A Template for Strategic Planning in Online Learning in Ontario Colleges and Universities

Strategic Domain	Key Questions to Explore and Answer	Accountability
	Does the institution have a clear, owned and widely understood vision for online learning? Can key leaders describe what it will be doing differently in terms of teaching and learning 5 years from now?	President
Vision for Online Learning at Institution	1. Is innovation in teaching at the heart of the organization? If yes, what is rewarded and recognized? What is being done? 2. Is online learning an "add-on" or core activity? If core, what structures are in place to support it? 3. Is there a high level technology committee in place to oversee investments and outcomes? 4. What analysis of performance of online learning is being undertaken? 5. How are faculty loads allocated? Are classroom-based models the core of the faculty agreement? 6. What leadership roles are assigned and what levels of expertise exist within these roles to really see online learning through? 7. Which forms of online learning (e.g. blended learning, entirely online, mobile learning) are the areas of most use and what is our intent over time?	Board and President

Strategic Rules for Online Learning and Blended Learning	1. Focus Rules – What is the focus?
	
	   a. Increased access? If so, which target groups?
	
	   b. Improved learning outcomes – what measurable targets have been set?
	
	   c. Skills development – 21st century skills or...?
	
	   d. Increased interactions between student and instructor and amongst students?
	
	   e. Technology integration?
	
	   f. Other
	
	2. Boundary Rules – What are the limits (boundaries) with respect to online learning?
	
	   a. Programs which are off limits?
	
	   b. Programs which are specific targets?
	
	   c. Quality assurance boundaries?
	
	   d. Faculty agreement boundaries?
	
	   e. Registrarial limits / boundaries? (Are online student services established and functioning well – are limitations set by financial or registrarial operations?)
	
	   f. Time – are students given options with respect to speed of completion?
	
	3. Partner Rules – With whom does the institution wish to partner?
	
	   a. Academic partnerships
	
	   b. Technology partnerships
	
	   c. Design and development partnerships
	
	   d. Delivery and deployment partnerships	

Measurable Outcomes	By end of academic year 2016: 1. What % of students will be studying entirely online at the institution? 2. What % of students will be studying blended learning courses on campus? 3. What % of students will be studying fully online? 4. What % of faculty will be teaching online? 5. What % of the budget will be dedicated to online technologies for learning?	
Strategic Leadership	What degree of alignment is there amongst the leadership team of the institution with respect to online learning and the future of the institution?	
Governance	1. Is there an appropriate governance structure for online learning at the institution? 2. What is the role of deans / department heads in promoting, managing and leading online learning developments at the institution? 3. Where do key decisions get made and how aligned are these decision-making bodies with respect to strategy? 4. Who makes decisions about technology investments?	
Quality Assurance (QA)	1. What QA processes are in place with respect to online learning within the institution? 2. What benchmarking (if any) is undertaken? 3. What investments are being made in faculty skills development for online learning? 4. What external QA mechanisms relating to online learning does the institution leverage? 5. Has the institution considered securing external QA with respect to its programs offered online (e.g. DTEC)?	

Financial Resources	1. What funds are available over and above core funding for faculty / current activities to support new developments? 2. What is the model for securing the resources for taking a classroom-based program and turning it into an online program? 3. What funding constraints apply? 4. What are the incremental costs of the development of online learning envisaged to 2016?	5
Barriers To Overcome	1. What will get in the way of moving the institution to an increased online presence? 2. What cultural / thinking barriers exist? 3. What legal / contractual barriers exist? 4. What bureaucratic barriers exist within the institution? 5. What bureaucratic barriers exist within the system?	
Critical Milestones	The critical milestones for the institution to 2016 (complete an annual chart): • 2011 • 2012 • 2013 • 2014 • 2015 • 2016	

Enabling Tasks	What are the enabling tasks which the institution needs to complete to permit the development of online programs and courses? Sample below gives examples of what might be included here.	
	1. A thorough asset map of what assets are in place -what the asset is, what durability it has, what use is being made of the asset and what capacity the asset has to be leveraged. An asset could be a person, course, software, skill set, capacity, etc.	
	2. A market-based assessment of opportunities – which programs in which markets could produce an online student population worthy of investment? Do programs in home care, automotive marketing, management, etc. have sufficient demand to warrant focus and investment? Will these produce an economic return?	
	3. An assessment of infrastructure capacities for expansion of online services and systems – IT infrastructure, registrarial and financial services and processes (automation of registration, online payment, student finance services etc.) and library services.	
	4. A review of faculty development and support needs – where are faculty in terms of skills and abilities? What do faculty need to accelerate course / program development, to support blended learning , and support online teaching?	
	5. A thorough understanding of trends in technology in terms of learning amongst the leadership of the institution – a systematic understanding of the developments taking place elsewhere and what these suggest as opportunities for the institution.	

Key Challenges	What are the five key challenges associated with this strategy (sample below gives examples from an institution):	
	1. Courage – to achieve this demanding plan, the senior leadership team will need to show real courage and conviction and be engaged with the work required.	
	2. Strategic Alignment – all leadership positions will need to articulate how blended and online learning link clearly with the strategy of the institution. It is clear that online learning does, but we need to artic-ulate this clearly.	
	3. New Tricks – faculty members need support so as to be able to develop effective and meaningful skills and develop competencies in using blended and online learning. To some, this will come naturally, but for most, it will require significant time and patience. We have worked successfully with many to develop the assets we already have – we now need to work with the next tier of staff so as to build momentum.	
	4. Alternative Uses of Resources – there are always competing resource demands and it may be asked why we would allocate additional resources to online learning when there are other priorities. The response needs to be strategic and focused – we're doing it to meet known and anticipated student need and to position ourselves for the future, especially in relation to key markets in which we have a unique competitive advantage.	
	5. Technological Leadership – being a quality provider of blended and online learning requires seamless technological services of quality. This may be a chal-lenge.	

	The following are samples of what will be needed under risk assessment - they are based on one institution's response to a risk assessment…		8
Risk Assessment	Risk 1: Resource Constraints	The acceleration of our development of blended and online learning may be constrained by limited access to resources and by the limits of existing instructional design capacities. Mitigation A: Focus development on "flagship" initiatives which will act as lighthouse projects for the institution, thus enabling others to see the value of the work and enabling subsequent resource reallocation. Mitigation B: Engage the community of interest / practice outside the institution to provide resources (content, expertise, and cash) to support specific program developments.	

	Risk 2: Faculty Resistance to New Ways of Working	A key change implied here is that some courses will be taught by faculty other than those who originally developed a course. Mitigation A: Engage and work with the faculty association (as we have always done) to ensure that there are "no surprises". Before entering into discussions, be clear on the issues and have "best practice" union agreements from other places in hand.	9
	Risk 3: Students are Slow to Take up Online Programs	Take up will be slower than anticipated – causing concern and hesitation. Mitigation A: Before any program launch, serious market research should be undertaken to look at potential volumes. Mitigation B: Partner with industry or a related partner to support volume enrolment. Mitigation C: Partner with OntarioLearn and Contact North | Contact Nord to aid marketing.	

| Resource Requirements | The key resource requirements over the 2011-2016 period will be:

1. Instructional design?

2. Technology governance?

3. Faculty development?

4. Materials acquisition and intellectual property?

5. Changes to operating systems – registrarial, learning management, IT?

6. New staffing?

7. Marketing and sales?

8. Transaction costs of partnerships and related activities?

9. Quality assurance? | |

Using the Template

Invariably, the issues raised in the use of this template lead to the identification of other concerns and opportunities. For example, are some program areas more suited to online learning than others? Do some professions prohibit the use of online learning as a basis for professional certification?

These are just two questions that were raised in the most recent use of this template in one Ontario college. The point of the template is to provide a tool to assist in engaging a cross section of faculty, administrators and academic leaders in a strategically focused, in-depth conversation that will lead to a thorough plan for online learning for that institution.

Each year, the Sloan Consortium (www.sloanconsortium.org) reviews the state of   e-learning in the United States. Their 2010 review – Class Differences – Online Education in the United States 2010 – shows that some 5.6 million students (or 30% of all college and university students in the United States) were enrolled in at least one course taught entirely online.

The report also shows that colleges and universities who have integrated online learning into their core strategy for their future grow faster than those who do not. Online learning growth in the United States is approximately 21%, while conventional programs and course registrations are growing at only 2%.

There are three ways the Sloan Consortium identifies that post-secondary institutions position themselves for online learning:

- Let a Thousand Blossoms Bloom – faculty members are encouraged and enabled to incorporate online learning into their courses. Departments can attract some resources to "convert" courses and programs into fully online delivery mode. But the key systems of the institution – use of time, registration systems, financial arrangements and teaching – remain basically the same. The Sloan Consortium Report refers to these institutions as "Non Strategic Online Institution".

    There are around 1,000 of these institutions in the United States.

- Let's Get Focused – senior administrators deliberately chose some key programs to be converted into largely online programs because of an access challenge, a perceived market opportunity or other factor. They invest in instructional design, technology support and other required resources to make this possible and market their online programs aggressively. MBA programs and nursing are good examples of where this has occurred.

In the Sloan analysis, some 800 institutions are in this category – known as "Engaged".

- Online as a Core Strategy – in selected systems, the model of how the institution operates has been changed to accommodate the potential of online learning, including the use of time, registration, instruction, financial arrangements. The Kentucky Community & Technical College System (KCTCS), for example, has moved to a different system. Online courses are separated into bite-size classes, or modules, with each section focusing on a specific skill that takes only three to eight weeks to complete, giving students an easy, inexpensive way to upgrade their skills quickly.

    Students begin a new module whenever they're ready, offering an on-demand educational experience unlike at other online colleges with fixed course schedules. Students "call" for their assessment when they are ready. Students can choose "on demand" courses or courses online offered by term. Course credits are transferable across the college and university system in the state. In this use of online learning, the strategy adopted by the institution sees the transformative potential of technology and leverages this potential to change the business model (in part at least) of the institution.

    In the Sloan study, some two thirds of all post-secondary institutions are in this fully engaged position. These institutions enrol fully two thirds of all online students in the United States. Not all have been as radically transformed as the KCTCS system.

As institutions move along this strategic framework, not only does online enrolment increases but so does the ability of the institution to deliver courses and programs in a variety of online modes and in a cost effective manner.

Ontario institutions have been successful in developing an online presence. For the most part, our approach has been the "Thousand Blossoms Bloom" approach. Through the use of tools, such as this template, institutions can move to a more strategic positioning for online learning within their college or university.