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The Scaling Solutions Across Higher Education Toolkit was created to empower college and university campuses to initiate frank conversations about the challenges that hamper student success. By student success, we refer to the ability for students to graduate in a timely manner with the knowledge and skills they need to achieve their personal and professional goals. It is always a difficult task to strategize starting from scratch, so the Toolkit contains prompts, themes, and resources to light the fire. An overarching goal of this Toolkit exercise is to assist institutions in identifying genuine solutions to problems and help higher education leaders, faculty, and students move these solutions towards action.

But first, some context:

In March 2016, more than 120 higher education leaders convened at SXSWedu to examine issues related to promoting student success. Ahead of the event, the same group was asked to identify the biggest barriers to the adoption of progressive solutions. From the submissions, 15 significant challenges emerged. Based on this convening, the New Media Consortium (NMC) published the NMC Horizon Project Strategic Brief, Scaling Solutions to Higher Education’s Biggest Challenges, which focused on eight of the challenges with a lens on their implications for access and equity for low-income students and other disadvantaged groups. The brief also identified barriers obstructing student success and featured exemplars that, if adequately cultivated, could support the widespread adoption of real solutions.

In November 2016, NMC convened the "Scaling Solutions to Higher Ed’s Biggest Challenges" workshop in which 45 higher education leaders met in Orlando, Florida at the OLC Accelerate conference to devise strategies for implementing the solutions to four of the eight challenges discussed in the NMC’s strategic brief:

1) Integrating Student Data Across Platforms
2) Scaling Evidence-Based Methods Across Disciplines
3) Supporting Adjunct Faculty through Tech Deployment
4) Financial Aid for Competency-Based Education
The full day event began with a keynote address, in which I provided possible scenarios for higher education under the newly elected Trump administration. That talk was followed by roundtable discussions. With an eye toward students as the ultimate beneficiaries of potential solutions, each table addressed one of the aforementioned challenges, responding to the following set of questions:

> What makes this challenge solvable?
> What facets of the challenge are missing from the current definition and discussion?
> What fundamental characteristics of the exemplars make them solutions worth scaling?
> What is missing from the current landscape of exemplars? Are there other worthy programs not listed above or deficiencies in the described exemplars’ approaches?
> How can we leverage the positive outcomes of the existing research and exemplars?
> How can solutions be adapted and implemented effectively across a range of institutions?

While this Toolkit will summarize the themes and outputs that emerged from each of the roundtable and taskforce discussions, I thought it worthy to describe several threads that emerged across the challenges:

> **Attitudes are evolving on institutions’ responsibility to help students succeed.** This is based on changing student demographics, new forms of competition across higher education, and the proliferation of evidence-based approaches to monitoring the student lifecycle.

> **Change must begin at the top.** Change in academia must be systemic and necessitates strong leadership with strategic vision. It requires champions at the executive level who support the work of others, provide incentives, accept and reward risk, and remove barriers.

> **Scaling solutions is never solely about technology.** There must be a combination of “algorithms and human intervention.” While there is a wide variety of tools and applications flooding higher education, there is a need to identify people who can successfully and empathetically lead educational technology organizations, manage the systems, imagine innovative solutions, and support users at different levels of mastery.

> **There is no one-size-fits-all answer.** The processes, products, and services we choose to implement must be flexible, agile, and aspirational if we want to make high-quality learning opportunities available to a culturally and economically diverse and geographically dispersed student body.

> **It is time to update obscure and archaic compliance policies and regulations.** This is the case at both the local and national levels. As an example, credit hours, seat-time, and residency requirements are concepts that are restrictive and obsolete in today’s on-campus and online higher education ecosystems.

> **Current learning management systems do not meet the needs of today’s shifting educational landscape.** By focusing on the course, not the learner, they are not portable and do not scale. Their proprietary nature limits value and most lack human-centered functionality, interoperability, standardization, accuracy, and efficacy.
Faculty need more support if expected to adopt new technologies. Whether tenured or adjunct, all faculty must be provided not just with tools, but also with professional development opportunities and experiential learning activities. Learning happens throughout people’s lives and through different experiences. Technology used in classrooms or virtual learning environments should enhance learning and serve as a window into a world of knowledge and expression.

In the afternoon, workshop participants formulated three taskforces intended to move potential solutions from idea into practice. Each taskforce worked to solve the challenges from different action-oriented angles with the recognition that a full cycle of product/solution development is needed. As such, the three taskforces were:

1) **Framework/Rubric Design** — standard readiness and evaluation models that define success using an ROI lens

2) **RFP/Grant Program Development** — continued grant opportunities with more transparency around the grant-making process for institutions focused on bolstering student access and equity

3) **Marketing/Outreach** — improved marketing and dissemination around challenges and solutions in community-driven formats that are dynamic and interactive

A highlight of the day’s roundtable and taskforce discussions was the contribution of the Young Invincibles, an organization that sent a select group of college students from low-income communities. Along with student participation from the University of North Florida, these youth ambassadors provided an important perspective on today’s higher education challenges, ensuring that the student voice remained a paramount consideration in crafting strategies to increase access and equity.

Is our work done? Hardly. These are wicked challenges that need unpacking from a variety of perspectives. I believe we moved the needle a bit closer to solving these problems, and this convening helped catalyze critical discussions that ultimately will bolster student success, making high-quality learning opportunities more accessible to all.

The *Scaling Solutions Across Higher Education Toolkit* aims to help campuses across the US, and even the world, to model and adapt these kinds of discussions and activities. From conversation to action — institutions looking to solve one or more of the challenges listed here can leverage the *Toolkit* to convene leaders, practitioners, students, and other key stakeholders with the goal of devising and implementing real solutions.

**Susan E. Metros**

*IT and Academic Innovation Consultant and Certified Coach and Career Mentor*

*Former Professor and Vice Provost of Technology Enhanced Learning, University of Southern California*
So you’re interested in addressing arguably the biggest challenges in higher education. Kudos, brave game-changers! The first step in solving a problem is admitting that there is one.

We have created this Toolkit to equip you, the prospective event facilitators, with templates and considerations to convene your own “Scaling Solutions” workshop. The Toolkit is designed to 1) facilitate frank discussions about the challenges’ impact at your institution; 2) determine the steps for reaching solutions; and 3) creatively brainstorm how those solutions can be executed.

Feel free to use all of the resources here or select a few to adapt to specific needs. Below is a glossary defining the usage for each section of the Toolkit, in the order in which they appear.

**Event Considerations** *(for facilitators only)*
This section contains three checklists to help facilitators prepare for and execute the workshop in a step-by-step manner — pre-event, during the event, and post-event — from start to finish.

**Challenge Discussions Activity** *(for facilitators and participants)*
This section contains summary definitions of each of the four challenges that can be addressed in the workshop, along with themes that workshop groups should discuss, exemplars to investigate, and sample outputs for inspiration. Consider this section the guide to the small-group discussion portion of your workshop. People selected to lead each challenge discussion should receive an advance copy ahead of the event.

**Taskforce Activity** *(for facilitators and participants)*
The taskforces represent the workshop progression from challenge discussion to action. For the purposes of the “Scaling Solutions” workshop, the taskforce activities can target one or all four of the challenges described in this Toolkit. The concepts of Framework/Rubric Design, RFP/Grant
Program Development, and Marketing/Outreach were selected by the NMC because they are seen as three elements needed to devise and implement real solutions on a campus.

- **Framework/Rubric Design** refers to how a solution project should be structured and evaluated;
- **RFP/Grant Program Development** refers to how a solution project should be conceived for garnering proper funding; and
- **Marketing/Outreach** refers to how a challenge and solution project should be broadly communicated to include an effective mix of voices.

**Appendix: Samples (for facilitators only)**

The final section of the *Toolkit* contains templates to help facilitators prepare for the workshop:

**Summaries of Taskforce Outputs**

Included are real examples of taskforce work from the original “Scaling Solutions” workshop. These can simply serve as inspiration to gain a better understanding of what taskforces can accomplish at the event.

**Sample Emails to Participants**

In order to implement the workshop, challenge leaders, taskforce leaders, and general participants need to be invited. This section contains examples of communications to prepare each kind of participant for the workshop, providing them with all of the vital information.

**Sample Workshop Agenda**

The *Toolkit* includes a model of an agenda that can be used or adapted to keep the event flowing, with recommended timelines for each activity.

**Sample Event Evaluation**

Measuring the success of the event is key. Adapting and circulating the suggested sample evaluation will give facilitators a better sense of how effective the event was from the perspective of the participants while providing feedback for how it can be improved for next time.
Below are three step-by-step checklists to plan and carry out your own “Scaling Solutions” workshop. Because we know time is precious and coordinating major events is difficult, a condensed version is also provided.

**Pre-Event**

☐ **Convene a workshop planning committee** to run event logistics (e.g., secure space for the workshop and order food and beverages); communications (e.g., participant invitations and post-event follow-up); and programming (e.g., determine which challenges to cover and manage challenge and taskforce leaders).

☐ **Make a list** of everyone on your campus who can help address the challenge(s), including leaders, practitioners, and students (recommended 100 max. participants).

☐ **Send out invitations** that introduce the challenge(s) and clearly state the goal of the workshop and the required time commitment. See email invitation example in Appendix.

☐ **Identify workshop facilitators** to ensure the day runs smoothly, with duties including time-keeping and announcements to transition participants to the next activity.

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**Condensed Checklist**

- Select workshop facilitators, challenge leaders, and taskforce leaders.
- Create an online workspace for participants to record notes throughout all activities.
- Convene campus leaders, practitioners, and students for the workshop.
- Host a brief icebreaker activity.
- Engage in small group challenge discussions for 60 min., with 15 min. for small groups to report out to the larger group.
- Engage in taskforce discussions for 90 min., with 30 min. for taskforces to report out and present ideas and outputs to the larger group.
- Ask participants to fill out a short evaluation before they leave.
- Send a thank you note to participants linking to the archive of notes, along with a brief survey.
- Create a forum for taskforces to meet regularly to continue to build upon their outputs.
Select challenge leaders and taskforce leaders. You can create a call for volunteers to self-nominate for leader positions, or reach out to practitioners with relevant expertise (see email example in Appendix). If your workshop is large, you should pick multiple leaders with similar expertise in the same challenge and taskforce areas so multiple discussions about each can be facilitated simultaneously. In selecting leaders, the following considerations will be useful:

> How have you faced the challenge in your work, and how are you overcoming it?
> How have you been involved in designing and/or implementing solutions?
> Are you comfortable leading group discussions and sharing your expertise?

Meet with challenge and taskforce leaders to describe the goals for the workshop as well as their roles and responsibilities. Share the Toolkit with them so they are familiar with the process and discussion questions.

Select a keynote speaker to provide brief opening remarks at the workshop. The speaker can provide a short presentation on a topic relevant to the participants that sets the tone for the day. See sample agenda in Appendix.

OPTIONAL: Invite up to eight attendees/leaders to prepare "Lightning Talks"—five-minute presentations on work related to workshop topics. See sample agenda in Appendix.

Allow participants to select their preferred challenge(s) in addition to their preferred taskforce ahead of the event. See email example in Appendix. Alternatively, assign people to groups if you have a deep knowledge of their skills and interests.

Reserve a meeting space or online forum conducive to breaking into small groups.

Ensure all participants have a copy of this Toolkit, or specifically the parts that pertain to the challenge(s) and taskforce they will be addressing.

Create an online space accessible for each small group to collaborate on discussion notes, taskforce outputs, and more. (The NMC has used Etherpad — etherpad.org — but Google Docs or another easy-to-use collaborative workspace will work.) The goal is to have an archive of all the major ideas and themes discussed.

Send a reminder email one week prior to the event. See email example in Appendix. Ask participants to post a brief introductory message within the collaborative online space so that they will be familiar with and comfortable using the application prior to the event.

Bonus Tip
Create an event hashtag. Select a hashtag and use Twitter for an informal “reporting out.” This is an efficient way to collect Tweets and Instagram photos related to the workshop and any future gatherings. With consistent use through multiple events, the hashtag can help initiatives build momentum, improve transparency, and allow participants to connect after events conclude.

Event Considerations
During the Event

- **Introduce** the workshop facilitators and challenge/taskforce leaders.
- **Facilitate a brief icebreaker activity** to set the tone and allow participants to get comfortable with each other. A few examples are suggested below.

For a large group (50+ participants): Small Group Discussion
Ask everyone to discuss with the people next to them:

- In the last ten years, what technology has been the most useful in your life? In an educational setting?
- In the next ten years, what technology do you think will be the most useful in your life? In an educational setting?

For a smaller group (fewer than 50 participants): Snowball Fight
- Give each participant a piece of paper to write an answer to a question (such as those suggested above) and sign their name.
- Ask participants to crumple their paper into a “snowball.”
- Snowball fight! Participants will throw their snowballs for a designated amount of time.
- After the snowball fight, participants can pick up the nearest snowball and read it to the group.

- **Engage in Challenge Discussions Activity.** This activity will use the worksheets contained in the Challenge Discussions Activity section of the Toolkit. Facilitators may also adapt the materials or create their own worksheets to address challenges most relevant to their institutions.

- **Engage in Taskforce Activity.** The taskforces represent the workshop progression from challenge discussion to action. This activity will use the worksheets contained in the Taskforce Activity section of the Toolkit.

- After 90 min., the workshop facilitators should **call on each taskforce** to present their results to the full group, allowing questions and feedback from participants.

- Request participants **fill out a short evaluation** before they leave. The survey should be designed to collect constructive feedback from participants on their reactions to the workshop and to add ideas that might not have surfaced during the day. See an example in Appendix.

**Bonus Tips**

**Gimme a break.** Even the most committed participants will need a breather between activities. Plan for time to allow attendees to stretch their legs and respond to emails.

**Fuel the work.** Ever feel drowsy during the workday? Provide attendees with coffee, tea, and a selection of healthy and light snacks in the morning and afternoon to keep energy high.
Post-Event

- **Send a virtual thank you note** to leaders and participants, linking to the online collaborative spaces where notes were recorded.
- **Include a link to a brief survey** to collect feedback from participants on their reactions to the workshop.
- **Create a forum** where taskforces can meet regularly (even asynchronously) to build upon their outputs to make them a reality. The shared collaborative space from the taskforce activity can serve as a starting point for the continued work.
- **Share your workshop facilitation experience** with the NMC! Submit your stories for inclusion in our Digital Learning Initiative at go.nmc.org/scaling-stories.

**Bonus Tips**

**Meet and greet.** A good ice-breaker activity at the beginning of the day helps participants get to know each other, discover shared interests, and understand how they can work together within their institutions.

**Aim for improvement.** Following the day’s activities, ask participants to complete a short evaluation. Their feedback will allow organizers to refine the format and gain ideas for future gatherings.
Challenge discussions are intended to take place over ~60 min., with multiple small groups discussing each challenge simultaneously depending on the number of participants in your workshop. Challenge leaders should be selected to facilitate each discussion and keep participants on track time-wise, encouraging them to take thorough notes on the ideas generated in an online collaborative workspace such as Etherpad or Google Docs.

**Challenge Discussions Activity** *(75 min. total: 60 min. for small group discussions; 15 min. for reporting out to full workshop group)*

- **Break into assigned small groups** to address the challenge(s), providing clear instructions on how long each discussion should last.

- **Give participants access** to the online collaborative workspace where they will be encouraged to take notes and record ideas. Challenge leaders may also assign a participant to serve as lead note-taker to capture major themes.

- The challenge leader should **initiate discussion** by providing a brief overview of the challenge (5 min. max). The premise of the discussion is to accept the challenge: What makes this challenge solvable for my institution? Discuss why this challenge is important for your institution to tackle today and what makes it doable.

- The challenge leader should serve as **timekeeper** or assign the role to a participant and spend a set amount of time on each discussion question. Each group member should be encouraged to present their ideas, questions, and challenges related to the discussion questions. Reserve a few minutes at the end of the discussion period for the group to identify major themes for sharing with all workshop participants.

- After the small group discussions, the facilitator should **call on each discussion group** to briefly share their findings and reactions with all workshop participants.
The growing use of data mining software in online education is fostering learning environments that leverage analytics and visualizations to portray learning data in a multidimensional and portable manner. In online and blended courses, data can reveal how student actions contribute to their progress and specific learning improvements. These technologies, enhanced by predictive analytics, have great potential to support student success by identifying and reaching out to struggling students and streamlining the path to graduation. As institutions implement new Learning Management Systems (LMS), degree planning technologies, early alert systems, and tutor scheduling that promote increased interactions among students, faculty, and advising staff, there is a need for centralized aggregation of these data to provide students with holistic support that improves learning outcomes. This can be a challenge for institutions that are using a variety of technology systems that are not integrated with each other. Further, while colleges and universities are capturing an abundance of student data, often this information sits in divisional and departmental silos, falling short of informing comprehensive decision-making and creating predictive models.

**Student Impact:**

How can students benefit from the data institutions collect about them? Students do not always have a say in what kinds of data are being gathered and how it will help them make smarter choices.
Considerations

Discuss how these challenge themes/considerations have materialized — or not yet materialized — on your campus. How can your institution plan for them? Who on your campus should play a role in addressing each? What are the next steps?

1. **Data for Personalization.** Grades alone are not an accurate depiction of student success and engagement. Data must be captured and examined holistically, tying unique learner circumstances to personalized pathways to degrees — making it easier for students to achieve their goals.

2. **Course Alignment to Career Paths.** Selecting the wrong courses and instructors could ultimately deter students from pursuing careers where they could excel. Data can help learners understand which course sequences they need in order to prepare for entering the workforce or graduate-level studies.

3. **Program Bias.** Some introductory courses (particularly in STEM disciplines) are designed to be difficult in order to weed students out of the program who were not the “cream of the crop.” This unfortunately deters learners from pursuing career pathways because they fear the course will lower their GPA.

4. **Combining Algorithms with Human Intervention.** Data and adaptive learning do not comprise the full solution; instructors, student advisors, and others must be able to interpret data in ways that enable the proper personal interventions catered towards each student’s best interests.

5. **Holistic Data Strategy and Interoperability.** Standardization, best practices, and the ability for data to be scaled across courses, departments, and institutions are key for accuracy and efficacy. Additionally, tools and technology must be made available to students and supporting staff to collect and connect these data in meaningful ways.

6. **Data Privacy.** This area continues to evolve as more data and different types of data are collected. However, policies that set the proper expectations for where and how data is stored, accessed, and leveraged are an important part of an institution’s data transparency.
Sample Outputs

Psssst… here are examples of ideas to address the challenges identified by the challenge discussion groups at the 2016 OLC Accelerate Workshop. Feel free to use these as a model to think of more!

Institutions must nurture cultures of open sharing and data literacy where many stakeholders understand how to read, interpret, and use the data to student and institutional advantage.

Students must be provided with greater exposure to their data so they gain more self-awareness and understand how they are performing in areas that grades alone do not validate.

Collaboration is key. Institutions can band together through collective action to lower costs of data integration for individual campuses. Communities of best practices must be nurtured to align resources and efforts in interventions.

Graduation and Progression Success

(GPS), Georgia State University’s advising program, flags academic “mistakes” like registering for the wrong lab sequence and connects students to advisors within 48 hours. GPS resulted in 43,000 student meetings in 2015 and an increase in the six-year graduation rate from 32% to 54%: go.nmc.org/gps.

Rising to the Challenge: Exemplars

Through Jisc’s learning analytics initiative, over 50 institutions will pilot a program that aims to define and implement a national open architecture for learning analytics: go.nmc.org/jiscla.

The Educational Advisory Board offers tools and resources to help institutions identify best practices in solving campus challenges, including big data integration: go.nmc.org/eab.

More institutions are hiring Chief Data Officers that serve as the central leadership for all data activities, moving beyond strategy development to operationalizing and addressing the technical concerns of the plan: go.nmc.org/cdo.

eLumen works with the California State University system to provide outcomes and assessments management: go.nmc.org/elumen.

Integrating Student Data Across Platforms

Rising to the Challenge: Exemplars

Through Jisc’s learning analytics initiative, over 50 institutions will pilot a program that aims to define and implement a national open architecture for learning analytics: go.nmc.org/jiscla.

The Educational Advisory Board offers tools and resources to help institutions identify best practices in solving campus challenges, including big data integration: go.nmc.org/eab.

More institutions are hiring Chief Data Officers that serve as the central leadership for all data activities, moving beyond strategy development to operationalizing and addressing the technical concerns of the plan: go.nmc.org/cdo.

eLumen works with the California State University system to provide outcomes and assessments management: go.nmc.org/elumen.
Rising to the Challenge: **Exemplars**

The organizations behind the data collection tools Tin Can API and Caliper Analytics Framework met to develop a unified path and a product to complement each other’s efforts: go.nmc.org/imsg.

University of Central Florida’s Institutional Knowledge Management initiative was launched to provide actionable data and insights to inform executive and operational decisions, student analytics/benchmarking, and more: go.nmc.org/ikmucf.

The IMS Global Learning Tools Interoperability was developed to establish a standard way of integrating rich learning with platforms like learning management systems, portals, and learning object repositories: go.nmc.org/lti.

Through the Integrated Planning and Advising for Student Success initiative, institutions are leveraging analytics to provide students with more personalized pathways and recommendations: go.nmc.org/ipassbmgf.
Evidence-based methods for learning refer to instructional practices that have fostered improved learning outcomes, as demonstrated in controlled trials and pilots.¹ Metrics and analytics that reflect greater student retention and performance across an entire course, program, or undergraduate division can illuminate the efficacy and obstacles of specific pedagogical and technological implementations. However, institutions are challenged with scaling their successful practices as the process and evaluation of teaching and learning in one discipline does not always translate to others. Current approaches to scaling effective pedagogies are too often based on anecdotal evidence, when one success story is amplified with the assumption that it can be simply applied in other learning contexts. Compounding this challenge is the notion that scaling is not synonymous with mere duplication: identifying ways to adapt teaching and learning practices for different learners, course levels, program types, and institutional settings requires analysis of the evidence followed by deep thinking around making appropriate modifications for other courses. Additionally, many instructional methods are grounded in habit — educators and leaders may grow complacent as cultivating real change can be a time-consuming, confusing, and expensive process.²

**Student Impact:**
*How can institutions give greater weight to the student voice in measuring the efficacy of pedagogical experimentation?*
Considerations
Discuss how these challenge themes/considerations have materialized — or not yet materialized — on your campus. How can your institution plan for them? Who on your campus should play a role in addressing each? What are the next steps?

1. **Bringing Good Ideas to Light.** An initiative’s success must be determined through analysis of data generated by the project. Institutions can create procedures for instructors to share evidence of successful pilots with leadership, other members of their departments, or across disciplines. Long-term funding models should be considered in the early stages and built with success and sustainability in mind.

2. **Structural Challenges.** Engaging in impactful or experimental teaching practices is not a pathway to tenure at most institutions. To encourage widespread adoption, innovations must not only improve student success, but improve instructor workflow. Further, leadership and faculty can have diverging priorities. Innovative faculty are islands of excellence unless they have institutional support from provosts and other leaders to scale their practices.

3. **Concerns Around Instructor Roles and Motivations.** Academic freedom dictates that faculty have control over their instructional methods. Therefore, top-down mandates from leadership to adopt innovations may garner pushback. Institutions can consider incentives to encourage faculty to participate in promising practices and gather more data.

4. **Institutional Biases.** Evidence that an intervention works at one type of institution (e.g., community colleges or for-profit institutions) can be rejected by other institutions that cite serving different student populations as a basis for different approaches.

5. **Leadership Changes.** Turnover in key institutional positions can render promising initiatives without a driver, especially if a clear innovation strategy is not implemented to propel sustainable change and other participants do not feel a sense of ownership over the program.

6. **Need for Robust Infrastructure.** In scaling technologies, institutional infrastructure must be prepared to support growth. If course content is delivered via an online platform, those materials must be accessible to students 24/7. All supporting technology must be subject to regular maintenance and updates.
Sample Outputs

Psssst… here are examples of ideas to address the challenges identified by the challenge discussion groups at the 2016 OLC Accelerate Workshop. Feel free to use these as a model to think of more!

Pilot, measure, assess, repeat. As institutions identify models that lead to increased academic performance, the move to scale must involve ongoing discussions around ways to improve and monitoring of initiatives to ensure momentum is not lost.

Professional development and training opportunities are essential to support faculty through pedagogical changes. Workshop settings foster meaningful conversations, encouraging instructors to participate in ideation and curriculum redesign.

Student success initiatives should be viewed through a return-on-investment lens. Change can be sustainably funded when solutions address systemic issues of retention and progression.

Rising to the Challenge: Exemplars

The **Sandbox CoILABorative** at Southern New Hampshire University is an incubator for assessing scalability of innovations in learning technology and education models: [go.nmc.org/sandbox](http://go.nmc.org/sandbox).

The **SCALE-UP Project** at North Carolina State University identifies research-based instructional strategies that foster activity-based learning: [go.nmc.org/scaleup](http://go.nmc.org/scaleup).

Carnegie Mellon University’s **Open Learning Initiative** provides flexible learning materials, developed based on leading-edge research, adaptable for various courses: [go.nmc.org/teacholi](http://go.nmc.org/teacholi).

Achieving the Dream’s **OER Degree Initiative** will implement open educational materials to improve pass rates at community colleges: [go.nmc.org/atd](http://go.nmc.org/atd).

Faculty at CUNY’s **Hunter College** created digital resources to promote an active learning approach in a chemistry course. Implementing at CUNY’s Lehman College improved passing rates for students by 45%: [go.nmc.org/cuny](http://go.nmc.org/cuny).

The **National Research Center for Distance Education and Technological Advancements** is using student data to determine which factors influence academic success: [go.nmc.org/deta](http://go.nmc.org/deta).

Achieving the Dream’s **OER Degree Initiative** will implement open educational materials to improve pass rates at community colleges: [go.nmc.org/atd](http://go.nmc.org/atd).

Carnegie Mellon University’s **Open Learning Initiative** provides flexible learning materials, developed based on leading-edge research, adaptable for various courses: [go.nmc.org/teacholi](http://go.nmc.org/teacholi).
Blended learning environments that harness adaptive learning technologies have proven to enhance student outcomes, while digital courseware can help students succeed in high-enrollment, general education courses. Part-time and adjunct faculty are often tasked with teaching introductory and online classes; however, institutions do not always provide them with access to the same tools, resources, and training afforded to full-time and tenured faculty. Further, due to their temporary employment status, adjuncts face unique challenges in implementing new technologies and redesigning curricula to utilize effective pedagogies. By understanding the needs of part-time and adjunct instructors and taking steps to support them, colleges and universities can help these populations improve their teaching to benefit more students.

**Student Impact:**
What are the implications for students when adjuncts arrive at the beginning of a term without proper training on tools used in the course?
Challenge Accepted: What makes this challenge solvable for my institution?

Discuss why this challenge is important for your institution to tackle today and what makes it doable.

Considerations

Discuss how these challenge themes/considerations have materialized — or not yet materialized — on your campus. How can your institution plan for them? Who on your campus should play a role in addressing each? What are the next steps?

1. Accessible Support. Adjunct instructors may teach at multiple institutions or engage in other full-time employment alongside their teaching. Available support must account for these challenges with online technology training and face-to-face offerings outside traditional working hours.

2. Building Momentum for Effective Interventions. When adjunct instructors are not adequately trained in the capabilities of learning technologies, course implementations are less likely to deliver the expected impacts on learner outcomes. As a result, promising technologies may fail to move beyond pilot phase at an institution, depriving future students of the benefits of these innovations.

3. Effective Communication. Adjuncts are not always exposed to the inner workings of their departments or cross-disciplinary efforts. Institutions must ensure that part-time instructors receive regular updates on campus services and resources to help them sharpen their digital skills.

4. Balancing Academic Freedom with Assistance. Particularly for adjuncts who receive their assignment just before a term begins, it is helpful for institutions to provide templates to help instructors build their course curricula and give them a boost in adding content to online learning platforms. However, instructors must be given leeway to creatively design their courses.

5. Impact of Technology and Student Evaluations. Instructors must be supported through the development of learning technology mastery in order to adequately field their students’ questions related to platforms or online learning environments. Negative feedback on student surveys can harm an adjunct’s chances of receiving another invitation to teach.

6. Accommodating the Spectrum of Technological Capabilities. Training for adjuncts must encompass a variety of skill levels and technological know-how, while potentially accounting for adjuncts’ personal devices.
Sample Outputs

Pssst… here are examples of ideas to address the challenges identified by the challenge discussion groups at the 2016 OLC Accelerate Workshop. Feel free to use these as a model to think of more!

Create a **systematic approach for onboarding adjuncts**. Departments can develop a “care package” with information on topics including online grade submission and any other standard digital tools used by the institution — this resource can be shared and updated as new processes emerge.

Offer adjunct instructors **ongoing access to technology training opportunities**, including financial support to attend external conferences, to update their skills, and help them implement the latest evidence-based practices and pedagogies.

Pair adjuncts with **full-time faculty mentors** who can help these instructors plug into institutional resources for faculty and students (e.g., curriculum innovation centers and tutoring labs) and give voice to adjunct ideas and concerns in campus conversations.

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**Houston Community College’s Curriculum Innovation Centers** help adjuncts with special projects, like digital storytelling, and teach them to navigate LMS: go.nmc.org/hcccin.

**Full-time faculty lead technology workshops for adjuncts through Tallahassee Community College’s Academy of Teaching, Learning, and Success**: go.nmc.org/tccad.

**The University of North Carolina at Charlotte’s Center for Teaching and Learning** is piloting a year-long professional learning community for adjuncts: go.nmc.org/uncchar.

**Rochester Institute of Technology** is leveraging a “lunch and learn” or “dinner and discussion” model that provides accessible professional development and networking for adjuncts: go.nmc.org/ritad.

**At Webster University**, seasoned adjuncts can receive **financial support** for professional development or research activities: go.nmc.org/webster.

**The Center for Teaching Excellence** at Cerritos College offers workshops for instructors on the Canvas LMS. Faculty serve as “Canvas Mentors” for extra help: go.nmc.org/canvas.

**The Association of College and University Educators (ACUE)** offers an online course to improve teaching practices. ACUE also hosts a social network to foster educator connections: go.nmc.org/acue.
Financial Aid for Competency-Based Education (CBE)

Cut to the Chase
Leaders are challenged with designing CBE programs that map student progress into traditional credit hour equivalencies so students can qualify for federal financial aid.

The traditional, time-based model of higher education is no longer the only viable option to obtain a degree. Thanks to the rapid advancement of technology and its adoption in higher education, alternative learning opportunities for students are on the rise. Competency-based education (CBE), which allows students to receive credit for and build on real-world skills more efficiently than the conventional semester system, provides a flexible and affordable solution for student success. Current evidence supports claims that these programs increase access to postsecondary credentials at more affordable costs for low-income and minority students. However, institutions are challenged with designing programs that map student progress into traditional credit hour equivalencies so students can qualify for federal financial aid. Multiple US organizations are collaborating to build solutions that create infrastructure and support for this accelerated college completion model.

Student Impact:
Without the proper infrastructure and credit mechanisms, how can students be sure these new educational models will lead to employment?
Challenge Accepted: 
What makes this challenge solvable for my institution?

Discuss why this challenge is important for your institution to tackle today and what makes it doable.

1. **CBE vs. Traditional Higher Education.** CBE differs from conventional systems in that the timing varies; students spend more time on subjects they may not fully comprehend. As such, a challenge for awarding financial aid to pursue these programs is that they do not align with traditional 16-week semesters.

2. **Lack of Structure.** The fluidity of CBE and the unbundling of credits is inherently in conflict with well-established, rigid accreditation processes, especially as accreditation is generally tied to seat time.

3. **Proof of Quality for Approval.** To implement federal financial aid regulations, institutions must obtain substantive change approval from their accrediting agencies; this means that institutions must prove that the quality of their CBE programs are equivalent to or better than the current offerings.

4. **Proper Staffing and Support.** While CBE programs are often administered in blended or online models, technology is merely an enabler; educators must be equipped to teach the CBE format, eschewing a one-size-fits-all approach to provide guidance to individual learners.

5. **Identifying Prospective Students.** Many CBE programs target specific groups of students for enrollment — often adult learners (usually with some credits but no degree) that have real-world experience that they can leverage and build upon to complete the program.

Considerations

Discuss how these challenge themes/considerations have materialized — or not yet materialized — on your campus. How can your institution plan for them? Who on your campus should play a role in addressing each? What are the next steps?
Sample Outputs

Psssst… here are examples of ideas to address the challenges identified by the challenge discussion groups at the 2016 OLC Accelerate Workshop. Feel free to use these as a model to think of more!

A range of institutional stakeholders must fully understand the definition and positive evidence-based outcomes of CBE before leading efforts to develop programs and seek approval from accreditation agencies.

Institutions must determine whether it will be more effective to build new teaching and learning models from the ground up or attempt to retrofit CBE programs into existing traditional structures.
Financial Aid for Competency-Based Education (CBE)

Western Governors University (WGU) has been a fully operational CBE institution for over a decade. With 76% of students receiving some form of financial aid, WGU has extensive information on how to apply for federal financial assistance on the home page of their website: go.nmc.org/wgufa.

The Competency-Based Education Network (C-BEN) is a group of colleges and universities that work to address challenges and scale solutions to improve CBE programs. The institutions aim to develop evidence-based approaches that deliver competency-based learning to a wide range of student populations: go.nmc.org/cben.

The Reimagining Aid Design and Delivery (RADD) program has leveraged multiple organizations’ research to produce reports underscoring the challenges in the current financial aid system and surfacing ways to restructure the system to provide more aid to low-income students: go.nmc.org/radd.

Texas A&M University-Commerce is using CBE to attract students with some college credits who have not yet earned a degree. Data indicate that students in their CBE program have higher persistence and graduation rates than other transfer students: go.nmc.org/txamuc.

Rising to the Challenge: Exemplars
Taskforce Activity

So, what do we mean by design thinking?

“…a human-centered approach to innovation that draws from the designer’s toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success.”

— Tim Brown

It’s time to take all of the solution-oriented discussions from the Challenges conversations and put them into action! Based on design thinking principles, form taskforces — Framework/Rubric Design, RFP/Grant Program Development, and Marketing/Outreach — to start developing products, projects, or other outputs to scale solutions to the challenges you are addressing. This section outlines descriptions of each taskforce (or you can come up with your own) as well as possible creative brainstorming activities to serve as inspiration. You have complete freedom to pick one or invent your own. In your taskforces, you can self-organize however you see fit, breaking into subgroups or working all together. You can tackle one challenge or all four.

Additionally, the Toolkit Appendix encompasses sample outputs for the taskforces from the OLC Accelerate 2016 workshop. Each taskforce should have an assigned leader to facilitate the 90 minute “playtime,” with an additional 30 minutes afterward to report outputs to all workshop participants.

**Taskforce Activity** (120 min. total: 90 min. for taskforce activity; 30 min. for reporting out to the full workshop group)

- **Introduce** the taskforces and taskforce leaders. Participants will break into assigned taskforce groups.

- **Make sure all participants have access** to the online collaborative workspace where they will all be encouraged to take notes and record ideas. Taskforce leaders may also assign a participant to serve as lead note-taker to capture major elements of the outputs.

- **Begin the activity** with each taskforce leader providing an overview of the taskforce objectives.

- Each taskforce should **select a desired output** (e.g., a product, prototype, strategy document, etc.) Sample outputs are included in Appendix.

- **Taskforce leaders will facilitate** their groups as they creatively work through ways to tackle the challenge(s) by beginning the process of planning for their selected output. Reserve a few minutes at the end of the activity for the group to plan how to share out with all workshop participants.
**Why design thinking?**

“…I could list a dozen types of complexity that businesses grapple with every day. But here’s what they all have in common: people need help making sense of them. Specifically, people need their interactions with technologies and other complex systems to be simple, intuitive, and pleasurable. A set of principles collectively known as design thinking — empathy with users, a discipline of prototyping, and tolerance for failure chief among them — is the best tool we have for creating those kinds of interactions and developing a responsive, flexible organizational culture.”

— Jon Kolko

“Design thinking employs divergent thinking as a way to ensure that many possible solutions are explored in the first instance, and then convergent thinking as a way to narrow these down to a final solution. Divergent thinking is the ability to offer different, unique, or variant ideas adherent to one theme while convergent thinking is the ability to find the ‘correct’ solution to the given problem. Design thinking encourages divergent thinking to ideate many solutions (possible or impossible) and then uses convergent thinking to prefer and realize the best resolution.” (Thanks, Wikipedia!)
How ready are institutions to address the most pressing challenges in higher education that are hindering student success? What does scaling look like? How is progress towards scaling solutions being measured? A standard framework or rubric for tracking and evaluating the impact of student success programs and technology-enabled solutions is vital to addressing these questions. The Framework/Rubric Design Taskforce will design an institutional readiness and impact framework that helps higher education leaders prepare for and measure the progress of solutions.

Possible Activities:

1. Design a rubric, or adapt/build upon an existing rubric, that assesses an institution’s readiness to solve the challenge(s).

   Create a framework that helps higher education leaders match the unique facets of the challenge(s) they are encountering to existing models/projects in higher education and beyond that could be adapted to meet their needs. It’s like Tinder for challenges to meet desirable solutions — ‘swipe right’ if you think what you see could work at your institution!

2. Design a rubric that measures the impact of a technology-enabled solution once it is implemented.

3. Develop a how-to guide that helps faculty move a solution from idea -> financial backing -> readiness to change -> getting buy-in from stakeholders -> implementation.

   We’ve officially colonized Mars! You are tasked with planning for the very first college campus on the red planet. You get to start from scratch with no constraints from the old ways on earth. Design a framework for a brand new business model for higher education that addresses the challenge(s).
Solutions to higher education’s biggest challenges require innovative design and a clear focus on student success as the overarching goal. One-off events and discussions can be useful, but a commitment to designing and scaling improvements to the college experience for low-income students must be woven into the fabric of institutions. Innovators in the field need resources to implement these initiatives and an avenue to disseminate what they learned. What would such a program look like? The RFP/Grant Program Development Taskforce will brainstorm and design a prospective Request for Proposals for a grant-making program that supports institutions as they implement long-term technology and student success solutions to the challenges.

1. Draft an actual RFP that states the challenge(s) that needs to be addressed and what kinds of programmatic solutions you are seeking.

2. In planning for such a program, design a survey for students to get their perspectives on the challenge(s), where the greatest needs lie, and what kind of sustainable support they require to help them succeed.

3. Create the ideal personas for each of the entities involved in the grant program — from the planning group to the implementation group at the college/university to the funder and beyond. Account for as many roles as possible!

4. Collaborate on creating a set of best practices around technology implementation and student success services that could solve the challenge(s) and inform an RFP. Think about what a grant-making organization looks for in terms of leading successful implementation on the ground.

5. Adopt the persona of a notoriously frank advice columnist. First write a letter from the institutional leadership that expresses the challenge(s) and potential grant program. Then write the columnist’s response. It’s important to anticipate reactions to new programs in the planning process.

6. You’re about to hire a grant consultant/grant writer. Create an RFP for such a consultant that accurately describes the attributes and objectives of the program to ensure the new hire understands and encapsulates these aims in their work.

Possible Activities:

1. Create a set of best practices around technology implementation and student success services that could solve the challenge(s) and inform an RFP. Think about what a grant-making organization looks for in terms of leading successful implementation on the ground.

2. Write a letter from the institutional leadership that expresses the challenge(s) and potential grant program. Then write the columnist’s response. It’s important to anticipate reactions to new programs in the planning process.

3. You’re about to hire a grant consultant/grant writer. Create an RFP for such a consultant that accurately describes the attributes and objectives of the program to ensure the new hire understands and encapsulates these aims in their work.
The Marketing/Outreach Taskforce will devise potential outreach activities and campaigns that enable the field to better understand the challenges associated with digital learning, where the potential solutions lie, and evidence of progress. It’s difficult to advance digital learning in ways that help underserved student populations when the definitions and terms that surround the topic and its accompanying challenges are nebulous. Discussions among education leaders and practitioners sometimes lead to a focus on semantics and identifying the proper nomenclature. Solutions can only be scaled if the challenges, needs, and solutions are well-understood, and a unified voice in the form of outreach activities can amplify the impact of those solutions.

Possible Activities:

1. Devise a social media campaign that raises broad awareness of the challenge(s).
2. Create a public service announcement using the camera on your phone or tablet that briefly summarizes the challenge(s) and solutions needed.
3. Plan for the development of a website that would serve as the central location for information on all solutions and potential solutions. The goal is to make it easy for education professionals and education stakeholders to discover solutions and see well-documented evidence of progress as the solutions unfold.
4. Plan a series of outreach events that connect institutional leaders with students to incorporate greater student voice in the design and dissemination of solutions.
5. Design an infographic that showcases the solutions.
6. Devise a crowdsourcing campaign to solicit people’s reactions to the challenge(s) and solutions and determine how to best synthesize the vast array of voices into a one-pager.
Appendix: Samples

This section contains:

- **Summaries of three real outputs for the taskforce activities** from the OLC Accelerate 2016 workshop. These can serve as a reference or for inspiration on what is possible to create and achieve as a taskforce.

- **Sample emails** for inviting workshop participants, challenge leaders, and taskforce leaders, as well as follow-up communications right before and after the event.

- **Sample agenda** for a full-day workshop involving all of the challenges.

- **Sample event evaluation.**
The Framework/Rubric Design taskforce at OLC Accelerate 2016 engaged in a series of discussions centered on how to develop successful initiatives to achieve goals of increasing student success and improving financial stability. The group envisioned how institutions might define success through a ROI (return on investment) lens. Guiding questions, below, reflect the taskforce’s consensus that the success of innovation initiatives ultimately lies in creating sustainable pathways to student success and financial stability. Finally, the group developed a three-part thesis statement synthesizing the “recipe” for changing institutional infrastructure and culture:

*If we are to preserve access and increase attainment, in a world of constrained resources and fewer students… then we must get a better return on investment from current resources through understanding levers to change the business model… which will require a strategic approach connecting financial practice with institutional change models.*

### Defining Success of Innovation Initiatives: Guiding Questions

- How would a 1% change in retention increase/decrease net revenue?
- How might we reallocate resources to better obtain mission/market opportunities?
- How might adaptive courseware allow faculty to reallocate their time?

In order to achieve improved retention and completion rates, institutions planning student success initiatives must shift their focus to encompass an ROI lens, as summarized in the graphic below.

**Need to Shift the Frame:**

*from Cost-Cutting to Maximizing Return on Investment*

- Preserve Access **AND** Drive Attainment
- Move from Spending to Investment
- Change Infrastructure and culture

If we are to **preserve access and increase attainment**, in a world of constrained resources and fewer students…

then we must get a **better return on investment** from current resources through understanding levers to change the business model…

which will require a strategic approach connecting **financial practice** with **institutional change models**.
In moving pilot programs to scale, institutions can organize their strategies in four overarching categories: Student Considerations; Faculty Considerations; Operations; and External Conditions. Taskforce leaders guided participants in a collaborative brainstorm of ideas and considerations relevant to each topic.

The templates below represent strategic considerations identified by taskforce participants. This work is the beginning of an ongoing conversation; continuing efforts include determining whether these dimensions are the right ones to address challenges on your campus and developing methods to measure and assess progress at your institution. Facilitators can distribute the templates to workshop taskforce participants: the templates can be personalized to establish metrics for success, understand where your institution currently falls within these dimensions, and identify next steps to advance across the grid. “0” indicates that your institution hasn’t started yet, while “3” indicates major progress.

### The Move to Scale: Strategic Considerations

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Sample Taskforce Output: RFP/Grant Program Development

The RFP/Grant Program Development taskforce at OLC Accelerate 2016 included participants from organizations who engage in grant-making as well as institutional representatives who routinely apply for grant funding. As these two groups do not typically sit at the same table, they agreed to harness the opportunity to speak candidly about challenges faced from both perspectives. The conversations resulted in the curation of a set of Questions and Lessons Learned. A commitment to designing and scaling improvements to the college experience for underrepresented student populations must be woven into the fabric of institutions. By reviewing the sample outputs below, the grant-making process can be better understood from multiple perspectives.

Questions: Grant-making, Applications, and Other Challenges

How do institutions discover available opportunities?
> Grant databases
> EdSurge EdTech Opportunities
> Chronicle of Higher Education weekly updates for faculty

How do institutions prepare to be ready when grants open up?
> Match problems, challenges, and solutions to possible funding sources
> Match received funding to current problems, challenges, and solutions

How can grantors measure the impact of their investments?
> Grantors must use data to measure whether money was “well-spent.”
> Grantors should establish processes for receiving regular updates from grantees.
  ▪ Institutions should report on successes, obstacles encountered, and agile strategies deployed to turn challenges into triumphs.
  ▪ This reporting can inform future directions in grant-making and help grantors identify the most promising initiatives for continued funding.

How should institutions responsibly handle surplus funds from grants received?
> Institutions can harness pilot data to present a holistic assessment of funds needed to achieve a move to scale.
> Institutions can request to invest surplus funds back into existing initiatives to sustain momentum or impact additional populations. These requests must be grounded in data that demonstrates the impacts of current investments.

What is the appropriate level of contact between grantors and potential grantees?
> RFPs can provide explicit instructions on permissible communication.
> A central contact at the grant-making organization should be provided to all potential grantees.
> If the scope of the grant changes during the RFP period, grantors should communicate these changes to all potential grantees, including those who have already submitted RFPs.
Lessons Learned

Grantor Side

> Transparency with applicants helps improve the quality of applications.
> Decision-makers should engage in ongoing dialogue to evolve the objectives of the grants.
  ▪ Any shifts in thinking should be timely communicated to potential grantees; if the direction or intention of the grant opportunity changes significantly, applicants should be given opportunity to amend applications.
> Request that institutions submit a statement of interest prior to formal RFP opening; grantors can then invite RFPs from selected applicants.
> Provide feedback to applicants on why proposals were not selected to refine institutions’ responses to future RFPs.
> Bring evaluators together to reach a shared understanding of how to score applications based on a rubric, before beginning the application review process.

Grantee Side

> Find the right voices to tell the story — engage stakeholders including students and faculty.
> Access grantee databases to help locate opportunities to pursue funding.
> Even if a valid institutional problem has been identified, this does not mean it will align with all RFP opportunities.

How Institutions Can Prepare for Success

> Have defined problems in institutional “back pocket” (impacted stakeholders, leadership teams, etc.) to be able to jump on grant opportunities that align.
> Learn from the process of applying. Even if your institution is not selected for funding, the process is valuable as it helps to clarify goals and unite stakeholders.
> Receiving feedback on why proposals were not selected can help refine future responses.
Sample Taskforce Output: Marketing/Outreach

The Marketing/Outreach taskforce at OLC Accelerate 2016 encompassed participants from both higher education institutions and learning technology-focused companies that are involved in content creation, content marketing, and community-building. Their objective was to envision a platform that would provide higher education leaders, faculty, and students with a constant window into pressing challenges in the field and solutions worth scaling. The conversations resulted in a vision for a website/app that leverages community and social features to foster, validate, and publicize ongoing discussions on the core issues.

**Goal and Strategy**

The objective of the web platform is to bring together education stakeholders from different backgrounds to solve higher education’s biggest challenges.

The strategy is to develop a website and accompanying app where students, staff, and faculty can collaborate on defining the core challenges and their solutions so that it becomes an ongoing, constantly evolving discussion.

**Product Features**

*A summary of features for the web platform prototype*

People can favorite and comment on the discussion items, surfacing the items that deserve top prioritization. This will leverage the notion of social validation, where upvotes and favorites are needed to show sentiment and what’s pressing/popular.

Users set up profiles and have a different view depending on whether they are staff, faculty, students, or administrators. Similar to a shopping website, their profile leads to custom views and recommendations.

To avoid it being a static website, users will be notified when someone continues a thread they initiated, or they can edit their settings to get notified via other platforms as well.

There will be a “Recording Studio” tab where users can record their reflections and stories through the website, with some light moderation from a web admin before it’s officially published (e.g., Interview Stream).

“Press Kits” will be available for download with common definitions, language, policy briefs, and resources to ease communication about important issues.

In future incarnations, the use of bots/machine learning will surface answers and extract interesting insight and ideas.

In order to keep the content on the site fresh and aligned with the current landscape, an advisory board consisting of faculty, staff, leadership, and students will convene virtually or face-to-face twice per year to determine new challenges to add to the mix, as well as provide updates on strategic initiatives in progress.

To maintain a constant flow of content, the advisory board and crowdsourcing methods cannot be relied on as the sole sources. Thus, credible people from the higher education field will be hired and awarded small honorariums for their contributions. Inviting technology vendors into the conversations and developments will also help keep the platform up-to-date while taking advantage of the latest, most sophisticated web features.

A regular e-newsletter will be disseminated to users and subscribers to inform them of updates on the website, the challenges, and determined solutions.

>>>
Fundamental Attributes of the Effective Solution
Why is this output a good idea and how will it help solve the challenges?
> Marketing by community is more organic and honest.
> The web platform creates a space for the challenge and solution discussions in an ongoing manner.
> The web platform incentivizes people to create profiles by easily linking to existing profiles including those on NMC.org, FlexSpace, LinkedIn, Facebook, and WordPress. Additionally, anyone who participates can receive continuing education or professional development credit and they will also be rewarded for bringing in other users to the network. Adjuncts can be motivated to participate by receiving service credit.
> The platform is scalable — eventually, it can be white labeled so that each institution has their own site. “Site Owners” can determine when challenges are solved by tracking progress across institutions and then being able to compare how one institution stacks up against others.
> An ambassadors program can help spread the word and that group can also be tapped for testing.
> Because challenges encompass different scopes of difficulty, the platform will help determine which ones are sprints vs. marathons.
> By gauging people’s interest in different challenges and solutions through the social features, it will be easy to create virtual and face-to-face events around a specific topic; the site will encompass a virtual room for synchronized video discussions. When a challenge gets enough upvotes, for example, a virtual event (synchronous or asynchronous) can be triggered.

Other Proofs of Concept
Existing institutional models or products that came up as good examples for outputs
> EdSurge’s Digital Learning and LOOP Networks
> Interview Stream
> Reddit
> The general notion behind Communities of Practice
Email Inviting Workshop Participants

Dear <First Name>,

You are cordially invited to this invitation-only, full-day workshop, “Scaling Solutions to Higher Ed’s Biggest Challenges,” focused on addressing the most pressing challenges that are threatening equity and access at <your institution> and in higher education across the US. Four challenges have been identified and detailed in a special NMC call-to-action publication (go.nmc.org/solution), with potential, evidence-based solutions in various stages. This workshop aims to move the needle of progress through a series of design thinking-inspired activities.

The event will be taking place on <event date> at <event location>.

Space in this workshop is limited so be sure to reserve your spot today!

Best,
<Your Name>
Email Soliciting Challenge Leaders (Financial Aid for Competency-Based Education)

Dear <First Name>,

I hope this note finds you well! We’re in the midst of planning a “Scaling Solutions to Higher Ed’s Biggest Challenges” workshop. The event will be centered around solutions to improve student success for underrepresented populations at <your institution>. The event will be taking place on <event date> at <event location>.

I am writing to inquire about your availability to participate in this event and your interest in serving as a discussion leader for the following challenge:

**Financial Aid for Competency-Based Education**

*How can we offer alternative learning opportunities that meet federal requirements for financial aid eligibility?*

Competency-based education, direct assessment programs, and other accelerated completion models provide flexible and affordable solutions for student success; however, institutions are challenged with designing programs that map student progress into traditional credit hour equivalencies so that students can qualify for federal financial aid.

We would love to have the benefit of your expertise and experience at this event. The objective of the workshop will be to have frank discussions about how the challenge is impacting <your institution>, how it can best be addressed, and how we can begin to set solutions into action. I am attaching a workshop Toolkit from the NMC that contains a summary of the themes and discussion questions you would be responsible for leading in a ~60-minute discussion with a small group of campus leaders, practitioners, and students.

The time commitment will include a meeting ahead of the event to clarify roles and responsibilities, as well as time to review the toolkit materials in preparation for the discussion.

Please let us know by <deadline date> if you are interested in serving as a challenge leader at this event.

We appreciate your consideration!

Best,

<Your Name>
Email Soliciting Taskforce Leaders (Marketing/Outreach)

Dear <First Name>,

I hope this note finds you well! We’re in the midst of planning a “Scaling Solutions to Higher Ed’s Biggest Challenges” workshop. The event will be centered around solutions to improve student success for underrepresented populations at <your institution>. The event will be taking place on <event date> at <event location>.

During this event, participants will be discussing and tackling the following challenges:

- Integrating Student Data Across Platforms
- Scaling Evidence-Based Methods Across Disciplines
- Supporting Adjunct Faculty through Tech Deployment
- Financial Aid for Competency-Based Education

After deep discussions on these topics, our plan is to move to an activity where participants devise real solutions in the form of taskforces. I am writing to inquire about your availability to participate in this event and your interest in serving as a leader for the following taskforce:

**Taskforce 3: Marketing/Outreach**

The Marketing/Outreach Taskforce will devise potential outreach activities and campaigns that enable the field to better understand the challenges associated with digital learning, where the potential solutions lie, and evidence of progress. It’s difficult to advance digital learning in ways that help underserved student populations when the definitions and terms that surround the topic and its accompanying challenges are nebulous. Discussions among education leaders and practitioners sometimes lead to a focus on semantics and identifying the proper nomenclature. Solutions can only be scaled if the challenges, needs, and solutions are well-understood, and a unified voice in the form of outreach activities can amplify the impact of those solutions.

We would love to have the benefit of your expertise and experience at this event. I am attaching a workshop Toolkit from the NMC that contains a summary of possible taskforce activities you would be responsible for leading in a ~90-minute timeframe with a small group of campus leaders, practitioners, and students.

The time commitment will include a meeting ahead of the event to clarify roles and responsibilities, as well as time to review the toolkit materials in preparation for the taskforce activity.

Please let us know by <deadline date> if you are interested in serving as a taskforce leader at this event.

We appreciate your consideration!

Best,

<Your Name>
Thank you for participating in the upcoming “Scaling Solutions to Higher Ed’s Biggest Challenges” workshop. During the event, there will be several small group discussions and working sessions around the challenges and potential solutions. To ensure you are grouped according to your expertise and interests, please take a quick moment to state your preferences on this brief web form by <deadline>.

Descriptions of each of the challenges and taskforces are below.

**CHALLENGES**

**Integrating Student Data Across Platforms**
Institutions are capturing a deluge of student data that often resides in departmental silos, missing the potential to be a holistic tool that informs decision-making and predictive models.

**Scaling Evidence-Based Methods Across Disciplines**
Teaching and learning models in one discipline do not always translate to others, and approaches to scaling effective pedagogies too often favor anecdotes over data-driven evidence.

**Supporting Adjunct Faculty through Tech Deployment**
Adjunct faculty often teach introductory and online classes, but institutions do not always provide them with access to the same supporting resources as full-time and tenured faculty.

**Financial Aid for Competency-Based Education**
Leaders are challenged with designing CBE programs that map student progress into traditional credit hour equivalencies so students can qualify for federal financial aid.

The NMC also released a Horizon Project Strategic Brief that elaborates on all of the challenges (go.nmc.org/solution). Please consider it recommended reading material ahead of the workshop as it will inform the discussions and the work we do together.

**TASKFORCES**

**Framework/Rubric Design Taskforce**
How ready are institutions to address the most pressing challenges in higher education that are hindering student success? What does scaling look like? How is progress towards scaling solutions being measured? A standard framework or rubric for tracking and evaluating the impact of student success programs and technology-enabled solutions is vital to addressing these questions. The Framework/Rubric Design Taskforce will design an institutional readiness and impact framework that helps higher education leaders prepare for and measure the progress of solutions.
RFP/Grant Program Development Taskforce

Solutions to higher education’s biggest challenges require innovative design and a clear focus on student success as the overarching goal. One-off events and discussions can be useful, but a commitment to designing and scaling improvements to the college experience for low-income students must be woven into the fabric of institutions. Innovators in the field need resources to implement these initiatives and an avenue to disseminate what they learned. What would such a program look like? The RFP/Grant Program Development Taskforce will brainstorm and design a prospective Request for Proposals for a grant-making program that supports institutions as they implement long-term technology and student service solutions to the challenges.

Marketing/Outreach Taskforce

The Marketing/Outreach Taskforce will devise potential outreach activities and campaigns that enable the field to better understand the challenges associated with digital learning, where the potential solutions lie, and evidence of progress. It’s difficult to advance digital learning in ways that help underserved student populations when the definitions and terms that surround the topic and its accompanying challenges are nebulous. Discussions among education leaders and practitioners sometimes lead to a focus on semantics and identifying the proper nomenclature. Solutions can only be scaled if the challenges, needs, and solutions are well-understood, and a unified voice in the form of outreach activities can amplify the impact of those solutions.

Thank you in advance for indicating your group preferences and we’ll see you soon!

Best,

<Your Name>
Email to Participants ~One Week Prior to Event

Dear <First Name>,

We’re looking forward to seeing you at the “Scaling Solutions to Higher Ed’s Biggest Challenges” workshop next week on <date and time>! This is just a note to share some important information ahead of the event, though all materials here will be printed and waiting for you at the event.

The workshop is located in <room name>.

Please find attached the workshop materials.
  > Full Agenda
  > Challenge Discussion Guides
  > Taskforce Activities

The NMC also published a Horizon Project Strategic Brief that elaborates on all of the challenges you will be addressing (go.nmc.org/solution). Please consider it recommended reading material ahead of the workshop as it will inform the discussions and the work we do together.

At the event, we will be utilizing a collaborative online workspace: <link>. Ahead of the event, please post a brief introductory message in the workspace to familiarize yourself with the application.

Many thanks and see you soon!

Best,
<Your Name>

Post-Event Thank You Email

Dear <First Name>,

Thank you for participating in our workshop! We are so appreciative of your time and your valuable contributions. You made it a success! It’s clear that the challenges in higher education are numerous and complex, but it gave us great hope to observe the high quality of ideas, discussions, and solutions shared at the event.

We would love your input on the event as we’re always looking to improve our offerings. Thank you in advance for taking a few moments to fill out this brief survey <link to survey or attachment>.

Remember, this is just the beginning of the conversation. We look forward to carrying forward your ideas into our future work — which we hope you will be a part of. Many thanks and stay tuned for more!

Best,
<Your Name>
Appendix: Sample Workshop Agenda

Registration and Continental Breakfast 8:00 – 9:15 (75 minutes)
Opening Remarks 9:15 – 10:00 (45 minutes)
Welcome and Logistics
Opening remarks; overview of the day
Keynote
A short presentation on a topic relevant to the participants that sets the tone for the day
Welcome Activity
An ice-breaker activity that fosters collaboration and communication

Snacks! 10:00 – 10:15 (15 minutes)

Round Table Challenge Discussions: Part 1 10:15 – 11:15 (60 minutes)
Challenge 1: Integrating Student Data Across Platforms
Challenge 2: Scaling Evidence-Based Methods Across Disciplines
Challenge 3: Supporting Adjunct Faculty through Tech Deployment
Challenge 4: Financial Aid for Competency-Based Education

Quick Debrief 11:15 – 11:30 (15 minutes)
Go around the room for a “two-breath share-out” by each Challenge Discussion group. Each group can Tweet key themes using the event hashtag.

Break 11:30 – 11:45 (15 minutes)

Round Table Challenge Discussions: Part 2 11:45 – 12:45 (60 minutes)
Participants switch tables and Challenge leaders facilitate a second round of discussions with their new groups.

Reporting Out 12:45 – 1:00 (15 minutes)

Lunch 1:00 – 2:00 (1 hour)

Taskforce Activities 2:00 – 3:30 (90 minutes)
Taskforce 1: Framework/Rubric Design
Taskforce 2: RFP/Grant Program Development
Taskforce 3: Marketing/Outreach

Report Out Results from Taskforce 3:30 – 4:00 (30 minutes)

Snacks! The Sequel 4:00 – 4:10 (10 minutes)

Lightning Talks (OPTIONAL) 4:10 – 5:00 (50 minutes)
Up to eight attendees can share five-minute presentations on their work related to the topics of the day.

Closing Remarks 5:00 – 5:05 (5 minutes)
Evaluations 5:05 – 5:15 (10 minutes)

Reception with Colleagues (You’ve Earned It!) 5:15 – 6:00 (45 minutes)
Thank you for sharing your thoughts on this session. Your feedback will be used to improve future sessions.

Session Title ______________________________________________________________

Name (optional) __________________________________________________________

Email (optional) _________________________________________________________________

Title (optional) _____________ ____________________________________________________

How relevant was this topic to your work?

(not relevant to my work)   1   2   3   4   5   (very relevant)

Was this session a valuable use of your time?

(a waste of my time)   1   2   3   4   5   (very valuable)

What did you find most useful?

How would you improve this session?

Please share additional comments here:
End Notes


