, and construction administration consulting services to assist with the pavement rehabilitation project at the Southfield Campus. The project includes the design and replacement of the entire parking field comprised of walkways, parking lots and the main access drive using a cost-effective pulverized pavement design. Atwell redesigned curb cuts and the stormwater management system in specific areas.

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Higher Education Experience

Wayne State University Marvin I. Danto Engineering Development Center
Detroit, Michigan

The Engineering Center is located on the northeast corner of Warren Avenue and Anthony Wayne Drive on the University's campus. Atwell provided construction layout services for the building's expansion and associated site utilities including the storm sewer, sanitary sewer and water main.

Wayne State University Baseball Field
Detroit, Michigan

Atwell provided survey services and layout for the new baseball field and horizontal and vertical layout for the outfield wall.

The Ohio State University 9th Avenue Parking Garage Expansion | Columbus, Ohio

Atwell provided development consulting including preliminary and final engineering services. The development includes a new six level parking garage with proposed streetscape improvements. Atwell was heavily involved in coordination efforts with multiple oversight authorities, including the City of Columbus and Ohio State University staff, in order to meet specific design requirements which directly affected site utilities design, earthwork operations and phasing of the construction process.

Oakland University | Rochester, Michigan

Atwell provided survey operations for the University's four-story, 136,000 square foot Education and Human Services Building. Detailed scope of work included construction staking for curb, utilities, and mass grading.
Oakland University | **Rochester, Michigan**

Atwell conducted a geophysical investigation to identify the presence/absence of below-grade utilities at the subject site along three or five-foot grid lines in the areas suspected of containing below-grade utilities. To conduct the geophysical investigation, Atwell utilized a ground penetrating radar (GPR) unit and marked the ground surface location of any anomalies identified in the survey.

University of Michigan Student Activities Building Redevelopment | Ann Arbor, Michigan

Atwell provided Alta surveys for the entire Pfizer Campus, aerial topography, field verifications, and boundary surveys. In late 2010, Atwell also provided topographical surveys at the Modular Data Building.

University of Michigan North Campus Research Complex | Ann Arbor, Michigan

Atwell's survey staff worked with the lead architect to provide survey operations necessary to facilitate the rehabilitation and programming change of the existing Student Activities Building.

University of Michigan Vera Baits II Coman House | Ann Arbor, Michigan

Atwell survey staff provided a full topographic survey of the 8.9-acre parcel in accordance with the University's minimum requirements to facilitate design of the dormitory's mechanical infrastructure renewal.

University of Michigan Museum of Art
Ann Arbor, Michigan

The project includes a 54,000-square-foot addition, as well as the complete restoration and renovation of Alumni Memorial Hall which has been the Museum's home since its foundation in 1946. Atwell provided the demolition plan, topographic surveys, civil engineering including sanitary sewer design, storm water drainage design, site planning, verification of existing available water locations, soil erosion control plan, and an existing steam/utility tunnel plan.

Michigan State University Toll Gate Farm
Novi, Michigan

Higher Education Experience

Atwell provided engineering services related to sanitary sewer design that included a pumping facility, an asphalt nature trail compliant with ADA requirements, and parking lot design.

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GIS Experience

Wind Project | **Arizona**
Atwell prepared a GIS database to identify waters that may be subject to Section 404 of the Clean Water Act. The project area measured over 100,000 acres with a watershed area measuring over 200 square miles. The GIS database was field verified for natural characteristics to qualify portions of the watershed as jurisdictional to waters of the U.S. Atwell prepared site-specific designs to locate a 500 MW wind farm on the 100,000-acre property. Atwell utilized GIS to identify effective project layouts to minimize impacts to potential jurisdictional waters, protected habitat areas, known cultural resource locations, topographic constraints and floodplain areas within the limits of the property.

Critical Issues Analysis Support
Multiple Projects throughout United States
As part of the preliminary due diligence for several power and energy projects, Atwell's GIS Team works in hand-in-hand with the firm's environmental and natural resource groups in the development of their critical issues analysis. Utilizing data gathered from various desktop studies, avian and bat risk assessments, natural resource surveys and related field reconnaissance, the GIS team creates Constraint Maps that outline recommendations for project strategy and next steps in the development process. In the past two years, the GIS Team has been directly involved in over 15 critical issues analysis reports.

Boquillas Wind Preliminary Jurisdictional Determination Project | **Northern Arizona**
Atwell prepared a GIS database to identify constraints and opportunities for multiple watershed areas spanning the Aubrey Cliffs, Rhodes Canyon, Red Mesa, and tributary to Big Chino Wash in Northern Arizona. The focus of the study was to identify waters that may be subject to Section 404 of the Clean Water Act. The GIS database was field verified for natural characteristics to qualify portions of the watershed as jurisdictional to waters of the U.S. Atwell prepared site-specific designs to locate a 93 MW wind farm on the property with ancillary roadway and electric transmission infrastructure. Atwell utilized GIS to identify effective project layouts to minimize impacts to potential jurisdictional waters, protected habitat areas, known cultural resource locations, and floodplain areas within the limits of the Boquillas project.

Roosevelt Water Conservation District GIS Design & Development | **Maricopa, Arizona**
Atwell developed a geospatial system to digitize irrigation infrastructure location information for the entire 40,000-acre irrigation district. Prior to the development and implementation of this system, the aforementioned infrastructure information was not written down, save for a few simple drawings. In addition to data development utilizing as-built plans and right-of-way boundary datasets, Atwell created an interactive mapping program that allows employees to quickly and easily retrieve infrastructure and right-of-way information. Scanned as-built plans and right-of-way documents are linked directly to the corresponding feature and can be opened directly from the map. Querying attributes of the various layers for in-depth analysis is also available.

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GIS Experience

Tinkers Creek Watershed Study
Cuyahoga, Geauga, Summit and Portage Counties, Ohio

Atwell provided comprehensive mapping and analysis of 103-square-miles to identify and prioritize ecologically significant land within the Tinkers Creek watershed. The watershed drains 96-square miles and is the largest tributary of the Cuyahoga River. The watershed includes 4-counties and 24 independent localities. This comprehensive study created a long-term action plan to assist the Land Conservancy as well as other entities located in the watershed with strategic decisions on how and where to protect the ecosystems and natural features of the watershed, mitigate flooding, address stormwater runoff, and promote sustainable development. The final plan prioritizes and categorizes land uses into manageable zones. Environmentally sensitive areas will be identified and reserved for less concentrated development or no development at all. This project will also allow a regional approach to land conservation and ecological protection. As a function of the project, Atwell prepared a GIS database using data collected from the study to analyze the various features of the watershed to help develop a strategic planning and management framework.

Leipsic Wind Farm Ohio Power Siting Board (OPSB) Land Support | Ohio

To assist with development of a wind farm in Ohio, Atwell's GIS team developed a database management system to track, maintain and report on the status of wind leases, setback and good-neighbor agreements. Development included gathering data from multiple subconsultants, performing spatial analysis of ownership to proposed facilities layout, manipulation of datasets, developing checksums to verify data integrity and interfacing directly with ESRI's ArcGIS to visualize progress. In addition, Atwell maintained version control of datasets by designing a geodatabase for centralized storage and established internal processes to ensure integrity.

Salt River Pima-Maricopa Indian Community (SRPMIC) Renewable Energy Feasibility Study
Maricopa County, Arizona

Atwell conducted a feasibility study related to Renewable Energy development within the SRPMIC. As a component of this study, Atwell's GIS Team created an interactive database and mapping solution that fully integrates into the SRPMIC's existing GIS. To facilitate development of this customized GIS, Atwell first analyzed all sources of power consumption, and their respective electrical usage levels, located within the SRPMIC. The team also identified all power line locations and their associated capacity ratings within the same subject area. As a result, Atwell digitized the aforementioned data to create an interactive geospatial system that allows the SRPMIC to visually interpret data and generate analytical reports to help determine the most ideal locations for distributed energy systems that are feasible, economical and will offset high levels of power consumption within the community.

Land Asset Management System

Designed by Atwell's GIS Team, the Land Acquisition System (LAS) is a custom GIS solution created to support the firm's land agents to facilitate short- and long-term land acquisition strategy on their respective projects. The LAS creates weekly status maps to provide visual

updates to land acquisition clients, along with landowner database updates and more. Additionally, optimal parcel groupings within a target area are located to maximize the amount of land per lease for potential developments.
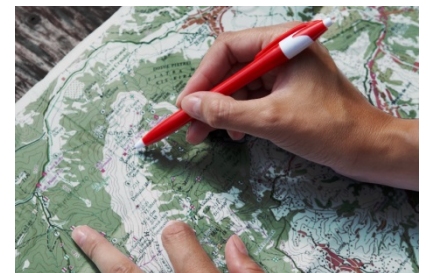
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GIS Experience

Wind Resource Project
Huron County, Michigan
Atwell created a custom mapping solution to track all county and Michigan Department of Environmental Quality permits. Useful for site contractors to show which areas have been approved for construction, the information was drawn from the permit applications and designated each "impact" area that required a permit. This allowed Atwell to digitize the approximate locations and assign symbols to distinguish each type of permit and its status. The maps allowed contractors to determine at a glance whether they can build on a specific location or not.
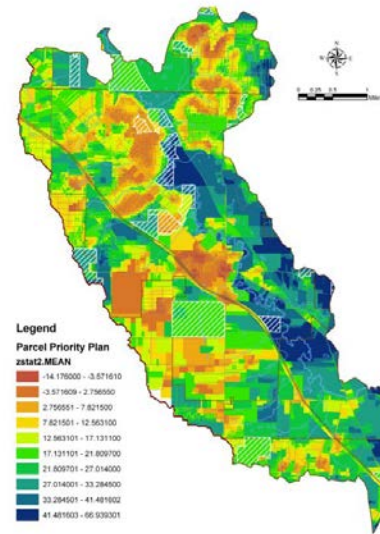
Lender Foreclosure GIS & Interactive Mapper
A regional branch of a national bank was struggling to determine fair market value of bank-owned real estate due to the large number of foreclosures and challenging market conditions. To help the bank manage their distressed real estate portfolio, Atwell developed a customized GIS data solution. Utilizing geospatial technology, the standalone computer application combines fragmented data into an integrated mapping database so the Client can visually interpret data associated with their foreclosed assets to optimize management and maintenance purposes. Data sets for comparison include bank-owned property locations categorized by usage and status, competitor property locations, market values, and client-defined fields. The custom GIS offers a single point of data entry, advanced search capabilities based on the Clients defined fields, and custom reporting features including maps, spreadsheets and traditional informational reports so users can easily identify, analyze, report and market their assets at the touch of a button.

Banklick Watershed Management Study
Northeast Kentucky
Atwell assisted in the preparation of a web-based educational tool that explored the environmental watershed changes to different development patterns. The study looked at traditional development versus conservation and sustainable development options in residential, commercial, and industrial land uses. These "BMPs" were then applied to the overall watershed to assess the complete effect to potential changes in nutrient loads, stormwater volume, and development costs. Five major objectives of this study included:

- Determine extent of reducing nutrient loading into the Watershed via innovative site development strategies.
- Demonstrate potential savings regarding construction and infrastructure costs with these developments.
- Produce and disseminate information promoting objectives 1 and 2.
- Educate all stakeholders-developers, planners, elected officials.
- Devise analytical method to assess nutrient reduction and economic benefits associated with conventional-innovative development. SUNOM- Simplified Urban Nutrient Output Model.

Tuscola West Wind Facility | Tuscola County, Michigan

To facilitate development of this 100 MW wind energy facility, Atwell is currently conducting environmental assessments including wetland, stream and floodplain services; threatened and endangered species surveys; habitat analysis and mapping; a cultural resource inventory; and a Phase I Environmental Site Assessment. As a function of the wildlife assessment, Atwell's avian specialist is conducting a year-long avian survey to determine spring and fall migration and resident breeding bird activity within the Tuscola wind resource area. Atwell is also providing environmental permitting assistance and agency coordination with the Michigan Department of Environmental Quality, Army Corps of Engineers and other county and local agencies.

Limon Wind & Eastern Colorado Interconnect | Arapahoe, Elbert & Lincoln Counties, Colorado

Atwell conducted preconstruction surveys for avian species, including raptor nest searches, prairie dog colony delineations, burrowing owl surveys and mitigation, wetland surveys, threatened and endangered species habitat assessments, and is initiating an avian and bat post-construction monitoring study for a 400 MW wind energy project and 45-mile transmission line. Atwell also conducted a Phase I Environmental Site Assessment and prepared three county permit applications and two state 1041 permits for the project. Atwell also coordinated all Floodplain Development Permitting and prepared grading, erosion and sediment control plans, and drainage study for the transmission line portion of the project.

Pheasant Run Wind Project | Huron County, Michigan

200 MW/88 wind turbine generator project located on 47,000 acres. To facilitate development of this 200 mw wind energy facility, Atwell conducted environmental assessments including wetland, stream and floodplain services; threatened and endangered species surveys; habitat analysis and mapping and cultural resource inventory. As a function of the wildlife assessment, Atwell's avian specialist is conducting a two year-long avian survey to determine spring and fall migration and resident breeding bird activity within the Pheasant Run project area. Atwell completed in-depth bald eagle roost, net and use surveys throughout each season. Atwell also conducted acoustical bat monitoring to determine bat use and migration within the project area. Atwell is currently engaged and is providing agency coordination support with the Michigan Department of Natural Resources and the

Environment (DNRE), US Fish and Wildlife Services (USFWS) Army Corps of Engineers (ACOE) and other county and local agencies. Additionally, Atwell provided site plans and issues for construction documents. Atwell coordinated permitting with the Huron County Road Commission and the Huron County Drain Commission for access roads, crane walks, collection lines, and public intersection improvements. In addition, the project included Michigan Department of Environmental Quality permitting for water course, wetland, and flood plain impacts; public intersection improvements for the turbine delivery parts, access road design, collection line coordination, laydown yard design, O&M site design, and culvert design.

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Magma Solar Energy Project | Arizona
Atwell provided a Critical Issues Analysis(CIA), Phase I Environmental Site Assessment (ESA) report, and Boundary/ALTA Survey and assisted the client in negotiations during the real estate transaction to provide for seller required exceptions and easements for certain irrigation equipment. The CIA was conducted to identify and analyze the natural, social and environmental issues in the proposed project area that could potentially impact the siting and development of a solar facility and to identify the time sensitive items that would likely need to be addressed during the permitting process. Included in the CIA was a complete permitting matrix identifying zoning and entitlement, environmental, construction, and regulatory issues for all applicable Federal, State and local agencies. The Phase I ESA was completed for the site in accordance with the real estate transaction requirements and the Boundary/ALTA survey was completed on the 304-acre site including a lot split of an existing parcel to satisfy the land sale contract. Atwell provided an analysis of existing easements and proposed easements, setbacks and Central Arizona Canal easements in accordance with the local zoning jurisdiction to assist the client in negotiating the purchase of the property to insure adequate usable area for the solar energy project.

Sanilac Wind Facility | Sanilac & Lapeer Counties, Michigan
To facilitate development of this 100 MW wind energy facility, Atwell is currently conducting environmental assessments including wetland, stream and floodplain services; threatened and endangered species surveys; habitat analysis and mapping; a cultural resource inventory; and a Phase I Environmental Site Assessment. As a function of the wildlife assessment, Atwell's avian specialist is conducting a year-long avian survey to determine spring and fall migration and resident breeding bird activity within the Sanilac wind resource area. Atwell also conducted a bat risk assessment to determine the risk of the Indiana Bat within the region as well as other bat that my cause an issue in the future. Additional Bat and Avian work is planned for 2012. Atwell is providing agency coordination support with the Michigan Department of Natural Resources and the Environment (DNRE), US Fish and Wildlife Services (USFWS) Army Corps of Engineers and other county and local agencies.

Bluff Point Environmental Assessments & Permitting | Noble County, Indiana
In association with the environmental due diligence and critical issues analysis associated with this wind energy development, Atwell has completed detailed environmental assessments and permitting coordination. These assessments include wetland, stream and floodplain services; threatened and endangered species surveys; habitat analysis and mapping; cultural resource inventory and in-depth avian and bat migration surveys. Atwell's avian and bat specialist is conducting year-long avian migration, use and breeding surveys, raptor use and nest surveys, bat acoustic and mist net surveys to determine migration, resident breeding bird activity and summer roosting bat activity within the project's wind resource area. Atwell lead and conducted multiple agency coordination meeting to discuss the Indiana Bat issues facing the site with the Indiana Department of Natural Resources (IDNR), U.S. Fish & Wildlife Service (USFWS). Portion of these discussion include negotiation of possible buffer requires with the USFWS and the need and requirements for the Habitat Conservation Plans and Incidental Take permitting.

Six-Pack Construction Support
Ontario, Canada
Atwell has been awarded a contract to provide construction management and environmental coordination during the construction of a group of wind energy facilities called the Six Pack. Owned and developed by NextEra Canada Development and Acquisition, Inc., the combined sites will generate approximately 490 MW of power via 288 turbines. Specific coordination and management items include: permit issuance, amendments, building permits, turbines, access roads, collection lines, transmission lines, as well as environmental elements such as natural resources, archaeological approvals, and mitigation implementation, compliance and adherence to client standards. Atwell will also act as the owner's on-site representative, supporting budgeting and scheduling, contractor performance, issue resolution and site supervision. Lastly, Atwell environmental professionals will provide oversight and agency coordination to ensure project adherence to environmental permits and mitigation requirements.

Fayette Wind | Nobel County, Indiana
In association with the environmental due diligence and critical issues analysis associated with this wind energy development, Atwell has completed detailed environmental assessments and permitting coordination. These assessments include wetland, stream and floodplain services; threatened and endangered species surveys; habitat analysis and mapping; cultural resource inventory and in-depth avian and bat migration surveys. As a function of the these assessment, Atwell's avian and bat specialist is conducting year-long avian migration, use and breeding surveys, raptor use and nest surveys, bat acoustic and mist net surveys to determine migration, resident breeding bird activity and summer roosting bat activity within the project's wind resource area. Atwell lead and conducted multiple agency coordination meeting to discuss the Indiana Bat issues facing the site with the Indiana Department of Natural Resources (IDNR), U.S. Fish & Wildlife Service (USFWS). Portion of these discussion include negotiation of possible buffer requires with the USFWS and the need and requirements for the Habitat Conservation Plans and Incidental Take permitting.

Summerhaven Wind Energy Centre
Haldimand County, Ontario, Canada
Atwell is currently providing environmental compliance support during construction of the Summerhaven Wind Energy Centre in Ontario. Our environmental team is actively involved in conducting raptor nest observations and managing mitigation commitments associated with raptor nests, overseeing water body and wetland compliance issues pertaining to LPRCA permitting, and identifying sensitive habitats to avoid during the construction phase of this project.

Majestic II Wind Resource Area | Carson & Potter Counties, Texas
Atwell provided natural resources services including wetland delineation, cultural resources delineation, desktop wetland, streams, floodplain and habitat assessments on more than 10,000 acres. Atwell also conducted a Phase I Environmental Site Assessment and conducted post-construction avian monitoring. An area rich with protected species—burrowing owl, Texas Horned Lizard and more—Atwell prepared a best management practices plan that was implemented by the contractors.

Conestogo Wind Energy Centre
Wellington County, Ontario, Canada

Atwell, through its subsidiary Peak Power, provided power generation and electrical engineering services consisting of 10 turbines with a maximum generation capacity of 22 MW. Construction was completed in 2012 by Conestogo Wind, LP, an indirect subsidiary of NextEra Energy Canada.

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Cedar Bluff Wind Resource Area | Ness, Rush, Trego & Ellis Counties, Kansas
When constructed, Cedar Bluff will produce up to 200MW of wind power and will include approximately 40 miles of transmission line. Atwell provided land solution services for all 40-miles of transmission right of way. With approximately 32,000 acres among native grassland within the lesser prairie chicken range, bald and golden eagles were observed foraging/migrating. A large active prairie dog town encouraged raptor feeding and burrowing owl nesting. In the project's initial stages, Atwell conducted wetland delineation, cultural resources delineation and assessment, incidental avian observations/data collection, as well as desktop wetland, streams, floodplain and habitat assessments.   As the Cedar Bluff project approaches its final stages before construction at the end of 2015, Atwell is currently providing micrositing assistance, cultural resources inventory, wetland and waterway services, habitat and listed species assessments, bat habitat and occurrence analysis, eagle and raptor nest assessments, bird and bat conservation strategy, a Lesser Prairie-Chicken management plan, transmission line support, a Phase I ESA, and Kansas permitting assistance.

Carousel Wind Project | Kit County, Colorado
The Carousel wind project is a 200MW wind farm spanning 27,000 acres in Kit County, Colorado. Atwell is providing complete land surveying for the site, as well as land support and environmental services, which includes avian monitoring and permitting with various state and local agencies.

Golden West Wind Project | El Paso County, Colorado
The Golden West wind project is a 200MW wind farm spanning 23,000 acres in El Pas County, Colorado. Atwell is providing complete land surveying for the site, as well as land support and environmental services, which includes avian monitoring and permitting with various state and local agencies.

Tuscola III Wind Resource Area | Tuscola County, Michigan
Atwell has completed the environmental and permitting work for both the Tuscola Bay and Tuscola II projects, and is continuing its services for the Tuscola III Wind Resource Area project. Services include micrositing assistance, wetland and floodplain services, threatened and endangered species review, cultural resource inventory, agency coordination, Michigan Department of Environmental Quality (MDEQ) Permitting, Environmental, Avian and Wildlife Impact Assessments, Shadow Flicker and Sound Level Impact Assessments, visual assessment, Special Land Use Permitting (SUP), site planning, local and county permitting and completing a Phase I Environmental Site Assessment for the site.

Huron County Wind Resource Area | Huron & Sanilac Counties, Michigan
Atwell is providing environmental and permitting services for NextEra's plan to develop an approximate 300MW wind facility in Huron and Sanilac Counties in Michigan. Services include micrositing assistance, wetland and floodplain services, threatened and endangered species review, bat studies, spring avian migration surveys, cultural resource inventory, agency coordination, Michigan Department of Environmental Quality (MDEQ) Permitting, and a Phase I Environmental Site Assessment. Additionally, Atwell provided avian monitoring for the site's pre-development planning.

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DTE Solar Prospecting
Land Acqusition Status
Livingston, Macomb, Oakland, Washtenaw & Wayne Counties, Michigan
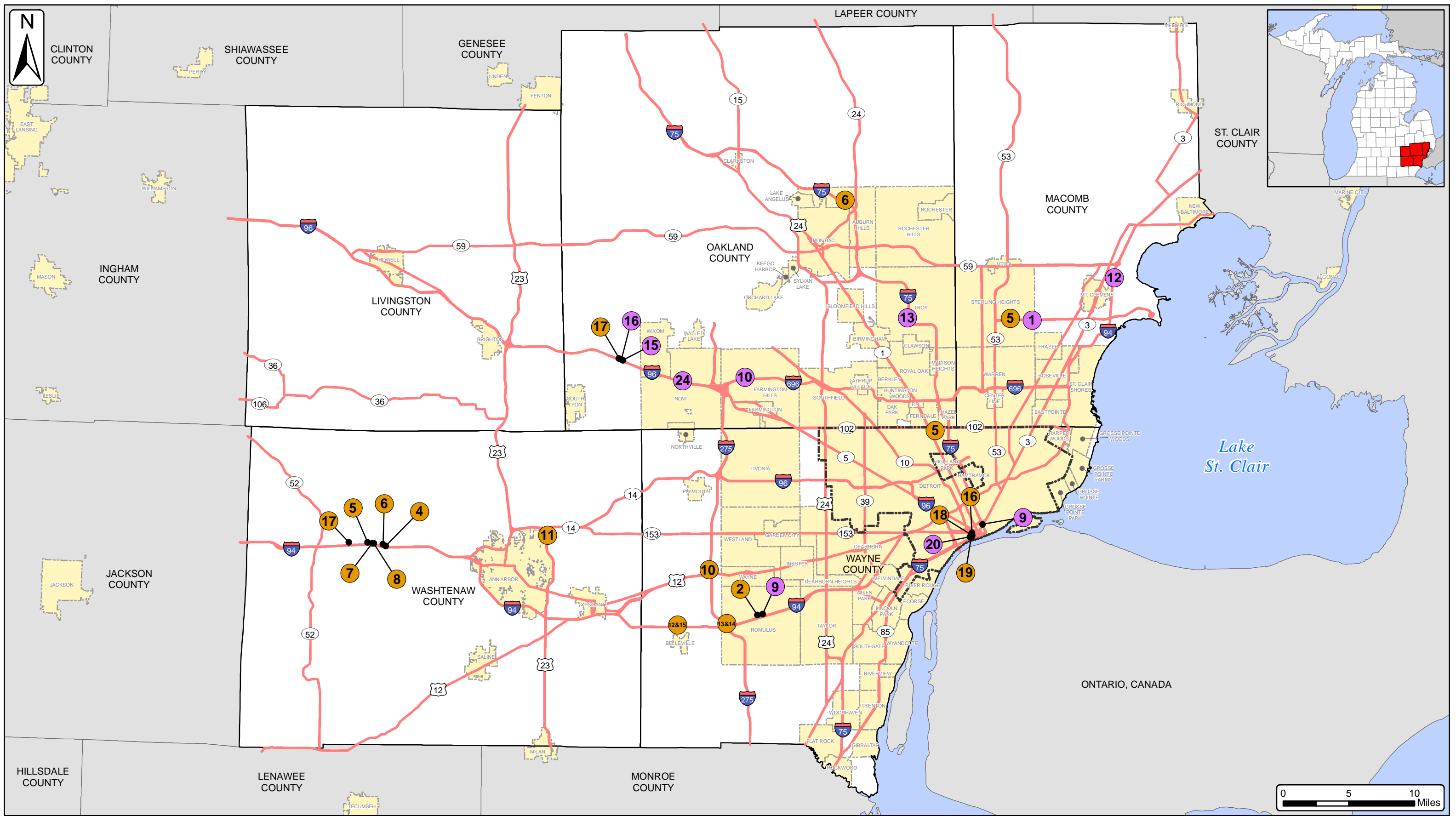
Land Acq. Status
- Targeted
- Site Opinion Report
- Negotiating
- Returned Signed

County Boundary
City Boundary
City of Detroit Boundary
(#) Site Number
Targeted Road

DTE Energy

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N

Washington County

Fayette County

Harris County

Austin County

Waller County

Site I

Colorado County

Brazos Country

Attwater Prairie Chicken National Wildlife Refuge

Houston

Wharton County

Fort Bend

Legend:
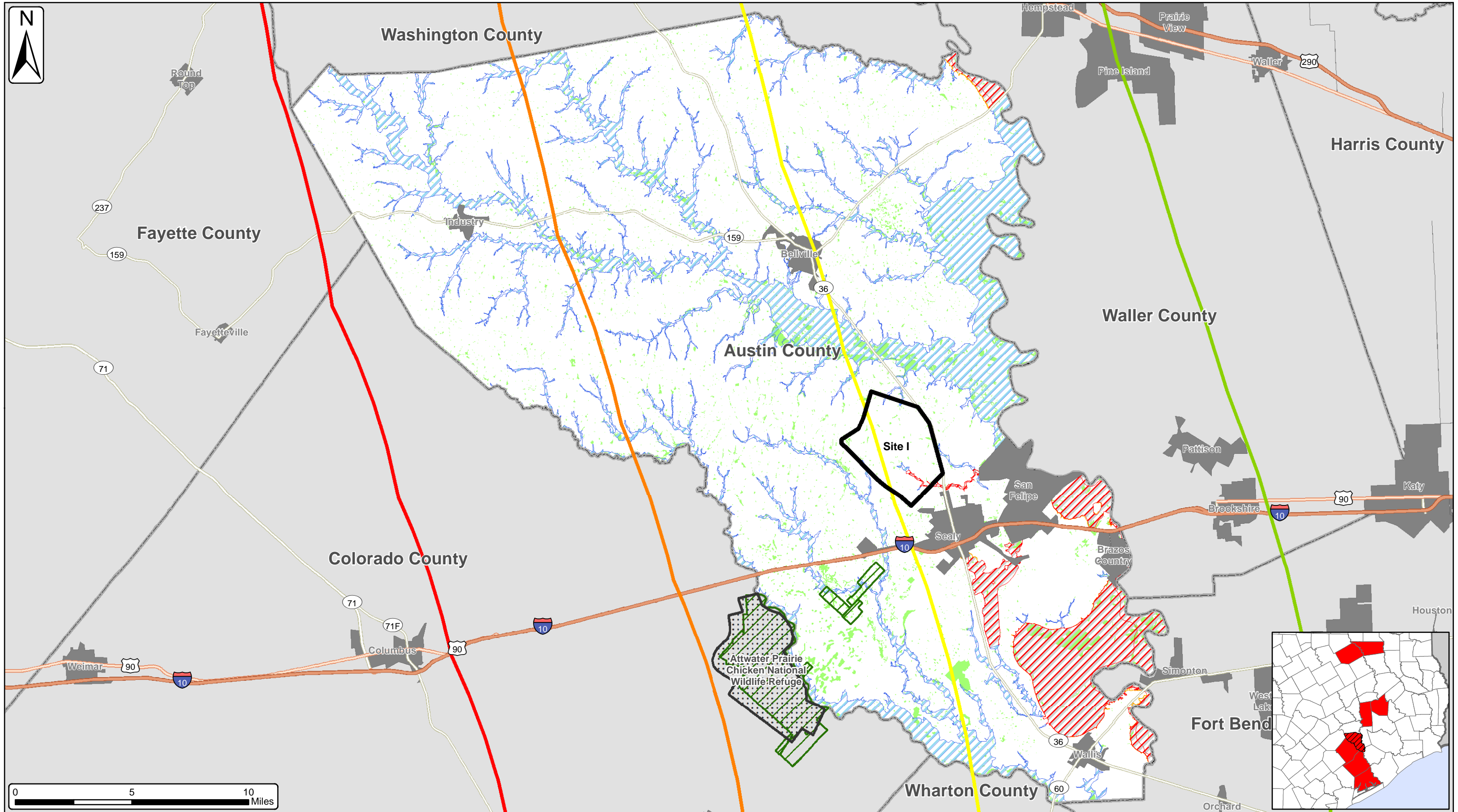
Target Site Boundary^	FEMA Floodzones*	Whopping Crane Observation Corridors (USFWS)
Non-Attainment Area	Zone A: 100-year floodplain (no BFEs)	75 %
City Limits	Zone AE: 100-year floodplain (w/ BFEs)	80 %
Federal and Indian Lands	Zone X (moderate): 500-year floodplain	85 %
Critical Habitat (USFWS)	Zone X (minimal): Outside of 100- and 500-year floodplain	90 %
National Wildlife Refuge (USFWS)	*Digital data not available for Wharton & Matagorda Counties	95 %
National Wetlands Inventory Wetland	^ Site M is excluded by Client	

Halyard Site Selection

Austin County Overview

Austin County, Texas

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PROFILE

Career Contributions: Pioneer educational innovations, develop new revenue streams, build partnerships and collaboration among stakeholders, drive positive change and strategic success, cultivate highly successful college graduates.

Who I Am: As a higher education senior executive and leader, the focus of my career has been on leading strategic change and innovation in higher education. As a consultant and change leader I have worked with executive leadership at dozens of colleges and universities seeking to redesign models for in higher education courses, programs, and institutions. I also have an abiding commitment to serving students and focusing on the transformative power education can have on their lives. My passion is to eradicate barriers for students, especially for those who must balance work, family, and education, while at the same time maintaining high expectations for student learning outcomes. My leadership, strategic, and collaborative skills have been honed through starting successful ventures that generate new revenue sources and profitable growth as well as building partnerships to drive academic and technology initiatives at the institutional, state, and national levels.

What I Do: Executive leadership and driver for strategic initiatives; adult learning program development and enrollment; student support and retention design and management; online learning program management and development; internet and traditional marketing strategy and execution; lead generation strategy; faculty development; academic program oversight and management; program design and assessment; technology support services and operations design and management; faculty relationship building and support; policy development and implementation; academic and technology initiatives; event planning.

EXPERIENCE

Strategic Consultant, Teaching and Learning Strategies
Pearson, Inc,
January 2015 to present

As a member of the Strategic Consulting Team within Pearson, I provide strategic consulting services and thought leadership for higher education clients seeking to improve, enhance, and innovate teaching and learning. I also support client with strategic consulting for new program development, academic innovation and business development, recruiting and retention, and technology integration and planning. Recent work has focused on Competency-Based Education, Employability, Retention and Completion, Adaptive Learning, and Online Learning.

Vice President/Dean, Professional and Graduate Studies (PGS)
Hiram College, Hiram Ohio
May 2011 to present

In addition to serving on the President's Cabinet, as Vice President of PGS I direct all adult, off-campus, online, and graduate programs, including summer academic programs and courses. PGS is responsible for $3.4 million in annual revenue for the College. With a staff of 10 we provide 8 major programs and 8 minors through the Weekend College at Hiram, offer 2 fully online majors and about 40 online courses per year, offer a Master's of Interdisciplinary Studies degree program, and have launched new partnerships with three area community colleges to offer degree completion programs on their campuses. As a member of the leadership team I am responsible for creation of new revenue streams and opportunities to diversify the college's program offerings. I participate in all Board of Trustees meetings and several Board Committees.

Key Accomplishments and Initiatives:
- Established a successful partnership program and agreements with three community colleges to offer degree

completion programs. Our program at Lorain County Community College began in spring 2012 with 22 students in Accounting and has now grown to 77 students. We now are offering 6 majors at three campuses. We project more than $1.2 million in revenue this year.

- Led enrollment management and planning to reverse declining enrollment trends in adult learning programs leading to increases in overall enrollments over the past three years.
- Implemented formalized recruiting process with funnel management metrics and CRM implementation and redesigned communication flows. Increased inquiry speed-to-lead from two weeks to less than one business day.
- Redesigned enrollment marketing strategy to implement internet based lead generation and inbound marketing tactics. Redesigned website and social media strategy, launched SEO and lead tracking program, and created content strategies focused on prospect needs and interests.
- Launched Hiram College's first online courses and degree programs. We offered the first course in 2012 and now offer over 30 different courses, and are developing about 8-10 new courses per semester.
- Developed a six-week summer training program for students from India bringing over 100 students to campus and generating net revenue of over $80,000. The program is expanding to additional exchanges and year-round programs.
- Led the redesign of the Master's of Interdisciplinary Study to provide for career-facing tracks and to serve as a launching point for additional master's level programs.
- Created a plan for additional master's program. The initial program, a Master's of Accounting and Financial Management is in the Higher Learning Commission approval process.
- Revised undergraduate programs and added new majors to more directly address market demand.
- Aligned PGS programs with the College Core Curriculum (implemented in the traditional college in 2008), strengthening academic program quality and alignment of PGS programs.
- Instituted enhanced faculty approval and program oversight processes to strengthen faculty oversight and engagement with PGS programs.
- Received a Council of Independent Colleges grant to participate in the creation of an independent college online consortium focused on upper division humanities courses.
- Served on the Steering Committee for the Northeast Ohio Council for Higher Education Talent Dividend Initiative to increase degree attainment in the region. The Akron region, including Hiram College, was named a finalist for the national CEO For Cities Talent Dividend Competition.

Solutions Director
Blackboard Strategic Consulting, Blackboard, Inc.
June 2009 to May 2011

As Solutions Director for Blackboard, Inc., I was part of a team that developed a strategic consulting practice to serve Blackboard clients through engagements designed to advance institutional strategies to foster and grow online and adult learning programs. My work focused on clients within the U.S. and globally. I wrote and presented strategic solutions for achieving client objectives, as well as proposals, scope, budget, and implementation plans. I supervised engagement teams and resources to ensure solution effectiveness, service quality and client satisfaction. I partnered with key managers to build a new business strategy for global for consulting services and to cultivate engagement opportunities with prospective clients. I routinely made presented and led sessions for executive leadership as client universities and colleges.

Key Engagements and Accomplishments include:
- Developed an online learning program assessment model and framework to identify areas for strategic improvement.
- Created a summary evaluation of revenue share outsourcing models vs. institutional program and support models.
- Developed strategic recommendations and practices for online programs at the University of Southern Mississippi. We increased revenue from online enrollment by over $1.5 million in one year.
- Led a team to assess online learning organization and financial modeling for Ivy Tech Community College, Indiana, the largest singly accredited Community College in the U.S.
- Facilitated online learning strategic planning for Boise State University. Conducted stakeholder strategic planning sessions and review of online programs and presented recommendations for future implementation.

- For the University of Southern Florida, St Petersburg, led a program assessment and strategic planning process for starting up an institutionally driven online learning program, including recommendations for faculty development, course design, technology support, and program marketing and recruiting.

Director, eLearning
Cleveland State University, *Cleveland, Ohio*
February 2007 to June 2009

As the first Director of eLearning for Cleveland State University (CSU), I was responsible for establishing a unit to support online learning and develop strategic, institutional support and management processes. CSU had a large number of online courses offered each semester, but the offerings were undertaken by departments and colleges with little consistency of student experience, technical and enrollment support, faculty development, and program design and marketing. CSU sought to standardize approaches for online learning with across the University and introduce additional programs to extend its recruiting footprint. My responsibilities included technology planning and development, student and faculty support, course and program design and development, marketing, and building collaborative relationships with departments and colleges to expand online offerings. I worked directly with Deans to identify needs and shape program development priorities and regularly reported at Board of Trustees meetings.

Key Responsibilities and Accomplishments:
- Established a Strategic Planning Team of Deans and other stakeholders to shape policies and objectives for elearning at CSU.
- Achieved annual growth rates in online learning enrollments between 60-70% and increasing online courses offered by over 25%. During this period, CSU became the fastest growing online program among state universities in Ohio.
- Expanded an RFP process to distribute grants for online course and online program development. The Center provided incentives to individual faculty and programs to develop courses or degree programs managed through the Center. The center designed approximately 30 courses per year through this program and launched three new programs in the second year.
- Implemented a formal course design and development process with instructional design support.
- Implemented a faculty development curriculum, including an extensive program of workshops, semi-annual "boot-camps," and college and departmental faculty development cohorts.
- Created a three-tier support network for students and faculty using the University technology call center, a Student Technology Assistants (STA) team, and Center staff. Prior to this effort, the University call center was the only level of support available for students and faculty.
- Served in a leadership role to develop a statewide Quality Matters consortium to deliver workshops, peer reviewer training, and a network of peer reviewers. We began with 6 schools participating initially. Today over 40 schools are in the consortium and CSU continues to maintain a leadership role.
- Created University elearning policies and online support. My team revamped and expanded the website for supporting elearning and developed key policies such as definitions for types of elearning courses, uniform withdraw policies, and course design and teaching minimum requirements.

Education Consultant
RDR Associates, *Cedar Rapids, Iowa*
January 1988-2007

Provided comprehensive technology planning and change management services for educational clients in K-12 and higher education. Also facilitated workshop activities and faculty development services.

Selected Clients, Projects, and Boards:
- State of Iowa, Iowa Independent College and Universities, Iowa Communications Network – represented independent colleges on the Educational Telecommunication Committee, a legislatively mandated committee to oversee develop of the educational portion of the Iowa Communications Network. Served 1988-2006.
- Instructional Management System (IMS) Board, National Learning Infrastructure Initiative, EDUCAUSE. 1997-1999.
- Lansing Community College (Michigan) – development of a distance learning plan. 1997.
- State of Iowa – 21st Century Learning Infrastructure – development of a draft architecture. 2001.

- Portland Community Schools (Oregon) – development of a telecommunications plan 2000.
- Mt. Marty College (South Dakota) – development of a faculty development program and support for wireless laptop campus 2003.
- Southwestern College (Kansas) – recommendations for next phase development of a campus laptop program, faculty development, and integration of learning management system 2002.
- U.S. Department of Education – town meeting satellite teleconference for community colleges, co-producer and web support. 2000.
- Houghton Mifflin Company, Educational Division – developer and author of web content for higher education products. 2001-2005.
- Monterey Institute, National Repository of Online Courses (NROC), Advisory Board. 2005-2007.

Associate Academic Dean, External Programs
Buena Vista University, Storm Lake, Iowa.
June 2006-Janaury 2007

I served Buena Vista University for 22 years in a variety of roles and was progressively promoted to higher levels of responsibility, helping the University achieve top objectives for growth and excellence. During my tenure my career moved from junior to senior faculty and to the President's Council and executive leadership team.

Buena Vista University operated partnerships with 8 community colleges in 15 location across the state of Iowa. As Associate Academic Dean, I was responsible for academic oversight for programs in business, education, and social sciences, as well as operational oversight for financial management, marketing and enrollment management, staff supervision, program development, operational administration, and maintaining strategic partnerships with the community colleges. Duties included supervision of 15 direct reports and a total staff of over 60 at 15 locations. Served as a member of the President's cabinet.

Key Responsibilities and Accomplishments:
- Managed budget and forecasting for over $11 million in annual revenue and approximately 1600 student FTE.
- Implemented a marketing assessment resulting in consolidation and centralization of marketing spend and system-level strategic marketing plan.
- Contracted with third-party provider to handle recruiting outbound calling and funnel management to increase conversion rates from inquiry to application.
- Reviewed location staffing and recommended a plan to consolidate management of locations under regional directors to reduce costs and improve operational effectiveness.
- Evaluated and improved processes for adjunct faculty approvals, reducing the number of independent studies, creating guidelines for adjunct teaching loads, and increasing faculty oversight of off-campus programs.

Director of Online Programs
Buena Vista University, Storm Lake, Iowa.
August 2004-June 2006

Spearheaded the design and launch of a successful online program, including a fully online Master's of Education with three tracks. The program was profitable in the first year and by year three was earning over $1.5 million in revenue. I continued to oversee the Center for Teaching and Learning and built a staff of 5 additional FTE to support the online program, plus a network of adjunct faculty.

Key Responsibilities and Accomplishments:
- Crafted and managed a program budget model and beat enrollment and expense forecasts in each year and made regular presentations and led sessions for the Board of Trustees.
- Generated approximately $600,000 in revenue in year one and $1.5 million in revenue in year two.
- Assisted the development team in securing a $500,000 federal grant to support the program start-up.
- Evaluated and selected third party providers for instructional design, media development, LMS hosting, and

help desk support.

- Created and implemented a collaborative course design and faculty development process, using effective practices for online course design and teaching.

- Established an early warning retention monitoring and intervention program to promote persistence. Achieved a course completion rate of nearly 80% in the first year and over 80% in year two.

- Devised a marketing and recruiting strategy to boost enrollments for fully online Master's program in Education.

Director of Teaching and Learning with Technology
Buena Vista University, Storm Lake, Iowa.
June 1998-August 2004

Served as one of the two principles who provided leadership, vision, and management for development and implementation of the eBVyou initiative, the nation's first completely wireless, laptop campus. I instituted The Center for Teaching and Learning with Technology as part of this plan to increase the support for and use of technology as part of the teaching and learning environment. My team launched the eBVyou plan first with faculty development and support through this Center, but my main role was as one of the primary architects and managers of the overall eBVyou plan that included technology, faculty and student support and development, financial modeling and management, technology infrastructure and design, and change management and communication.

Key Responsibilities and Accomplishments:

- Co-led design and implementation the eBVyou program – the nation's first totally wireless educational community and comprehensive campus technology plan. Crafted Board of Trustees proposals and presentations.

- Created the Teaching and Learning with Technology Center to provide support for the integration of technology with instruction.

- Supervised the design, development, and management of 76 multimedia classrooms, including the new Estelle Siebens Science Center.

- Supervised construction and support for BVU's interactive video classrooms.

- Developed a comprehensive technology plan to provide wireless laptops, training, and support for 15 Centers locations across Iowa.

- Designed and delivered faculty development programs and workshops, including faculty grant projects, web development, and course materials development.

- Launched a Student Technology Assistants program to provide increased levels of technical support and expanded opportunities for student employment.

- Assisted with grant development, helping to secure over $750,000 in technology related grants. Provided definition and support documentation for numerous fund-raising proposals.

- Supervised and administered support for campus learning management system (Blackboard).

Assistant Professor, Mass Communication
Buena Vista University, Storm Lake, Iowa.
August 1985-June 1998

Developed curriculum and programs for Mass Communication Major and taught courses in media production, criticism, film, and new technologies. Advised student video production unit including design and management of a full service video production facility.

Key Responsibilities and Accomplishments:

- Served as full-time faculty member (tenured conferred in 1992) and supervisor of the campus video production and distribution system.
- Chaired several faculty committees, including Academic Affairs, and served two terms on Faculty Senate.
- Designed and supervised construction of multi-million dollar video production studio and broadband distribution network, including fiber optic capabilities for multi-camera video origination for key venues on campus.
- Supervised student productions, cable channel programming, and campus video services. Produced hundreds of hours of original video programming annually with students, including live events, corporate videos, documentaries, and studio productions.
- Advised students, supervised internships, supported independent student projects

Communications Media Instructor
Kirkwood Community College, Cedar Rapids, Iowa
July 1983-July 1985

Key Responsibilities and Accomplishments:
- Created the video and radio production curriculum of a new program in Communications and Media Studies.
- Supervised a student organization for video production including arts events, sports, and special projects.
- Coordinated student interns and work-study with KCCK, Kirkwood's Public Radio Station and KTS, The Kirkwood Telecommunication System.
- Produced the "Live from Stone City" concert series for radio and cable television simulcast, featuring national folk, jazz, and bluegrass performers.

EDUCATION

Master of Arts, Communication Studies (Broadcasting and Film)
University of Iowa, Iowa City, Iowa
Bachelor of Arts, Theatre Arts
Hiram College, Hiram, Ohio

PRESENTATIONS AND PUBLICATIONS (SELECTED)

"Weathering the Storm: Strategies for Reshaping Enrollment and Driving Growth"
Ohio Continuing Higher Education Association, March 2014.

"Online Learning Capabilities: A Framework for Strategic Assessment"
Blackboard World, June 2010.

"Online, Scenario-Based Faculty Development: Improving Developmental Learning"
Sloan-C Conference, November 2007

"Preparing for the Challenges of Connected Learning Environments"
Bradley University, School of Communication, December 2004.

Featured Presenter on Instructional Design, Assessment, and Intellectual Property
Iowa College Foundation, Technology and Education Workshops, June 2004 Buena Vista University, Central College, Luther College (also in 2003 and 2002).

"Collaborating Online: A Time-Revealed Scenario"
Principle Author. Waubonsee Community College and Valencia Community College, December 2003.

"Report From The Front: The Connected Learning Classroom"
Ohio State University Symposium on Wireless Technology, Keynote Presentation, November 2003.

"Cutting the Wires: How Will YOU Prepare for the Connected Learning Environment?"
Moorhead State University, May 2003

"Innovative Approaches to Aligning Student and Faculty IT Support"
(with Star Muir, George Mason University), EDUCAUSE pre-conference workshop, October 2002.

"Teaching and Learning in the Connected World: Lessons Learned from the Wireless Laptop Campus"
Technology Leadership Fall Institute -University of Texas at Austin, September 2002.

"Teaching and Learning in the Wireless Computing Environment"
League For Innovations Computer Information Technology Conference, Minneapolis, November 2001.

"Secrets of Wireless Technology Planning: Simple Things Done Well"
College Planning and Management, July 2001.

"Discovery-Based Learning in the Wireless Environment" (article)
Syllabus Magazine, January 2001.

"The Death of Distance Learning"
Iowa Lakes Distance Learning Conference – Keynote, August 2001.

"Time Revealed Scenarios: Online Interactive Faculty Development"
League for Innovations, Computer Information Technology Conference, November 2001.

"Student Technology Assistants: A Small Campus Study"
(with Ken Clipperton, Buena Vista University), Ohio Foundation of Independent Colleges Workshop, May 2001.

"Webagogy: The Art of Integrating the Web with Pedagogy"
Workshop for Ohio Foundation of Independent Colleges Workshop, April 2001 – May 2003

HONORS AND PROFESSIONAL AFFILIATIONS

- Member, EDUCAUSE, Online Learning Consortium, and the Council for Adult and Experiential Learning
- Ohio Continuing Higher Education Association, 2013-2014.
- American Council of Higher Education Change and Innovation Lab, 2014 (Grant project funded by Lumina Foundation).
- Council of Independent Colleges and Universities, Consortium for Online Humanities, 2014 (Grant project funded by Mellon Foundation).
- Association of Independent Colleges and Universities of Ohio, Course Sharing Pilot, 2013-2014.
- Association of Independent Colleges and Universities of Ohio, Faculty Development Collaboration, 2013-2014.
- Talent Dividend Steering Committee, Northeast Ohio Council on Higher Education, 2011-2014.
- Founding member, Ohio Quality Matters Consortium, 2007-2008
- National Repository of Online Courses, Advisory Board, 2005-2006.
- Co-Founder and Conference Chair, Iowa Connections (IACON), Joint Conference of the Iowa Distance Learning Association, Iowa Association of Communication Technology (IACT), and Iowa Research and Education Network (IREN), 1998-2006.
- Co-Founder and Past President, Iowa Distance Learning Association, 1993-2006.
- Iowa Educational Telecommunication Committee (Formerly Narrowcast Advisory Committee), 1988-2006
- Past President and Member, Iowa Association of Communication Technology, 1990-2001.IMS Global (formerly IMS) Board, 1997-1999.
- Senior Fellow, House Subcommittee on Telecommunication and Finance, U.S. Congress, 1990.
- Faculty Fellow, National Association of Television Programmers, WJW-TV Cleveland, Ohio, 1988

STEVEN G. RHEINSCHMIDT

6851 S. Gaylord Street, Unit 2315 · Centennial, Colorado 80122 · 319.759.2925

STRENGTHS:
Organizational Strategy, Team Building, Consensus Building, Learning Analytics, Consulting, Communication, Public Speaking, Coaching, Financial Planning, Budgeting.

EMPLOYMENT HISTORY:

2012-present
Strategic Consultant Institutional Performance, Pearson North America, Centennial, Colorado
Provide strategic consulting expertise for community colleges as well as colleges and universities with a general focus on student persistence, retention, success and using data to inform decision. Provide clear recommendations for strategic implementation, process improvement, efficiency, sustainability and scale. Attend relevant conferences and maintain professional network through presentations and relationship building.

2003-2012
Director, Iowa Community College Online Consortium, Southeastern Community College, West Burlington, Iowa
Lead an innovative team in providing online educational programming for seven community college districts. Manage six full time and five part-time staff, negotiate licensing agreements, provide financial forecasting, planning, implementation and analysis, develop and foster strategic partnerships, participate on national advisory boards, coordinate staff and board of directors meetings, and manage all day-to-day activities of an organization which become a respected leader in online education.

2001-2003
Coordinator of Distance Learning Services, Southeastern Community College, West Burlington, Iowa
Provide information and materials to students attending SCC in addition to students enrolled in an Iowa Community College Online Consortium member college. Work with student services department to meet the needs of students, design and update distance learning web sites, and train instructors on distance learning technologies.

2000-2001
Academic Advisor, Admissions Counselor, Southeastern Community College, West Burlington, Iowa
Assisted students with academic planning and scheduling. Assisted prospective students with admissions process (i.e. application, financial aid, academic planning). In addition, worked part-time through a federally funded TRIO grant in Student Support Services. Provide tutoring in math as well as technology support. Help with web page design and maintenance.

1999-2000
Academic Support Specialist, Southeastern Community College, West Burlington, Iowa
Work through a federally funded TRIO grant in Student Support Services. Provide academic advising, college transfer advising, financial aid advising, and tutoring for first generation and/or low-income students. Coordinate and manage the program's web page.

1996-1998
Retail Sales, Rheinschmidt's Floor Specialists, Burlington, Iowa
Third generation family business. Primary responsibilities: residential and commercial floor covering sales, assist with installation scheduling, and manage computerized inventory system.

1992-1994
Athletic Director, Southeastern Community College, West Burlington, Iowa
Scheduled and coordinated college athletic activities. Filed eligibility and annual reports with the National Junior College Athletic Association. Managed athletic budget, records, and events. Developed and implemented fund raisers and recruiting strategies for athletic programs. Wrote and distributed press releases. Supervised coaching staff. Note: This job was in addition to other duties at the college.

1990-1996
Admissions/Communications Specialist, Southeastern Community College, West Burlington, Iowa
Responsibilities included counseling prospective students (non-traditional and traditional), coordinating campus visits, campus tours and coordinating admissions correspondence. Initiated computerized student contact system at SCC. Also responsible for foreign student admissions which included communicating admissions requirements and assisting foreign students with Immigration and Naturalization forms, policies and procedures. Other duties included assisting with student orientations, class scheduling/academic advising, phone-in student registrations and committee work. In addition, organized and implemented annual advertising strategy for two campuses. Wrote and edited radio, newspaper, and television advertisements. Oversaw annual institutional advertising budget.

ADDITIONAL EXPERIENCE:

1995-2012
Volleyball Coach
Mediapolis (IA) Community School District

2000
Grassroots and Beach Programs Intern
USA Volleyball

HONORS AND AFFILIATIONS:
Pearson eCollege Excellence in Online Administration Award - 2009
USA Volleyball Iowa Region Male Coach of the Year - 2001
USA Volleyball Iowa Region Meritorious Service Award - 2010
Member, Iowa Distance Learning Association
Advisory Board, Monterey Institute for Technology and Education
Advisory Board, IMS Global Consortium
Co-Chair, WCET eLearning Consortia Common Interest Group
Advisory Board, Iowa Statewide K-12 Online Learning System
Member, United States Distance Learning Association

EDUCATION:
Bachelor of Arts - Business Management: Central College, Pella, Iowa. 1990
Central College, Merida, Yucatan, Mexico International Studies Program - one semester, 1989
Diploma: Burlington Community High School, Burlington, Iowa. 1986

Keith J. Lewandowski

| 15 Greenwood Avenue | Wakefield, MA 01880 | 508-873-1694 | KeithLew22@gmail.com |

PROFESSIONAL EXPERIENCE

Pearson Education, Boston, MA   **Jan 2015- Present**

Strategic Consultant, Consulting Services

- Provide colleges and universities with strategic insight regarding business operations, process improvement, new program development, and competitive positioning.
- Conduct both primary and secondary market research for higher education and corporate clients, to include surveying, market sizing, qualitative interviewing, and labor data analysis.
- Work in collaboration with business development colleagues to scope new engagement opportunities. Leverage research expertise in discovery calls with client as well as in proposal writing process to design project engagement plan.
- Collaborate with Consulting Services colleagues to design new service offerings and to enhance thought leadership in the market.
- Leading large-scale qualitative study to explore the motivations, experiences, and outcomes of adult learners throughout the US.

Wentworth Institute of Technology, Boston, MA   **Apr 2012- Jan 2015**

Director of Marketing and Admissions, College of Professional and Continuing Education (January 2014 – January 2015)
Marketing Manager, College of Professional and Continuing Education (April 2012 – January 2014)

- Managed all marketing and admissions activities, including strategy, planning, execution, and tracking.
  - Supervised four direct reports; manage all marketing and admissions vendor relationships.
  - Managed annual marketing and admissions budget of approximately $850,000.
  - Planned and executed all on-campus, off-campus, and virtual events for the department.
  - Responsible for department's social media presence; launched initiative in June 2012.
  - Led initiative to build and document all admissions processes for consistency and training purposes.
  - Re-designed prospect, applicant, and accepted student communication plans to increase interaction levels.
  - Collaborated with colleague to update all marketing, admissions, advising, and other externally facing materials for consistency in design and in messaging.
  - Key Successes:
    - Increased number of inquiries by 63%, increased web traffic by 344%, and lowered cost per inquiry by 41% over two year period.
    - Achieved year over year new student enrollment growth of 45% for fall 2014 and 43% for spring 2015.
    - Exceeded master's enrollment goal by 39% in fall 2014 and by 80% in spring 2015, representing approximately $1.4 million in incremental revenue.
    - Increased conversion rate year over year from acceptance to enrollment by 19% in fall 2014 and by 29% in spring 2015.
- Managed market research process for department as it relates to new program development and competitive analysis. Scoped research, conducted research execution, and presented findings to key internal stakeholders.
  - Played leading role in development of MS in technology management program during concept design, market research, internal approval process, accreditation process, and marketing plan to launch program.
    - Program beat enrollment goal by 73% in inaugural launch.
- Oversaw departmental web site to assure consistency in messaging and quality control of content.
  - Worked in collaboration with colleagues across the institution to launch new departmental web site in June 2012. Worked in similar capacity to add online programming section to web site in January 2013.
- Played a leading role in implementation an in on-going development of Hobsons-Radius CRM software. Member of core implementation team, working in close collaboration with IT department and external consultant.

Eduventures, Inc., Boston, MA   **August 2009- April 2012**

Marketing Programs Specialist, Marketing Team (April 2011- April 2012)

- Oversaw planning and execution of all marketing activities for three Eduventures products.
  - Worked in collaboration with sales and research teams to create and execute various email and direct mail campaigns.
  - Led planning and on-site execution of conference events in collaboration with sales and research teams.
    - Secured booth, prepared all materials, planned and hosted private prospect events at conferences, and provided on-site support for sales and research team members.
  - Responsible for writing and distribution of press releases.
  - Led initiative to build new collateral materials; served as lead author and worked in collaboration with vendor on design.
  - Worked extensively with Salesforce and Marketo to drive marketing initiatives.
- Responsible for Eduventures' social media initiative on Twitter and Facebook; served as lead "voice."
- Selected by President and CEO to lead pricing and packaging team as part of new product development initiative.
  - Specific activities included: analysis of historical pricing trends, correlation of products with pricing, in-depth competitive analysis, and gauging consumer preferences.
- Project manager for Eduventures' annual customer satisfaction survey. Built and administered survey, conducted analysis, wrote final report, and presented results to all staff at company-wide meeting.

Market Research Analyst, Continuing/Professional Education and Online Education Team (July 2010-March 2011)
Market Research Associate, Continuing/Professional Education and Online Education Team (Aug 2009-July 2010)

- Conducted primary and secondary market research, wrote customized reports, and advised postsecondary clients on topics such as program feasibility, their competitive environment, and operational best practices.
- Served as the account manager for 21 postsecondary institutions throughout the U.S. Addressed all client questions and challenges related to Eduventures membership, scoped custom research projects at the client's request, and gauged client satisfaction.
- Acted as the liaison for all research staff at Eduventures to the IT department.
- Assisted custom research manager in editing of colleagues' research reports for quality assurance and consistency purposes.
- Managed team intern for spring 2011 semester. Coordinated with team members to allocate intern's resources as appropriate and worked closely with intern to complete a custom research project for a postsecondary client.
- Received company-wide award in Q3 2010 for commitment to working and building relationships across organization.

Institute for Community Inclusion, Boston, MA   **Sep 2007 - May 2008; Sep 2008 - Aug 2009**

Research Assistant

- Worked on a team of researchers as a part of a five-year, federally funded grant to research and improve state-level vocational rehabilitation services. Supported senior research staff through conducting extensive literature reviews, performing data entry and analysis, coding study findings, and assisting in database management.
- Served as the primary administrator on nationwide survey that examined academic market for opportunities available to persons with disabilities at post-secondary level.
- Conducted a program evaluation, in conjunction with a co-worker, on in-house work experience program for persons with disabilities. Presented findings and suggestions for improvement to senior staff.
- Assisted in conducting survey of parents of students with disabilities who were taking college-level courses.
- Supported instructors in online graduate program, which trains teachers on the best practices in educating students with disabilities.

EMC Corporation, Hopkinton, MA   **Mar 2006 - Aug 2007**

Business Analyst, BURA/Centera Group

- Produced daily, weekly, and bi-weekly business reports to track global partner sales activity.
- Served as primary administrator for internal sales web site, a key resource in managing and driving channel sales.
- Provided on-call support for pre-sales engineers working at prospective customer sites.
- Administered, monitored, and processed results of sales incentive program for EMC direct and partner sales groups.
- Supported BURA/Centera engineering group in identifying and alleviating customer equipment malfunction issues.

EDUCATIONAL BACKGROUND

University of Massachusetts, Amherst   **Jan 2013- Jul 2016 (expected)**
- Master of Business Administration, GPA 4.0

University of Massachusetts, Boston   **Sep 2007- May 2009**
- Master of Arts in Applied Sociology, GPA 4.0

University of Massachusetts, Amherst   **Sep 2001- May 2005**
- Bachelor of Arts in Political Science; minor in Sociology, GPA 3.4

DANIEL GOLDSMITH

EXPERIENCE

Pearson, Consulting Manager. Boston, MA. January 2015 – Present.
Lead the Intuitional Strategies team for Pearson Consulting Services, focusing on institutional strategy and growth planning, career and technical education, workforce and employability solutions, innovative educational delivery models, and data and analytics.

Eduventures, Director of Business Development. Boston, MA. 2013 – 2015.
A 20+ year-old leading research/advisory firm in higher education. Developed and launched Eduventures Research for Higher Education Technology Leaders focusing on the higher education technology landscape.

PA Consulting, Principal Consultant, Cambridge, MA. 2011 – 2013.
A top 25 management consultancy headquartered in London and operating in 35 countries. Worked collaboratively with clients to develop pragmatic solutions to complex challenges, utilizing systems thinking and simulation modeling to develop strategy, improve market awareness, and harness large data sets to meet enterprise challenges.

MIT Sloan School of Management, Research Associate, Cambridge, MA. 2005–2011.
Developed academic yet business- and policy- relevant research on strategy, management, and digital business topics. Research sponsors included: Gates Foundation, Business Higher Education Forum, SAP, Defense Advanced Research Projects Agency (DARPA), and the Masdar Institute of Science and Technology (Abu Dhabi.)

Fremont Group, Research Associate, San Francisco, CA. 2003 – 2004.
Private equity firm, affiliated with Bechtel Corp. Developed and evaluated demographic-driven investment proposals for the corporate strategy office.

Senate Committee on Armed Services, Staff Assistant, Washington, DC. 2001 – 2003.
Conducted mathematical analysis of the Department of Defense budget and specific policy issues, such as new training technologies.

EDUCATION

Brandeis International Business School, Waltham, MA. MBA. 2006.
Faculty Award, Top MBA Student; GPA – 4.0; Graduate Teaching Assistant and
Research Fellow

University of Virginia, Charlottesville, VA. BA, Government. 2001. Dean's list

PUBLICATIONS

Co-authored over 15 peer-reviewed journal and conference publications on
strategy, policy, and technology.

LINDSAY BAUN   507-828-2386
4641 W 26th Ave   labaun@gmail.com
Denver, CO 80212

Education:

Master of Science in Applied and Computational Mathematics, May 2012
University of Minnesota Duluth
GPA: 3.97/4.0 Scale
Honors: Duane E. Anderson Graduate Fellowship, Outstanding Graduate Teaching Assistant
Research Project: "Nonparametric Statistical Analysis of the Correlation between two Single-Neuron Firing Rates."

Bachelor of Arts, Magna Cum Laude, May 2010
College of St. Benedict, St. Joseph, MN
Major: Mathematics, Minor: History
GPA: 3.88/4.0
Honors: Phi Beta Kappa, Dean's List, Presidential Scholarship, Sisters of St. Benedict Scholarship
Honors Thesis: "Radio K-Labelings of Generalized Petersen Graphs"
Study Abroad: Galway, Ireland, Fall 2008

Advanced Course Work

Probability Theory	Multivariate Statistics	Advanced Linear Algebra	Genetics
Statistical Inference	Probability Models	Mathematical Modeling	Biostatistics
Regression Analysis	ANOVA	Bioinformatics	Clinical Trial Data Analysis

Technical Skills:
SAS, SQL, R, Tableau, APT Test & Learn, AQT, HTML, Mathematica, LaTex, Minitab, Microsoft Office

Experience:

Strategic Consultant   March 2014 – present
Pearson, Centennial CO
- Partnered with higher education institutions to build reports and conduct analysis to leverage data to increase student success.
- Conducted analytics readiness assessments for higher education institutions to provide recommendations for creating a customized plan to develop and execute a data strategy.
- Developed, researched, and documented best practices to understand the analytics opportunity in higher education.

Data Analyst   June 2012 – February 2014
Target Corporation, Minneapolis MN
- Empowered business partners to confidently make data-driven decisions by using test and learn practices.
- Leveraged a large customer database to build statistical models predicting customer trends and behavior.
- Developed and documented new analytical methodologies to drive customer-centric marketing campaigns.
- Built strong partnerships with business clients through delivering accurate and relevant data supported insights.
- Consulted on the creation and implementation strategic customer segmentations for marketing.

Graduate Teaching Assistant/Course Instructor   September 2010 – May 2012
Mathematics Department, University of Minnesota Duluth
- Designed and taught a lecture course in college algebra for 60 students.
- Facilitated weekly discussions and activities for math courses such as calculus and finite math.
- Held office hours weekly to provide individualized help for students.

Data Analytics Intern   June 2011 – August 2011
Target Corporation, Minneapolis MN
- Processed large marketing and sales data sets using SAS and SQL.
- Employed mixed modeling techniques to build econometric models measuring marketing effectiveness.
- Communicated results and strategic insights with media and marketing business clients.
- Utilized optimization tools to inform marketing budget allocations across media channels based on channel ROI.

Research Assistant   Summer 2010
Summer Institute for Training in Biostatistics, University of Wisconsin Madison
- Applied statistical methods to analyze large clinical trial data sets.
- Gained experience using the statistical languages R and SAS.
- Collaborated with a team to analyze data from clinical trials of new prescriptions for heart attack patients.
- Presented findings as a paper and presentation.

Michelle Bacon | GIS Coordinator

EDUCATION
Bachelor of Science
Geographic Information Science
Western Michigan University

CERTIFICATIONS
Esri Desktop Technical Certification

Esri Desktop Professional Certification

SOFTWARE
Esri ArcGIS 10.3.1
Autodesk
Microsoft Office
Adobe Suite
Enterprise Data Systems

AFFILIATIONS
American Association of Geographers

YEARS OF EXPERIENCE
9

As GIS Coordinator, Michelle plans, organizes, coordinates and participates in the development and implementation of various geographic information systems; directs and participates in the long-term development and enhancement of GIS information technology to meet client mapping and end user service objectives; supervises and performs GIS modeling duties; and provides expertise, direction, support, assistance and guidance for business operations to Atwell staff and clients. She collaborates directly with the leadership team and decision makers in other departments to identify, recommend, develop, implement, and support cost-effective geospatial technology solutions for all aspects of the organization. Michelle also identifies emerging information technologies to be assimilated, integrated, and introduced within the company, and acts as a liaison with related external clients and organizations.

RECENT RELEVANT EXPERIENCE *Additional Experience Available Upon Request*

GIS Coordinator – Anderson, Eckstein and Westrick, Inc
Michelle's primary duties while GIS Coordinator at Anderson, Eckstein and Westrick, Inc. (AEW) were to direct all GIS activities within the company, and to develop and manage GIS for AEW's 27 client municipalities. Spatial analysis, location analytics, and business intelligence facilitated by ArcGIS helped AEW's clients gain insight and drove decision making in the local governing process. Michelle managed all data management and GIS tasks associated with multiple Stormwater, Asset Management, and Wastewater (SAW) grants obtained through the State of Michigan for these clients. Tasks associated with SAW grants included developing mobile field GIS data collection during asset inspection; online, real-time project tracking and data management; location analysis to target infrastructure in greatest need of rehabilitation to maximize the utility of the funds supplied by the grant; and authoring asset management plans. Michelle also worked closely with water resource engineers at AEW to provide hydrologic and hydraulic modeling and analysis in GIS.

Geospatial Analyst – Amec Foster Wheeler, PLC
Michelle was primarily responsible for GIS services associated with the National Flood Insurance Program. Her job duties as a Geospatial Analyst included watershed modeling and floodplain mapping per FEMA Digital Flood Insurance Rate Map specifications, and she frequently participated in task and project management duties, lead team-based efforts, and edited large documents for publication. She independently managed project tasks related to GIS, database design and management, location analytics, mapping, data acquisition, spatial analysis, and business intelligence. In addition to GIS, Michelle distinguished herself in the field of cartography by producing design-savvy digital maps for a variety of office and client needs, including web-based mapping using Adobe Flash. She frequently assisted with the editing and design components of intra-office publications and presentations. Michelle also worked closely with the Environmental Group in the field and office to produce high quality environmental documents and reports under state and federal regulations for myriad projects.

ATWELL

Michelle Bacon | GIS Coordinator

Additionally, Michelle was responsible for developing, maintaining and executing office-wide safety compliance. She conducted monthly office-wide meetings where she gave presentations on a diversity of safety topics. Michelle was responsible for all record keeping, project Health and Safety Plans (HASPs), annual employee medical examinations, implementation of best practices, and enforced company, state, and federal requirements for office and worker safety. She performed annual office safety audits, and her office ranked in the 99th percentile for safety compliance corporate-wide. Michelle made numerous other business improvements for cost-reduction and waste minimization to secure office health and safety, and enhanced performance and compliance for the AMEC Safety, Health, and Environment program corporate-wide.

Environmental Scientist – Apex Companies, LLC

Michelle began her professional career working as an environmental scientist. In this role, she worked simultaneously on many projects, including Phase I and Phase II environmental reports, Environmental Impact Statements, and Environmental Impact Screening Forms. Michelle also performed field work such as air, water, soil, and toxic substance sampling. Michelle is 40-Hour HAZWOPER OSHA certified for fieldwork and hazard mitigation, a certified trainer for CSX, and qualified in first aid and CPR by the American Red Cross.

<Degree Name>

Institutional Readiness Assessment

Final Report

Prepared for

<University Name>

<Date>

Embanet™

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PEARSON

ALWAYS LEARNING

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Introduction

In preparation for launching an online <Degree Name> (<DEGREE ACRONYM>) degree program with in 2012, Pearson Embanet (EMBANET) undertook an assessment of <University Name> The assessment project evaluated <University Name> institutional preparedness for supporting a large number of online students and faculty in two <DEGREE ACRONYM> concentrations, in Community and Social Development and Direct Practice The assessment project consisted of evaluating the <COLLEGE NAME> systems, processes, and staff resources in key functional areas that are critical to the successful launch and management of online degree programs. Pearson Embanet's findings were compared to industry best practices and EMBANET's own experience in supporting large distance learning programs. This report presents <COLLEGE NAME>'s infrastructure gap analysis and recommendations for improvement.

Assessment Scope of Work

The goal of the infrastructure assessment is to evaluate the institution's readiness to provide resources and services that support effective online degree programs, students and faculty, and to determine the impact of a nationally-distributed student population on workflow and resources. To achieve this goal, Pearson Embanet:

- **Conducted a site visit**. Conducted a campus site visit to interview administrative and academic staff and evaluate current systems and processes.
- **Completed a gap analysis**. Benchmarked the institution's systems, processes, and staffing against other institutions delivering online programs and created a gap analysis.
- **Provided strategic and operational recommendations**. Formulated recommendations regarding technology, staff, organizational, and system improvements that will enable the institution to support a distributed faculty and student base.

Figure 1: Institutional Readiness Assessment Scope of Work
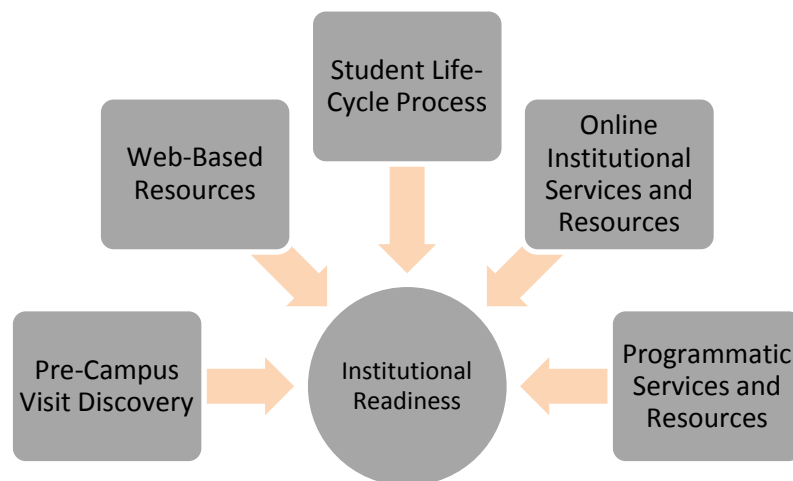
Assessment Methodology

In order to assess institutional and school readiness to deliver equivalent services to distance students, Pearson Embanet took a process mapping approach that examines each process within each student-life cycle phase. This examination also reviews how prospective and enrolled students interact with various departments within <COLLEGE NAME>. EMBANET staff visited the <COLLEGE NAME> campus to conduct the evaluation sessions with academic administrators, program staff, and staff representing the functional support areas of marketing/ communications, recruitment/admissions/enrollment management, registration, financial aid, student accounts, information technology, instructional design and technology, student support and success services, bookstore, and library. EMBANET consultants have compared their findings from these sessions against best practices.

Comparative criteria represent industry best practices and documented experience from the distance learning industry as well as EMBANET's own 16+ years of marketing and supporting online degree programs. EMBANET's review looks at a total of 92 best practices across 9 functional areas of the institution. The following breakdown provides further information regarding this review.

Figure 2: Institutional Readiness Assessment Best Practices Scope

Functional Area	Number of Best Practices
Marketing	14
Admissions	10
Registration	14
Financial Aid	10
Student Accounts	6
Bookstore	12
Library	8
Student Support Services	6
Institutional and Instructional Technology	12

The EMBANET team shared assessment findings for those best practice areas that present risk to <COLLEGE NAME>'s ability to support large distance learning enrollments. EMBANET worked with <COLLEGE NAME> to solicit feedback and input. To achieve intended outcomes, EMBANET completed the following objectives:

Student Life Cycle Process Evaluation: Assess current processes for supporting students through each phase of the student lifecycle in an online environment. Lifecycle phases are:

- Student Lifecycle Phase I: Applicant to Admitted Student
- Student Lifecycle Phase II: Admitted Student to Registered Student
- Student Lifecycle Phase III: Registered Student to Fully Enrolled Student
- Student Lifecycle Phase IV: Fully Enrolled Student to Fully Matriculated Student
- Student Lifecycle Phase V: Fully Matriculated Student to Graduating Student

Functional Area Operation and Systems Evaluation: Assess current services, systems, and processes in each critical functional area for supporting students and faculty in an online environment.

- Marketing and Public Relations
- Student Lifecycle I: Recruitment and Admissions
- Student Lifecycle II: Admissions and Registration
- Student Lifecycle III: Financial Aid and Student Accounts
- Student Lifecycle IV: Bookstore, Library, Student Success, Advising, Orientation
- Information and Instructional Technology/Helpdesk

Report Structure

The report outlines the findings and recommendations for the Institutional Infrastructure Readiness Assessment project. EMBANET's findings and analysis will include the following areas:

- High-Level Process Map
- Marketing and Communications
- Recruitment and Admissions
- Registrar
- Student Accounts
- Financial Aid
- Instructional Technology and Helpdesk
- Bookstore
- Library
- Student Success
- Summary

Findings and Recommendations

High Level Process Map

A process map was created as a result of the cross-functional process mapping session and individual interviews. The graphic on the following page provides a high-level view of the current process that prospective students experience from first contact with <COLLEGE NAME> until they graduate.

START ___ Admission Process Map

Prospective student online application for the program. No application fee. 25-30% of applications are received in hard copy.
Student

Prospective student receives a unique id #. If they matriculate this ID becomes permanent.
Student

College Net form and applications are downloaded every morning and placed in hard copy file. *
_____

All information is manually entered into SIS by Admissions/Student Service/Fin Aid/Registrar resources.*
_____

___ implements manual communication plans for follow up with incomplete information, completes coding in SIS.
_____

___ reviews completed applications for Fall admissions. Current application deadline is May 15. **
_____

___ reviews applications and makes admission decisions within 2 weeks; Separate committee for applicants reporting a felony.
_____

___ sends admission letter to applicant via US mail and email (international students by email only).
_____

Student receives admission offer – confirms acceptance with $100 deposit.
Student

Student submits $100 via check or cash. *** Students can register for classes.
Student

Prospective student completes online FAFSA
Student

Applicant receives email that application has been submitted
Student

Applicant receives a welcome email from ___ within 24 hours; along with info as to next steps, missing application materials; if app is complete, they receive info about orientation, and are invited to join Facebook.
Student

Health sends email to obtain proof of immunization & TB test
Health Services

Financial Aid applications are sent by MSASS to University Financial Aid office.
Financial Aid

Applicants submits all application materials, including field work proposal
Student

Applicant/Admitted Student completes FA application processes
Student

Financial Aid tracks students using admission and acceptance codes in SIS
Financial Aid

Financial Aid determines award by April. This includes ___ scholarships.
Financial Aid

Financial Aid sends award letters to students via email
Financial Aid

Student accepts financial aid
Student

Confirmed applicant status recorded in SIS based on applicant admission code and manual delivery of $100 deposit to Student Services
_____

Student uses ID number issued during application process, once the deposit is paid to access services
Student

Student Financial Services receives deposit. Health Fee added to account.
Student Accounts

Registrar's office opens registration. Batch registration for 2 year students. Advanced standing all take same courses. Transfer credits and proficiency exams accepted.
Registrar'

Students self-register after matriculation
Student

Financial Aid reconciles student status in SIS registration
Financial Aid

Financial Aid disperses award directly to student account on first day of class
Financial Aid

Tuition payment at time of registration with due date by the first day of class (electronic bill) unless other arrangements are made; completes drop/add if needed. Students with more than $100 balance cannot register.
Student

Financial Aid tracks student account changes, refund policy, and satisfactory academic progress and communicates with students
Financial Aid

Student receives transcript evaluation and degree audit completed manually
Student

___ Completes transcript review and enters in SIS
_____

FINISH MSSA Program

Student receives orientation information and email information via email (batch)
Student

Student attends orientation, completes proficiency exams, gets ID at Access Services
Student

Student financial account statement generated. Health fee can be waived with proof of coverage before deadline. Credit balances refunded by check – mailed or picked up at cashier's office.
Student Accounts

Registered students ready to begin classes
Student

Student maintains satisfactory academic progress, complies with all requirements, continues re-enrollment
Student

Student completes online application for graduation; completes graduation requirements
Student

Completes graduation audits and ensuring all requirements and process are complete
_____

Grants final approval and posts/releases diploma
Registrar

Marketing and Communications

Pearson Embanet staff assessed <COLLEGE NAME>'s current process and capabilities to support online program marketing with institutional resources. This section outlines <COLLEGE NAME>'s current marketing and communications processes and evaluates them against best practices.

Figure 4: Marketing and Communications Findings and Recommendations

Best Practice	Findings	Recommendations
Online availability of institutional and school brand standards, logos, and imagery	This collateral is available online through an external vendor. The institutional marketing department can provide a log-in. In process of developing an asset management system. Some images are currently available for search. Within <COLLEGE NAME> there is a shared server with event photos, videos, etc. depicting real people and reflective of the diversity of the university and <COLLEGE NAME>. All students sign a photo release form upon admission. A faculty repository is also under construction.	<COLLEGE NAME>'s current process meets EMBANET's best practices.
Willing to permit EMBANET use of institutional and school brand standards, logos, and imagery	Third party vendor password and ID can be provided. First phase of branding updates, tracking visitors, and other related initiatives are on-going.	<COLLEGE NAME>'s current process meets EMBANET's best practices

Ease of finding distance learning programs on institution's home page	<COLLEGE NAME> does not currently offer online degree programs. Distance learning consists of the Weekend Intensive program.	EMBANET encourages <COLLEGE NAME> to consider, and plan how online learning will be positioned and represented on the school website. Clear separation of online programs vs. on-ground programs will be important to ease navigation for potential online students.
Ease of navigation to program-specific web pages	Same as above	Same as above
Ease of inquiry about programs on website	<COLLEGE NAME> programs are presented on the <COLLEGE NAME> website. This can be accessed through the <University Name>.edu site or at http://<College Name>.<University Name>.edu	<COLLEGE NAME>'s current process meets EMBANET's best practices
Ease of finding online application on website	The online application is available – however, finding that on the <COLLEGE NAME> Admissions page is not intuitive. The form is easily navigated to on the <University Name>.edu site.	EMBANET encourages <COLLEGE NAME> to review the current web pages and make navigation to the online application clear and easily accessible for prospective students.
Centralized marketing approval process	Currently, program press releases can be developed jointly. There is a media rep for <COLLEGE NAME>.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Willing to create CNAME for online programs off the institution's .edu domain	i<UNIVERSITY NAME> initiatives are underway to allow for this process. A task force has been established and will begin functional development in January, 2012.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Willing to share current marketing assets, keyword sets, and past campaign performances	There would be no problem sharing this information.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Permit EMBANET to bid on branded keywords without geographical restrictions.	Permission could be obtained.	<COLLEGE NAME>'s current process meets EMBANET's best practices

Permit EMBANET to link to the institution's website and to EMBANET designed landing pages.	The possibility (2 years out) web content management will begin to change next year. Current platform is an open source. Permission can be obtained.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Permit EMBANET to create social media assets when appropriate to campaign strategy	Currently there is Facebook advertising, cost has been a consideration. Permission can be obtained.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Level of Staffing	At the <COLLEGE NAME> level - Director, 2 part time students. Recognition of the need for a part-time staff member. At the University level – projects are assessed and staff is devoted as needed. Currently there are a total of 18 people working as media reps, internal communication, designers and editors.	EMBANET recommends that <COLLEGE NAME> consider adding additional staff to the tasks involved in Marketing and Communication. Staffing benchmarks are provided in a separate section of this report.
Other Notes/Key Findings	<COLLEGE NAME> / <University Name> would be willing to work with us on accessing alumni data bases. There are 5 centers that are pretty much stand-alone. Traffic coming to these center pages can be tracked. Promote additional services to students interested in <UNIVERSITY NAME>. (Free software, computers, discounts, etc. What is working really well? The focus on the website, ability to track and analyze traffic for effectiveness. There is no internal knowledge of how effective printed materials are, but there are plans to do a better job of tracking that in the future. "Think Beyond the Possible" tagline is effective. <COLLEGE NAME> and <University Name> markets the research done at the university and are positioning <University Name> / <COLLEGE NAME> as a top research institution. Changing the World One Community at a time – is the tag line for the School. <University Name> is nearing 100 year	No recommendations necessary for this section.

| | anniversary. This will be a big campaign.

Any mobile marketing at this point? There is awareness of the numbers from Google about this, but no activities going on there. | |

Admissions

The competitive nature of the online degree market requires that <COLLEGE NAME> be responsive to prospective students and applicants. Pearson Embanet assessed 10 best practices in regards to <COLLEGE NAME>'s current admissions processes, systems, and staffing with an eye to timely responses, process scalability, and ease of use. The following table presents recommendations for those best practices which may present risk in regards to launching the online programs being considered.

Figure 5: Admissions Findings and Recommendations

Best Practice	Findings	Recommendations
Online application with functionality for online degree selection	The online application is currently available. Current applications are printed and manually entered into the SIS. There is an initiative underway to implement Hobson's Connect and ApplyYourself. A goal of this initiative is to implement functionality and establish integration of these systems. A timeline for implementation will be sent to EMBANET. There is an online designation option within Hobson's Connect and Apply Yourself that can be added to the online application. <COLLEGE NAME> is still receiving 25 – 30% of their applications in hard copy format. These are also manually entered into the SIS. These hard copy applications include: • 3 letters of recommendation • Personal Statement • Resume • Official Transcripts • Test scores (if applicable) • Background checks (for those with a felony only) • Field education proposal essay (.pdf file submitted via email).	In order to increase ease of application and reduce frustration regarding irrelevant questions, EMBANET recommends that a separate online application be developed for online students only. This application will provide information and processes that are relevant to those who will not be coming to campus. This development time would also provide an opportunity to investigate and review the ability to further leverage the automated processes inherent in the support systems or to make adjustments to further develop and enhance the efficiencies of applying online.

	• Agency agreement form, proposed field instructor resume, proof of the field instructor credential (note: this will be added to Hobson's and AppyYourself implementation) All materials are stored in Student Services – once complete the file is turned over to the admissions committee for decision making. Much of the application process can be done online. Electronic transcripts can be received. Hobson's Connect and ApplyYourself implementation will allow automatic response for letters of recommendation. The online application does provide the option for students to self-identify regarding disabilities and accommodations that might be needed. Currently, Educational Services alerts Disability Resources. While the Hobson's Connect implementation will provide for automatic routing of the application denoting a disability, it is important to note that many times applicants will include this information in the personal statement, during a phone conversation, or during the orientation process as a response to Disability Resources presentations.	
Online payment of application fee	No application fee	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online application data auto-populates in Student Information System	College Net form and the application are downloaded every morning and then placed into a hard copy file. This information is entered, manually into the SIS.	EMBANET encourages further integration of additional Hobson's Connect and ApplyYourself functionality to reduce

	Hobson's Connect and ApplyYourself are slated to go live in January, 2012 to provide a direct interface with the SIS (PeopleSoft) and eliminate the need for hard copy and manual entry. <University Name> / <COLLEGE NAME> are working with other schools who have implemented Hobson's Connect and ApplyYourself to overcome delays in addressing issues such as duplicate applications and other known process issues.	manual data entry.
Separate degree/ program code for online programs for tracking purposes	Currently there are no online programs and no separate degree coding has been implemented.	EMBANET encourages <COLLEGE NAME> to implement this coding so that online students can be uniquely identified and differentiated from face-to-face students. This will permit <COLLEGE NAME> to track applicants electronically using SIS functionality.
New students can be admitted every term	Currently, students are admitted only in the Fall.	EMBANET recommends that <COLLEGE NAME> consider a minimum of 3 starts per year (Fall, Spring, and Summer). Further exploration of the possibility of six starts per year as an additional differentiator for the program may be undertaken at a later time as a six-start model may offer opportunities for greater scale and application of additional efficiencies.
Rolling application acceptance and review for	Currently, applications are reviewed and students admitted for Fall term only.	EMBANET recommends that <COLLEGE NAME>

each academic term		implement rolling review and acceptance processes for each academic term.
Admission decisions made within one week of completed application	Hard copy file is turned over to admissions committee and an admission decision is typically made within 2 weeks. <COLLEGE NAME> conducts a thorough review of the admissions documents, consider academic preparation, rigor of program, communication skills on essay, references/resume, appreciation for diversity, any volunteer work to better assess the student's ability to be successful in the program. A summary form is created manually based on evaluation and critique of the documents included in the file. This must be signed off on by <NAME> (Admissions and Financial Aid). Interviews for all international students, students with resume gaps, students with felonies, personal statements with trauma are conducted within the 2 week timeframe. Admissions Review Committee consists of faculty and admissions counselors that do a first review (2 faculty members); there is also a committee (4 faculty members) who specifically review the applications indicating a previous felony. Committee meetings are scheduled as applications come in. The committee reviewing applications with previous felonies receive scanned documents via email (these are provided as soon as possible). The current process is reportedly working well.	EMBANET recommends that <UNIVERSITY NAME> continue to review processes and automated support systems to facilitate a maximum of one week admission decisions.

	Minimum data needed to make a decision about a student (conditional admits occur due to missing data – 40 to 50% meet this status. They must meet requirements and send data before they start. Upon receipt of all data, the student gets a revised full admissions letter via US Mail and email).	
Email communication with students for all institutional communications, i.e., acceptance letters and registration information	Mostly the admissions counselors are in touch with the students; they can put students in touch with faculty; these individuals help coach them through the processes, and take time to discuss expectations along the way. Emails are currently not automatic; most communications are manual (email, phone call and in-person). Applicants are notified by US mail and by email within 24 hours of the admissions decision being rendered (for international students email is the only communication sent). The admit letter provides information regarding their network ID and password (University credentials that allow them to begin to access online services, and have 2-way communication with the university).	EMBANET recommends that additional programming be considered to provide automated email responses throughout the process of application and admission, further reducing the manual efforts of limited staff resources and increasing assurance that these are processed in a consistent timeframe or as a result of specific actions on the part of the applicant or <COLLEGE NAME>.
Process to track missing documents	There is a manual email process to alert prospects regarding which aspects of their application have been received and which ones are pending.	EMBANET encourages <COLLEGE NAME> to revisit the programming requirements for the upcoming implementation of Hobson's Connect and ApplyYourself and the integration with the SIS to provide automated processes for checking necessary admission documents and generating automated

		emails to applicants regarding missing documents and their admission status.
Dedicated admission resources for distance learning students	The Director of the Weekend program (NAME) is both a faculty member and a recruiter and is actively engaged in the recruitment process for the weekend students. There is not a dedicated staff resource who works only on the Weekend program admissions.	EMBANET recommends the addition of dedicated staff in this area. Staffing benchmarks are provided in a separate section of this report.
Transcript evaluations completed within two weeks of completed application	This practice follows a similar process to the application / admissions review process. Transcripts are submitted as part of the admissions file. There are instances where a transcript review is done after admission (a course syllabus may be required to determine if the course is equivalent). If a student is a <DEGREE ACROYNM> student, this is done during the advanced standing admissions process. These processes are normally done within the 2 week timeframe.	EMBANET encourages further review of the transcript evaluation process to assess efficiencies in timeliness for receipt of, review, and response to transcripts. While <COLLEGE NAME> does not currently experience a high volume of transfer credits, large numbers of online students could create strain on the current process and resources.
Integrated systems	Currently, there is not integration between Hobson's Connect, ApplyYourself and the SIS. Prospect information is input manually. There is one staff person who spends most of her time entering information from information session data cards, and web inquiries. There is hope that Hobson's Connect and ApplyYourself will provide self-service for applicants to enter their own information.	EMBANET recommends continued review of the functionality being created as a result of the implementation of Hobson's Connect, ApplyYourself and the existing SIS (People Soft). Increasing integration between systems and reducing the manual processing of data is essential to the success of supporting large online

		enrollments.
Level of Staffing	Shared Resources between Registrar, Student Services and Admissions/Financial Aid include: 3 Department Assistants 2 Recruiters 1 Part-time Recruiter 1 Future Full Time Admissions Specialist 1 Director of Admissions / Financial Aid Assistant Dean of Student Services Registrar	Staffing benchmarks are provided in a separate section of this report.
Other Notes / Key Findings	Student recruitment and tuition revenue goals are established by the budget subcommittee of the school. Recruitment / Admissions employs a variety of methods to market to potential students (e.g., graduate affairs, faculty and alumni referrals, conferences, campus visits, graduate fairs, and guest lecturers). Service standards include responding to prospective students within 24 hours (there is a <COLLEGE NAME> department assistant assigned to follow up on emails every morning). Email, phone calls, Skype, Facebook and Twitter are all used to interact with prospects (typically these are monitored until 9:00 at night). Hobson's will be used to track the application and create email processes. Online tracking has just been implemented.	No recommendations necessary for this section.

Registrar

Once students have been admitted to an online program, the process for registration and successful matriculation should be convenient and uncomplicated. For many distance-learning students the ability to access critical information and complete processes in a proactive and efficient manner will be a critical part of their decision to begin a program. Effective processes will maximize the institution's student service efforts and assist with academic and support resource planning. Pearson Embanet staff evaluated <COLLEGE NAME>'s current registration and course scheduling process in light of the following functionality.

Figure 6: Registrar Findings and Recommendations

Best Practices	Findings	Recommendations
Automation of applicant/admitted student information transfer to student information system (SIS)	Currently this is a manual process	<COLLEGE NAME> is encouraged to eliminate manual data entry of student information into PeopleSoft and to fully utilize the functionality of the online application.
Online readily available student ID/access to online student services/resources	Student ID is available at orientation (go to the ID center, access services) same for weekend students Students can get IDs by sending a picture (white background, and following a prescribed process). These are sent to Access Services for processing – these come back to <COLLEGE NAME> for transmission to students. There is understanding that this could be automated and become a student-managed process.	EMBANET encourages the establishment of a process for uploading pictures into the SIS and providing online students with picture IDs.
Online registration available	Students have declared majors (concentrations/ specializations) on their application (it's a drop down box) – from this designation, they are assigned an academic advisor – with advanced standing they can transfer up to 15 hours (of advanced standing courses).	EMBANET has no recommendations for this best practice area.

	Cohorts are created from non-<DEGREE ACROYNM> students (batch process) If a student takes a proficiency exam they can waive out of some of the foundation courses – they find out about this during orientation Registration happens before orientation (as soon as they are submitted they are registered) About 4 students per term take the proficiency exam (between 4-8 exams per term, only non-<DEGREE ACROYNM> students) Up to four proficiency exams may be taken (graded by the lead instructor for that class) and they choose a different course with Registrar (NAME) applies to transfer credits (most transfer credits translate into pre-requisites). 48-72 hours for grading of proficiency exam – manual process and the tests are not electronic (most exams are essay); only the research exam is multiple choice Registrar (NAME) does a batch registration the first time for all new students after that the students can register themselves using the self-service modules of the SIS. Students receive emails regarding registration processes and dates.	
Automation of transfer credit to the electronic record and degree plan	Currently, the Registrar's office (NAME) manually inputs transfer credit information into the SIS. These are considered on a <University Name>-by-<University Name> basis with courses and syllabi being reviewed for equivalency.	EMBANET recommends automation of the transcript review process utilizing the capabilities of the SIS. While there may still be exceptions from time to time, these

		will be few.
Student online access to final grades	Students can access this information themselves through the SIS interface.	<COLLEGE NAME>'s current process meets EMBANET's best practices.
Student online access to track academic progress	Students can access this information themselves through the SIS interface. There is no degree audit currently.	<COLLEGE NAME>'s current process meets EMBANET's best practices with the exception of online degree audit capability. EMBANET recommends that <COLLEGE NAME> work with the Registrar's office undertake the additional programming and consulting to implement this module. This will allow for automated advising and degree audits, significantly reducing the demands on current resources, and increasing <COLLEGE NAME>'s / <University Name>'s ability to provide enhanced services and response times for students.
Dedicated registration resources for distance learning students	There are no dedicated resources for distance learning students. Current resources are shared between Student Services, Admissions and Registrar.	EMBANET recommends that a dedicated point person in registration fulfill a role of centralized communications for EMBANET staff and students. This is not a new staff resource. Cross training others will

		be important as well. The resource(s) will need to have thorough knowledge of processes and systems to support online students, and the academic programs, as well as be a liaison with EMBANET.
Electronic and/or digital communication of new student information and academic policies	Student manual is online (one is the university and student policies for faculty, staff, and students. The other manual is targeted specifically for field instructors and academic advisors).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Registration hold placement on student accounts with outstanding balance	Student Accounts processes monthly and bi-monthly balance reports. During pre-registration, reports are run daily to confirm clearance for students who have had balances exceeding $100.00. Financial holds are the most common ($100 or less balance must be obtained). Transcript holds also exist (mostly related to field clock hours). .	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online student orientation including introduction to institutional resources (i.e., library, learning assistance, bookstore, counseling services, etc.) and campus culture	A comprehensive orientation does exist – however there is not an online orientation.	EMBANET encourages <COLLEGE NAME> to develop an interactive, media rich, online orientation course for the programs being considered for online delivery. This orientation should provide an orientation to <University Name>, <COLLEGE NAME>, and all aspects of the student process.

Summer term is the same length as other semesters/quarters	The summer term for <COLLEGE NAME> programs is the same length as the Fall and Spring terms	<COLLEGE NAME>'s current process meets EMBANET's best practices
Ability to have variable academic calendar for online degree programs	The academic calendar for the weekend intensive program is very close to the main campus calendar. <COLLEGE NAME> can dynamically date their courses going outside the parameters using SIS.	EMBANET recommends that the academic calendar for the programs being considered for online delivery should align with the main campus academic calendar as closely as possible to prevent any delays in financial aid disbursement or other student support services.
Streamlined process for conducting graduation audits	Currently, this is a manual process (pretty mistake proof because you have to follow the pattern of enrollment; not real strict about the free electives. Students must have a written document from a director in the department that shows a waiver of required courses). Academic Affairs, Student Services, Registrar, are good about documenting any curriculum changes.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Proof of immunization not required for online students	TB test is required as part of the field education process (if they have had this immunization within the last 6 months, they can submit the proof of immunization to University Health Services). Upon admission acceptance, the SIS triggers transmission of a form for students to document health history. This must be signed by a physician. The completed form is housed in University Health Services).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Level of Staffing	Shared Resources between Registrar, Student Services and Admissions/Financial Aid include: 3 Department Assistants	Staffing benchmarks are provided in a separate section of this report.

| | 2 Recruiters
1 Part-time Recruiter
1 Future Full Time Admissions Specialist
1 Director of Admissions / Financial Aid
Assistant Dean of Student Services
Registrar | |

Student Accounts

Financial concerns are a key reason that distance students drop or fail to enroll. EMBANET evaluated <COLLEGE NAME>'s current student account processes.

Figure 7: Student Accounts Findings and Recommendations

Best Practices	Findings	Recommendations
Differential tuition rates can be set for degree courses/programs	<COLLEGE NAME> does not currently have differential fees, other schools do set differential tuition rates and it is possible to do this within the SIS. <COLLEGE NAME> bases tuition on credit hours: 2-12 12-16 Above 16	<COLLEGE NAME>'s current process meets EMBANET's best practices
Additional fees for online students are appropriate	There is currently a health fee ($726 per semester) – this can be waived if the student provides proof of other coverage; however, the waiver must be completed by the deadline at the beginning of each semester. There is an online process for waiving the health insurance. This must be done by the deadline or the student will be charged the fee. Health Services contacts every student (via email) prior to the last day to waive. There is an "invisible" technology fee built into the tuition. This fee provides students with access to a library of software downloads (Office, program-specific software, and other software of relevance).	EMBANET recommends that no additional fees related to distance learning be charged for online students. EMBANET recommends that a process be developed (SIS) to eliminate this fee and waiver deadline for online students. Only applicable fees should be charged to online students. Online students should not be charged fees for services they will not utilize (e.g. parking).
Online payment available	Payment of all fees can be accomplished online. Student Accounts can accept cash, cashier's checks, money orders, or paper checks through the mail. There are capabilities within the SIS and third-party billing systems to allow for payment through electronic check (checking or savings).	EMBANET encourages <COLLEGE NAME> to consider accepting credit card payments from online students. This is a typical best practice for many online programs and would

	Discover is the only credit card accepted (there is a 1.77% convenience fee included). There is an internal collections office – if a student doesn't make a payment it is transferred to external collection agency after 1st year. The obligation remains on the student's account for life. All billing is done electronically on a monthly basis. Students can request paper copies be sent via US mail. Late fees are accrued on balances. Students are not allowed to graduate until all financial obligations have been resolved.	be an expectation for students entering the online program. In the event that <COLLEGE NAME> elects not to accept credit card payments, continued efforts to inform potential students early in the application and admission process in order to give them sufficient time to be prepared for this financial transaction are essential.
Tuition payment plan available	There are both internal and external 10-month plans available to students. These are geared to stay within due dates for tuition over the course of an academic year. The plans start in June and end in March (first 5 payments go to first term and second 5 payments go to second term). Online form can be found at: http://www.<University Name>.edu/finadmin/controller/pdf/ezpay_tuition.pdf Outside vendor provides tuition management systems. They market directly to students. ACH is the in-house plan and the one recommended to students experiencing difficulties but committed to graduating from the program. Students are provided with links to the payment plan website during their orientation process (Financial Aid information sessions). Students are notified by Tuition Management Systems of external payment plans via email. The plan provides monthly billing.	Given that <COLLEGE NAME> / <University Name> does not accept credit cards for tuition payments, payment plans are increasingly important. EMBANET recommends that <COLLEGE NAME> / <University Name> develop year round payment plans in order to bridge the gap between financial aid and actual tuition costs.
Online access to student account information	Students can see overdue balances and they can see credit balances through the student portal of the SIS. File from financial aid is loaded into the SIS (3 x	EMBANET encourages a review of the PeopleSoft capabilities and the policy decision regarding credit

	per week) and posted to student accounts; Students can see status online.	balances to further reduce manual processes, and to increase ease of student access to this information.
Tuition refund policy availability made public to students	<COLLEGE NAME> does not refund tuition in the Intensive Weekend once the class has begun. If the student receives federal funds they have to maintain at least 6 hours of enrollment.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Third party billing availability	Students must send a letter, via corporate letterhead with the agreement. Currently the military billing is about a third of the total of third-party billing with companies, agencies, 529's and embassies making up the rest. Much of this traffic comes from the Weekend Intensive program. If the 3rd party does not pay promptly, then the student receives notifications (1 semester is OK, 2 semesters is not allowed); the student is asked to pay if there has been no payment during the past 2 semesters. Phone calls, and emails are sent to the company and the student to inform them that 3rd party billing is being removed from the student's account.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Level of Staffing	Bursar's Office: Bursar 2 staff members working for student accounts monitoring emails and phone calls and various other critical processes 1 staff member in collections 1 staff member processing internal loans (within the university) 2 accounting clerks (same responsibilities but broken down by schools) process charges and payments. Students who do not register for the right number of hours (who qualify for financial aid or scholarships) create a drain on resources to follow up and make corrections.	<COLLEGE NAME>'s current process meets EMBANET's best practices

Financial Aid

Financial aid is a vital consideration for the majority of working professionals who wish to pursue a degree online. For many students their ability to receive financial aid in a timely fashion will be critical in their decision to begin a program. Pearson Embanet assessed the institution's current processes for the processing and awarding of financial aid.

Figure 8: Financial Aid Findings and Recommendations

Best Practices	Findings	Recommendations
Financial aid award packaging using differential tuition rates	<COLLEGE NAME> currently provides this service.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Financial aid available year-round including Veteran's benefit availability	Financial Aid for the graduate professional level is available year round.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Financial Aid counseling	Information sessions and one-on-one conversations with the <COLLEGE NAME> staff regarding financial aid are available to students. <COLLEGE NAME> Financial Aid does not interact directly with students until they are admitted (information is made available through SIS). <COLLEGE NAME> runs queries at least 3 times a week – sometimes daily. These reports trigger processes for communicating with students.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Financial aid processing available for flexible scheduling	This is available. Emails are sent early in the process to those who inquire about financial aid to educate about how to apply and completing the FAFSA. Prospective students are also informed regarding scholarship opportunities. The student can complete the FAFSA at any time, but these are held in a staging hold within the SIS until such time as the student is admitted.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online access to complete institutional	There is an online institutional application and a memo of assistance (from <COLLEGE NAME> so they know whether <COLLEGE NAME> is offering	<COLLEGE NAME>'s current decision processes are based on a traditional

financial aid processes	any assistance) – over $5 million comes from scholarships and 98% of current <COLLEGE NAME> students get some form of scholarship). There is a customized website with calculators for tuition, links to FAFSA, loan calculators, loan counseling, living expense calculators and other important tools for financial decision making. No hard copies of forms are needed. Financial aid decisions are made in April or May and are communicated to students.	academic year. EMBANET recommends that financial aid decisions be communicated with each new admission group of students that will occur for Fall, Spring and Summer for the <DEGREE ACRONYM> program.
Electronic communications with students regarding financial aid application and status	<COLLEGE NAME> Financial Aid does not interact directly with students until they are admitted (information is made available through SIS). <COLLEGE NAME> runs queries at least 3 times a week – sometimes daily. These reports trigger processes for communicating with students. <COLLEGE NAME> receives notice of application completions a couple of times a month (it is an automatic process based on application status – there is a dedicated resource who handles this). Emails are sent early in the process to those who inquire about financial aid to educate about how to apply and completing the FAFSA. Prospective students are also informed regarding scholarship opportunities.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Student online access to view financial aid status	Using their student id and password, students do have access to view financial aid status at any time.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Financial aid availability for part-time, certificate, and provisionally-admitted students	**Part-time status:** PT status for the university is 6 credit hours per term (Fall and Spring); 3 credit hours for Summer term. **Certificate:** No financial aid for certificates. **Provisional:** Provisional students are eligible as long as they are admitted.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Timely financial aid packaging and	Packaging and processing is accomplished within a couple of days once the application is complete	<COLLEGE NAME>'s current process meets EMBANET's

processing once the file is complete	and ready to go. Currently, this does not begin until late April (as <COLLEGE NAME> does not have federal software until mid-February and they don't begin packaging until April). Packaging done in April includes summer (as this is their header). After April, processing is rolling.	best practices
Financial aid disbursement electronically to the student account	<COLLEGE NAME> does disburse funds electronically to the student accounts (this is the only disbursement method practiced). Funds are sent to the Controller's (NAME) office and posted immediately to student accounts (this is done 3 times per week. The 1st disbursement run is done on the first day of class).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Credit balance funds can be electronically deposited in student checking account	An initiated refund can be sent via check or given out in the Cashier's office (can be mailed and by default is mailed to student). Currently, there is no direct deposit option available.	EMBANET recommends that <COLLEGE NAME> review refund policies and processes to provide direct deposit options for students to their personal bank accounts. Providing this option to geographically disbursed students is viewed as a foundational service / best practices standard.
Level of Staffing	Financial Aid Office: 16 employees: 5 data entry/systems support 2 in external loans (direct and private loans) 2 work study Remainder are financial aid advisors 1 dedicated resource to manage memos of assistance (includes scholarships and work study) and work to process these funds	Staffing benchmarks are provided in a separate section of this report.

Institutional and Instructional Technology

Technology can quickly become a barrier for students and faculty and lead to high attrition rates. Technology resources and on-demand help desk support are also critical success factors for online students and faculty.

Figure 9: Institutional and Instructional Technology Findings and Recommendations

Best Practices	Findings	Recommendations
24X7 helpdesk support with helpdesk ticket system and reporting	Service desk is available 24x7 365 days a year. There is a ticket system (Footprints ticket system). Users can contact via phone, live chat, or email. Once this occurs a ticket is generated. 80% first call resolution to the service desk, any not resolved get escalated. Incident models are in place where IT strives to meet targets (99% resolution targets met). Users can submit a ticket on the site. There are 2 care systems on campus (9am – 10pm everyday) no charge. Also resources in the school. Average time to resolution is about 6 minutes (Tier 1 resolution). Priority 4 incident (computer problem – goal is 5 days and is met 99% of the time). They know each day which tickets are in jeopardy of missing the service standards. Users have the ability to do their own password changes and small technology changes.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Robust Learning Management System (LMS)—latest version	Blackboard version 9.1 SP 7 during winter break	<COLLEGE NAME>'s current process meets EMBANET's best

		practices
Identification of LMS hosting in current use or preference of hosting site	Hosted on-site currently	<COLLEGE NAME>'s current process meets EMBANET's best practices
Seamless Integration between LMS and Student Information System for auto-population of course rosters and final grades	Yes, once the student is populated through the Registrar into SIS they can also be populated into Blackboard Faculty don't have to create a course shell (they can use Blackboard Wizard and just click a button to create the shell) Course rosters are updated nightly.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Robust streaming media server available	Have supported streaming video for about 10 years ; it can exist externally or within the LMS; there are no quotas currently for courses (there are approximately 100 courses per semester that do streaming full length lectures) Adobe Connect hosting as well – there is no cut off (they keep streaming content for four years and for graduate programs it would be four years) Students can go back to older courses (all of the courses that students are enrolled in are available throughout their academic career – both undergraduate and graduate) <School Name> School also has its own streaming server (back 7 years) with about 3 terabytes available (content, presentations, visitors, candidates, etc.) They also offer Second Life as an augmented virtual reality – they don't use a lot for traditional lectures as a meeting place, do a lot of role play and simulation especially in health care also use it to connect with non-native speakers.	<COLLEGE NAME>'s current process meets EMBANET's best practices

	Right now faculty videos reside both with ITS or <School Name> (full classroom content would likely reside with ITS, short lectures and videos would be with <School Name>)	
Adequate student and faculty training on LMS features and functionality	Process of launching a new "self-help" website that has several hundred articles. IT researches and crafts tutorials to address pain points IT develops knowledge basis and articles on top 5 incident reports (current process in place). Available tools provide real-time help and Interactive training through presentation or Captivate Lynda.com (self-help tutorial) Applies to both faculty and staff depending on tool	Given the possibility of geographically dispersed students and faculty, <COLLEGE NAME> is encouraged to provide all online training for online faculty and students via an online modality. Training should be required for all users and for faculty certified to teach online. Additional training sessions to cover online pedagogy and course design would also be recommended.
Expertise and equipment necessary to shoot and edit video on campus	<COLLEGE NAME> / IT has the ability to record and capture station technology – Accordant capture station (presentation in a separate window than the content) Equipment is available to shoot video in the classroom and also have a multimedia studio (team of 12 in the studio dedicated to editing) – brand new facility 22x40 sound stage, comparable to broadcast quality studio; these 12 individuals are part of the run staff	<COLLEGE NAME>'s current process meets EMBANET's best practices
Ease of creating copies of the course template for new course design, refresh, or multiple sections	Customization work has been done through Blackboard Wizard (custom to <University Name>) Gives faculty members the ability to archive	EMBANET recommends that best practice processes be implemented and shared regarding

	and store classes	copying course templates, refreshing courses and delivering multiple sections of courses.
	Basic template is set up for faculty (not through Wizard). Training is provided along with a guide that talks about the way they can manipulate BB.	
	Template is specific to <University Name> not to <COLLEGE NAME>	Comprehensive online training for all faculty, course designers, and others involved in developing, and maintaining online courses should be provided and required.
	<COLLEGE NAME> is working on a template and implementing it in the foundational courses – will then trickle into the advanced and field education courses once they are up in running	
	Template is more consistent in the organizational communities and then that helps to build the individual faculty site	
	Template could then be customized depending on the needs of a course	
	Template – has colors, predetermined number of menu items (can customize through banners) – no HTML and CSS driven content (not to a tremendous extent) – template overall is extremely basic	
	Customization takes place at the instructor level	
Regularly scheduled maintenance and upgrades that do not interfere with course delivery	PeopleSoft SIS version 9.0 – do the bundles 3 times per year (January, April, and August – August is the biggest one).	To avoid interruptions to online courses, EMBANET recommends that <COLLEGE NAME> and IT carefully plan upgrades and maintenance that would create lack of course accessibility for students and faculty.
	Did tools release last August and were down one weekend.	
	<University Name> will be down one day in January for another tools upgrade.	
	Freeze windows are in place and chain	

	management.	
	BB service packs are reviewed as they come out and put into a test environment, but no set updates (moves through a change window scenario and sets them up to be minimally disruptive – tries to do 3rd week of May to limit the disruption to students from BB upgrades) Also investigating other LMS systems	
Dedicated instructional design and technology resources available to support faculty in course development process	Two instructional designers at the moment (campus wide); nursing works with them on their online psych program There is a mash-up system that allows them to document project requirements and resources and do a lot of individual consultation As needed situation (typically by environment) There are several open positions in Academic Technology Support (2 new IDs at the beginning of the year to a total of 5 overall)	EMBANET recommends dedicated instructional design services to support faculty during each new online course development.
Technology requirements defined and made available	Yes – the requirements are available to all students (on website and during admissions and orientation processes). There is a tech fee that includes software but not hardware (all the applications that utilize on campus are available) – this is included in tuition (does not show up as a separate charge in student accounts).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Level of Staffing (if discussed)	<u>IT Staff</u> Approx. 120 people in central IT (FTEs) 2-3 dozen students 1 dozen contract employees 67 in Run (day to day operations) 21 in Design 21 in Build	<COLLEGE NAME>'s current process meets EMBANET's best practices

	ID Staff 3 designers now 2 designers to be hired after the first of the year (2012)	
Other Notes/Key Findings	Overall Faculty Attitude Towards Online Learning: Varies depending on the college – in the School of Nursing it was a mandate so there was a lot of initial fear; Adobe Connect (students were surprised about the synchronous activities) Have recently re-organized the IT services department into design, build, run model with different teams for each (each group has a director and staff) **IT perspective:** engage students as early in the application process as possible about the services that are available to them (email address and resources are available as soon as their application is accepted). Once they've made the decision to join the university they go through an on-boarding process with a publication that describes all of the resources available. They also participate in orientation. They have an initiative to assimilate students once they arrive on-campus with a defined process. They've worked to make IT support a differentiator. **<COLLEGE NAME>:** Additional part of the orientation (computer lab), create the domain accounts the students, walk them through changing their passwords, and activate their ID. This is all included in the orientation but many prefer that to be walked through it Part of the orientation for new students and present about the different services	No recommendations for this section.

Bookstore

Students studying at a distance cannot access the campus-based bookstore to obtain course materials. This necessitates the smooth processing and delivery of textbooks, course packs, and software to online students in a timely fashion. Pearson Embanet staff assessed <COLLEGE NAME>'s current capability to deliver online bookstore services.

Figure 10: Bookstore Findings and Recommendations

Best Practices	Findings	Recommendations
Online book ordering	Full functionality (Barnes & Noble). All required books, as well as recommended, are listed and attached to the course number to provide "one stop shopping" at time of registration. New, used, rental and digital options are available Shipping Options: 1. Campus bookstore 2. Ground Shipping can be arranged Online book order communications come from, and supply contact information for, the Manager of the bookstore (NAME).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online book payment options	Visa, MC, Discover, AMEX, gift certificate options are available. The bookstore is working to be able to use "<University Name> Cash" (student accounts).	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online order fulfillment within 48 hours	Website indicates a 24-48 hour turnaround. This is pretty standard turnaround but does go faster depending on bandwidth and resource constraints. Online orders can be pulled if student comes to campus.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Track order status online	This capability is currently not available through SIS. UPS tracking is available with the UPS tracking number.	EMBANET encourages <COLLEGE NAME> to provide order tracking

		capability on all bookstore orders. Online students working from a distance will want to know where these materials are in the fulfillment process in regards to arrival in time for course starts.
Inventory maintenance per course enrollment demand	While there is no perpetual system to assist in inventory planning, the bookstore maintains an inventory to meet the needs of course enrollments.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Online course faculty adoption service	Faculty can enter orders online. Faculty selections are adopted manually and then appear on the website 24-48 hours after submission of the adoption.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Textbook and course learning materials selection deadlines are clearly articulated and enforced	Information is physically walked to departments for approvals. Deadlines do exist, are clearly articulated, but are not enforced. The bookstore spends a great deal of time with follow-up emails regarding adoptions and deadlines.	EMBANET recommends continued education for faculty regarding the processes and the reasons for the deadlines. Clear articulation of the deadlines is also important. This will grow increasingly important with large enrollments of online students who are not within a short distance of the campus bookstore or who encounter shipping issues. Removing this barrier to early engagement in the course and ability to fully participate is an

		essential element in online learning success.
Copyright clearance services	Faculty works with bookstore staff to get copyright clearance for anything that they put together on their own.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Book return policy availability	Information is provided to students during orientation and is available on the website. There is also signage in the store.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Book-buy-back options are available	Information is provided to students during orientation and is available on the website. There is also signage in the store.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Textbook rental	This is the 2nd year of providing textbook rental services to students. This is going well. There is some availability to e textbooks.	<COLLEGE NAME>'s current process meets EMBANET's best practices

Library

As with all other university services, library services must be available to distance students online. EMBANET assessed <COLLEGE NAME>'s current capabilities to provide equivalent library access and support for distance students.

Figure 11: Library Findings and Recommendations

Best Practices	Findings	Recommendations
Online access to a full suite of library services, and resources	4 main libraries on campus – <Library Name> is specific to <Employment Field>. Hundreds of databases are available for student access – VPN is required for those working off campus. There is a fairly extensive library component of the student orientation process. This is currently conducted in a face-to-face method, with 5 components delivered via BlackBoard. Students must complete quizzes. The Imbedded Librarian allows a librarian to monitor these courses, answer questions via the discussion forum. This has been very successful and has been implemented as part of the Weekend Intensive program as well. There are APA and writing resources available.	<COLLEGE NAME>'s current process meets EMBANET's best practices
Distance learning librarian available 24/7 via email or phone	Currently, there is not 24x7support in the <Library Name>. There is recognition of the need.	EMBANET recommends that <COLLEGE NAME> and the <Library Name> investigate shared services to provide assistance by email, phone, Skype, instant messaging, and other service support tools for geographically dispersed students 24 X 7.
Interlibrary loan services for distance learning	These services are available – currently this may require physical pick up of materials	EMBANET recommends that <COLLEGE NAME> and the

students	requested.	<Library Name> provide shipping of all materials for distance learning students. The processes around requesting, shipping, and returning will need to be reviewed in order to provide equivalent services to online students.
Online orientation and/or tutorials for library services, resources, and research	Orientation is conducted for new students (face-to-face). There is currently a heavy focus on IT resources (email, online catalog, student portal services). The online portion of the orientation (library services) is more targeted to finding books, articles, how to use databases, request materials, and so forth.	EMBANET encourages the development of a media rich, online library orientation course appropriate to graduate students, new faculty, and online <COLLEGE NAME> students.
Electronic and digital communication with students	Students can request a VPN account that allows them to access databases and library resources from off campus. Current processes are more directed to face-to-face communication with students.	EMBANET recommends that <COLLEGE NAME> and the <Library Name> continue to consider leveraging technology to assist in efforts to meet the needs of students and to provide 24x7 communication and support.
Level of Staffing	5 staff 3 professional full-time librarians (all teach and do reference); there is currently 1 vacancy 2 full-time support staff (circulation, ordering, facilities maintenance, bill paying) Some student workers who staff the circulation desk	Staffing recommendations will be presented in other areas of this report.

Student Success

Online students will require access to the same tutoring, ADA, and counseling services as campus students. EMBANET assessed <COLLEGE NAME>'s capability to deliver student success services to a large distributed student population.

Figure 12: Student Success Findings and Recommendations

Best Practices	Findings	Recommendations
Online tutoring resources	There are some resources available through the Educational Support Services department. However, there are currently no online equivalent services.	While the assumption may be that <COLLEGE NAME> students might not need or want tutoring, EMBANET encourages <COLLEGE NAME> to explore development of online communities to include tutoring and to provide resources to support online tutoring.
Online writing center	The Director is a full time staff member. Staffed by faculty and graduate students from the English department. Students can currently access the center for up to 120 minutes a week, and can make appointments online. Hours: 8 – 5 or 9 -5 Monday through Friday Will work with intensive weekend students via email Not an editing service or basic English teaching center. Possible recommendation: • Undergraduate program has an electronic drop box where they get papers back to students within 48-72 hours (this would allow asynchronous contact if implemented)	<University Name> is encouraged to consider partnering with book publishers to design a customizable writing handbook, reflective of the caliber of the FEMBA student and their professional roles. EMBANET also recommends providing web-based writing center assistance.

	• Template for APA formatting <u><Library Name> Student Services</u> • An entire library of APA resources including Purdue Owl • They do some workshops on time management, procrastination, etc. (on campus) • Three workshops conducted last year on APA • Workshop on how to read a journal article • No workshops currently offered online • Some of the programs have been repeated for the Weekend Intensive program	
Academic advising using electronic modalities	Academic advisors, in general, are using primarily email as their only electronic modality; they have not explored these options fully because their current student population is on campus at some point. Most advising is done face-to-face (secondary modalities include phone and email).	EMBANET encourages <COLLEGE NAME> to consider reviewing current advising processes and resources to leverage technology in order to provide online advising to distance students. EMBANET also recommends that key staff are trained to provide advising, thus reducing the strain on faculty, and further increasing the ability to quickly respond to student needs – essential to scalable programs.
Career planning and placement resources using electronic modalities	<COLLEGE NAME> is purchasing some services from the university career center to provide students with some support for resume building. • Career Link: repository of job postings, upload resumes • Workshops are primarily conducted	EMBANET encourages <COLLEGE NAME> to review current career planning processes and resources to develop a plan for providing equivalent services to online students at a distance.

	face-to-face	
	• Provide drop-in and one-on-one counseling	
	• Some workshops are customized for <Employment Field> (with PPT) but have not been saved for use in an online environment.	
	Information about career planning and services are provided during each orientation via PowerPoint presentation and a liaison from career services who discusses mock interviews, resume building, and so forth. Information about career opportunities are also shared the alumni network.	
Online counseling	<University Name> Counseling Center provides services for on-campus students. If a student is having academic difficulties, the advisor starts the process for a consultation committee – there are 3 members of this committee (there is documentation of this process available for students; however there is not an electronic process in place).	Privacy, client confidentiality, and state counselor licensure laws present challenges to offering such services. EMBANET encourages <COLLEGE NAME> to clearly articulate the school's policies and requirements during the orientation process, and reinforced in program handbooks, course websites, and other online sources of information.
ADA accommodations for distance students	ADA – Disability Resources is currently working with students who self-identify or who are identified by faculty or advisors as needing assistance or special accommodations. The department most commonly sees chronic illness, Asperger's, ADD, ADHD, hearing or vision impairments. Disability Resources works to provide extended test periods, scanned texts, access to the classroom. There is a long process (beginning in July) to make sure that accommodations are in place by the time classes start in late August. Currently over 300 students are served by Disability Resources and this number	<COLLEGE NAME> is encouraged to develop recruitment and retention processes that ensure timely and appropriate communications with students and with faculty regarding ADA compliance and accommodations. EMBANET also encourages faculty to work with instructional designers to ensure courses comply with ADA compliance.

	continues to increase each year. There is a recognized lack of Disability Resources staff to read a large number of applications that might be presented with a large online enrollment.	

Summary

Significant Key Assessment Findings – Functional Areas

Large online programs require a high level of coordination by the academic units and administrative units at the university. EMBANET's assessment of <University Name> <School Name> readiness to develop, launch, and support an online Master of Science in Social Administration program included all the staff and processes that will be involved in supporting online students. The following is a summary of EMBANET's significant findings and recommendations.

Marketing and Communications

Significant Finding:

1. <COLLEGE NAME> currently does not offer an online degree program. Online education does not have a presence on the school's website.

Recommendation:

1. EMBANET encourages development of a strategic plan regarding how online learning will be positioned and represented on the website. Clear separation of online programs vs. on-ground programs will be important to ease navigation for potential online students.

Recruitment and Admissions

Significant Findings:

1. Online application data must be manually entered in the SIS. This is very resource intensive.
2. Currently there are no online programs and no separate degree coding has been implemented.
3. New students are accepted once a year (Fall).
4. The current program admission process can take up to two weeks for review of the completed application.

Recommendations:

1. EMBANET encourages continued development and implementation of Hobson's Connect and ApplyYourself functionality to reduce manual data entry as these manual processes are not scalable for large enrollments.
2. EMBANET encourages <COLLEGE NAME> to implement this coding so that online students can be uniquely identified and differentiated from face-to-face students. This will permit <COLLEGE NAME> to track applicants electronically using SIS functionality.

3. EMBANET recommends a minimum of three starts per year with future exploration of the possibility of six starts per year as a further differentiator for the program. The three start model is essential to developing scalable online programs. A six-start model may offer opportunities for greater scale and application of additional efficiencies.
4. <COLLEGE NAME> is encouraged to continue to review processes and automated support systems to facilitate a maximum of one week admission decisions.

Registrar

Significant Findings:

1. The application/admitted student information transfer to the Student Information System process is currently manual. However, <COLLEGE NAME> is implementing both Hobson's Connect and ApplyYourself with integration to the SIS.
2. Online registration is available; however, first-time registering students typically work with their advisors to complete this process manually.
3. <COLLEGE NAME> does not currently have online programs, nor dedicated resources for distance learning students.
4. Orientation is currently done face-to-face.
5. The current <COLLEGE NAME> academic calendar is closely aligned with the <University Name> academic calendar. <COLLEGE NAME> does have the ability to develop differential calendars for different programs.
6. Degree audits are currently conducted manually.

Recommendations:

1. EMBANET encourages <COLLEGE NAME> to eliminate manual data entry of student information into PeopleSoft and to fully utilize the functionality of the online application, Hobson's Connect and ApplyYourself. Development of an additional application for online students only (available online) is recommended to decrease the irrelevant questions for online students.
2. Streamlining of processes that enable online students to access the online registration system without waiting for time with advisors is recommended. Eliminating the possible bottleneck of a manual component of the process will further leverage electronic support systems, and reduce the strain on resources supporting large online student enrollments.
3. EMBANET recommends that a dedicated resource be established in <COLLEGE NAME> to fulfill a role that is a registration resource and a centralized point of contact. Cross training others will be important as well to further leverage <COLLEGE NAME> resources and provide equivalent services to online students. These resources will need to have thorough knowledge of processes and systems to support online students, and the academic programs.
4. EMBANET encourages <COLLEGE NAME> to develop an interactive, media rich, online orientation course for the online program that provides an orientation <University Name>, to <COLLEGE NAME> and to all aspects of the student process.

5. The online program academic calendar should align to the <University Name> Academic calendar as closely as possible to prevent any delays in financial aid disbursement or other student support services.

6. The SIS system at <COLLEGE NAME> / <University Name> (People Soft) offers an Academic Advisement module. EMBANET recommends that <COLLEGE NAME> work with the Registrar's office undertake the additional programming and consulting to implement this module. This will allow for automated advising and degree audits, significantly reducing the demands on current resources, and increasing <COLLEGE NAME>'s / <University Name>'s ability to provide enhanced services and response times for students.

Student Accounts

Significant Finding:

1. <COLLEGE NAME> does not accept major credit cards (with the exception of Discover) for tuition and fee payments. A convenience fee is charged for those using Discover.

2. Payment plans are offered internally, and also through an external vendor. Payment plans currently begin in June and end in March with first 5 payments going to first semester and second 5 going to second semester.

3. Students receive information about payment plans during the orientation process.

Recommendation:

1. EMBANET encourages <COLLEGE NAME> to consider accepting credit card payments from online students.

2. Given that <University Name> does not accept credit cards for tuition payments, payment plans are increasingly important. EMBANET recommends that <COLLEGE NAME> / <University Name> develop year round payment plans in order to bridge the gap between financial aid and actual tuition costs.

3. EMBANET recommends that <COLLEGE NAME> / <University Name> present information about tuition plans early in the recruitment / admission process.

Financial Aid

Significant Finding:

1. Currently there is no direct deposit option for refunds.

Recommendation:

1. EMBANET recommends that <University Name> / <COLLEGE NAME> review current capabilities to assist in providing direct deposit options for students in online programs.

Educational Technology and Helpdesk Support

Significant Findings:

1. Currently there is no formal training for students or faculty using Black Board.
2. No dedicated Instructional Design and Technology resources are currently available to support faculty in online course development.

Recommendations:

1. EMBANET recommends that Training be required for all users and for faculty certified to teach online. Additional training sessions to cover online pedagogy and course design would also be recommended.
2. EMBANET recommends dedicated instructional design services to support faculty during each new online course development.

Bookstore

Significant Finding:

1. Materials selection deadlines are established and well articulated. Faculty are not held accountable for missed deadlines.

Recommendation:

1. EMBANET recommends continued education for faculty regarding the processes and the reasons for the deadlines. Clear articulation of the deadlines is also important. This will grow increasingly important with large enrollments of online students who are not within a short distance of the campus bookstore or who encounter shipping issues. Removing this barrier to early engagement in the course and ability to fully participate is an essential element in online learning success.

Library

Significant Findings:

1. Currently, there is not 24x7 support for library services.
2. Orientation to library services is presented during the student orientation process with Black Board modules to reinforce and assess learning.

Recommendations:

1. EMBANET recommends that the university investigate shared services to provide 24x7 assistance by email, phone, Skype, instant messaging, and other service support tools to provide geographically dispersed students with any time assistance.
2. Development of a media rich, online library orientation course appropriate to graduate students, new faculty, and online students.

Student Success

Significant Finding:

1. Disability Services works to collect documentation, and to approve accommodations, with dependency on students to self-identify regarding disability services needed.

Recommendation:

1. <COLLEGE NAME> is encouraged to develop recruitment and retention processes that ensure timely and appropriate communications with students and with faculty regarding ADA compliance and accommodations. EMBANET also encourages faculty to work with instructional designers to ensure courses comply with ADA compliance.

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Embanet™

Program Readiness Assessment

Example Planning Document

October, 2014

Pearson Embanet™

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Introduction

In preparation for the launch of the institution's program offered through the {name of the school}, Pearson Embanet (PE) and the institution's faculty will collaborate to create an online delivery model that meets the current degree's quality academic standards and requirements while providing maximum access for adult working professional students studying at a distance. Using a proven delivery model for online learning, PE consultants will prepare the following report to document the program model, schedule of courses, and admission requirements that will be used to inform the marketing, recruitment, course development processes, and scheduling of faculty.

Assessment Scope of Work

The goal of the curriculum assessment is to evaluate the courses, learning outcomes, and academic requirements of the program and to collaborate with the program faculty to create a scalable online delivery model. To achieve this goal PE will complete the following:

- **Conduct faculty interviews**. Conduct faculty interviews to understand program curriculum.
- **Create a scalable online delivery model**. Based on the interviews, PE will work with faculty to create an online delivery model that meets the institution's academic quality standards and can support a large number of part-time distance students.
- **Develop a program pro forma**. Create a schedule of courses for input in to a pro forma that will generate an analysis of program expenses over time. This pro forma will inform planning for faculty and staff resources.

Figure 1: Program Readiness Assessment Scope of Work
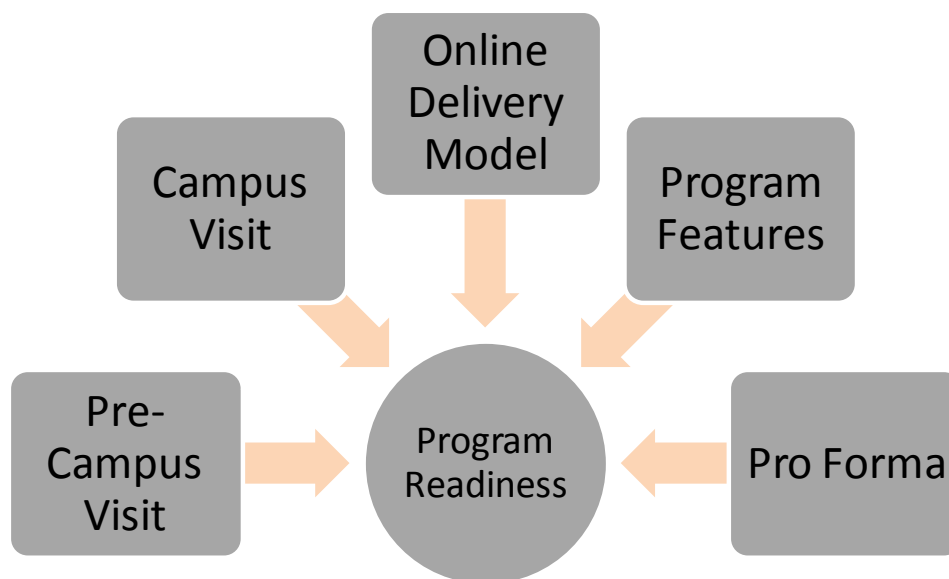
Assessment Methodology

PE will utilize a scalable model called the carousel to assist faculty in structuring the program curriculum to achieve a model that is academically equivalent to the campus program but is designed for maximum accessibility by students at a distance. The method that PE will use in working with faculty during the curriculum assessment process is outlined below.

1. Conduct curriculum modeling sessions
   o Study the current or proposed curriculum with an eye to course sequencing, assessments, practicum requirements, and learning outcomes
   o Explain the carousel model in light of the needs and limitations of the adult working professional student
   o Review the program admission requirements and compare with key competitors' admission requirements
   o Design an online program delivery model
2. Document the carousel model and schedule of courses
   o Work with faculty to finalize the program carousel model
   o Create a schedule of courses that shows the sequence in which courses will be offered and how many courses will be offered each term
3. Assess admission requirements and process
   o Review current admission requirements
   o Assess the current process used for admitting students
   o Compare admission requirements and process to competitive set and best practices
   o Document findings and recommendations
4. Create program pro forma
   o Work with Dean and Program Director to complete pro forma assumptions worksheet itemizing program expenses
   o Input curriculum model and expenses into pro forma spreadsheet
   o Input projected enrollments and retention rates
   o Produce a program pro forma showing revenue, expenses, and net operating income

Campus Visit Agenda

The sample agenda identified in Figure Two will assist the institution in planning for PE's campus visit.

Figure 2: Sample Campus Visit Agenda

Meeting Time or Time Allocation	Meeting Participants	Topic	Purpose
10 minutes	Project Leadership, Academic Leadership, and Faculty	Introductions and Agenda Overview	Present project overview
30 minutes	Academic Leadership and Faculty	Program Overview	Understand program *(see next section, Faculty Interview Questions, to prepare for this meeting)* • Program mission, vision, and core values • Benefits to completing the program and program key differentiators • Prospective student and motivation to enroll • Competitive online programs • Industry and enrollment trends
1 hour	Academic Leadership and Faculty	Program Delivery Model	Collaborate on program • Structure • Delivery Model • Course Sequencing • Instructional Resources
20 minutes	Program Leadership and Faculty	Program Admission Processing	Understand Program • Admission Requirements • Admission Processing • Transcript Evaluation • Admission/Academic Advising • New Student Orientation
30 minutes	Project and Program Leadership	Exit Review	Discuss pro forma assumptions Review high-level findings Identify next step actions

provide 10 minutes for break or travel time between locations

Pearson Embanet Project Contact

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Tandy Stone is responsible for consultant related assessments and services. Prior to joining Pearson Embanet, Tandy enjoyed an 18 year tenure in higher education and seven years in healthcare. Her experience included roles as the Respiratory Care Program Director for eight years, the Assistant VP/Dean of Student Services for four years, the Assistant Vice President/Senior Enrollment Officer for Distance Learning for four years, and the Dean of Enrollment Management for two years. Tandy was responsible for implementing and managing the administration, processes, infrastructure, and recruitment for distance learning programs. Tandy earned her Bachelor's degree in Allied Health Professions from The Ohio State University and Master's degree in Adult Education from Marshall University.

Project Timeline

Figure 3: Project Timeline
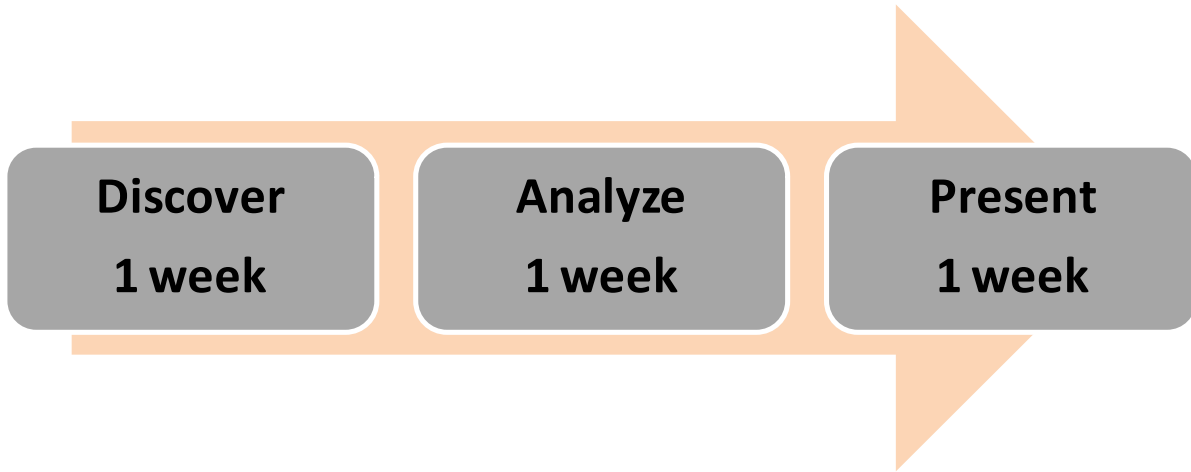
Discover Phase	Analyze Phase	Present Phase
Prepare for campus visit	Develop/refine delivery model	Formulate recommendations
Complete review of Program website	Compile discovery information and complete findings for each best practice	Finalize draft report
Conduct campus visit and develop delivery model	Share preliminary findings with each program leadership	Share draft report with leadership
Interview program faculty	Complete analysis of findings	Submit final report

Report Structure

The report outlines the findings and recommendations for the Program Readiness Assessment project. PE's findings and analysis will include the following areas:

- **Program Carousel Model**: a graphic representation of the sequence of courses students will follow to complete the program.
- **Proposed Schedule of Courses**: based on the carousel model, a schedule representing how courses will be rolled out.
- **Faculty Instructional Resource Model:** a graphic model of how the program can scale faculty teaching loads.
- **Admission Requirements and Process**: documents the admission requirements and the process that students will follow in order to apply and be admitted to the program.
- **Pro forma**: documents the major institutional assumptions used to build the pro forma and the key financial metrics used to evaluate the projected financial performance of the program.
- **Appendix**: provides course descriptions and other information important to the launch of the program online as discovered throughout the assessment project.

Findings and Recommendations

Program Carousel Model

This section depicts the program carousel model that PE and faculty co-create.

Degree Name

Insert narrative that describes the program, what graduating students are prepared to do, accreditation, and other important information.

Program Structure

Figure 4: Program Structure

Program Feature	Concentration One	Concentration x
Semester Credit Hours		
Campus-based Residencies		
Applied Learning Education		
Semester Structure		
Time to Degree Completion		
Semesters to Complete Degree		

Required Courses

Figure 5: Required Courses

Courses	Foundational Core Courses	Concentration	Electives or Capstone
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			
Course Prefix, Number, and Name			

Campus-Based Residencies

Insert narrative that describes the residency requirements

Figure 6: Campus-Based Residencies

Residency	When	Time	Purpose
First			

Program Delivery Model

Insert color-coded table of course organization

Example of how a program might be structured

- 30 semester credit hour degree program with 10 – three credit hour courses
- 16 week semester with 8 week-long courses
- 1.6 years time to degree completion which occurs over 5 semesters @ 6 credit hours per semester

Figure 7: Program Delivery Model

Foundation Courses: 6 credit hours	Core Courses: 18 credit hours	Capstone Courses: 6 credit hours
Course F1 Course F2	Course C1 Course C2 Course C3 Course C4 Course C5 Course C6	Course CC1 Course CC2

Core

Foundation

Capstone

F1 | F2

C1 | C2

CC1 | CC2

C5 | C6

C3 | C4
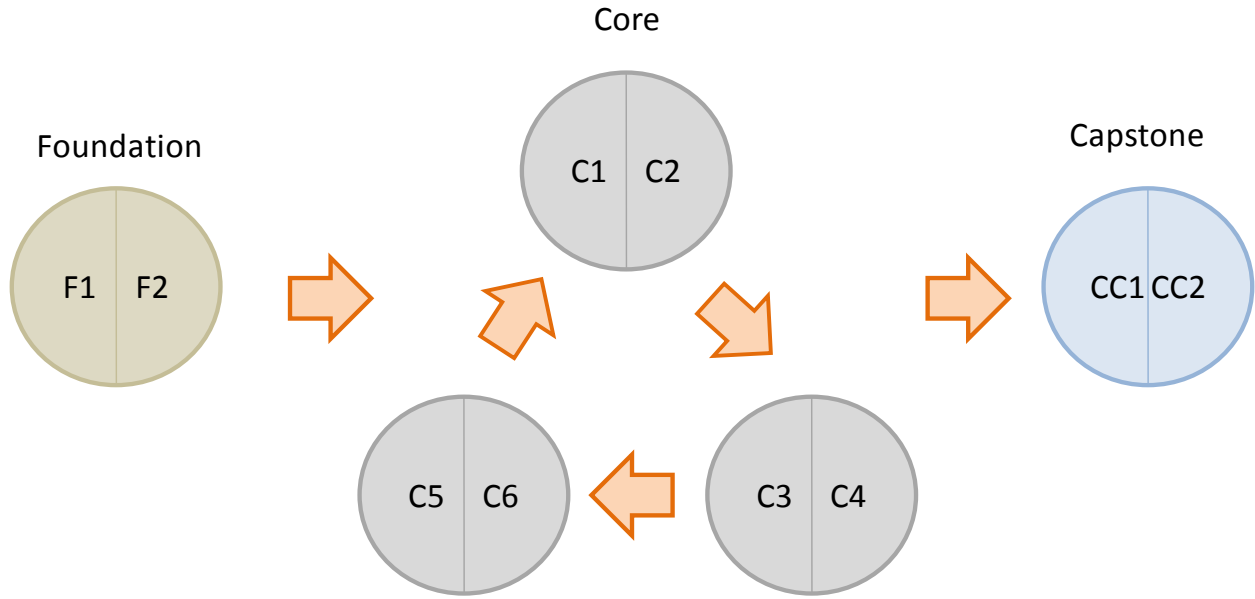
Figure 8: Delivery Model Best Practices

Best Practices	Findings	Recommendations
Students take two courses back-to-back in a term		
Minimal course sequencing		
No, or limited, campus residency requirements		
Practicum or clinical experiences can be completed in students' local community		
Courses are offered every term so that students complete in the least amount of time possible		
Students maintain a part-time schedule for financial aid purposes		

Schedule of Courses

Based on the carousel model, PE will create a schedule of courses that shows the sequence in which courses will be offered every term so that students can complete the program in the shortest amount of time possible. The schedule also becomes an essential planning tool for determining faculty instruction and course development schedules. The following table is demonstrates the course schedule.

Figure 9: Schedule of Courses

Academic Terms	Term 12A	Term 12B	Term 12A	Term 12B	Term 12A	Term 12B	Term 13A	Term 13B	Term 13A	Term 13B*	Term 13A	Term 13B
Foundation	F1	F2	F1	F2	F1	F2	F1	F2	F1	F2	F1	F2
Core			C1	C2	C3	C4	C5	C6	C1	C2	C3	C4
Capstone									CC1	CC2	CC1	CC2

Academic Terms	Term 14A	Term 14B	Term 14A	Term 14B	Term 14A	Term 14B	Term 15A	Term 15B	Term 15A	Term 15B	Term 15A	Term 15B
Foundation	F1	F2	F1	F2	F1	F2	F1	F2	F1	F2	F1	F2
Core	C5	C6	C1	C2	C3	C4	C5	C6	C1	C2	C3	C4
Capstone	CC1	CC2	CC1	CC2	CC1	CC2	CC1	CC2	CC1	CC2	CC1	CC2

Figure 10: Schedule of Courses Best Practices

Best Practices	Findings	Recommendations
Scalable offering of courses		
Schedule facilitates student self-advising with regard to planning upcoming course schedule		
Schedule scales course development and re-development resources to a manageable level		

Expandable Faculty Model

This section will model how the program can scale faculty teaching loads. The following model is structured in a manner that will permit academically qualified professionals to assist program faculty with providing rich educational experiences to students. Incorporating such an operational instructional resource model will enhance the ability to manage and scale instructional resources while upholding high academic standards and accreditation requirements.

Instructional Role Terminology

Course Instructor: assumes responsibility for online course development, management and assessment, and supervision of all course related instructional resources.

Expert Presenter (EP): provides content specific input into course design or fulfills guest faculty/lecture roles.

Facilitator (F): facilitates course delivery to a defined cohort of students.

Preceptor (P): provides practicum or internship oversight and instruction to students in experiential learning environments.

Didactic Instructional Resources Model

Figure 11: Expandable Faculty Model
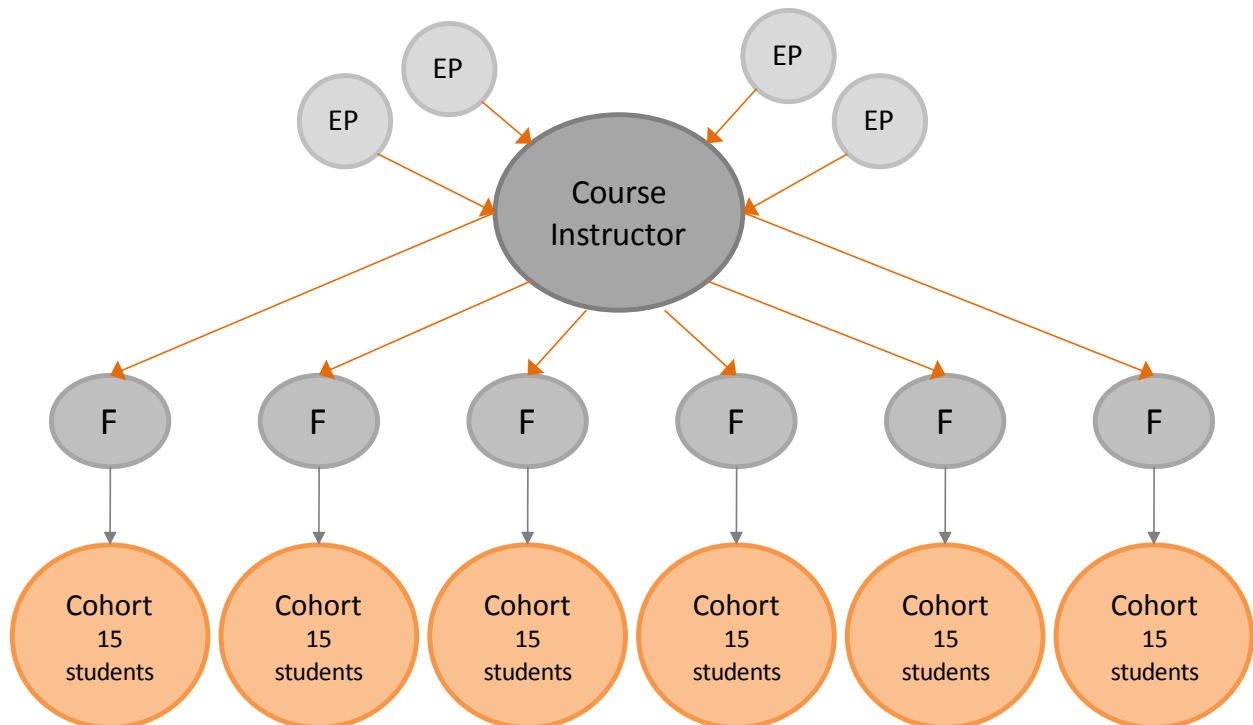
Admissions Requirements and Process

This section lists the current program admission requirements and process compared with the competitive set and industry best practices. PE provides recommendations, if any, for changes that will make the program more competitive and efficient.

Admission Requirements

To be eligible for this program, students must meet the following qualifications.

- Insert admission requirements

Admission Process

Figure 12: Admissions Process Map

Insert Program Admission Process Map

Insert narrative that describes admission processes

Figure 13: Admissions Best Practices

Best Practices	Findings	Recommendations
Admit new students every term		
Review applications on a rolling basis		
Minimal or no pre-requisite courses		
Admission decision within one week		

Pro Forma

PE will complete a financial business model that accompanies this Program Readiness Assessment Report. The pro forma tool provides a baseline for planning and assessing model changes and can help the institution evaluate the financial impact of various decisions. The following section outlines the key assumptions of the Pro Forma.

Figure 14: Pro Forma Process

Input Assumptions	Key Financial Metrics
Schedule of Courses	Total Revenue
Course Instructor Fee	Total Students
Course Development Fee	Faculty Expense
Course Refresh Fee	Staff Expense
Facilitator Fee	University Overhead
Tuition Rate Per Credit Hour	Program Overhead
Number of Student Intakes Per Year	PE Partnership
Staff Expenses	Cash Positive
Overhead Expenses (postage, materials, etc.)	Break Even
Average Number of Credits that Students take Per Term	Net Cash Flow
University Overhead Charge	Cumulative Net Cash Flow
Projected Enrollments Per Term	Contribution Margin %

Appendix A: Course Descriptions

Prefix ### Name (Credit Hours)

Narrative

Appendix B: Other Resource Considerations

Accreditation and Approval Processes and Timeline

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Example executive summary

Deliverable from a 2015 new program development engagement – "Eastern Polytechnic University" (*name changed to protect client confidentiality*)

September 2015

Overview of document

This presentation includes the summary of our consulting engagement, analysis, and recommendations made to senior leaders at a mid-sized, private, career-focused institution, referred to as Eastern Polytechnic University (EPU) in this document to protect client confidentiality.

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Initial analysis and recommendations

Overview

Before Eastern Polytechnic University (EPU) launches a proposed part-time master's degree in mechanical engineering it needs to assess the market viability of the program.

We evaluated data on the major factors influencing program demand – 1) the potential market for mechanical engineering degrees and 2) the competitive landscape of existing providers - to provide an analytical basis for decision making. We also surveyed current and prospective students to improve program positioning.

Our recommendation

While the data suggest both opportunities and challenges, EPU can successfully launch a MSME program if it differentiates in online delivery, marketing messaging, and cost.

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There are ten key factors that determine overall market feasibility and influence competitive positioning

Factors determining feasibility

	What it is / what it means
Labor demand	Relative labor demand for ME; higher = more demand
Requisite education	Required degree in workforce; higher = more demand
Credential inflation	Credentials demanded by employers; higher = more demand
Earnings potential	Growth in earning per degree; higher = more demand
Degree conferment	Growth in number of graduates; higher = more demand
Movement of providers	Market entry and exit; more = more opportunity
Local competition	Number of competitors; less = more opportunity
Online learning	Quality of curriculum & structure; lower = more opportunity
Competitor program structures	Positioning, cost, format; weak, high cost, rigidity = more opportunity
Prospective student market size	Number of prospective students; more = more opportunity

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The MSME program performs well on balance---five factors support launch

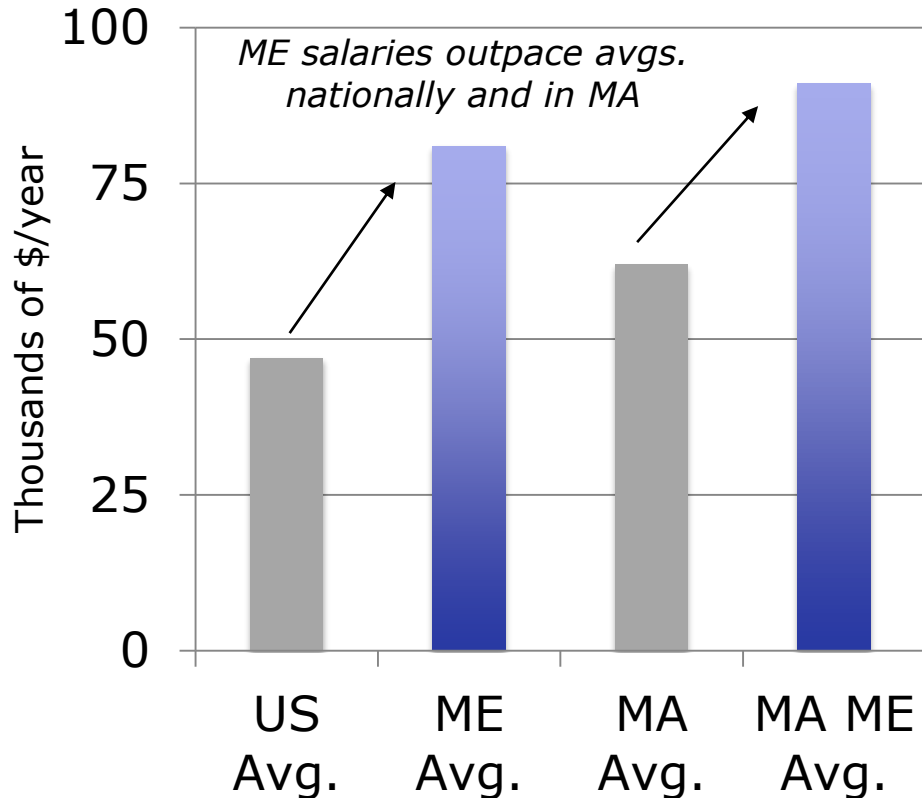| Factors determining feasibility	Score and assessment	
	Score	**Summary**
Competitor program structures	Opportunity	Weak positioning; room to differentiate
Online learning	Opportunity	Current programs non-exemplary
Earnings Potential	Opportunity	ME's salary twice national average
Prospective student market size	Opportunity	Large prospective student population
Credential inflation	Opportunity	Already present but should grow
Labor demand	Mixed	Data inconclusive
Degree conferment	Mixed	Growing at moderate pace
Requisite education	Challenge	Bachelor's degree requisite
Local competition	Challenge	Nine programs in MA
Movement of providers	Challenge	Limited market entry and exit

Summary of supporting indicators

The strength and importance of the following supporting factors leads us to our overall recommendation supporting program launch.

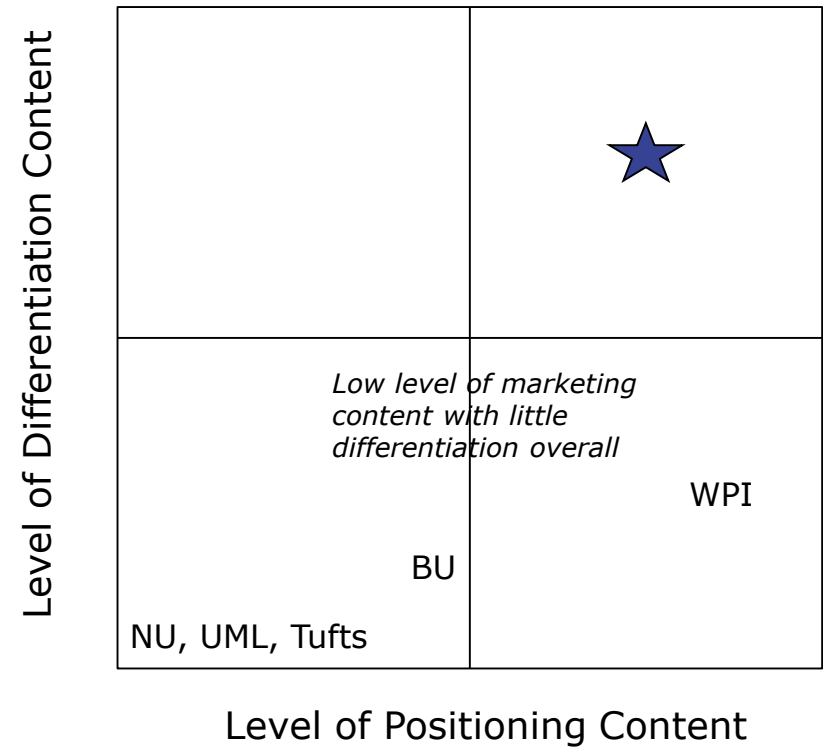|	Assessment
Factors determining feasibility	
Prospective student market size	Estimated number of prospective students for MSME very high relative to number of current enrollments nationally. Points to unmet demand and opportunity for new market entrant.
Competitor program structures	Marketing messaging is weak on the whole and price is relatively high- EPU can enter market successfully via differentiation strategy.
Earnings potential	Salaries for ME's are about twice the national average- high reward potential should continue to drive growth of master's market.
Online learning	Online learning common for MSME programs, pointing to compatibility between subject and delivery mode. No exemplars identified, providing opportunity to differentiate via innovative delivery.
Credential inflation	Higher than national average master's attainment for bachelor's requisite field points to existing credential inflation. High wages and moderate demand should continue to increase master's demand.

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Key supporting indicators – average salaries and competitor program structures– are very positive for program launch

The relative advantage in salaries for ME degrees as well as opportunity for differentiation drive our assessment supporting program launch.

Avg. and ME salaries in MA and Nationally

ME salaries outpace avgs. nationally and in MA

Thousands of $/year

US Avg. — ME Avg. — MA Avg. — MA ME Avg.

Level of Competitor Positioning and Differentiation

Level of Differentiation Content

Low level of marketing content with little differentiation overall

WPI

BU

NU, UML, Tufts

Level of Positioning Content

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Summary of mixed indicators

Labor demand and degree conferment were mixed (data contained both positive and negative indicators) and require more detail to interpret

	Assessment
Labor demand	Supporting: Low unemployment, lack of job candidates, recent growth Non-supporting: Projected slower than average occupational growth Summary: Labor market healthy, but growth projections relatively weak
Degree conferment	Supporting: Number of MSME graduates continues to grow YoY Non-supporting: Moderate relative demand Summary: Some demand exists but not a high growth area

Factors determining feasibility

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Summary of challenges: non-supporting indicators

The following factors did not provide support launch and represent areas of potential risk for EPU. However, positioning can help mitigate risk.

| Factors determining feasibility	Assessment
Requisite education	Requisite education level for most ME positions is a bachelor's degree
Local competition	There are nine MSME programs in MA
Movement of providers	A small number of institutions have launched (or retired) MSME programs in the past five years, suggesting a mature market

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Current adult students rate proximity to their home, cost, and credit transfer policy as top reasons for choosing EPU

Top Selection Factors for Current Adult Students

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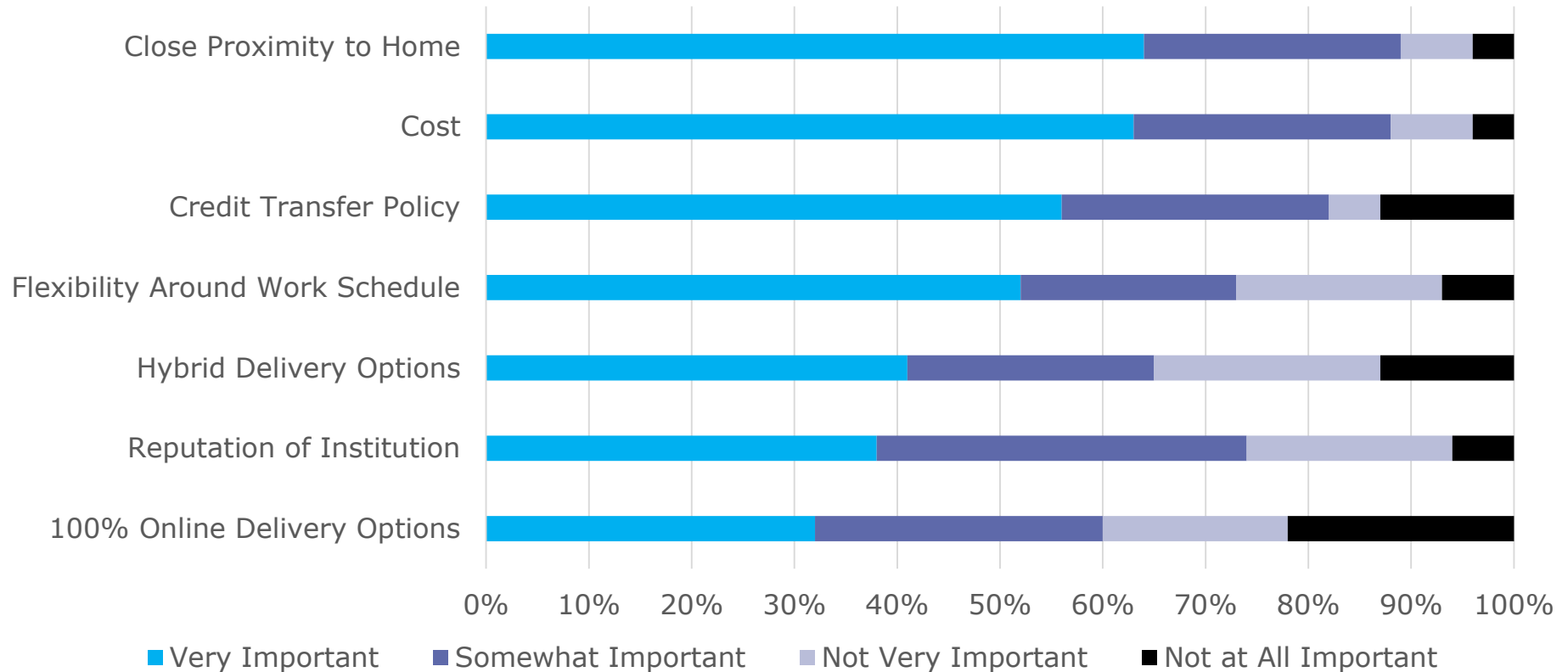
Earning more money and gaining new skills are key motivators for prospective EPU students

Top Five Reasons Prospective Adult Learners are Interested in Returning to School
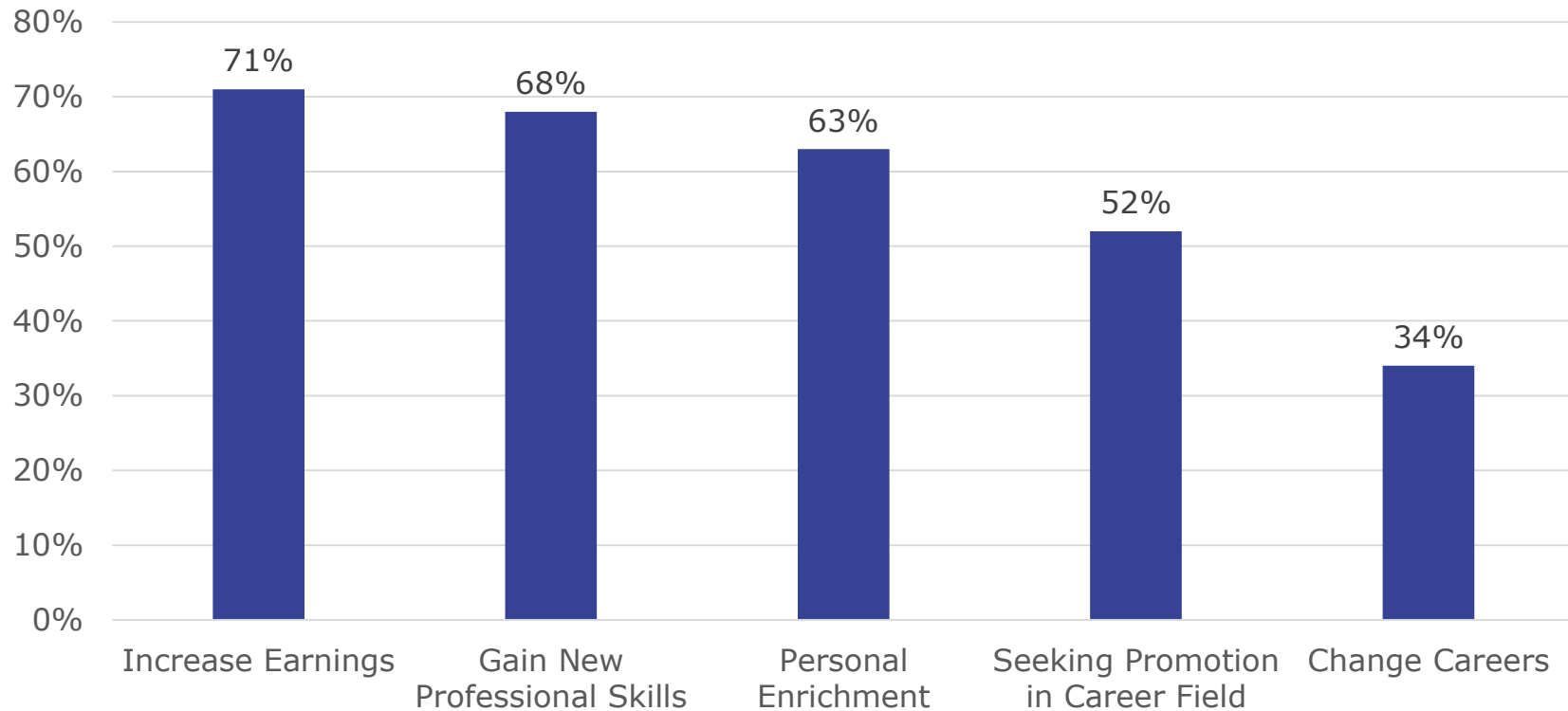
Note: Respondents were asked to select all that apply

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We combined the data to identify success drivers for EPU – differentiation in delivery, marketing messaging, and cost

Taken as a whole, the data supports a program launch if three key success drivers are met:

1. Differentiation in online delivery: None of the competitor programs are exemplary. EPU has a great opportunity to build a program that goes well beyond video lecture and truly makes distance learning as good, if not better, than campus learning.

2. Marketing message: Competitor marketing messages are poorly constructed and delivered. EPU can stand out providing text and video content that touches on the following themes: specific career opportunities; earnings potential faculty details and strengths; target audience; flexibility; EPU reputation with employers & alumni network; and tradition of peer to peer learning in the classroom.

3. Cost: EPU can attract share as the low-cost provider (at least initially). Current tuition at EPU costs $33k, over $8k less than the average tuition amongst profiled providers of mechanical engineering master's degrees in MA.

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