Innovative Learning Technology Initiative

Recommendations for Future State
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Letter from Provost Michael T. Brown

Office of the Provost and Executive Vice President for Academic Affairs

August 2020

Dear Colleagues,

At President Napolitano’s direction, I initiated an extensive assessment of the Innovative Learning Technology Initiative (ILTI) in the summer of 2018. Many members of our community, including the staff at the UC Office of the President and stakeholders from the campuses, provided feedback. I sought to understand the current state of ILTI and to understand what our community members felt should be maintained, improved, and changed in the future.

This document contains recommendations for repositioning what is now ILTI, and for the use of state funds that are allocated to the UC system to support online education. These recommendations are based on nearly 40 interviews and a review of background materials, including data sets and other documents provided by program stakeholders.

My own review made several things clear to me. For one, we have an incredibly strong team across the UC dedicated to online education, one that includes and goes beyond the staff within ILTI: registrars, deans, faculty, and administrators who support online courses at our campuses. We have also collectively achieved several significant accomplishments, including:

- A technical system that facilitates enrollment between campuses, an almost unheard-of feat in American higher education;
- Hundreds of innovative online courses that have served thousands of students across the campuses; and
- Increased interest in and adoption of online instructional modalities amongst our faculty.

I can reasonably say that we have done justice to the goals that Governor Brown established when he first offered funding to UC in 2012-2013 to invest in online education. I have also concluded, after speaking with colleagues and reviewing the recommendations, that it would not be wise to transition ILTI or its funding wholesale to a campus in the future. Such a move would not allow us to consistently and equitably achieve the goals that we and the Governor set out for this funding.

Now is the time to chart a new course and continue furthering our mission through online education, and that includes a fundamental “rethinking” about how to best to advance instructional innovation in the online space – and to do this in a collaborative way that best supports the activities underway on the campuses. Our future approach must recognize that over the past few years, each campus has developed its own infrastructures to support online education and, generally, does not require as much central service support from the Office of the President. This evolution necessarily requires that we identify the aspects of current work that are best managed centrally at OP, and which are best left to the campuses for management.

I also believe it is important to critically assess what value the University can achieve by each and every function we pursue. The nature of this work is to be innovative and keep the University of California on the cutting edge, so some endeavors may not pay off in the long-term. We must learn from the past few years and make changes accordingly.
Three principles are central to these recommendations and my vision for the future and will guide our future endeavors in this area:

- Simplifying our organizational structure, funding model, and requirements to reduce the amount of administrative work required both centrally and on the campuses;
- Recognizing the strengths of the campuses and the UC Office of the President to determine which organizations are best positioned to complete certain activities; and
- Directing as much funding as possible to the development of online courses to optimize our impact on the campuses, our faculty, and our students.

Ultimately, it is important for us to retain the strong assets that we have developed over the past five years—most especially the cross-campus enrollment system – but invest our funds to reflect the current situation for the UC system. The future of ILTI and how we allocate funding will look different than its current trajectory: the administrative role of the Office of the President can shrink, and that of the campuses should expand.

I want to thank all the individuals who participated in this assessment through thoughtful conversations with me and my team. I also want to thank the ILTI co-managers – Ellen Osmundson, Mary-Ellen Kreher, and Paul Montoya – for leading this group so successfully over the past few years. On behalf of the University of California, thank you.

The recommendations in this report provide a blueprint for organizing the next phase of UC’s systemwide efforts in support of online education. I look forward to your comments and suggestions as we undertake the next steps.

Appreciatively,

Michael T. Brown, Ph.D.
Provost and
Executive Vice President for Academic Affairs
EXECUTIVE SUMMARY

The recommendations that follow are based on an assessment of the current status of the Innovative Learning Technology Initiative (ILTI) conducted by UC Provost Michael T. Brown and a team from Academic Affairs in consultation with Huron. These recommendations provide a framework for repositioning ILTI so that it most effectively supports the campuses in their online course development, and UC generally for online education. There are undoubtedly many more details that need to be determined; these recommendations are intended to facilitate conversations with members of the community and help determine any additional considerations that can inform next steps.

ILTI’s current activities and services can be summarized in the following four general categories:

- **Online Course Development**: ILTI funds faculty and campus administrations to support the development of online and hybrid courses and provides support to more than 50 campus faculty to design, develop, and host online courses available for enrollment to UC students.
- **Undergraduate Student Enrollment**: ILTI facilitates the opportunity for UC undergraduates to enroll in online courses offered by a different campus than their home campus.
- **Non-Matriculated Student Enrollment**: ILTI facilitates the opportunity for non-matriculated students from outside the UC system to enroll in online courses offered by any UC campus.
- **Cross-Campus Enrollment System**: ILTI offers a technology system that facilitates the enrollment of UC students in courses at campuses other than their home campuses.

The recommendations for a future state are centered around opportunities which were suggested and identified during the assessment. These opportunities include:

- **Eliminating** the non-matriculated student program known as UC Online;
- **Increasing** the amount and proportion of funds distributed to the campuses by minimizing internal costs within the UC Office of the President;
- **Rebranding** ILTI to a name that is more permanent and recognizable to stakeholders;
- **Addressing** ILTI’s leadership and organizational structure;
- **Expanding** the use of the cross-campus enrollment system;
- **Simplifying both the different** types of funding offered to the campuses and the reporting requirements for the use of those funds;
- **Refocusing** the staff on efforts for the future.

After consultation with stakeholders on these recommendations, Provost Brown will determine how best and in which priority order to implement them, and to consider others that may arise during the consultation phase.
BACKGROUND

The Innovative Learning Technology Initiative (ILTI) is a UCOP systemwide initiative housed in the Division of Academic Affairs that advances online education and innovation in the UC system. This section will provide a brief introduction to ILTI, covering the following high-level information:

- An overview and history of the creation of ILTI;
- An overview of its four primary functions, including online course development, undergraduate student enrollment, non-matriculated student enrollment, and the cross-campus enrollment system; and
- An overview of ILTI's organizational structure and governance.

Overview

Since FY13, the State of California has provided annual funding to support online education at each of the three segments – the University of California, the California State University system, and the California Community Colleges – as a means of increasing access and decreasing the time-to-graduate. These funds were provided to UC as an annual increase to the state general appropriations. Technically, there are no specific restrictions from the State on the use of these funds, though the University verbally agreed to use the funds to support online education. These funds are currently understood as ongoing state support to fund online instructional innovations across the system.

Though each segment decided to spend the annual funds differently, former UC Provost Aimée Dorr’s recommendation to the President, which was accepted, was to direct the funds to create ILTI, which spends the funds directly and through campus transfers. ILTI’s direct expenses are typically related to personnel, technology, marketing, and special projects within the UC Office of the President. Campus transfers are allocated for a variety of purposes, and typically represent a majority of ILTI’s expenses.

There have been several systemwide online education efforts coordinated through the UC Office of the President over the past decade. The most significant effort that preceded the creation of ILTI was UC Online Education (related to the Online Instruction Pilot Program), which eventually evolved into ILTI when Governor Brown offered the $10 million in funding for online education in 2012.

UC Online Education

In 2010, UC President Mark Yudof directed the creation of UC Online Education (UCOE) to accomplish the goal of creating “a systemwide set of campus-based, faculty-developed, high-need undergraduate courses” (2013 ILTI Project Statement). While many UC campuses were already investing in online education, UCOE and its leaders aimed to provide executive-level guidance for online education across the UC system. The program’s leadership oversaw the construction of the UC Online enrollment system to support the creation and offering of fully online courses to UC students. In the fall semester of 2012, UCOE course offerings were opened for the first time to non-UC students (non-matriculated) in addition to currently enrolled UC students. The expansion of UCOE to non-matriculated students allowed the program to enter into a new student market and provided an additional source of revenue.

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1 In 2020 ILTI was moved from the Office of the Provost and Executive Vice President to the department of Graduate, Undergraduate and Equity Affairs as part of a larger restructuring of the Division of Academic Affairs.
Creation of the Innovative Learning Technology Initiative

In 2012, California Governor Jerry Brown approached UC requesting that the university further invest in providing online courses for UC students. As student enrollment was increasing across the state of California, campuses faced challenges with course availability.

Using these funds, the UC Provost established ILTI in January 2013. ILTI was housed under the Office of the Provost with the goal of developing additional high-demand online courses that were available to UC undergraduate students across all campuses. The existing UCOE program and the UC Online enrollment system for non-matriculated students were shifted under the umbrella of the newly created ILTI. A series of meetings and workshops were held with stakeholders from across the UC system – including faculty, students, staff, and administrators – to develop a vision, goals, and priorities for ILTI and its use of the state funding. ILTI convened campus registrars, for example, to discuss the potential for cross-campus online learning through the new initiative.

As a result of this planning, during Spring 2013 the program’s leadership announced its intention to build a system that would integrate with campus systems to facilitate undergraduate enrollment across the campuses. To support this system and its functionality, ILTI leveraged an existing agreement with UC Merced’s Students First Center to provide front-end customer support for UC students in cross-campus courses. Building and funding these courses was a key goal of the program, so ILTI launched a competitive RFP process for the first time in Summer 2013 in which campus faculty applied for funding to create and host courses through the cross-campus system. In Fall 2013, ILTI administered its first round of campus grants, which were given directly to each of the ten UC campuses to support the development of online courses and infrastructure for the cross-campus system.

Online Course Development

While each of the UC campuses supports the online course development process to some degree, ILTI also supports the various stages in five key ways:

- **Campus funding**: Providing funds directly to campuses to support various stages of the online course lifecycle that they may pursue on their own;
- **Competitive RFP process**: Administering a robust RFP process through which campus faculty submit online course development proposals and receive financial awards to develop courses;
- **Course catalog**: Maintaining a full catalog of all ILTI-supported courses (any course offered cross-campus or developed using ILTI funding);
- **Instructional design**: Working directly with faculty to design and develop courses; and
- **Learning management system**: Hosting online courses that are developed on an ILTI-specific learning management system.

The RFP process was first conducted in June 2013 and has typically been conducted four times each academic year; it was only conducted three times during 2018. **Over the course of these five years, ILTI received a total of 230 RFP applications.**

ILTI’s course catalog has grown significantly over time due to course development awards offered through the RFP process. The following figure shows the growth of the available course catalog over the last six years, as of July 2018. Note that a much smaller number of courses are typically offered each term.
In its first year of operation, the ILTI catalog consisted of just 11 courses offered by six campuses. As of July 2018, all ten UC campuses have courses in the ILTI catalog, with a total of 277. The total number of courses in the catalog has grown each year since AY12. Seven of the ten campuses have increased their number of courses in the catalog every year since AY12. UC Irvine, while not yet live on ILTI’s cross-campus enrollment system, has had the largest number of courses in the catalog each year since AY13.

The majority of courses developed through the RFP process can be grouped into three categories, detailed below.
Category 1 – **Innovative Courses** represent the smallest number of courses in the catalog. These courses are typically developed collaboratively with faculty from multiple campuses, and truly push the needle in terms of innovative instructional delivery. During stakeholder interviews, the “Bending the Curve: Climate Solutions” course was frequently cited as the most successful and exemplary Category 1 course. “Bending the Curve,” which was first offered in 2018, is a hybrid course that was funded by ILTI and developed by 23 faculty and nine campuses and labs. It has been offered by five campuses, and as several stakeholders noted, accomplishes ILTI’s goal of innovation in education delivery.

Category 2 – **High-Demand Courses** are the second largest group of courses in ILTI’s catalog. These are typically common introductory or pre-requisite courses that have applicability across different UC campuses. When ILTI was founded, one of the specific requests from Governor Brown was that the program use online cross-campus courses as a means of alleviating enrollment challenges and bottlenecks in Category 2 courses.

Category 3 – **Specialty Courses** represent the largest portion of courses in the catalog. Because the open RFP process is the primary means through which courses are added to the catalog, individual faculty interested in online education apply to offer their isolated, specialty courses that are often more niche and less universal. While these courses have significantly contributed to the growth of ILTI’s course catalog, they do not necessarily fit into a deliberate course sequence or count for strategic credit.

**Undergraduate Student Enrollment**

Much like developing online courses, enrolling UC undergraduate students in online courses has remained a goal of the program in some shape or form since its founding. UCOE’s initial focus was enrolling students
in online courses generally. When these courses were first offered to non-matriculated students in Fall 2012, ILTI’s mission expanded, but UC undergraduate enrollment remained a focus. With the state funding in FY12 came a renewed challenge to increase opportunities for UC students to enroll in online courses. This sparked the creation of ILTI with the unique mission of enrolling UC undergraduate students in online – and ideally, cross-campus – courses.

Each academic term, ILTI confirms which courses will be offered by communicating with campus faculty and registrars, opens the courses for enrollment, transfers course registrations and grades, and resolves any enrollment issues. At the end of each spring semester, ILTI staff contact faculty who have offered courses in the past or who have received ILTI Competitive Course Awards for the coming year to determine which courses they intend to offer. From there the staff creates a preliminary list of courses and faculty. Roughly 60 days before each term, ILTI staff contact all faculty who responded to confirm these offerings. ILTI staff manually set up the courses being offered for enrollment in the CCES and open them at the beginning of the term. These staff work with the UC Merced Student Support staff to resolve any complications that arise during open enrollment and manage individual student issues.

ILTI focuses a significant amount of effort identifying which courses will be offered in a given term. For example, in AY14, ILTI had 107 total courses in its course catalog, and offered 70 sections of courses from this course catalog to students that year. The following figure highlights ILTI’s undergraduate course offerings over time.

**FIGURE 3: COURSE OFFERINGS BY YEAR AND CAMPUS (AY14-AY16)**

The three years shown in the figure above are those for which ILTI has a full academic year of data. Within those three years, **ILTI increased its total course offerings by 130% (from 70 to 161 offerings)**. UC Irvine has consistently offered the most courses, and UC Irvine, UCLA, and UC Berkeley have increased their respective number of course offerings each year for the last three years.

Once an ILTI-supported course has been developed, the course must be articulated across the campuses in order to enroll UC undergraduates in it. Course articulation is the process through which UC faculty review the content of an ILTI cross-campus course and determine whether the course will meet certain
course requirements for the students’ home campus (e.g., general education requirement, major requirement).

Generally, as courses are added to the ILTI course catalog, ILTI staff contact departments on the campuses to discuss the possibility of offering credit for the courses. Faculty at the other campuses review the ILTI course, its content, and its learning objectives to decide what credit (if any) to offer. The level of equivalency given to a specific course at one campus is not necessarily given at every other campus. ILTI’s course articulation efforts typically require individual conversations and agreements across the campuses for a single course.

The figure below summarizes self-reported data from cross-campus and home-campus students identifying the type of credit they received for an ILTI course. This data was collected through course evaluation surveys for 74 course offerings between January 2014 and June 2015.

**FIGURE 4: TYPE OF CREDIT RECEIVED FOR ILTI-SUPPORTED COURSES**

Of the 952 students who responded, one-third were receiving only general education (GE) credit, while 21% were receiving credit toward their major or minor and 17% were receiving unit credit toward graduation.

While ILTI’s courses serve students from one campus who enroll in courses at another, students may also enroll in ILTI courses hosted by their own campus. As such, the reach of ILTI’s courses goes beyond just the students who enroll cross-campus. ILTI reports that between Spring 2013 and 2018, 108,297 student enrollments across the UC system have enrolled in ILTI-supported courses. This includes students enrolling in cross-campus courses hosted by their own campus or another campus, and students enrolled in online courses that received ILTI funding, even if the courses were not offered cross-campus.

One of primary goals for ILTI was to provide opportunities for UC students to enroll in courses offered by a campus other than their own. The data in the figures below illustrates the cross-campus students who enrolled in ILTI courses between AY14 and AY17 but excludes students who enrolled in ILTI courses hosted by their own campus. For example, UC Davis students enrolling in cross-campus courses hosted by
UC Davis are not included. This figure also highlights the number of students each year who completed a course and those who were dropped from a course.

FIGURE 5: COURSE COMPLETION BY YEAR (CROSS-CAMPUS ENROLLMENT ONLY, AY14-AY17)²

Across all campuses, the total number of students who enroll in ILTI courses hosted by other campuses has increased each year since AY14. This suggests growing interest in ILTI's cross-campus course offerings. However, each year the proportion of these students who do not complete the course is larger than the proportion who do complete. For example, AY17 saw ILTI’s highest number of students enrolling cross-campus in ILTI courses to-date – 1,364 students – but 834 of these students did not complete their course. A student may fail to complete for a number of reasons (e.g., home-campus Registrar denies the enrollment for various reasons, student withdraws). This suggests that although cross-campus enrollments in cross-campus courses have increased, the majority of students do not complete them each year.

Non-Matriculated Student Enrollment

Since 2012, ILTI has enrolled non-matriculated students in online courses through a program called UC Online. All of the courses were developed through ILTI's online course development process, and are open to undergraduates as well as non-matriculated students. However, not all courses that are open to UC undergraduates are open to non-matriculated students; the faculty offering the courses must opt into non-matriculated enrollment. Non-matriculated students can gain general education credit that could transfer to UC or another institution and pay roughly $1,400 to $2,100 per course. For comparison, most of the UC extension schools offer online courses in the range of $650 to $750. ILTI splits the revenue for the non-matriculated student enrollments with the campuses.

UC Online serves a distinctly different market than ILTI's other enrollment offerings. While ILTI's UC undergraduate enrollment efforts serve a “captive market” (i.e., students who are already matriculated in the

² Data from Fall Quarter/Semester 2014 through Spring Quarter/Semester 2018
UC Online serves a more general population of learners who are not enrolled at the UC and who purchase UC Online courses as consumers (i.e., the "consumer market"). These may be international students, high school students, adult learners, or undergraduates from non-UC institutions seeking distance education for a variety of reasons.

Since AY12, ILTI has enrolled slightly more than 600 non-matriculated students in over 220 courses hosted by eight of the UC campuses. Over the last six academic years, ILTI has enrolled an average 101 non-matriculated students each year, resulting in an average of $144,000 in revenue each year and a total of $860,000 in tuition revenue since AY12. ILTI has only started generating surpluses from the non-matriculated student enrollments in the past year or two, though it is very difficult to determine how much money has been lost or gained in a given year because the finances for the non-matriculated student enrollments are closely intertwined with the undergraduate student enrollments.

Cross-Campus Enrollment System

To operationalize ILTI’s goal of increasing access to educational opportunities for UC students, development of the cross-campus enrollment system (CCES) began in FY13. ILTI’s leadership decided to invest in this system, which would facilitate systemwide cross-enrollment as a means of providing greater access to courses for UC students. Operationally, the CCES is the platform through which matriculated UC students enroll in online courses offered by faculty on other UC campuses. In the five years since the CCES was launched, ILTI has worked to bring UC campuses onto the system and increase the number of enrollments facilitated through the system each term. Additional CCES detail is provided in the following sub-sections.

The CCES, also referred to as “the Hub,” is comprised of a series of integrated, cloud-based applications that facilitate the student’s cross-campus enrollment experience, from browsing the course catalog to enrolling in a course, completing the course, and receiving a grade on their home campus transcript. The distinctive feature of the CCES is its linkage to the individual campus student information systems (SISs). Designed in a hub-and-spoke model, the CCES serves as the hub or focal point, transferring student enrollment information to and from the individual campus SISs. The figure below depicts the integration between these applications at a high level.
Since FY13, ILTI has invested roughly $13 million in the CCES between ILTI central funding and campus funding. Approximately $8.6 million was spent centrally, while the remaining $4.4 million was given to the campuses to support campuses in making necessary SIS modifications, accommodating specific technical requirements, and facilitating successful integration with the central CCES.

Organization

Until 2020, the Innovative Learning Technology Initiative (ILTI) was organized within the Immediate Office of the UC Provost in terms of human resources reporting and budgeting. In 2020, ILTI was moved to the new department of Graduate, Undergraduate and Equity Affairs (GUEA) within the Division of Academic Affairs as part of a larger divisional restructuring. ILTI is currently co-led by a team of three leaders who currently report to the Vice President for Graduate and Undergraduate Affairs / Vice Provost for Equity and Inclusion:

- A Chief Financial Officer & Marketing Director leads the Marketing, Finance, and Student Support team;
- A Program Director leads the Program Management and Enrollment Operations team; and
- A Director of Course Design and Development who leads the Course Design, Technical Development and Operations team.

These three Directors collectively oversee the program’s day-to-day activities, supervise the remainder of ILTI’s immediate staff, and make decisions on behalf of the Initiative. They serve as voting members of the Steering Committee and, until 2020, reported directly to the UC Provost.
While the size of the office has grown considerably in the past five years – with personnel costs growing 140% from $1.2 million to $2.8 million in FY17 – it is important to recognize that ILTI has been ramping up its activities over that time period as well and developing the Initiative from scratch. ILTI had roughly 22 employees and vacant positions at the time of assessment. The following organizational chart describes their structure in more detail.

**FIGURE 7: ORGANIZATIONAL CHART WITH STAFF RESPONSIBILITIES**

Governance

ILTI is currently led by a six-member Steering Committee which provides general oversight for the program by advising on academic policies that impact ILTI courses, advocating for online education across the UC system, reviewing competitive RFP applications, approving allocation of the program’s competitive course awards, and reviewing program reports related to course evaluations and campus use of funds.

Decisions that impact the objectives of ILTI, the scope of its work, or the use of its funds must be approved by the Steering Committee. The Steering Committee meets biweekly for two hours, and meetings are occasionally supported by other ILTI staff.
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<th>Member</th>
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<tr>
<td>UC Provost &amp; Executive Vice President</td>
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<td>Director, Course Design, Technical Development, &amp; Operations</td>
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<td>Program Director</td>
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RECOMMENDATIONS FOR FUTURE STATE

Since its inception, ILTI has achieved several significant accomplishments, including:

- A technical system that facilitates enrollment between campuses, an almost unheard-of feat in American higher education;
- Hundreds of innovative online courses that have served thousands of students across the campuses; and
- Increased interest in and adoption of online instructional modalities amongst our faculty.

As such, ILTI has made substantial and important progress toward the goals that Governor Brown established when he first offered funding to UC in 2012-2013 to invest in online education. UC campuses as well have created new capacity for development of online education infrastructure.

There exists opportunity now to rethink the role and administrative function of ILTI so that it better supports the evolution of online education at UC, for a broader array of academic endeavors, and via streamlined organizational and funding structures.

Vision Statement

Online education efforts at the UC Office of the President have evolved over the years from the UC Online Education (UCOE) efforts of the early 2010s to ILTI in the past five years. The mission and vision for these efforts have changed over time due to leadership transitions; differences in perspective between the campuses, faculty, and the UC Office of the President; and the evolution of campus infrastructure and capacity to develop and deliver online courses for both their own matriculated students and those who are cross-enrolled.

With the assumption that the annual funding allocation from the State of California will continue, the following vision statement was developed based on consultation with stakeholders during the assessment phase.

**Vision Statement:**

The University of California will invest in online education to ensure all of its students can access high-quality, relevant courses through digital modalities that advance their academic careers, foster critical learning outcomes, and help them graduate on-time.

This vision is intended to be narrowly focused to ensure the limited funding is spent judiciously and can make an impact on this scope of effort.

Goals

The UC Provost and leaders across the UC system identified five main goals that will help support and achieve this vision over the next few years.
TABLE 2: FUTURE GOALS

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<th>Topic</th>
<th>Goal</th>
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<tbody>
<tr>
<td>1</td>
<td>Systemwide Oversight</td>
<td>Ensure systemwide oversight over the funding priorities and administration of the funding, involving stakeholders from the campus administrations, Academic Senate, and UC Office of the President.</td>
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<tr>
<td>2</td>
<td>Complement Campus Efforts</td>
<td>Ensure that funds are spent in a way that complements existing campus efforts and priorities and does not create competition between systemwide and campus efforts.</td>
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<tr>
<td>3</td>
<td>Leveraging Assets</td>
<td>Leverage assets and resources available on the campuses and in the UC Office of the President to ensure efforts are not duplicated and administrative costs are kept low.</td>
</tr>
<tr>
<td>4</td>
<td>Broad Applicability</td>
<td>Where possible, fund activities that support broader systemwide academic priorities, including, but not limited to, online education.</td>
</tr>
<tr>
<td>5</td>
<td>Efficiency</td>
<td>Maximize the amount of funds that are spent towards fulfilling the University's mission and the state vision and minimize administrative effort to manage the funds and related activities.</td>
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Recommendations

Several changes have been and should be made to ILTI’s structure, resources, support, and the way in which the funding has been allocated to help achieve the goals and the strategic vision articulated above.

This section describes three recommendations for restructuring what is now ILTI:

- Eliminate the Non-Matriculated Student enrollment efforts previously branded as UC Online.
- Replace what is now collectively known as ILTI with a long-term program branded as UC Online. As a new program, UC Online should:
  - Provide funding for and support the development of new online courses;
  - Manage cross-campus enrollment systems and operations to cover most means of enrolling across campuses, including UC Washington Center, UC Center Sacramento, etc.; and
  - Coordinate systemwide instructional technology support, including providing technical assistance and instructional design support, establishing standards, and negotiating systemwide contracts.
- Structure UC Online administration and governance to streamline functions, reduce administrative costs and burden, and ensure more campus perspective, input and collaboration in decision-making.

The following sections outline these recommendations in more detail.
Recommendation 1: Eliminate Non-Matriculated Student Enrollment

UC should eliminate the non-matriculated student enrollment effort known as UC Online. A significant number of stakeholders, including campus registrars and vice chancellors/deans of undergraduate education, ILTI staff, and leadership from the UC Office of the President recommend eliminating efforts to enroll non-matriculated students because the effort offered little value to the UC system. Among the issues highlighted:

- **Low enrollments** averaging 100 non-matriculated students per year across the entire UC system;
- **Annual deficits** incurred from years of losing money, and although the non-matriculated student enrollments had started to turn a small profit in recent years, UC Online has not yet broken even on total costs;
- **Brand confusion** between the non-matriculated student enrollment effort, called UC Online, and the UC undergraduate enrollment efforts, leading some campuses to brand both of them as UC Online;
- **Unnecessary competition** with UC Extension given that Extension also offers online courses to non-matriculated students;
- **Enrollment issues** highlighted by campus staff in tracking these students in courses and ensuring they have access to the appropriate systems; and
- **Sporadic course offerings** given that the faculty must opt-into enrolling non-matriculated students, leading to a non-strategic and disparate list of course offerings.

While some of these issues could be addressed or mitigated in the future, many stakeholders noted that the non-matriculated students diverted attention from the larger UC undergraduate student enrollments and that profit-generating educational activities were not a core competency of the UC Office of the President. When factoring in the opportunity costs of the staff time for supporting enrollment of non-matriculated students with the marketing and hard costs of running the effort, UC Online for non-matriculated students offers more issues and disadvantages for the UC system as a whole than benefits.

It should be noted that the Division of Academic Affairs eliminated non-matriculated programming in August 2019. Staff who support both UC undergraduate and non-matriculated student enrollments now focus solely on UC undergraduate enrollments, and efforts are underway in 2020 to identify opportunities for FTE and position consolidation that result from reorganization within the Division and creation of a new department of Graduate, Undergraduate and Equity Affairs.

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3 Non-matriculated student efforts ended in August 2019 in tandem with UCOP and Academic Affairs restructuring efforts already underway.
Recommendation 2: Create a New UC Online Program

UC should streamline and restructure the remaining components of ILTI into a new systemwide academic program called UC Online. As a new program, UC Online should:

- Provide funding for and support the development of new online courses;
- Manage cross-campus enrollment systems and operations to cover most means of enrolling across campuses, including UC Washington Center, UC Center Sacramento, etc.; and
- Coordinate instructional technology support for a broader array of campus online education endeavors, including providing technical assistance and instructional design support, establishing standards, and negotiating systemwide contracts.

The new UC Online program should also be funded by the existing commitment dedicated to online education, with efforts made internally to identify cost savings and streamline expenses with a goal of redirecting 60 percent of current ILTI funding to campuses via block or competitive grants.

The following sections describe these functions in more detail.

A. Fund and Develop New Online Courses

In the ILTI model, campuses receive funds through nine different funding streams, each with narrowly defined purposes and reporting requirements. A new UC Online should comprise no more than two grant opportunities:

- **Campus block grants**: The new UC Online program should offer funds to the Executive Vice Chancellors/Provosts to invest in online education and course development on their campuses.  
  
- **Systemwide competition**: Similar to the current state, the new UC Online program should manage a competitive process where faculty can submit proposals to fund online course development.

In both cases it is recommended that reporting requirements be streamlined, and campuses provide an annual report describing how they have spent the funds and the outcomes they have achieved. Since the $10 million in funding from the State is affirmed through a “handshake” agreement, there are no formal requirements for reporting on the use of funds, and the new UC Online should adhere to current UCOP reporting practices for state funds.

The following sections provide additional detail on these two types of grants.

*Campus Block Grants*

The Campus Block Grants are tied to campus funding needs to help promote online education writ large at the campuses and capped at an amount to be determined. Each campus is awarded a Block Grant annually based on a simple proposal that describes their plans. Awards are distributed to campus Executive Vice Chancellors/Provosts to be used according to the campus proposal.

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4 *In response to COVID-19, ILTI began administering campus block grants in 2019-20.*
Systemwide Competition

The Systemwide Competition should focus on soliciting and funding proposals to develop online courses that meet one or both of the following criteria and are comparable in dollar amount to campus-level awards for online course development to avoid confusion and perverse incentives that come from award amounts that are significantly higher than those offered by the campus:

- **Innovation**: Courses that innovatively leverage the online medium for instructional delivery; and
- **High demand**: Courses that, when offered online and across campuses, will help alleviate the stress of high student demand on campuses.

UC should establish a faculty review committee to evaluate each proposal based on established criteria. Staff support for the competitive grants program will identify the steps and calendar for the application cycles, communicate criteria, support campuses and faculty to submit applications, and provide support to the proposal review panels for their decision-making processes.

B. Manage Cross-Campus Enrollments and Operations

Although stakeholders noted the difficulty and cost of developing and deploying the Cross-Campus Enrollment System (CCES) over the past five years, most felt that CCES should be leveraged and expanded to cover as many academic programs as possible. The Division of Academic Affairs should also undertake additional assessment to determine whether support, staffing and ownership for CCES can be more sustainably managed in the future. This section includes some considerations for that additional assessment.

Because of the successful development of the CCES, many ILTI staff and a clear majority of campus registrars felt that UC should leverage the system on a greater scale to automatically and digitally transfer course registrations and grades between campus Student Information Systems for students enrolled in other multi-campus academic programs.

These additional multi-campus programs could include systemwide academic programs such as:

- **UC Education Abroad Program (UCEAP)**: A systemwide study abroad program that is jointly administered by the UC Office of the President and UC Santa Barbara and requires transferring students’ course registrations between UCEAP’s in-house systems and the student information systems at the nine undergraduate campuses;
- **UC Center Sacramento (UCCS)**: An experiential learning program in Sacramento that is jointly administered by the UC Office of the President and UC Davis and requires transferring grades between the student information system at UC Davis and the systems at the eight other undergraduate campuses; and
- **UC Washington Center (UCDC)**: An experiential learning program in Washington, DC that is administered solely by the UC Office of the President and requires transferring grades between the student information systems at all nine of the undergraduate campuses.

All of these academic programs coordinate their own independent registration, enrollment, and grading processes through unique systems and handle these enrollment operations differently. They each interface regularly with campus faculty, registrars, and enrollment management staff in ways that each could be streamlined through the CCES. Leaders of these other programs expressed interest in leveraging the
CCES to transfer student registrations and grades, contingent upon the appropriate design of the system and its ability to meet their needs.

In addition to these systemwide academic programs, campus stakeholders – especially the registrars – also suggested expanding the scope of the CCES to support other options for cross-campus enrollment, including:

- **Intercampus exchange**: This enrollment option allows UC graduate students to enroll in courses offered at another UC campus for credit at their home campuses;
- **Intercampus visitor**: This enrollment option allows UC undergraduate and graduate students to study full-time at another UC campus for one quarter or semester and transfer the enrollments/grades from that term to their home campus for credit; and
- **Simultaneous enrollment**: This enrollment option allows UC undergraduates and graduate students to enroll in one course per semester at another UC campus and receive credit for those courses at their home campuses.

Many campus registrars noted that they currently transfer the enrollments and grades for students enrolled in these systemwide programs and cross-campus enrollment options by sending paper or electronic records between the campus Registrar offices and then manually entering the records into their Student Information Systems. This was partly due to the small number of enrollments in these programs and enrollment options – for example, UCCS enrolls roughly 160 students per year and UCDC enrolls roughly 530 students per year systemwide. Some of the cross-campus enrollment options – like the Intercampus Visitor option – are even smaller and projected to number in the dozens of students per year, though exact numbers are not easily ascertained since these enrollments are not centrally tracked. Many of the registrars noted that it is cheaper for them to manage these enrollments through manual entry because the cost of independently developing automated or technical solutions would be prohibitively higher than the cost of manually entering the records in their existing systems. However, several campus stakeholders noted that the time required to manually enter grades for students enrolled in these programs or options can create issues for the students because it can delay their ability to generate transcripts, show potential employers and graduate schools their grades, and receive their diplomas during graduation (since their transcripts may not be finalized).

Some stakeholders from the campuses and the UC Office of the President suggested that the CCES could potentially also be leveraged to manage transfer credits, particularly from the California Community Colleges. Though expanding the CCES to cover some transfer credits could offer the highest potential value to the UC system of all the enrollment options identified, it would also likely require the highest investment and may not be technically feasible given the complexity in the transfer credit system.

If UC does decide to expand the scope of the CCES, leadership from Academic Affairs, the Information Technology Services department, and the campus registrars should assess the relative costs of expanding this system to cover the systemwide programs, cross-campus enrollment options, and transfer credits. UC will need to justify the cost of such an investment by showing that the benefits outweigh the costs.

The perceived benefits of expanding the CCES include:

- **Reducing manual data entry** by the campus Registrar offices to record course registrations and grades for their students enrolled in these programs or options;
- **Increasing data quality and consistency** by ensuring data is transferred according to a set of common rules and parameters (assuming that the system is appropriately configured and tested);
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- Minimizing delays in generating student transcripts/grades that arise from the time required for the Registrar offices to manually enter grades into their Student Information Systems; and
- Reducing administrative effort from the systemwide programs and the campuses in managing and tracking these cross-campus registrations and grades.

CCES Support Structure

Currently, ILTI manages the CCES through an in-house technology team with roughly five budgeted positions which report to one of ILTI’s directors. Several stakeholders noted several issues with this structure, including:

- Unsustainable staffing model: The small size of the team means that any vacancies or leaves of absence put the system at risk;
- Limited technical competencies: The CCES team reports to the program leadership of ILTI within the Academic Affairs division, but technology and software is not necessarily a core competency of the Academic Affairs division; and
- Compliance risk: Given that the small technical team within ILTI does not have a formal connection with the Information Technology Systems department, there is a risk that the system is developed or configured in a way that is out of compliance with UC policies and practices.

The Information Technology Systems department (ITS) within the Chief Operating Officer division currently has over 200 FTE devoted to supporting dozens of systems used by the UC Office of the President and the campuses. ITS partners with many other departments within the UC Office of the President by managing their systems at cost. In these partnerships, the departments appoint a “Business Owner” who is responsible for owning the functionality, requirements, and usage of the systems, while ITS is responsible for updating, testing, and configuring the systems. Some leaders from the UC Office of the President and ILTI staff suggested that the CCES should be managed in a similar way to help mitigate the issues and risks previously identified.

The Division of Academic Affairs and its department of Graduate, Undergraduate and Equity Affairs should conduct additional assessment to determine whether technical ownership of the CCES can be transferred to the ITS department within the UC Office of the President while maintaining functional or “business” ownership of the system within GUEA. This would require transferring the budget and FTE for the technical team and their associated expenses to ITS, and identifying a business owner within the department who oversees the functionality of the system.

If this recommendation is implemented, over time, ITS should integrate the technical team into its organizational structure to ensure appropriate integration and collaboration with other technical teams, and to gain leverage from the larger department. This would also require the creation of a clear set of expectations and division of responsibilities between GUEA and ITS for the CCES through a Service Level Agreement or comparable document. Should CCES expand to support other academic programs within Academic Affairs, similar SLAs can be developed between GUEA and those departments for support.

Business ownership responsibilities include:

- Initial implementation: Overseeing the remaining CCES implementation amongst the campuses to support ILTI’s online courses, as this implementation has not yet been completed;
- Issue resolution: Identifying issues in the system that should be addressed and overseeing their resolution or mitigation;
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- **Needs identification**: Working with campus and systemwide stakeholders to identify needs and requirements for the system; and
- **Major upgrades**: Guiding the decision-making process and overseeing any approved expansions of the CCES to support other systemwide programs, cross-campus enrollment options, and possibly transfer credits.

ILTI previously has provided funds to the campuses to support necessary upgrades and enhancements to their Student Information Systems to support integration through the CCES. The future business owner CCES should work with ITS to determine whether additional funds should be provided to the campuses. Any additional funds should be allocated from the existing funding commitment.

In a future assessment, Academic Affairs and GUEA should identify potential risks in transitioning technical oversight of the CCES to ITS – most notably the risk of reduced customer service and adaptability by splitting oversight of the system across two UCOP divisions. However, many stakeholders felt that restructuring the oversight and management of the CCES would offer several major benefits which would outweigh these risks, including:

- **Cost efficiency**: The long-term cost of managing the CCES will likely decrease given the possibility of leveraging the larger technical organization and greater capabilities within ITS;
- **Long-term sustainability**: The CCES will likely be more sustainable and face fewer technical issues by ensuring technical oversight from ITS;
- **Functional oversight**: Maintaining business/functional oversight within the Division to oversee the CCES would ensure that the academic enterprise is still setting the direction for and owning the system; and
- **Probability of success**: It is unlikely that the current technical team, given its small size and limited leverage, could successfully manage the system upgrades required to support the other systemwide programs and cross-campus enrollment options.

Transitioning the technical team to ITS and establishing a business owner may require staffing changes. Should a decision be made to implement this recommendation, the Vice President/Vice Provost for GUEA will need to work closely with the Chief Operating Officer and Chief Information Officer within the UC Office of the President to manage these transitions and develop a Service Level Agreement or comparable document outlining the expectations of this partnership.

**Enrollment Operations**

The new UC Online program should have a team of individuals dedicated to supporting cross-campus enrollment in online courses. This team should include support from the UC Merced Students First Center in addition to some internal staff. The primary goals of this team should be:

- Developing and maintaining a catalogue of online courses that are open for cross-campus enrollment;
- Supporting students who want to or are enrolled in the courses;
- Coordinating cross-campus enrollments with the registrars to resolve issues and ensure seamless registration and access; and
- Supporting faculty who are offering the courses.
C. Coordinate Systemwide Instructional Technology Efforts

UC Online can represent an expansion of focus beyond ILTI-specific instructional technology to include coordinating broader systemwide efforts related to instructional technology. In ILTI currently there is one instructional technology position (Assistant Director of Learning Platforms). Several campus stakeholders and some ILTI staff noted that there was significant duplication of effort across the campuses regarding the identification, evaluation, and negotiation of contracts for instructional technology systems. There are several federal and state laws and regulations that impact instructional technology systems, and the campuses largely navigate the selection and configuration of these systems independently in the current state.

In a future state, instructional technology within UC Online would help the UC system as a whole by coordinating efforts to:

• Establish standards and guidelines for instructional technology systems;
• Evaluate instructional technology vendors consistently to determine whether they meet the approved guidelines and standards;
• Negotiate systemwide contracts for instructional technology systems; and
• Identify best practices for instructional technology and communicate those best practices across the campuses.

A position dedicated to instructional technology within the UC Online organization could be responsible for:

• Convening campus leadership focused on instructional technology;
• Evaluating systems and negotiating with vendors on behalf of the broader UC system;
• Tracking existing contracts to allow campuses to leverage negotiated agreements from other UC entities;
• Maintaining guidelines and standards for instructional technology systems based on feedback and guidance from campus leadership;
• Managing instructional technology systems that are utilized by systemwide academic programs, like ILTI's online courses, and any common systems that are licensed by the UC system as a whole; and
• Coordinating with other departments within the UC Office of the President, including ITS for technical expertise and Systemwide Procurement for contract negotiation.

The campuses will continue to own their own instructional technology systems to ensure they are serving the unique needs of their students and faculty. However, increased coordination amongst the campuses on instructional technology could provide the following benefits:

• De-duplication: By offering a single set of guidelines, vendor evaluations, and systemwide contracts, UC should be able to reduce the duplication of efforts across the campuses;
• Cost reduction: By leveraging the buying power of the ten campuses, UC should be able to reduce aggregate spending on instructional technology; and
• Programmatic support: This position would still be able to ensure that the ILTI online courses that leverage the current instructional technology systems are supported.

Instructional Design

The new UC Online program should have a team of individuals dedicated to offering instructional design support to faculty who are awarded grants to develop online courses. Many current faculty and campus
stakeholders identified the current instructional design team within ILTI as a strength. Faculty should be able to use their own campus-based instructional designers in the future, as they are currently, or to leverage the instructional design team within ILTI.

Periodic review of campus need should be conducted to ensure that there is not duplication between central instructional design support and campus internal instructional design capabilities. Over time, the team can evolve to provide capacity-building support beyond design, including professional development and training and establishing systemwide best practices.
Recommendation 3: Restructure Administration and Governance

The new UC Online program will be administratively located at UCOP in the department of Graduate, Undergraduate and Equity Affairs within the Division of Academic Affairs. This change should become effective July 1, 2020, when GUEA will launch as a new UCOP department. This relocation will allow a new UC Online to leverage the resources of a larger department — including budget, human resources and administrative communications, among others — and eliminate some operational duplication.

However, the new UC Online program should be governed by a group that includes campus leadership and should rely more heavily on support from other units within the campuses and the UC Office of the President to accomplish its mission.

A. Leadership

A new UC Online program will require a single leader who oversees the UC Online organization and is moreover responsible for representing at the system, state and national levels UC’s systemwide engagement in online education. The leader oversees the three teams that support UC Online’s key functions: grant-making, cross-campus enrollment operations and instructional technology.

Considerations for a leader of UC Online include:

- **Faculty status**: Because the new UC Online will be an academic program, the leader should be a currently tenured faculty member from one of the UC campuses with expertise in online education and instructional technology. This would be different than the current leadership structure, where none of the Directors have faculty appointments. This would make UC Online similar to other systemwide academic programs, like UCDC, UCCS, and the UC Education Abroad Program (UCEAP).
- **Appointment term**: The leader should be appointed on five-year terms, as the leaders of other comparable systemwide academic programs are (e.g., UCDC, UCEAP).
- **Reporting**: The leader should report to the Vice President for Graduate and Undergraduate Affairs/Vice Provost for Equity, Diversity and Inclusion.

The new leader should be recruited at the UCOP Executive Director level.

B. Governance

A new UC Online should leverage best practices for governance from other systemwide academic programs, like UCDC, UCEAP, and the Multicampus Research Units (MRUs). Future governance should include representation from campus leaders at all ten of the UC campuses, in addition to leadership from the Academic Senate.

A **Governing Council** should replace the current six-member Steering Committee and should be responsible for overseeing the operations, budget, strategic plan, annual reporting, and for reviewing the performance of the Executive Director on a recurring basis. The membership of the Governing Council should include senior UC management and representatives of the systemwide Academic Senate. The members are appointed by the University Provost and campus Executive Vice Chancellors. The Governing Council advises on the selection of the Executive Director, authorizes the annual operating budget,
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establishes annual program goals within a strategic planning framework, and provides oversight of overall operations.

The Governing Council would be responsible for advising the Executive Director on the operations, strategic direction, and evaluation of the new UC Online program. This committee would ultimately be responsible for:

- **Governance documents**: Approving the program’s budget, annual reports, strategic plan, and program charter as proposed by the Executive Director and staff;
- **ED performance**: Reviewing the performance of the Executive Director on an annual basis and providing feedback to the Vice President / Vice Provost;
- **ED recruitment**: Supporting and advising the Vice President / Vice Provost on the recruitment of a new Executive Director when the position needs to be refilled; and
- **Advice and guidance**: Advising the Executive Director on the operations, direction, and vision for the program.

Ideally the Governing Council would be comprised of a combination of administrators and staff, with no more than twelve individuals – eleven members and the chair. The Council would have representatives from the UC Office of the President and many of the campuses. The Executive Director, Vice President/Vice Provost and Chair of the Academic Senate would serve as *ex-officio* members of the Governing Council.

To better support the new UC Online program and ensure appropriate governance and accountability of its finances and operations, the program should also establish the following guiding documents:

- A formal **charter**, updated at least every five years, that outlines the general roles, responsibilities, structures, and expectations for the program and involved parties;
- A five-year **strategic plan** that establishes the program’s goals and identifies means of accomplishing those goals;
- An annual **operating budget** that identifies the planned revenues, expenditure of funds, and net position of the program for the upcoming fiscal year, along with an analysis of the actual financials from the current and prior fiscal years; and
- An **annual report** for stakeholders and governance committees that highlights key metrics such as enrollment statistics, courses developed, and progress towards goals.

Ultimately, the Governing Committee for the new UC Online program should have ultimate approval authority over grant proposals, including establishing funding caps for campus block awards and competitive faculty grants. The Governing Council should also approve the amount of the awards based on an understanding of comparable awards offered by the campuses.

C. **External Support**

Academic Affairs and GUEA should undertake additional assessment to determine whether the new UC Online program can leverage support from several groups within the UC Office of the President and on the campuses. These include:

- The **Research Grants Program Office (RGPO)**, which could help administer grant funding and manage the post-award review processes; and
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- A group of Campus Representatives, who can help to advertise and market the program to students and faculty on their campuses.

RGPO is a team of over 40 individuals dedicated to managing grant application processes and analyzing grant expenses through post-award reviews. RGPO has been primarily focused on research grants in the past decade, like the State-funded programs on tobacco-related diseases, HIV/AIDS, and breast cancer, but it has an effective infrastructure that many stakeholders and leaders within the UC Office of the President felt could be leveraged to administer UC Online’s grants in the future. For example, RGPO has a robust post-award management team that reviews grant expenses to ensure compliance – ILTI currently manages its own post-award process internally. Also, RGPO uses proposalCENTRAL to manage its grant applications, just as ILTI has in the past (ILTI and RGPO used separate instances of this program).

In addition Academic Affairs and GUEA should assess the efficacy of establishing a team comprised of one or two Campus Representatives from each of the nine undergraduate UC campuses who would be responsible for helping to advertise and market the cross-campus online courses with their student bodies. This would mimic the Campus Representative structures for UCDC and UCCS, which campus stakeholders noted worked fairly well at marketing those programs.

ILTI currently manages marketing internally through social media advertisements and some outreach to students. Most campus stakeholders felt that marketing these courses would be best accomplished by individuals working on the campuses who are closest to the students. UC Merced successfully employed two student interns as well, using ILTI funding, to market the courses to their undergraduate population. This campus-based marketing approach generated more interest than ever before on that campus, and could be a model for the future as well. The new UC Online program may need to offer some funding to the campuses to support marketing efforts.

Support from these two groups would help reduce the need for the finance and marketing functions currently within ILTI. Eliminating these functions may moreover help increase funds for grants and reduce headcount for the new program.

D. Additional Recommendations

Academic Affairs and GUEA should also make several changes related to the current state of ILTI and the funds that have been provided to the campuses, including:

- Relaxing restrictions on fund balances that the campuses currently have from ILTI;
- Evaluating all reporting requirements to ensure they are appropriate and necessary for the operation of the program.

Most campuses are carrying some fund balances from ILTI that are earmarked for specific purposes tied to the nine funding categories (e.g., infrastructure development, course development, course maintenance). Restrictions on those funds should be relaxed to allow the Executive Vice Chancellors/Provosts to spend the funds however is most beneficial to their campuses based on individual priorities, so long as the funds are spent to support online education. In the future, funds should be earmarked by the campuses based on the two categories of funding identified previously.

5 In response to COVID-19, restrictions were eliminated in Spring 2020 to allow campuses to use carryover funds to improve instructional resiliency and address campus-specific needs.
In addition, a new UC Online program should closely evaluate the need for any reporting requirements from the campuses – specifically on how the campuses spend granted funds and enrollments in the online courses. All requirements for reporting from the campuses should be approved by the Governing Committee and be structured to minimize administrative burden the campuses, while meeting the operational needs of the program.
CONCLUSION

ILTI has successfully achieved many of its initial goals over the past few years, including developing the cross-campus enrollment system (a first for American higher education) and funding hundreds of online courses. Many stakeholders, especially the faculty, felt that ILTI’s goals were appropriate and helped advance online education across the UC system. However, ILTI has faced several challenges and the UC system is in a different place now than it was when ILTI was first founded. Now is an appropriate time to reevaluate the structure and priorities for the existing funding commitment for online education.

Most campus stakeholders feel that the future systemwide online education efforts should remain within the UC Office of the President, but most also felt that it was appropriate to reenvision how the funding is spent and how the program is structured to make the best use of subject matter expertise and funding. There were several opportunities identified to accomplish these aims, including:

- Eliminate the Non-Matriculated Student enrollment efforts previously branded as UC Online.
- Replace what is now collectively known as ILTI with a new long-term program branded as UC Online. As a new program, UC Online should be positioned to support a broader array of academic programs than ILTI is currently serving. Within a new UC Online, this expansion can include deploying the Cross-Campus Enrollment System to cover most means of enrolling across campuses, and position instructional technology and design supports to better address common systemwide needs for standards, practices, training and procurement.
- As a new UC Online, restructure administration and governance to streamline functions, reduce administrative burden, and ensure more campus perspective, input and collaboration in future decision-making.

Notably, several functions that are currently performed by ILTI would not be required in the future or could be managed by other groups. Ultimately, Provost Brown and the President of the University will need to decide on the future state for ILTI, and whether and how to implement these recommendations.
APPENDIX

Appendix I: List of Interviews

In total, 39 stakeholders were interviewed during the course of this assessment, including 13 ILTI employees and 14 campus stakeholders. The number of stakeholders interviewed from relevant groups are highlighted below, but there is some overlap between those numbers since certain individuals involved appear in multiple groups.

- **Steering Committee**: 6 of 6 interviewed;
- **ILTI Staff**: 13 of 19 interviewed;
- **Campus Registrars**: 7 of 10 interviewed (with three Associate and Deputy Registrars as well);
- **Campus Vice Presidents and Deans of Undergraduate Education (VPDUEs)**: 4 of 9 interviewed; and
- **Additional Stakeholders**: 7 total interviewed.

Each stakeholder interview was conducted by a team of two interviewers. Each interviewee was presented with the same interview prompt in advance of the interview, which was used to guide the conversation. After each interview, notes from both interviewers were reviewed and compared, and the primary topics of discussion were extracted as themes.

The table below lists all staff within ILTI who were interviewed for this assessment and their titles. Note that all of these individuals are employed by the UC Office of the President or UC Merced.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
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</thead>
<tbody>
<tr>
<td>Michael T. Brown</td>
<td>Provost and Executive Vice President</td>
<td>UC Office of the President</td>
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<tr>
<td>Robert May</td>
<td>Vice-Chair of the Academic Senate, 2017-18</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Shane White</td>
<td>Chair of the Academic Senate, 2017-18</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Paul Montoya</td>
<td>CFO and Marketing Director</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Mary-Ellen Kreher</td>
<td>Director of Course Design, Technical Development, and Operations</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Ellen Osmundson</td>
<td>Program Director</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Scott Friese</td>
<td>Assistant Director, Instructional Design</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Christine Moy Harmon</td>
<td>Associate Director, Online Strategic Partnerships &amp; Programs</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Adam Hochman</td>
<td>Assistant Director, Technology Development</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Veronica Kemp</td>
<td>Enrollment Operations</td>
<td>UC Office of the President &amp; UC Merced</td>
</tr>
<tr>
<td>Maurice McElhaney</td>
<td>Financial Analyst</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Natasha Rogers</td>
<td>Program Analyst</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Alan Roper</td>
<td>Instructional Designer</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Laura Rosenzweig</td>
<td>Instructional Designer</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Mary C. Wong</td>
<td>Program Analyst</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Michael Wood</td>
<td>Assistant Director, Learning Technology Platforms</td>
<td>UC Office of the President</td>
</tr>
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The table below lists all campus stakeholders who were interviewed for this assessment and their titles.

### TABLE 4: INTERVIEW LIST OF CAMPUS STAKEHOLDERS, 2018

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<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td><strong>Student Support Staff</strong></td>
<td></td>
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</tr>
<tr>
<td>Lisa Perry</td>
<td>Director, Students First Center (UC-ILTI Student Services)</td>
<td>UC Merced</td>
</tr>
<tr>
<td>Carlton Stroud</td>
<td>Assistant Director, Students First Center (UC-ILTI Student Services)</td>
<td>UC Merced</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
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<th>Affiliation</th>
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</thead>
<tbody>
<tr>
<td>Leesa Beck</td>
<td>Registrar</td>
<td>UC Santa Barbara</td>
</tr>
<tr>
<td>Elizabeth Bennett</td>
<td>Registrar</td>
<td>UC Irvine</td>
</tr>
<tr>
<td>Bracken Dailey</td>
<td>Registrar</td>
<td>UC Riverside</td>
</tr>
<tr>
<td>Laurie Herbrand</td>
<td>Registrar</td>
<td>UC Merced</td>
</tr>
<tr>
<td>Kate Jakway</td>
<td>Associate Registrar</td>
<td>UCLA</td>
</tr>
<tr>
<td>Claire McCluskey</td>
<td>Associate Registrar</td>
<td>UCLA</td>
</tr>
<tr>
<td>Tchad Sanger</td>
<td>Registrar</td>
<td>UC Santa Cruz</td>
</tr>
<tr>
<td>Frank Wada</td>
<td>Registrar</td>
<td>UCLA</td>
</tr>
<tr>
<td>Erin Webb</td>
<td>Deputy Registrar</td>
<td>UC Merced</td>
</tr>
<tr>
<td>Walter Wong</td>
<td>Registrar</td>
<td>UC Berkeley</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catherine Koshland</td>
<td>Vice Chancellor for Undergraduate Education</td>
<td>UC Berkeley</td>
</tr>
<tr>
<td>Carolyn Thomas</td>
<td>Vice Provost and Dean for Undergraduate Education</td>
<td>UC Davis</td>
</tr>
<tr>
<td>Marlene Tromp</td>
<td>Executive Vice Chancellor and Provost</td>
<td>UC Santa Cruz</td>
</tr>
<tr>
<td>Pat Turner</td>
<td>Vice Provost and Dean, Undergraduate Education</td>
<td>UCLA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael Dennin</td>
<td>Dean of Division of Undergraduate Education and Vice Provost of Teaching and Learning</td>
<td>UC Irvine</td>
</tr>
<tr>
<td>Bill Hodgkiss</td>
<td>Senior Associate Vice Chancellor for Academic Planning and Resources</td>
<td>UC Santa Barbara</td>
</tr>
<tr>
<td>Cindy Larive</td>
<td>Executive Vice Chancellor and Provost</td>
<td>UC Riverside</td>
</tr>
<tr>
<td>Jan Reiff</td>
<td>Academic Senate Liaison for Online Education</td>
<td>UCLA</td>
</tr>
<tr>
<td>Michael Tassio</td>
<td>Assistant Director for Online Education</td>
<td>UC Santa Cruz</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Blake</td>
<td>Professor, Spanish and Chair of Designated Emphasis in Second Language Acquisition</td>
<td>UC Davis</td>
</tr>
<tr>
<td>Emily Brauer</td>
<td>Online Instruction and Online Technologies Coordinator, School of Humanities</td>
<td>UC Irvine</td>
</tr>
<tr>
<td>Abel Chuang</td>
<td>Assistant Professor, Mechanical Engineering</td>
<td>UC Merced</td>
</tr>
<tr>
<td>Juliette Levy</td>
<td>Associate Professor, History</td>
<td>UC Riverside</td>
</tr>
<tr>
<td>Beth Simon</td>
<td>Associate Teaching Professor, Education Studies</td>
<td>UC San Diego</td>
</tr>
</tbody>
</table>

The table below lists all other UC stakeholders, most from within the UC Office of the President, who were interviewed for this assessment and their titles.
### TABLE 5: INTERVIEW LIST OF OTHER UC STAKEHOLDERS, 2018

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Steering Committee Members (Non-ILTI)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Michael T. Brown</td>
<td>Provost and Executive Vice President</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Robert May</td>
<td>Vice-Chair of the Academic Senate</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Shane White</td>
<td>Chair of the Academic Senate</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td><strong>Other Systemwide Program Leaders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Susan Carlson</td>
<td>Vice Provost, Academic Personnel &amp; Programs</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Vivian-Lee Nyitray</td>
<td>Associate Vice Provost &amp; Executive Director, UCEAP</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Helen Shapiro</td>
<td>Executive Director, UC Washington Center (UCDC)</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Jennifer Diascro</td>
<td>Associate Academic Director, UC Washington Center (UCDC)</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Cindy Simmons</td>
<td>Associate Director, UC Center Sacramento</td>
<td>UC Davis</td>
</tr>
<tr>
<td><strong>Other Stakeholders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tom Andriola</td>
<td>Chief Information Officer</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Dan Russi</td>
<td>Executive Director, UCPath Center</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td>Cheryl Lloyd</td>
<td>Chief Risk Officer</td>
<td>UC Office of the President</td>
</tr>
</tbody>
</table>
Appendix II: List of Documents and Data

Forty-three documents and datasets were analyzed. These documents were provided by a variety of constituent groups, including ILTI staff, campus stakeholders, and other stakeholders from the UC Office of the President.

The table below lists the 34 documents and datasets that were received directly from ILTI staff.

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Description</th>
<th>Date</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2016-2021 ILTI Project Statement Draft</td>
<td>Project statement outlining first three years of progress, the May 2016 all-campus review, and the five-year outlook</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>2</td>
<td>A4 Instructional Innovation ILTI Regents Item from May 2018</td>
<td></td>
<td>2018</td>
<td>PDF</td>
</tr>
<tr>
<td>6</td>
<td>CCES Document Hub</td>
<td>Portal with an assortment of documents related to the CCES, its maintenance, its background, and the processes it supports</td>
<td>FY12-FY17</td>
<td>WEB</td>
</tr>
<tr>
<td>7</td>
<td>CCES Hub Interfaces Documentation (API Portal Documents)</td>
<td>Portal with documents related to the CCES, APIs, and various technical processes</td>
<td>FY12-FY17</td>
<td>WEB</td>
</tr>
<tr>
<td>8</td>
<td>CCES Overview Video (Higher Ed Summit 2017)</td>
<td>Video presentation about the CCES developed and delivered by ILTI staff at the 2017 Higher Ed Summit</td>
<td>2017</td>
<td>VIDEO</td>
</tr>
<tr>
<td>9</td>
<td>CCES Service Level Agreement with campuses</td>
<td>Service Level Agreement between ILTI and campuses with respect to the operation of the Cross-Campus Enrollment System</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>10</td>
<td>CCES System Integration Overview</td>
<td>Technical specifications document for the CCES and its component applications</td>
<td>2018</td>
<td>PDF</td>
</tr>
<tr>
<td>11</td>
<td>Cross-Campus Enrollment Data - Approvals and Reasons</td>
<td>Enrollment data for cross-campus enrollees in cross-campus courses offered between AY14-AY18 as of June 2018</td>
<td>AY14-AY18</td>
<td>XLS</td>
</tr>
<tr>
<td>12</td>
<td>Estimated Budget Request for ITS Support</td>
<td>Preliminary budget estimate between ILTI and UCOP Information Technology Services (ITS) with respect to website maintenance and development support ILTI intends to request from ITS for FY17-198</td>
<td>FY17-18</td>
<td>PDF</td>
</tr>
<tr>
<td>13</td>
<td>Graduate &amp; Professional Program Market Analysis</td>
<td>Internal research conducted by ILTI staff to explore the online Graduate and Professional education industry and the potential for ILTI to enter it.</td>
<td>2017</td>
<td>WEB</td>
</tr>
<tr>
<td>14</td>
<td>ILTI Course Catalog</td>
<td>Full course catalog by campus and discipline as of October 2017</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>15</td>
<td>ILTI Course List</td>
<td>Full list of ILTI-supported courses as of July 2018, including host campus, date added to catalog, and funding detail</td>
<td>AY12-AY17</td>
<td>XLS</td>
</tr>
<tr>
<td>16</td>
<td>ILTI Cross-Campus Funding – Transfers and Expenditure Reporting Summary</td>
<td>Campus use-of-funds data detailing expended and unexpended campus transfer funds from FY13-FY17</td>
<td>FY13-FY17</td>
<td>PDF</td>
</tr>
<tr>
<td>17</td>
<td>ILTI Dean-Senior Administrator Agreement</td>
<td>Campus Dean agreement regarding the use of ILTI funding and guidelines</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>18</td>
<td>ILTI EVC-P Agreement</td>
<td>Campus EVC agreement regarding the use of ILTI funding and guidelines</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>19</td>
<td>ILTI Expenditures Guidelines</td>
<td>Expenditure guidelines for all ILTI awards given to campuses across the categories of funding (FY16-17)</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>#</td>
<td>Title</td>
<td>Description</td>
<td>Date</td>
<td>Format</td>
</tr>
<tr>
<td>----</td>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------</td>
<td>--------</td>
</tr>
<tr>
<td>20</td>
<td><em>ILTI</em> First Four Years By The Numbers</td>
<td>Summary overview of goals, achievements, and funding for FY13-FY16</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>21</td>
<td><em>ILTI</em> Five Year Financial Summary - Huron</td>
<td>Summary of <em>ILTI</em>’s financial activity from FY13-FY18, including the current-year forecast and next year proposed budget</td>
<td>FY13-FY18</td>
<td>XLS</td>
</tr>
<tr>
<td>22</td>
<td><em>ILTI</em> Organization Chart</td>
<td>Unit organization chart as of September 2017</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>23</td>
<td><em>ILTI</em> Project Statement Final</td>
<td>May 2013 project statement outlining <em>ILTI</em> structure, background, objectives, and needs for FY14</td>
<td>2013</td>
<td>PDF</td>
</tr>
<tr>
<td>24</td>
<td><em>ILTI</em> Regents Presentation</td>
<td>Regents Presentation from May 2018</td>
<td>2018</td>
<td>PDF</td>
</tr>
<tr>
<td>25</td>
<td><em>ILTI</em> RFP Process Data</td>
<td>Data on RFP applications from FY13-FY17, including application cycle, individual scores, award status, and award amount</td>
<td>FY13-FY17</td>
<td>XLS</td>
</tr>
<tr>
<td>26</td>
<td><em>ILTI</em> Student Support Cases</td>
<td>Student Support ticket data for cross-campus and home-campus enrollees in CCES courses, as well as for UC Online, from AY13-AY17</td>
<td>AY13-AY17</td>
<td>XLS</td>
</tr>
<tr>
<td>27</td>
<td><em>ILTI</em> SWOT</td>
<td>Results of an internal <em>ILTI</em> SWOT conducted in AY2016</td>
<td>2016</td>
<td>WEB</td>
</tr>
<tr>
<td>28</td>
<td>Non-Matriculated Student Enrollment Detail Adjusted</td>
<td>UC Online enrollment, payment, and course data from AY12-AY17, as of June 2018</td>
<td>AY12-AY17</td>
<td>XLS</td>
</tr>
<tr>
<td>29</td>
<td>Policy Barriers Documentation</td>
<td><em>ILTI</em> internal initiative to identify campus and UCEP policy barriers to <em>ILTI</em> activity as of June 2018</td>
<td>2018</td>
<td>XLS</td>
</tr>
<tr>
<td>30</td>
<td>Program Catalog, Offering Summaries</td>
<td>Summary statistics of courses offered by campus and discipline from AY12-AY17</td>
<td>AY12-AY17</td>
<td>PDF</td>
</tr>
<tr>
<td>31</td>
<td>RFP Required Documents</td>
<td>Five documents with information that faculty are required to submit related to the RFP application</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>32</td>
<td>Student Course Evaluation Summaries</td>
<td>17 individual course reports and 1 aggregate report based on student evaluation surveys on courses offered AY13-AY14; as of June 2018</td>
<td>AY13-AY14</td>
<td>PDF</td>
</tr>
<tr>
<td>33</td>
<td>UC Merced Extensions MOU</td>
<td>Agreement between <em>ILTI</em> and UC Merced Extension; <em>ILTI</em> provides platform services to UCM Extension and its costs are recovered</td>
<td>2017</td>
<td>PDF</td>
</tr>
<tr>
<td>34</td>
<td>UC Merced Student Support MOU</td>
<td>Agreement between <em>ILTI</em> and UC Merced Student First Center; <em>ILTI</em> contracts with UCM to provide our cross-campus student support</td>
<td>2016</td>
<td>PDF</td>
</tr>
<tr>
<td>35</td>
<td>June 2016 All-Hands Meeting Presentation</td>
<td>Overview of 2016 conversion plan for transitioning contract staff positions to career positions</td>
<td>2016</td>
<td>PPT</td>
</tr>
<tr>
<td>36</td>
<td>June 2016 All-Hands Meeting Agenda</td>
<td>Agenda for 2016 all-staff meeting concerning <em>ILTI</em> staffing transition</td>
<td>2016</td>
<td>DOC</td>
</tr>
<tr>
<td>37</td>
<td>June 2016 Staffing List</td>
<td>List of <em>ILTI</em> staff as of June 2016, including contract start and end dates, job code description, and recruitment plan</td>
<td>2016</td>
<td>PDF</td>
</tr>
</tbody>
</table>
The table below lists the nine other documents and datasets that were received from campus and UC Office of the President stakeholders.

**TABLE 7: DOCUMENTS AND DATASETS FROM OTHER STAKEHOLDERS**

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Description</th>
<th>Date</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>UC Irvine Enrollment Data</td>
<td>Enrollment data for a subset of UC Irvine's ILTI courses from Winter 2017 to Winter 2018</td>
<td>AY17</td>
<td>DOC</td>
</tr>
<tr>
<td>2</td>
<td>UC Merced Enrollment Data</td>
<td>Enrollment Data for UC Merced's non-ILTI programs for AY2016</td>
<td>AY16</td>
<td>MSG</td>
</tr>
<tr>
<td>3</td>
<td>UCEAP IT Notes Related to CCES</td>
<td>Collection of thoughts and observations from UCEAP's internal IT team on the possibility of leveraging ILTI's CCES</td>
<td>2018</td>
<td>DOC</td>
</tr>
<tr>
<td>4</td>
<td>2017 Housing Allocation Reporting Template</td>
<td>Campus use-of-funds reporting template from the 2017 Housing Allocation project</td>
<td>2017</td>
<td>DOC</td>
</tr>
<tr>
<td>5</td>
<td>2017 Housing Allocation Cover Letter</td>
<td>Sample cover letter to accompany the campus use-of-funds reporting template</td>
<td>2017</td>
<td>DOC</td>
</tr>
<tr>
<td>6</td>
<td>2018 Housing Allocation Reporting Template</td>
<td>Campus use-of-funds reporting template for the 2018 Housing Allocation project</td>
<td>2018</td>
<td>DOC</td>
</tr>
<tr>
<td>7</td>
<td>2018 Housing Allocation Internal Message</td>
<td>UCOP internal message introducing the 2018 Housing Allocation project</td>
<td>2018</td>
<td>MSG</td>
</tr>
<tr>
<td>8</td>
<td>2018 President's Letter to Chancellors</td>
<td>President's letter to the chancellors announcing the approval of the one-time housing assistance fund and the 2018 Housing Allocation project</td>
<td>2018</td>
<td>DOC</td>
</tr>
<tr>
<td>9</td>
<td>2018 Housing Allocation Memo</td>
<td>Memo announcing the approval of the one-time housing assistance fund and the 2018 Housing Allocation project</td>
<td>2018</td>
<td>DOC</td>
</tr>
<tr>
<td>10</td>
<td>Campus EdTech Ecosystems: Current Status</td>
<td>Tracking document used to track the work of the Educational Technology Leadership Council and their cataloging effort</td>
<td>2016</td>
<td>WEB</td>
</tr>
<tr>
<td>11</td>
<td>Campus EdTech Ecosystems: Engagement Request to ITLC</td>
<td>Proposal to engage campus educational technology stakeholders for the purpose of sharing evaluation resources, considering a data repository, and standardizing the review and vetting process of educational technology tools.</td>
<td>2017</td>
<td>WEB</td>
</tr>
<tr>
<td>12</td>
<td>Campus EdTech Ecosystems: Original Findings</td>
<td>Final report from a cross-campus working group that assessed educational technology apps used and shared across the campuses</td>
<td>2016</td>
<td>WEB</td>
</tr>
</tbody>
</table>