Draft report of the ad hoc faculty senate committee to study EOU's proposed partnership with a for-profit OPM (Pearson Online Learning)

Submitted on behalf of the Faculty Senate

Authored by ad hoc committee appointed at senate meeting of Feb 20, 2018, with assistance from participating faculty

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Executive Summary

Eastern Oregon University's Faculty Senate charged this ad hoc committee with reviewing the information available on OPMs (online program management companies), Pearson Online Learning (POL), contractual partnerships between public institutions and for-profit OPMs, and the EOU leadership team's public rationale and research that led to the determination to pursue an OPM partnership. Faculty Senate as a body possesses the expertise and knowledge of the higher education industry to play a critical role in evaluating the potential 'fit' for our students, our academic programs, and our integrity as an institution serving primarily rural regions and populations. We took on this task in the spirit and ideal of shared governance, which has served this institution well over its first 89 years. If all stakeholders were to read this document, we would have a more informed dialogue heading into the Fall. However, serious gaps in our knowledge are described below. It is still unclear at publication time how many of these information deficit areas could have been addressed by the documentation of effort possessed by the EOU administrative leadership team.

EOU faces enrollment declines. These in part reflect broader national trends over the last several years. But they also reflect temporary enrollment spikes—occasionally used as a somewhat misleading reference point—which occurred after the Recession beginning in 2008. Regression to an average historical range was exacerbated, though, by state legislative changes that closely couple higher education funds with degrees conferred (over enrollments). With the creation of its own independent Board of Trustees in 2015, current EOU leadership has enjoyed greater latitude to consider options for increasing enrollment and operating revenue. In January 2018 Faculty were informed that EOU leadership had made a choice some time during spring 2017, that they had chosen to pursue a possible partnership with a for-profit OPM, Pearson, and that Pearson representatives would be visiting campus the following week. Pearson representatives met with academic programs, ostensibly to better understand what we do and how we do it, and to take that information and propose means of rapidly expanding online enrollment without unduly compromising the integrity of programs or the institution. During the Winter and Spring 2018 terms, faculty were asked to meet with Pearson representatives and with their respective college deans. The meetings were informational and exploratory, as Pearson representatives and faculty worked towards a mutual understanding of potential opportunities, challenges, risks, and overall feasibility of a rapid expansion in online enrollment.

The Board of Trustees was to vote in late May on whether or not to engage Pearson in a long-term contract (ostensibly designed to increase online enrollment by over 500% in 10 years). In late April President Insko announced he was deferring the process (Appendix G), and announced in the June 5 Faculty Senate meeting that he was creating several committees to work over the summer on aspects seemingly designed to evaluate in detail the 'fit' with EOU. Meanwhile, faculty who responded to a survey sent out week 10 expressed strong reservations about engaging Pearson, as well as specific concerns about how their students, programs, and ultimately the institution might be affected by a partnership. It is our intention that the reporting and discussion of findings in this document shed light on the issues we were able to identify from available literature, recasts and broadens the frame of analysis beyond a binary choice between OPM or no OPM, and helps create conditions for a more open, intellectually honest dialogue about the future of EOU and its options for responding to changing conditions in higher education.

Key findings

In the relatively short history of OPMs, some larger institutions have partnered with outside corporations to rapidly develop online programs where none had existed before, with many of these efforts focused on graduate-level and professional degree programs serving higher-performing students with some prior success in college.

There are numerous examples of partnerships with OPMs—Pearson in particular—ending prematurely because of unmet enrollment projections and dissatisfaction with some of the support services (including marketing, 'success coaching,' instructional design, and tutoring). A portion of these partnership agreements have ended up in litigation, and in several cases public institutions have had to pay significant sums to Pearson in order to be released from multi-year contracts. A common theme in the literature is that academic quality is, at best, difficult to maintain in revenue-sharing models that incentivize adjunctification, reduce students' access to in-house academic support professionals, and move universities toward "one-size-fits-all" models for curriculum and delivery that ignore significant differences in student backgrounds, needs, and abilities. Additional concerns raised in the literature relate to student data and privacy, intellectual property, and substitution of "learning analytics" generated through for-profit learning management systems for more meaningful assessments of individual students' academic and advising needs.

Increased scrutiny under the Obama Administration of for-profits and predatory lending practices in higher education has led some of the same industry actors—Pearson included—to change tack and pursue these same sources of federal financial aid and military education funding through partnerships with public institutions in the burgeoning online environment. However, as long as the industry is associated with predatory lending, low graduation rates and crippling student debt, calls for investigation and possibly regulation of federal funding streams will likely persist.[1]

Another area of focus for Pearson has been the use of standardized testing and instruments that automate parts of the learning and evaluation process. As one might expect, proponents tout the inevitability of this process; critics the degradation in the quality of the learning experience. Disagreements and dissatisfaction have in some cases led to lawsuits (in some of these concerning Pearson's K-12 operations). As in the OPM arena, there have been several well-publicized cases in which Pearson has not been able to deliver on its promises; they have also been investigated for improper bidding processes with public entities. See Appendix B for annotated bibliography.

Survey of faculty

Forty faculty responded to a survey, open for five days during weeks 9 and 10 of the Spring 2018 term, seeking to better understand their experiences and perspectives on the proposed OPM partnership. The vast majority of respondents expressed skepticism of Pearson, the OPM industry, and the potential harm that a hastily-considered proposal, if enacted, could cause to an institution closing in on its 90th anniversary of serving the region. Many of the faculty responding addressed directly their experiences meeting with Pearson representatives to provide program information to be used to propose a plan to spur and manage online enrollment growth. What begs further clarity is whether the Pearson representatives were having difficulty understanding the character of EOU's online programs and culture (and if so, why?), or whether the poor 'fit' represented a reluctance or limited capacity to invest

[1] See Derek Newton 2016, "How Companies Profit off Education at Nonprofit Schools." *The Atlantic*, June 7.

resources in customizing programs to cater to the individual needs of a smaller rural institution and its students. See Appendix C for response rates to and discussion of specific questionnaire items.

Preliminary recommendations

The ad hoc committee will continue to work on a set of recommendations, made in the spirit of collaborative exploration of viable options, as it receives requested information from EOU leadership (see Part 4 of the report):

- Open the decision making process to greater transparency and meaningful participation by faculty.
- Clarify, specify and justify activities to be undertaken this summer and up until the Board vote in November, including those announced as well as any others being undertaken. Waiting for summer to gather information about an OPM partnership creates the unfortunate impression of an administration wishing to avoid scrutiny of its actions.
- We request that President Insko make a good faith effort to respond to the ad hoc committee's March 20 request for information. Faculty possess the expertise to participate in the 'due diligence' process, with skills that complement those of the leadership team, especially in the areas of research and knowledge of higher education.
- President Insko should ask Faculty Senate to appoint a committee to explore alternatives to a partnership with a for-profit OPM for the Board's consideration. He stated in a Faculty Senate meeting this spring that no other option had been seriously considered, which presumably should trigger a high standard for justifying the investment of time and resources on the OPM proposal.
- EOU leadership and the Board owe it to their constituents to examine the research on academic institutional response to change to better understand the need to expand the frame of reference for considering EOU's future direction and response to enrollment decline (or if such research has already been conducted, provide it to faculty as part of the response to the ad hoc committee's request for information, providing all campus constituencies the opportunity to evaluate). Generally, in a university setting, prescribed treatment for a problem follows from careful consideration and diagnosis. In this case any diagnosis beyond a simplistic claim of declining enrollment—a serious symptom, to be sure—has not been shared with the University community.

The committee has organized this report into five sections: 1) justification; 2) preliminary findings; 3) assessment of the overall decision making process undertaken, and the current state as summer approaches; 4) recommendations for addressing critical gaps in information needed to make an informed decision in the best interests of all parties affiliated with the institution; 5) appendices (requests for information made to the president on March 20; annotated bibliography of source material; Responses on Faculty Survey of OPM; timeline (original and updated June 5) provided by EOU leadership team; President Insko's FAQ, amended June 5; discussion of the opportunities and risks posed by 'McDonaldizing' higher education; President Insko's memo delaying until November a recommendation to the Board of Trustees [thus delaying their vote on a potential partnership]).

The highest use of this report's findings would be to inform the University community—interested faculty, staff, students past and present, the Board of Trustees, and administrators—and ensure that important decisions affecting broad constituencies are made in the open, with source material whose credibility has been evaluated, based on sound and debatable rationale. We freely share the work we have done to inform what is known about OPMs, Pearson, public/private contracts to provide online programs, and EOU's engagement and decision-making. We do this in the spirit of collective self-interest in the future of the institution, and we hope and expect the EOU leadership team to reciprocate

with respect to publicly sharing information, increasing the transparency of the process, and either furnishing the information requested, or clearly and thoughtfully stating their reasoning for declining to do so. Before considering Pearson as a partner instrumental to the institution's health and survival in a changing environment for higher education, we implore EOU leadership to consider its own commitment to a more equal and enduring partnership with faculty, whose members are less prone to self-interest and profit motive, and who tend to show unfailing loyalty to the institution and its students.

Prefatory statement

This is a preliminary report. We have attempted, given limited resources and time, to investigate the state of the OPM industry as it relates to the committee's charge, the specific organization to be engaged, and institutions that have partnered with that organization. The ad hoc committee made a request to the president's office on March 20 for information to assist in this process, seeking to better understand how EOU leadership arrived at this decision, what research was conducted prior to choosing an OPM and then Pearson, both to understand how we have as an institution arrived at this juncture, and why the engagement of faculty happened only after key decisions had already been made. We have yet to receive any information as per our requests (see Appendix A).

Part 1: Justification

The following represent the justification for creating an ad hoc committee and producing a report for Senate and for the Board of Trustees:

- *Shared governance responsibility.* A motion carried in the February 6 meeting of the Faculty Senate included a charge to 'collect all of the available information for faculty to weigh in on this issue.'
- *Asserting faculty voice, providing relevant expertise*. The decision to move forward in considering partnership with a corporate OPM (online program management company), specifically with POL (Pearson Online Learning) was made without faculty input. These initial decisions that occurred prior to faculty notification or involvement included: 1) the initial decision by administration, which narrowed the frame of reference to whether or not EOU would engage in a partnership with a corporate OPM; 2) the subsequent decision to choose Pearson over any other OPMs that were considered; 3) the decision as to how and when faculty would be collectively notified and engaged in the process (faculty were given one week's notice before the first academic programs were to schedule a meeting with POL representatives); 4) subsequent decisions made by EOU leadership, announced in May 2018 after deferring a final Board of Trustees vote until November 2018, to enlist selected faculty in conducting further inquiries deemed appropriate (we have received only a brief summary of these inquiries in the president's report at the May 15 Senate meeting).
- *Faculty role in design, implementation, and course correction*. Faculty, both collectively and as individual academic professionals, have a critical stake in the outcome of any such decision-making process in terms of curricular planning, instructional design, managing faculty, scheduling, student advising, program marketing, evaluation, accreditation, etc. The burden of addressing any miscalculations affecting the above would be borne primarily by teaching faculty with responsibility over participating online programs.
- *Administration decision to pursue prospective OPM partnership outside of shared governance model*. Beyond the common sense argument that faculty have an important stake and hundreds of years of collective experience at EOU and in higher education, important, historic and potentially radical changes affecting staff, students and faculty have traditionally been discussed and debated publicly, with responsibility for outcomes shared.

Part 2: Preliminary Findings

Review of available literature: Pearson as an OPM partner, organization

The available literature on the online program management industry in general and Pearson's record as a purveyor of OPM services specifically suggests the following general conclusions:

In their relatively short history, OPMs have largely been retained by universities without existing online programs seeking to build something from scratch rapidly with little to no infrastructure or expertise available on their campuses for doing so. In many cases, these programs have been graduate level and/or professional programs, not full undergraduate liberal arts degrees serving online students with the diverse needs and levels of academic preparation of students meeting EOU's admissions threshold. In addition these partnerships have occurred with much larger institutions, and in ways that did not risk jeopardizing the universities' reputation and legacy. In 2010, Washington State contracted with Pearson Embanet to create an 'EMBA' (all online MBA). In 2016 the University of Nevada-Reno launched an online Masters in Social Work. Other common professional program launches online include Law or Paralegal programs, Nursing, etc. Aside from Maryville University (located in St. Louis, Missouri), few OPM partnerships exist to deliver undergraduate liberal arts programs, especially where such programs are already in place.

A significant number of universities have sought to end their relationships with OPMs, and with Pearson in particular, well before the end of their contracts, often paying significant fees for doing so. Some of the main reasons for ending relationships with Pearson have been Pearson's inability to meet promised enrollment projections, dissatisfaction with Pearson's marketing (and desire to work with a firm that specializes in marketing instead), mismanagement of the student services aspects of the arrangement, including poor advising, and drop in academic quality due in part to funds lost to revenue sharing agreements and reduced capacity to hire and retain qualified faculty. There are many documented cases of individual universities and university systems ultimately concluding that the partnership was not worth the money and that the services provided could be better delivered in-house.

The OPM industry emerged in the wake of increased Congressional scrutiny and regulation of the for-profit higher education market, in which similar clusters of corporate partners were investigated for predatory recruiting practices and inability to demonstrate "gainful employment." Partnering with public institutions of higher education provides an alternate route for corporations like Pearson to continue accessing the billions of dollars of federal financial aid and Department of Defense money these entities were previously funneling through adult students enrolled in for-profit institutions.

Pearson's marketing strategy—The case of Maryville[2]

Online marketing involves understanding search engines in order to best position marketing to encourage customers to access web content. Search engine optimization (SEO) attempts to strengthen marketing by positioning web content higher in the results generated by a search engine. One means of optimizing content for search engines is to understand the role of keywords in searches. Keywords can be tracked through the URLs used to arrive at a site. Optimization might include linking particular paths

[2] Amended 6/28. For a more complete explanation of site auditing, see Ortiz-Cordova, A. and Jansen, B. J. (2012). Classifying web search queries in order to identify high revenue generating customers. *Journal of the American Society for Information Sciences and Technology* 63(7)1426–1441. https://faculty.ist.psu.edu/jjansen/academic/jansen_high_revenue_customers_2012.pdf

of arrival to site visits and sales and making recommendations about keywords that generate more visits and sales.

Electronic tools now exist to assess marketing effectiveness in optimizing search-engine use. One tool is SEMRush, which has won a number of industry awards for search optimization. SEMRush can be used to evaluate Pearson's effectiveness at optimizing comparator institutions' online marketing. For example, Maryville University in St. Louis, MO, is the Pearson partner most similar to EOU. Two SEMRush reports provide insight on Pearson's implementation of Maryville Online.

1) SEMRush searched Maryville on Google in Missouri with mobile devices. A search of the ranking report had Maryville, in a search within Missouri on Google, scoring above 100 (meaning not appearing on a Google search until page 11 or higher). A score above 100 compares to the best possible score of 1. To provide context on a five-point scale, a '1' is given five points, a '2' is given 2.5 points. So on a search conducted daily from March through late May, Pearson averaged a near zero score in its marketing work on Maryville's site.

2) The Site Audit is more troubling because it shows that Pearson's implementation of Maryville has many errors. The average score (using SEMRush's scoring system) of sites on the internet is 75%. However, Pearson's Maryville site is consistently well below the average score, in the 55% range (for reference, EOU's current score average is about 25%). This means they do not adhere to Google AdSense standards, and they will not show up in subsequent searches. In short, the Pearson Maryville site has many fundamental flaws with respect to how it markets the University and targets potential students via their smart phones, and has minimal value according to Google's valuation.

These data were shared with the EOU Board of Trustees in May by faculty knowledgeable in digital marketing technologies and audit methodologies, with an offer to run custom searches to help EOU leadership better gauge Pearson's marketing effectiveness. However, neither President Insko nor Executive Director of Regional Outreach and Innovation Vande Pol responded to this offer–even though the administration has promoted Pearson's marketing expertise and experience as the key selling point of their proposed OPM partnership. In a Board of Trustees meeting, President Insko valuated Pearson's investment to be approximately $1 million in the first year. From the above data, it is not clear what EOU would receive for that money invested (to be subsequently compensated with revenue sharing of student tuition dollars), but what is clear is that EOU leadership has failed to provide a breakdown of any costs Pearson would actually incur, relative to their stated estimates. Marketing through Facebook and other sites (except for Google) is very inexpensive, and the use of an ad redistribution service such as Adroll at most should cost $2500 per month, $30,000 per year.

Other observations of Maryville's online advertising indicate that Maryville uses Facebook ads with Adroll redistribution, which are remarkably cost effective. Up to 2.5 million Facebook ads limited to young people in the region around EOU would cost approximately $2500 per month. Moreover, wizard-based advertising is relatively easy to learn. So, the value of Pearson marketing may be considerably inflated. The only way to know for sure would be for EOU leadership to share the data the ad hoc committee has requested. The premise for engaging Pearson—that they would provide the up-front marketing that EOU leadership claims it cannot afford—would seem to rely on marketing dollars well-spent, which in the case of Pearson's partner Maryville, remains in serious question. On the other hand, assertions by EOU leadership that digital marketing costs would be prohibitive for the University to assume merit reassessment.

Online learning environments: EOU's educational mission, academic quality, integrity

EOU has been offering programs at a distance since the late 1970s. It was an early adopter of online program development, through the Division of Distance Education (DDE). DDE was eventually integrated into the university academic system under a previous administrative re-organization, and now there are many academic programs offering on campus and online degrees. The twist with considering an OPM is the outsourcing of recruiting, marketing, and potentially some student support services to a private corporation, which would capture some percentage of the tuition dollars (the last figure publicly shared was 50%). Rapid expansion is the only way this would interest an OPM like Pearson, which would provide the up-front investment while the university re-organized to match structure and function—a continuous hiring cycle, academic terms (at least online) that are stand-alone and allow students to begin and finish at any point in the calendar year, and faculty enlisted to manage adjuncts, hired on an as-needed basis as Pearson students are recruited, processed, and registered. Such expansion poses problems that technology vendors have sought to address through processes of automation (e.g., software for grading papers and exams, taking attendance). Pearson, not surprisingly, has also invested and heavily lobbied and promoted the education IT business, in K-12 and increasingly higher education. Increasing automation also places greater emphasis on the LMS—learning management system—which is a sophisticated term for software that among other possible uses organizes courses and provides online venues for interaction. Because of the training necessary to learn an LMS and to keep up with changes and upgrades (on the part of the institution as well as faculty), there may be pressure—as we have witnessed at EOU—to mandate the use of the LMS by faculty—a standardization or technological monoculture that offers the lure of stability and predictability, but possibly at the expense of creative pedagogy and experimentation.

More insidious are the prospects embedded in standardized course technology systems that allow collection of information unbeknownst to users, whether students or faculty, as well as other risks that accompany monocultures and their vulnerability to software hacking and viruses. There are also serious personnel matters that if not explicitly addressed threaten to erode trust forged in previous eras between administration and faculty. From the American Association of University Professors:

> "Online teaching platforms and learning-management systems may permit faculty members to learn whether students in a class did their work and how long they spent on certain assignments. Conversely, however, a college or university administration could use these systems to determine whether faculty members were logging into the service "enough," spending "adequate" time on certain activities, and the like. *Such monitoring should not be permitted without the explicit and voluntary permission of the instructor involved*."

Integrity and a volume-driven online operation

EOU's administrators should be commended for securing a designation for the institution as 'Oregon's Rural University.' However, efforts to outsource online programs to a private, for-profit company could render difficult making good on that promise of a rural experience, as Pearson would likely target whatever markets existed where a good 'fit' exists between EOU programs and demand for courses to complete a degree. Would the centripetal pull of the 'rural university' mission be sufficient to control the centrifugal force of dispersed demand throughout the US and beyond, and maintain the integrity of EOU's designation and commitment to the region (see Appendix A for information requests made on related topics)?

EOU administrators have made the argument that revenue from projected online growth would naturally translate into higher on campus enrollments—a claim that has been thus far made with no supporting evidence or examples from comparator institutions. The committee and participating faculty were able to identify examples where the inverse occurred—online programs siphoned off on campus students, in the extreme leading to closure.[3] Less extreme are examples—familiar to all of us who teach in the classroom—of on campus students enrolling in online courses. Questions about the ease of transferability from one modality to another, or more generally the quality of learning, have not been raised by EOU leadership as concerns to be researched.

McDonaldization: A model for managing increased traffic (see Appendix F)

The Administration's stated goal has been to expand online enrollment from 800 sfte ('student full-time equivalents') to 5000 in the span of 10 years. The logical argument given has been that such a period of rapid expansion in a resource-scarce fiscal environment would require partnering with a corporation that can provide the up-front investments to stimulate that growth, especially (presumably) in marketing. The assumption that a 500% projected enrollment expansion in ten years is in any way realistic or achievable—the most fundamental of arguments underlying this investment of institutional time and resources—has not been explained. Much of the public discussion on campus has focused on operational issues and changes that would be necessary were academic programs to buy in to the administration's proposal and adopt Pearson's general model for online enrollment growth. Interactions with Pearson representatives have been instructive with respect to understanding the kinds of changes required to realize rapid acceleration of enrollment, and center on efficiencies, which would affect how students engage with programs, how courses are staffed, and how concerns about quality of learning might be addressed.

The strategies both in the literature and in discussions on campus suggest the need to 'McDonaldize' elements of the university's online operations. 'McDonaldization' is a process by which key principles of the fast food industry—efficiency, calculability, control and predictability—are adopted and spread, largely owing to their potential as a means to accommodate increasing size and complexity. While this makes sense when considering managing traffic in a restaurant during the lunch hour, the potential for more problematic issues to be carefully considered becomes evident when applied to higher education and learning.

For a broader discussion of McDonaldization's key principles, and the opportunities and risks for higher education posed by partnering with an OPM would likely involve, see Appendix F.

Results of Faculty/OPM survey (n=40)

The data in chart form can be found in Appendix C. What follows is a brief discussion of questionnaire items, and a summary of open-ended responses. Items 1-20 are all responded as a level of agreement (from 'strongly disagree' to 'strongly agree,' allowing for a 'no opinion' response).

Item 1: I have followed the OPM/Pearson decision making process closely.

Thirty-seven faculty agreed with this statement (27 SA, 10 A), three disagreed. Those faculty who responded to the survey have followed the decision making process. While the overall response rate

[3] Mike Freeman. 2015. "Ashford University plans to close Iowa Campus." July 13, San Diego Union-Tribune.

included less than half of faculty, it is clear that those who responded have been paying attention.

Item 2: I have read extensively in the private OPM movement in higher education.

Twenty-five agree with this statement; twelve disagree. Among respondents, there appear to be more following EOU leadership's actions than doing research on the private OPM industry. However, those who have read on the subject outnumber those who haven't by a two-to-one margin.

Item 3: I have personal/professional experience in a higher education setting working with an OPM.

Only one respondent reported any personal experience working with an OPM (with 38 responding either in disagreement or 'not applicable').

Item 4: The administration has presented faculty with a wide range of viable options to consider in addition to partnering with a for-profit OPM.

One response in agreement; 36 in disagreement (26 strongly). Respondents almost unanimously disagree with the statement that administration has presented non-Pearson options. This is consistent with President Insko's own remarks in a Spring Faculty Senate meeting that alternative options had not been seriously considered.

Item 5: I am optimistic that partnering with Pearson will solve EOU's enrollment and revenue problems.

Three respondents in agreement; thirty-four in disagreement (26 strongly). The administration has not persuaded the vast majority of respondents that Pearson will solve problems with declining enrollment.

Item 6: Based on what I have learned so far, I expect Pearson to serve students well.

Three respondents in agreement; thirty-six in disagreement (22 strongly). It is worth noting that while the sample is a minority of faculty, most respondents had reported they researched for-profit OPMs (item 2).

Item 7: EOU leadership has accurately identified the pressing problems EOU faces, and the investment of time and resources in considering a private OPM is well-placed.

Six respondents in agreement; 33 in disagreement (18 strongly). By a 5 to 1 majority respondents disagree both with the framing of EOU's problems by leadership, and with the value of effort invested by the institution in considering the private OPM option.

Item 8: Faculty have had adequate opportunity to provide public and meaningful input on the future direction EOU should take in confronting its enrollment decline.

Six respondents in agreement; 33 in disagreement (19 strongly). Those responding, by an over 5-to-1 margin, believe meaningful faculty input in confronting enrollment problems has been marginalized.

Item 9: EOU leadership has no obligation to involve faculty in the decision on whether or not to partner with a private OPM/Pearson.

Four respondents in agreement; 37 in disagreement (29 strongly). While the last question sought perceptions of faculty being included in decision making, this item asks whether faculty believe leadership has any obligation to involve them. Responses suggest a strong opinion that administration is obliged to do so.

Item 10: Our program has little or no inclination to partner with Pearson.

Five respondents were in disagreement; 31 in agreement (22 strongly). This is not surprising, as Pearson has been meeting mostly—but not entirely—with disciplines who already have robust online programs. The committee would caution the reader not to conclude that programs not targeted to partner with Pearson would not be affected by a partnership with them—potentially every facet of the organization could be affected, including on-campus enrollment.

Item 11: I have confidence that the Pearson officials with whom I have interacted to date have the necessary skills and expertise to deliver on their promises.

Three respondents agreed with this statement; 24 disagreed (19 strongly). There were higher responses of 'no opinion' or 'not applicable,' likely representing those respondents who have not interacted directly with Pearson in discussing their programs.

Item 12: Work samples produced by Pearson to date (including proposed course rotations) accurately reflect our program and its potential for rapid online expansion.

One respondent agreed with this statement; 28 disagreed (19 strongly). Lower responses reflect that some faculty may not have interacted with Pearson (11 responded with 'no opinion' or 'not applicable'). Respondents reported that Pearson, after two rounds, had either not grasped the specifics of programs, or were simply offering a standardized template of questionable 'fit.'

Item 13: A long-term partnership with Pearson will have minimal effect on EOU's regional mission and core values.

Four respondents agreed with this statement; 33 disagreed (25 strongly). The vast majority of faculty who responded has *serious* concerns (based on strong disagreement) about how an OPM partnership might affect the institution, what it has stood for, and how it serves the region.

Item 14: I am concerned that EOU will lose its identity if we rapidly expand into the online market through the hiring of adjunct instructors.

Thirty-six respondents agreed with this statement (24 strongly); three disagreed. This response reflects an additional dimension beyond EOU's mission—the importance of a close working relationship between faculty and students, presumably because students may be recruited from anywhere in the country, and faculty hired on an as-needed basis to teach courses. President Insko's committee to study 'adjunct life cycles' would seem to address this approach, and Pearson's model.

Item 15: I would like to see the research conducted on alternatives to rapid online expansion via a private OPM partnership model.

Thirty-six respondents in agreement (28 strongly); 3 disagreed with the statement. At a minimum this suggests respondent dissatisfaction with the administration's ability to make a case for private OPM partnership *relative to* other potential opportunities, information about which has neither been identified nor provided in any depth. This is important because of the premise that the OPM route was a preferred choice *among others considered*.

Item 16: How many hours would you estimate that you have spent in meetings discussing Pearson/OPMs, doing research on the OPM industry or related topics, or actually meeting with Pearson representatives?

More evenly distributed: 10 have spent more than 15 hours; 19 at least six hours (but less than 16); nine respondents five or less hours.

Item 17: What is your college affiliation?

(items 17-20 were designed to collect demographic information on the sample of forty respondents) Thirty-three respondents from either the College of STM/Health Sciences, or Arts, Humanities and Social Sciences (the remaining seven distributed among Business, Education and the Library).

Item 18: What is your status as a teaching faculty member?

Twenty-nine respondents were full-time and tenured. Only three full-time faculty who are tenure track replied, the other eight were non-tenured. We have heard from multiple faculty that they were concerned that the survey results, housed on an EOU server, would not be confidential and they declined to respond. On the other hand, the high number of tenured faculty suggests people who have spent the majority of their careers working at this institution and living in the local community.

Item 19: To what extent do you teach online?

This question was asked to better understand how respondents might be affected by rapid growth in online operations, or to gauge their experience with online teaching. Sixteen teach mostly or all on

campus, 19 teach an even mix between on campus and online modalities, five mostly online.

Item 20: Describe your program's online status.

Twenty-two respondents teach in a program offered online. Sixteen reported either teaching some online but with no plans for a degree (9), having no plans to offer an online program (6), or considering doing so (1).

Item 21: Use this space for any additional comments you would like to make related to the questionnaire's purpose.

Sixteen responded. Because we sought to identify *patterns* in the open-ended data, we have not included here comments not shared by at least two respondents. Some themes emerge (in order of frequency of mention):

EOU lacks the marketing expertise that would provide a counterweight to a private OPM partnership. Six respondents discussed this, most mentioning that marketing would be the main attraction with a partnership—many of the other bundled services would not be valued or sought by faculty. Little confidence was expressed by respondents that the current marketing team had successfully marketed their academic programs, or demonstrated a capacity to work effectively with faculty to launch a campaign to sell our programs and increase enrollments, online or on campus.

Five respondents discussed a lack of trust or confidence in Pearson as a corporation. This concern was multi-dimensional. One aspect was the uncertainty of whether proposals to programs were simply a poor fit, or whether Pearson would be unwilling to cater to EOU's idiosyncrasies. Another element was Pearson's continuing ethical and legal troubles, with one respondent wondering how if something went wrong EOU could hold a corporation with a fleet of lawyers accountable. A third element was a lack of trust in the possible sharing of data (for example, faculty have been told that Pearson would have access to parts of Canvas, needed to 'trigger' services for students who might have a low assignment grade or hadn't logged in for a period). Refer to the annotated bibliography (Appendix B) for further discussion of some of the ethical considerations from source material.

Three respondents discussed specifically their engagement with Pearson and a lack of 'fit' between what the latter was offering, and how they envisioned being able to rapidly expand online offerings. Pearson's experience with liberal arts programs, and more generally undergraduate programs that aren't necessarily pre-professional, was by their representatives' own admission in meetings, limited.

Three respondents mentioned the lack of transparency on the part of EOU leadership. The decisions to move forward with an OPM, then with Pearson, were made before faculty were informed—a six-month process occurred that excluded faculty input. Even to the present, faculty's role has been to respond, with occasional opportunities to provide feedback in college meetings. Efforts to glean more information about these first six months, or to read what research was conducted by the EOU leadership team on viable alternatives, have been unsuccessful. The ad hoc committee's requests for information (Appendix A) have not been fulfilled, yet we remain optimistic as a refusal to provide such information not been communicated.

Three respondents discussed at length the lack of 'fit' with EOU's regional mission, and its long history serving the region with programs that bring students and faculty together in close collaboration. More specifically the proposals made by Pearson representatives seemed to miss the mark, not understand how programs being targeted operate, or how treating summer as simply another term indicated a shallow understanding. It was not clear whether Pearson was prepared to offer its model, and was only willing to make limited adaptations, or whether the representatives had not fully grasped the nature and character of our programs or institution, which include a long and rich history of offering online courses and degree programs.

Three respondents discussed the risks posed to the future of EOU by any private OPM partnership, and to EOU's legacy as a regional institution offering smaller classes and accessible faculty. These comments were included in responses made by individuals who clearly were offering courses and programs online. Like any faculty members who have been at EOU long enough to be promoted

and/or tenured, these respondents noted that enrollment decline was indeed a real problem. The general sentiment, though, was that no serious consideration was afforded other potentially viable options besides a private OPM (the example of OSU, which has developed and marketed its own growing online capacity, was provided).

Part 3: Assessment of the process for effecting organizational change

This section is a narrative of the timeline and decision making process, to the best of our knowledge. We have divided it into: the past, which includes events up to the decision to defer a Board of Trustees vote until November 15; the present, which includes the current state of the process as the academic year comes to a close, and what we know about President Insko's intentions moving forward over the summer and into the next academic year; the future, which includes the committee's assessment of the likelihood the Board of Trustees will have the information necessary to make an informed decision in the Fall—one that takes into account other viable alternatives (to online program expansion via a partnership with a for-profit OPM) for addressing enrollment declines that have yet to be seriously identified or examined.

The Decision to engage an OPM/Pearson

This section, in the absence of a response to our request for additional information (Appendix A), is based on what we have been able to piece together, as well as a partial timeline provided by EOU administration (Appendix D). Some time during the summer of 2017, unspecified members of EOU's leadership team made a decision to engage an OPM. David Vande Pol was hired over the summer to fill the ROI (Regional Outreach and Innovation) position. Mr. Vande Pol came with prior work experience of several years in the OPM industry (including for Pearson). In October 2017 the administration held a private interview process involving the two OPM finalists, one being Pearson. In December the EOU leadership team chose to engage Pearson. In mid-January, Mr. Vande Pol presented to faculty in the colleges, announcing that EOU would be exploring a possible partnership with POL. Mr. Vande Pol relayed in his presentation President Insko's goal of a 525% increase in online enrollment over a 10-year period (from 800 to 5000 student FTE). Meetings with Pearson representatives and academic programs with existing online programs—which had been identified as likely partners—were scheduled for the next week. Pearson's goal in these meetings seemed to be to listen and learn from the programs, and to briefly describe the company's approach to online program management and design.

At the subsequent Board of Trustees meeting on February 1, Mr. Vande Pol presented his and the university's position on the engaging of Pearson as the choice to consider for the OPM option to increase enrollments. Other potentially viable alternatives to engaging a private, non-profit OPM (such as simply improving the University's marketing and branding, creating innovative and interdisciplinary academic programs, examining a fuller utilization of EOU's unique organizational capital embodied in its regional centers, etc.) were addressed in a cursory fashion if at all, prompting concern among some faculty that alternative options had not been carefully considered when the initial decisions were being made to pursue a partnership with an OPM.

At that point faculty began engaging in earnest to research what information was publicly available about Pearson and the OPM industry, with particular focus on those institutions that had chosen to outsource the online operations to private, for-profit entities. Several members of faculty took it upon themselves to organize the information for the benefit of those (faculty, students, staff, Board of Trustee members) with neither time nor inclination to immerse themselves. At the Feb 20 meeting of the Faculty Senate, an ad hoc committee was created to compile, organize and present this information for use by the University community. One of the early realizations was that the first six months of the decision making process had not been fully disclosed—how was the decision made, what research was done that informed the process, what list of relevant questions were identified and asked, why a

determination was made not to involve faculty until long after a decision had been made to move forward with an OPM and Pearson, what were the next steps to inform the process moving forward, and … what information did faculty need in order to conduct its own 'due diligence' surrounding this important and historic decision point?

As the information and source material were being compiled by faculty, President Insko sent out to the campus community a three-page 'FAQ'—questions posed and answered by the president—on the Pearson/OPM campaign (Appendix E). Some of the responses seemed to generate additional questions, which prompted those conducting research to expand their scope of inquiry. Still there was a realization that gaps existed in our knowledge of the OPM industry, and in our understanding of the administration's decision-making process leading to engagement with Pearson. On March 20, the ad hoc committee made a formal request to President Insko to provide information that would fill in the critical gaps in knowledge that would help the committee complete its charge (Appendix A). There was a particular concern that the consequences (of expanding to a predominantly online and national-scale institution) for EOU's mission and the value of an EOU degree to alumni, current and future students had not been taken into consideration in any rigorous way.

During winter term representatives of Pearson returned to campus for discussions with all interested faculty. These meetings were organized around college affiliations. In this cycle Pearson brought members of their marketing team, and we were able to learn that EOU was one of the first institutions Pearson was considering for partnership that placed an important emphasis on either undergraduate or liberal arts education (many of their partnerships centered around building pre-professional programs in areas such as nursing and business, which is common to private, for-profit OPMs). We also learned during the college-level meetings that Pearson was focusing on a handful of programs at EOU, and that it had never engaged a university with less than 15 existing online degree programs. Faculty had identified the most similar comparator institution to EOU, which was Maryville University, located in St. Louis, Missouri. Maryville had through its partnership with Pearson doubled overall enrollment over an approximately 10-year period. Informal inquiries made to Maryville, and frank discussions with Pearson's marketing representatives, showed that increases in enrollment were mostly accounted for through creation and expansion of practical, professional programs in nursing and a handful of masters-level programs.

Questions at these meetings were answered by the Pearson representatives with relative candor. The meetings made clear that many of the unanswered questions about the path toward engaging a private OPM would need to be answered by the EOU leadership team that made the decision to pursue this path.

EOU academic programs during this time were presented with initial projections about how engagement with Pearson might look, and what it might require in terms of course scheduling. Informal feedback from multiple programs suggested that Pearson representatives had either misunderstood some fundamental information about how our programs operate, or were simply providing a look at the kind of program they would be capable of offering. Equally instructive was the attention to capstone coursework—expensive for faculty to offer every term, but critical to a model predicated on a program geared toward degree completion of online students located elsewhere and at varying stages of progress, and as a result somewhat disconnected from EOU's traditional Fall-Spring academic cycle. Programs communicated that this would potentially harm EOU's reputation for emphasizing a small and personal college experience where students could form working relationships with faculty, in favor of

one where adjuncts teach much of the curriculum and 'regular' tenure-line and tenured faculty 'finish' near-graduates with their capstone experiences. Pearson's initial proposals for course rotations, despite having access to information online, in the catalog, and in meetings with faculty and administrators, suggested a surprisingly uninformed understanding of course sequencing, in some cases as basic as ensuring 200-level courses preceded 300-level courses in a rotation.

Another important feature of EOU's reputation involves helping students navigate financial aid. Course sequences that don't reflect how aid often treats summer terms differently—that is, students receive funding to attend three quarters of the year—showed Pearson had not fully understood our student body and the constraints often imposed by federal financial aid. In addition, many if not most of our online students are working part- or full-time, and are not 'traditional' students who can or seek to complete a degree in four years, over 12 terms. The diversity of transfer courses students often bring, and the consequences for advising, also add an additional layer of complication not fully appreciated by the Pearson teams. There are also complexities of a liberal arts program—such as general education, a diversity requirement, writing requirements, institutional math requirements or statistics—that require personal and sometimes intensive advising, which is not easily accomplished via a call center, even one with dedicated staff, located in Pearson's regional offices Chandler, Arizona. In general, the initial pro forma documents produced by Pearson were according to program representatives either riddled with errors, or simply windows into a 'one size fits all' philosophy that, though efficient, runs counter to EOU's core values and personalized commitment to students.

President Insko was unable to attend the first faculty senate meeting in April to respond to our request for information, but had said that after a period of travel, in early April, he would be able to respond. However a message was later relayed at the subsequent senate meeting that he did not consider the March 20 request as a 'final draft' and something requiring him to formally respond. The request was thus repeated. President Insko responded at the next meeting that most of the information being sought was included in the FAQ he had sent out in early March (for a comparison, see Appendices A and E). Faculty continued to press for a formal response to the request for more detailed and relevant information, which we hoped would answer some of the research questions the ad hoc committee had posed. As of the writing of this preliminary report—two and a half months after the initial request, and with the academic year drawing to a close—we continue to await the formal response the president said would be forthcoming in April.

Programs that Pearson has targeted for engagement in this campaign to buttress online enrollment were in mid-May provided a second round of projected schedules and course rotations for adopting a 'carousel' model divorced from the regular Fall-Spring academic year. The projections in at least two program examples suffered from the same shortcomings as the originals—misunderstandings of how our programs operate, in some cases omissions of required courses, inability to understand course sequencing, prerequisites, and relationships between lower and upper division course work, and once again, capstones offered each term (despite feedback concerning the operational inefficiencies for programs).

The current state

President Insko announced at the May 15 meeting of the Faculty Senate that he had created three new ad hoc committees, composed partly of faculty he had chosen (although the exact composition of these committees has not publicly been communicated), to work on three areas of consideration in deciding

whether to partner with Pearson: 1) an 'adjunct life cycle' analysis, presumably addressing the need to hire adjuncts on an accelerated basis and to consider how long adjuncts might be willing to teach courses for EOU/Pearson online programs; 2) some sort of 'due diligence' team that had already met and completed part of its work before the announcement was made; 3) we do not have the third committee, but will formally request it; 4) In addition President Insko announced the hiring of David Bentz, presumably as a liaison to assist faculty with instructional technology. As EOU faculty who have adopted Canvas have been using it for several years, it is unclear whether this full-time administrative position anticipates an influx of online adjunct instructors who would potentially need rapid up-front training.

The senate ad hoc committee eagerly awaits the president's response to its information requests, in the interest of informing this decision-making process and doing what best serves our students, our instructional capacity, the region and an institution of higher education approaching its 90th birthday. The 'FAQ' presented in early March (Appendix E) was based on a list of questions generated by EOU administrative leadership; the ad hoc committee has made significant requests for additional information in order to carry out faculty's own due diligence in reviewing the merits of partnering with a private, for-profit OPM.

Moving forward (toward a Board of Trustees vote in November)

The senate ad hoc committee continues to await a response from the president on our information requests, which will be incorporated into this document, which is the *only* publicly-shared research reporting on the proposed OPM partnership.

Three committees created by the president and subsequently announced at the Faculty Senate meeting of May 15 address issues related to the decision-making process. The activity slated for the summer seems designed to inform the OPM decision making process, but not necessarily to explore other viable options. This creates an impression, intended or otherwise, that there are no other viable options being seriously considered. Also created is an impression that the administration has no intention of changing its habit of making decisions out of the public eye, without, the committee would argue, sufficient scrutiny, expertise and experience in higher education. The inaction on exploring any viable alternatives in turn could increase pressure on the Board of Trustees to approve an OPM partnership in November, lacking any other well-developed options or visions and having spent 18 months focusing exclusively on the OPM option. Given the checkered history of OPMs and public higher education (Appendix B), and the strong reservations of those who responded to the survey (Appendix C), the necessary 'buy-in' of faculty would be problematic at best.

Exploration of other options

A discussion of other options being considered appears to be missing from President Insko's latest actions. There have been no alternatives seriously discussed in public forums with EOU's leadership team. Some recommendations, informed by what information has been shared with us:

- EOU *leadership team publicly announces the decision making process as it stands moving forward*
- *Clarification on the goals for the committee work* (the committees announced in the May 15 senate meeting).

- President Insko can make a *request to Faculty Senate to appoint an ad hoc committee* (of the senate's own choosing, in the spirit of shared governance and transparency) to explore viable alternatives to the OPM partnership with Pearson.

  Supporting rationale
  - November will mark almost 18 months since the administration began pursuing a path of considering a partnership with a private, for-profit OPM, with no other option either seriously considered, or at least shared in sufficient depth with faculty or other campus constituents and university stakeholders to allow for rigorous comparison.
  - If the university has seriously considered other options in any depth, we would request the president share this information with the ad hoc committee, as per the request made on March 20 and repeated on April 3.
  - Faculty Senate's review of available literature on OPMs and Pearson's track record cast doubt on the fit between the OPM model and EOU's regional mission.
  - Almost none of the debate that has occurred has addressed the literature on 'academic turnarounds' (e.g., Terence MacTaggart's work and compilation of research on universities that have successfully turned around declining enrollments).
  - As an example, OSU has not partnered with a private entity yet has significantly expanded its online presence and program offerings. There is little evidence that administration has explored the employment of EOU's extensive organizational capital throughout the state as part of an online/on site integrated system for instruction and regional collaboration (more partnerships with private for-profit entities or workforce development initiatives notwithstanding). The highly-touted REV Center was developed with minimal faculty input, and its purpose and relationship to enrollment or integration into student learning beyond a handful of internships has not been communicated to a faculty audience.

Part 4: Preliminary recommendations

The ad hoc committee continues to work on a set of recommendations made in the spirit of collaborative exploration of viable options.

- University decision making apparatuses must operate with greater transparency and professional courtesy than this process has reflected over the first year—faculty were not made aware of the university's intentions until the key decisions had already been made, then were asked to participate with one week's notice.
- EOU administration could show a response of good faith by specifying the work to be conducted this summer, identifying the committees and membership, and clarifying the goals of each committee (see discussion in Part 3, *The Current State*, for a partial list). This information was only presented informally at the June 5 Faculty Senate meeting in the president's update.
- The ad hoc committee will continue to seek a response from President Insko on the information request made March 20 (Appendix A) that is part of faculty's own 'due diligence' as critical stakeholders in any future partnership that affects teaching and degree programs. If the president will not be responding, we would request a formal reply to that effect, in writing, to the members of the ad hoc committee and the Faculty Senate leadership.
- We request that the Faculty Senate be engaged in appointing a committee to explore alternatives to a partnership with a for-profit OPM. This committee would serve under the same arrangements that other committees have negotiated in terms of faculty compensation for work performed during the summer related to the OPM/Pearson partnership proposal. This would represent a clear good faith demonstration that EOU leadership values undertaking a rigorous process for identifying and generating a healthy range of viable options that have been credibly researched and evaluated by those in a position, through professional training and research expertise, to do so.
- Nothing in the literature suggests a 500%+ growth rate in online enrollment in 10 years is achievable. Maryville University managed 100% over 10 years, focusing (with Pearson) on professional programs, especially nursing. Even though that is one-fifth of the growth EOU leadership has promoted as a 10-year goal with a Pearson partnership, our research found that most other universities with whom Pearson has partnered appear to have fallen far short of initial enrollment projections, in the case of the University of Florida adding less than 200 students out of tens of thousands projected. The committee recommends a vision that is both realistic, and rooted in some verifiable reality within the research and literature on higher education. To assume, as a claim for moving forward, that EOU's online growth will outperform every other institution we were able to learn about, suggests that wishful thinking has supplanted logic and evidence in the decision process.
- We strongly encourage administration to enlarge the frame within which it views challenges and change in higher education. Leadership—including the Board of Trustees—would be well-served by an examination of the research on academic institutions and change. A good starting place would begin with a sample of work contributed by Terrence MacTaggart. MacTaggart has written two books within the last decade, *Academic Turnarounds: Restoring Vitality to Challenged American Colleges/Universities (2010)* and *Leading Change: How Boards and Presidents Work Together to Build Exceptional Institutions (2011).* MacTaggart, in the March/April 2014 issue of Trusteeship, writes:

> "What kind of institutions are most at risk in today's environment?" Conventional wisdom views the most vulnerable as regional public universities dependent on diminishing state support, independent colleges

> lacking strong brand appeal, and any college or university located in rural America. All of these answers are wrong.
>
> The right answer is that the colleges most at risk are those that fail to adjust and innovate in the face of disruption.

MacTaggart goes on to mention three models of innovation:

- *The Legacy Model*—this entails using an institution's historic strengths as a foundation for innovation, as the author puts it: "*emphasizing traditional programs appealing to a traditional clientele of students*."
- *The Hybrid Model*—the author describes this as "*combin[ing] traditional strengths that may be less susceptible to disruption with innovations that enable the institution to reach new student markets in new ways*." Most institutions are pursuing some variant of a hybrid model. The key may be sound, legitimate leadership and clear-eyed vision of institutional capacity and the consequences of change for those constituencies with a large stake in the outcome.
- *The (Near) Total Transformation Model*—Southern New Hampshire University (SNHU) fits between this category and the hybrid model, because while it has a viable physical campus, it has embraced (say the authors) its online 'proprietary service model.' But holding SNHU up as a replicable model in Eastern Oregon seems unrealistic, given the vastly different geography and the state of a highly competitive and monetized market. The authors also warn: *"Boards of these innovative institutions face the challenge of asserting leadership when it comes to ensuring academic quality and responsible levels of student success."*
- Three areas MacTaggart deems critical to success include 1) learning from those institutions that moved too quickly (in the sense of *hastily,* with inadequate forethought) into the online market; 2) acknowledging and addressing the challenges that accompany coming late to the highly competitive market for professional programs; 3) possessing a savvy board and university leadership steeped in knowledge of higher education yet trained not to dismiss the potential for the right kind of change in a fluid environment. To those we would add a fourth: Approach long-term corporate partnerships with caution, transparency, open dialogue, and the humility of a caretaker of a longstanding and enduring public trust, one that has played a critical role in the region's economy.

Last, we urge administration not to wade into unfamiliar waters. Faculty do program and curricular development. Unilaterally exploring options to develop the kinds of professional programs that Pearson is more familiar with fall beyond the bounds of this process as the President and Mr. Vande Pol have characterized it. This is—as far as the campus community has been told—a process to decide whether to partner with an OPM, not a process to hastily slap together curricular offerings that would interest [that OPM] in a partnership. If EOU lacks certain professional programs, administration would do well to engage in open dialogue with faculty as co-equals, to better understand where program development makes sense in a highly competitive, national market, and where partnering and doing what's best for students doesn't require those up-front investments (not to mention the ill will and unintended consequences generated by developing curriculum outside of convention and standard educational practice). One institutional mantra that EOU leadership would do well to keep in mind: *Faculty own the curriculum*. This is not a statement about struggle for control. It is a statement rooted in tradition, common sense, professional specialization, and organizational culture.

In conclusion

If this document seems lengthy, let that reflect the volume of information available on the burgeoning industry of OPMs, and the complexity that requires sustained attention to organize and synthesize. Had we received information on EOU leadership team's efforts to understand these issues and alternative options prior to choosing the OPM model and engaging Pearson, it would have likely been longer—and presumably will when we receive responses to our information requests and complete the write-up of our research findings.

We perform this task not as paid consultants, but in the course of performing our duties as faculty committed to the long-term health of Eastern Oregon University and all of those students, staff, faculty, and regional partners who hopefully see such an outcome, as we do, as imperative.

If rapid online expansion were realized, it would affect the entire institution, not simply those programs that have been targeted for their potential to help the administration achieve its goal. And the effects reach well beyond the more easily quantifiable outcomes. What the University has stood for, what it means to students considering higher education choices, to graduates seeking entry into or upward mobility within their professions, should not be readily discounted simply because it is harder to quantify than quarterly enrollment totals.

To briefly summarize:

- EOU has experienced a decline in enrollment that has affected both on campus and online programs. Part of this decline signals a return to pre-recession (2008) enrollment levels (college enrollments tend to spike when the economy falters and unemployment increases). Leadership has not provided a quantitative comparison of how our enrollment trends compare with broader national trends—a comparison that might help many among faculty better understand the sense of urgency that led to moving forward without initiating a campus-wide dialogue.
- The trends are clear, however, and few would argue against a pressing need to address declining enrollment. The questions prompted by the subject of this report are: Why an OPM? Why Pearson? What other options were examined in sufficient detail to allow for a fair comparison with the administration's preferred OPM/Pearson option? What information is lacking to understand the stakes and weigh opportunities against risks, prior to a Board of Trustees vote in mid-November?
- A survey of faculty conducted by the ad hoc committee, though reaching a sample of only 40, showed a vast majority of respondents consistently opposed to the idea of partnering with Pearson or any private OPM. Results of the subcommittee's compilation and synthesis of faculty members' research on the OPM industry, Pearson, and University efforts to engage private OPMs, warrant skepticism toward the administration's preferred option. The stakes for the institution dictate an ongoing effort to better understand the likely opportunities and risks.

  Yet this increases investment in an enterprise about which faculty already harbor grave doubts. Part of this time investment involves getting faculty on board with a decision already made, one that—irrespective of success or failure—could have far-reaching consequences for their work and workplace, the professional relationships they develop and cultivate with students, and their ability to maintain quality in a rapidly changing, numbers-driven system that rewards standardization and uniformity.

> The ad hoc committee's inability to secure the administration's cooperation in a project that would do what universities do—apply rigorous inquiry to understand and address a pressing problem—runs counter to our expectations that we practice what we teach. The potential for change is real, the margin for error in this fiscal environment as narrow as the range of possible unintended consequences is broad (given the truncated research and timeline). Perhaps the real change we should be discussing is a diminution of shared governance and a default shift to a top-down, corporate decision-making model that faltered seriously in its first major academic decision.

The subcommittee can't help but be concerned about a decision making process of such historic importance, undertaken by a relatively inexperienced leadership team, which failed, intentionally or otherwise, to engage the vast expertise and experience of EOU faculty in research, in higher education, program development, and online delivery. This report represents an outgrowth of that concern, and a plea to honor tradition and confidence in the collective power of shared governance. Rhetoric aside, faculty as a group has shown its unwavering loyalty to this institution and its health and survival as reflected through professional longevity, continued commitment to pedagogical innovation, a relentless drive to serve students who have entrusted us with their educational welfare and professional socialization, and a willingness to undertake this work at salary levels that have long been a distant last among faculty at the seven public four-year institutions in Oregon. We have persevered while administrations came and went. Our institution's legacy is inextricably bound to the working relationships cultivated between faculty and students, cemented in the classroom setting. Decisions made and paths chosen through a flawed and cloistered process that jeopardizes that sacred trust, and minimizes faculty input through shared governance and the wise use of their applicable expertise, may not be disastrous, but they will be suboptimal.

These are uncertain times for EOU. Leadership no longer conducts its important business in public settings. The survey conducted suggests that Faculty as a body are not ready to embrace radical institutional change on faith. At one end of a spectrum is a president sure of himself, confident in his understanding of the complexities of higher education, to move the university forward in a bold and unprecedented way, without feeling the need to consult outside of a handful of individuals (and a very large for-profit corporation). At the other end is a president who is a change agent, but whose vision of change was met with high skepticism by the very people he needed to convince, and summer represents a quiet time to avoid faculty and craft his pitch to the Board of Trustees on a decision already made. Where does the truth lie? Intransigence of leadership renders an answer difficult.

Two questions beg addressing: First, can a small, public, rural university expecting to sustain itself in a climate of change and uncertainty afford such luxuries or arrogance? Second, in the absence of any course correction or indication to suggest otherwise, what new surprise announcements might await upon our return in the Fall?

Appendix A: Request for information from EOU leadership to inform the OPM decision making process and carry out the charge of the Faculty Senate

To: Tom Insko, President, EOU

From: Ad Hoc OPM Committee, EOU Faculty Senate

Date: March 20, 2018

RE: Information Requested on Potential Partnership with Pearson Online Learning

On January 17 and 18, 2018, EOU faculty in each of the colleges were notified by David Vande Pol, EOU's new Director of Regional Outreach and Innovation, that the University was exploring a partnership with a for-profit corporation to provide online program management (OPM) services, including marketing, recruitment, retention, and instructional design as well as other possible add-on services. The primary goals of such a partnership would be to help EOU increase its visibility and online enrollment (from 800 FTE to 5000 by 2029) by entering into a revenue-sharing agreement in which the OPM would make a significant upfront investment in marketing and recruitment. Though the terms of such an agreement have yet to be negotiated, it was reported that typical contracts with OPMs are for ten years, with a minimum of 50% of new student tuition dollars being paid to the corporation depending on the scope of services provided.

According to Mr. Vande Pol, the decision-making team working on this project issued a request for proposals in August, 2017, and received two responses, one from Learning House and one from Pearson Online Learning. After on-site visits to both Learning House and Pearson during fall term 2017, he said, President Insko had decided to move forward with discussions with Pearson, whose representatives would be on campus to meet with programs with existing online majors the following week. Faculty were told that the president would be making a recommendation to the Board of Trustees in May 2018 on whether to pursue the partnership; that the campus was now entering into a "dating" period in which both EOU and Pearson would be doing "due diligence" in advance of their possible "marriage"; and that Mr. Vande Pol was strongly advocating that this relationship was the best path forward for EOU.

Given the significant potential impacts such a partnership would have on all parts of the university, the EOU Faculty Senate formed an ad hoc committee at its next scheduled meeting to help ensure that all campus constituents have access to the information necessary to evaluate the merits of such a partnership and participate meaningfully in the decision-making process. As a first step, the committee solicited questions and information needs via email from faculty, staff, and students. This included providing opportunities for EOU employees concerned about potential retaliation to communicate their questions and concerns anonymously. These questions have been distilled into a set of categories of information requests (below).

As it has been described by the EOU administration to date, the proposed partnership with Pearson would represent a transformational change for EOU, over a very short time span in the life of an 89 year-old institution. Faculty would obviously play a vital role in any such transformation, yet have been afforded at best a delayed and compressed time period to undertake our own due diligence. The Senate in particular seeks more information because the track record of OPMs is mixed, the potential

for change is historic, and faculty have a principal stake in any decision to engage in a long-term contract with a for-profit corporation designed to rapidly expand enrollment. In any case, the following requests for information address the concerns that the committee believes are essential to a thorough evaluation leading to such a momentous decision point.

It is important to recognize that as a body faculty are uniquely suited to add analytic value to this decision making process, and we all have a clear stake in a robust future. A clearer understanding of how we arrived rather suddenly at this particular option and this particular contractor, and how the potential benefits *and* risks of such an organizational transformation were debated, would certainly aid and expedite that process. It is our hope that, though the list of requests may seem considerable, this research has been conducted and most of the responses relatively easy to provide. The committee thus respectfully requests that the president and provost provide materials and information pertaining to the following categories, ideally by Monday, April 2, 2018.

1. Future Vision for EOU
   a. **Rationale**: EOU's mission emphasizes our beautiful setting, small size, and personal attention, as well as partnerships, but not with for-profit entities. Many are concerned that only the most optimistic scenario of a partnership with Pearson has received serious attention.
   b. **Information requests**: General description of the discussions and debates among the decision makers about the effects of an unprecedented nationwide expansion of scale on institutional traditions that students--both online and on campus--tell us they value.
   c. Analyses undertaken of the **organizational and operational challenges** decision makers have identified and anticipated in some future alignment of expanded online and on campus operations
   d. How does this partnership **connect to EOU's recent designation as Oregon's rural university?** To what extent did the decision-making team consider the effect of outsourcing university operations and directing so much revenue outside our region--rather than using this opportunity to create jobs and capacity, and contribute to the regional economy?

2. Decision-Making Process
   a. **A *clear timeline*** of how the University arrived at this current point, moving into the future up to the time of the vote of the Board of Trustees, scheduled for its May meeting. There is a relatively clear consensus among faculty that opportunities for input thus far have been carefully controlled and limited to one-hour, Friday afternoon Q & A sessions. In these last two months before the decision point, can you clearly lay out the formal and informal means by which faculty can not only provide comments, but actively participate in deliberations?
   b. **Involvement of key stakeholders** (faculty, students, staff, community). Four issues we would like to better understand:
      i. Why was an RFP for a proposal of this scope issued for such a short timeline (August 31 issue date; notice of interest date Sept. 11; proposals due Sept. 21), and with no opportunity for faculty involvement?
      ii. Why were key stakeholders excluded from deliberations until well after (at least from what we know about the timeline at this point) a final decision about bringing a contractor to campus had been made?
      iii. Without the involvement of key stakeholders in the decision making process, how have the decision makers anticipated their response or the impacts a public/private partnership might have? For instance, all *students*--past, present and future--have a stake in the University's

reputation as the credential affects their marketability in the professional workplace. *Administrative staff*ing levels may be adjusted downward if for instance Pearson assumes more recruiting or marketing responsibilities. *Regional centers*--a unique feature of EOU's system--may see major transformations if the contractor assumes more in-state recruiting duties. *Faculty* clearly have a stake, both those academic programs with online majors, and those with little inclination or ability to move with integrity into the online environment. Given the past practice of including a diverse team of stakeholders in reviewing partnerships with other outside contractors (Sodexo, Barnes and Noble, etc.), what was the rationale for such a limited team in this case? What objections would the university have to engaging the Faculty Senate in nominating faculty from each college to join the decision-making team and participate formally in deliberations--especially given the potentially significant impacts on academics?

iv. Given Mr. Vande Pol's prior employment negotiating such contracts for Pearson, what steps were taken to ensure the RFP process was fair and unbiased; to address potential ethical conflicts; and to address the public appearance of impropriety?

c. The contract

i. Who will negotiate on the University's behalf?
ii. What are the key elements of the contract (e.g., payment arrangements, investment on contractor's behalf, time whether components--tutoring, instructional design, student 'coaching', marketing--are optional or bundled)?
iii. How will faculty, staff and students have opportunities to provide substantive input during the contract negotiation period?
iv. How will draft versions of the contract be shared with the campus community for necessary feedback and input?
v. How much flexibility exists in negotiating a contract and the bundling of services?
vi. What would constitute a breach of contract by EOU? By Pearson?
vii. What kinds of escape clauses are typical in such contracts?

3. Analyses conducted in the process of narrowing options and contractors
   a. Information **and research conducted by decision makers** and used in making the determination to move forward with an OPM, Pearson
   b. Research conducted on each of the **other viable non-OPM options** studied by the decision making team for addressing recruitment, enrollment and retention issues
   c. Analytic **comparisons with a 'no-action' option**

4. Analyses performed on anticipated impacts (either by the decision making team or via secondary data from other comparator institutions currently under contract with an OPM)

a. Financial

i. How are expansion costs to be borne?
ii. Would the contractor have recruiting rights inside the state of Oregon (creating a scenario where the University was sharing tuition revenue for students who would have likely been recruited by regional center staff)?
iii. How did the decision making team arrive at the online scale expansion from 800 to 5000 FTE over a 10-year period? When this goal was set for the strategic plan, it was described as arbitrary to some extent. What analysis has gone into the feasibility of actually achieving this

number? What analysis has gone into the potential impacts and institutional capacity to serve approximately 8000 - 12,000 additional individual students (part- and full-time) online?

iv. Would the contractor also receive a percentage of state reimbursement for graduation rates?

v. Copies of any financial modeling that has been done to determine how instructional, student support, and other institutional costs would be covered under a revenue-sharing agreement in which a sizable portion of tuition dollars would be paid out to an OPM

b. Academic

i. Anticipated or potential changes to ratio of regular/tenure-line faculty to adjunct

ii. Anticipated or potential impacts to on-campus programs and enrollments

iii. Does the contractor have a record of success working with universities that have a strong liberal arts component?

iv. What evidence does the contractor have of working successfully with academically underprepared undergraduates, students with a wide range of learning disabilities, English language learners, and undergraduates meeting EOU's admissions threshold?

v. What qualifications do members of the decision-making team have for evaluating Pearson's instructional design services? Is there anyone on the decision-making team who has ever taught an online class? If so, how recently and in what disciplines?

vi. What analysis has been done of Pearson's retention and student support services? What evidence has been provided of their quality and/or value? What would EOU be paying for, in other words, and what qualifications do Pearson's employees have to do this work? Which services would duplicate what is currently done entirely in-house?

vii. Planned strategies for investing in on-campus programs with revenue generated from online operations. Has any modeling been done?

viii. Have plans for masters-level programs been considered? If so, which ones?

ix. Potential impacts on on-campus advising services and professional staff

x. Potential impacts on ancillary services (TRiO, DSO, tutoring services)

xi. Potential impacts on adjunct instructor recruitment, vetting, and retention.

xii. Potential impacts on adjunct compensation, including impacts on class caps, which currently help adjuncts determine whether it's financially worth it to teach an online course.

xiii. What student data would Pearson have access to?

xiv. What faculty data would Pearson have access to?

xv. What kinds of learning analytics would a contract for retention services be based on?

xvi. Pearson would appear to have an incentive to recruit students better suited to the on-campus environment to take classes online. How would that be mitigated?

xvii. Potential impacts on service course needs, including increased demands for developmental math, writing, and general education coursework online.

xviii. Potential impacts on undergraduate tutoring services

c. Institutional

i. What *evidence* exists to support the premise that rapid expansion in online operations will benefit on campus students and the regional mission?

ii. EOU possesses considerable organizational capital represented by regional centers (a public investment going back three decades)--what studies and discussions have transpired re: how a proposed OPM partnership might affect these valuable resources?

iii. Campus staffing levels--how affected by proposed suite of services contractor offers (tutoring, support/coaching, marketing/recruiting, HR)?

iv. Growth management--500% over 10 years--What plans have been made to manage an unprecedented rapid expansion?
v. Institutional reputation--Has the decision making team thought through the possible change to a mostly online University, and how that might affect recruiting in the region and state, and the value of an EOU degree on the market?

5. Concerns about Pearson's track record
   a. **Which comparator institutions contracting with OPMs were contacted**? Which that had contracted with Pearson?
   b. What has EOU learned about **Pearson's past practices** and unsuccessful partnerships with universities?
   c. Has EOU confirmed some of the **premises underlying the promise of growth** through expansion online with an OPM (e.g., that there are 36 million people in the US with college credit and possible interest in undergraduate degree completion)?
   d. How does Pearson engage in **partnerships with smaller institutions** that lack the visibility or marketing clout of an Arizona State? In other words, what is EOU's marketable niche?
   e. Has EOU requested any **evidence from Pearson of student satisfaction**? Faculty satisfaction?
   f. Pearson's sales team acknowledged that the **retention data** they provided during their presentation did not come from comparator institutions or comparable student populations. What evidence has EOU requested of Pearson's success recruiting and retaining undergraduate students meeting EOU's admissions profile?
   g. Pearson and other OPMs have actively re-positioned themselves to step into the public higher education market following increased Congressional scrutiny of predatory recruitment practices in the for-profit sector. What evidence has Pearson provided that they do not use the same predatory recruitment practices? **What safeguards have they put in place, and what level of oversight will EOU have**?
   h. What is **Pearson's position on gainful employment legislation**? What practices have they put in place to minimize the risk to partner institutions?

Appendix B: Bibliography of source material concerning OPMs, Pearson, and public/private partnership

ONLINE PROGRAM MANAGEMENT ISSUES (GENERAL)

Kolowich, Steve. "What You Need to Know about Companies that Run Online Programs for Colleges." *Chronicle of Higher Education*, 30 Sept. 2014, https://www.chronicle.com/article/What-You-Need-to-Know-About/149075

"The biggest cautionary tale involving an online enabler is that of Cal State Online, the California State University system's ambitious plan to build a centralized online campus for its 23 universities. The system, desperate to strengthen its online presence, struck a deal with Pearson in 2012 to help get Cal State Online up and running as swiftly as possible. [. . .]

The two parties anticipated that in 2013, the first full year of the contract, nearly 17,000 students would enroll in Cal State Online programs.

They didn't come close. By June 2013, Cal State Online had two programs running and only 138 full-time enrollments, according to university documents compiled by the blog e-Literate."

Matters, Margaret. "The Private Side of Public Higher Education." The Century Foundation, 7 Aug. 2017, https://tcf.org/content/report/private-side-public-higher-education/

"The revenue-sharing model of fee structures utilized by OPMs such as AP, Pearson, Wiley, and 2U is *particularly problematic because it establishes clear financial incentives for OPMs to make online programs larger and more expensive for students, while simultaneously reducing expenditures*. In other words, these companies have a financial interest in pressing public institutions to enroll as many students as possible for as high a price as possible, *regardless of how well students are prepared for the specific educational program or the quality of the program itself*. And, since many of these OPMs play a significant role in developing and delivering these programs, the companies also have an incentive and the ability to cut production costs and, potentially, quality" (italics added).

"If institutions—public and nonprofit alike—are not careful to monitor these contractors, students and taxpayers who thought they were working with a relatively safe public institution may find that they have been taken advantage of by a for-profit company. More so than other contracting arrangements, OPMs represent the outsourcing of the core educational mission of public institutions of higher education, threatening the consumer-minded focus that results from the public control of schools."

Newton, Derek. "How Companies Profit Off Education at Nonprofit Schools." *The Atlantic*, 7 June 2016, https://www.theatlantic.com/education/archive/2016/06/for-profit-companies-nonprofit-colleges/485930/

"Democrats have *filed bills in U.S. Senate to limit the use of federal funds for marketing and recruitment at all higher-education institutions*—a policy change that would almost certainly apply to the marketing and recruiting tactics of nonprofit and public schools. And the OPM and online college markets may face pushes for reform from other places as well.

On the inside, Katzman sees a new OPM model taking hold. His new company, Noodle Partners, is an OPM that uses *flat fees-for-service instead of tuition-sharing*. "For a fee, we help schools assemble the tools, services, and tech to run great programs without taking money from students—it's more flexible and transparent and wildly less expensive," Katzman argued. "The only real question is, how quickly will the old revenue-sharing model die?"

From the outside, Shireman thinks public pressure and school leaders will bring changes to the tuition-sharing practice. "The people who ultimately control nonprofit and public institutions—trustees—are not getting rich off of the predatory practices," he said, "so they will not be thrilled to discover that *poor people are being taken advantage of*—once they learn about it."

Lederman, Doug. "Setting Limits on Academic Outsourcing." *Inside Higher Ed*, 15 Jan. 2018. https://www.insidehighered.com/digital-learning/article/2018/01/15/arbitrator-sides-eastern-michigan-dispute-union-over-online

An arbitration decision at Eastern Michigan State ruled for the OPM on a case involving marketing and advertising but also indicated that the program curriculum is a boundary across which the OPM cannot step.

Noodle Partners, "Three Problems with OPMs." Noodle Partners. N.d. https://www.noodle-partners.com/approach/vs-traditional-opm/opm-problems/?hsCtaTracking=81eda100-7920-49cc-a9d4-aa5f879b8918%7C05f69024-f8a6-4e1e-874d-2c9e77aa1d47

A competitor that has shifted to an a la carte, fee for service rather than a revenue-sharing model like Pearson's argues that there are three main problems with OPMs: expense, rigidity, and risk.

"A traditional OPM invests its marketing dollars ***where it can make the greatest return; in other words, on the programs that are least selective and most expensive***. If it discovers that it can steer a student elsewhere, with less expense or more revenue, your enrollment will suffer. Given that online programs are increasingly core to your mission, working with an OPM means adding existential risk."

Johnson, Sydney. "With $14M Fundraise, Noodle Wants Colleges to 'Pick and Choose' How They Build Online Programs." *Edsurge*, 1 Dec. 2017. https://www.edsurge.com/news/2017-12-01-with-14m-fundraise-noodle-wants-colleges-to-pick-and-choose-how-they-build-online-programs

Briefly describes how Noodle and other "a la carte," fee-for-service companies differ from traditional OPMs, which were premised on partner schools lacking existing online offerings and infrastructure.

"The flexible option to purchase instructional design, marketing and student support services was one of the reasons why Tulane University chose Noodle Partners, even after having built some online programs in-house. 'We can elect to use those services or not, and that was attractive to be able to **decide internally** as we scale,' says Jamie Northrup, senior associate vice president of strategy at Tulane."

Katzman, John. "The Spending War on Student Recruitment." *Inside Higher Ed*. 18 April 2016. https://www.insidehighered.com/views/2016/04/18/too-much-being-spent-higher-education-marketing-assault-essay

Opinion piece by Noodle founder John Katzman identifying ethical problems with OPM model and competition for online students and describing possible legislative fixes.

"To populate their online programs and appear more selective, colleges hire shady companies to generate clicks and inquiries, then drive those inquiries to call centers using sophisticated scoring algorithms. And to lower risk, many are offering marketing and management firms direct shares of their online tuition revenue. [. . .] At a time when everyone should be committed to lowering the cost of postsecondary education, *this seems an unconscionable use of federal student loan and student tuition dollars*. . . ."

"To get this marketing explosion in check, a statutory or regulatory fix may be needed. For instance, *Congress could limit subsidized student loans to the cost of the education itself, as the former Senator Tom Harkin once proposed, avoiding subsidies for recruiting expenses and profit.* Or the Department of Education could limit outside providers from sharing tuition revenue if marketing spend exceeds 5 percent of tuition (of course, this limit would have to somehow be extended to universities' in-house programs as well)."

Craig, Ryan. *College Disrupted: The Great Unbunding of Higher Education*. St. Martins, 2015.

Advocate for privatizing public higher education lays out blue print and rationale for a series of "unbundling" and monetization efforts.

Kennedy and Company. "Trends in online education." April 2017. https://kennedyandcompany.com/wp-content/uploads/2017/04/OnlineTrends-KCO-April2017.pdf.

Slide presentation by for-profit higher education consulting firm briefly describes reasons that corporations like Pearson are turning to public institutions of higher education in wake of greater scrutiny and regulation of the for-profit higher education sector; goes on to compare benefits and disadvantages of OPMs to DIY and hybrid models.

PEARSON CORPORATION (BUSINESS PRACTICES, REPUTATION, TRACK RECORD, LEGAL AND FINANCIAL ISSUES)

Watters, Audrey. "Pearson: A Timeline." Hack Education. 20 June 2017. http://network.hackeducation.com/2017/06/20/pearson

Click on the watermarked image near the top of the page.

Pearson plc. 2016. Higher Education Investor Day (Report to Investors). May 17. https://www.pearson.com/content/dam/one-dot-com/one-dot-com/global/standalone/investor-day/Investor-Day-Presentation_FINAL_WEB.pdf

This report describes for investors the performance of Pearson for 2016. Report predicts a quadrupling of OPM industry value by 2020.

Faculty Association of Ocean County College (NJ): http://faocc.org/plaintruth/#pearson

Documents how much Ocean County, one Pearson "partner institution" comparable to EOU in terms of admissions thresholds, paid to Pearson over a several year period. Pearson promised to grow Ocean County's enrollment from 7,000 to 21,000 in a five-year period. At the end of the five years, Ocean County's enrollment was 8,100; it's unclear how much of that can be attributed to Pearson.

Jaschik, Scott. "U of Florida Cancels Huge Pearson Contract." *Inside Higher Ed*, 22 Oct. 2015. https://www.insidehighered.com/quicktakes/2015/10/22/u-florida-cancels-huge-pearson-contract

"The University of Florida on Wednesday announced that it is terminating a huge 11-year deal for Pearson to build and manage the university's online programs. . . . The email says *the university will be better able to serve online students by including them in general university operations and obtaining some new specialized help for some areas, such as marketing*."

Simon, Stephanie. "No Profit Left Behind." *Politico*, 10 Feb. 2015. https://www.politico.com/story/2015/02/pearson-education-115026

". . . the company has ***routinely failed to hit its contractual targets for student enrollment***. The higher those targets are, the more lucrative the deal appears to the university — and the more willing administrators may be to promise Pearson a cut of up to 60 percent of student tuition. If Pearson fails to bring in the promised number of students — and David Daniels, a managing director, acknowledged the targets are often "very ambitious" — it rarely gets sanctioned.

At Rutgers University in New Jersey, for instance, Pearson is in charge of recruiting students to online degree programs and counseling them so they stay engaged and enrolled. Yet if Pearson falls short of its recruitment or retention goals, its share of student tuition isn't reduced. On the contrary, the contract allows Pearson's cut of tuition to be increased in the face of disappointing numbers, keeping the revenue flowing. Last year, enrollment was about 200 students short of the minimum stipulated in the contract and nearly 1,000 students below the goal.

Contractual language also ensures *Pearson collects its full cut if a student drops out mid-semester or fails to pay the tuition bill.*"

Straumsheim, Carl. "Faculty Push Back on Online Deal." *Inside Higher Ed*, 11 Oct. 2013, https://www.insidehighered.com/news/2013/10/11/rutgers-u-graduate-school-faculty-vote-block-pearson-partnership

"Graduate faculty at Rutgers University at New Brunswick carve a section of the university out of a contract with Pearson, but administrators say the online program partnership will continue on track." … "[the] dean of the Graduate School, said the university accepts the vote, but that degree programs not managed by the Graduate School will still be free to participate."

Hill, Phil. "Cal State Online: Public Records Shed Light on What Happened." *e-Literate*, 14 Aug., 2014. https://mfeldstein.com/cal-state-online-public-records-shed-light/

"CSO was only able to enroll 130 full-time equivalent students (FTES) in CY2013 despite starting from pre-existing campus-based online programs and despite minimum thresholds of 16,700 FTES in the Pearson contract"

"In early summer Pearson requested changes in the CSU/Pearson contract; wanted to increase CSU costs for services. ***The quality of the marketing provided by Pearson was not adequate***. There were multiple meetings between Pearson and Cal State Online to resolve concerns resulting in changes to the contract.

The ***new marketing firm for Cal State Online is DENT; replaces Pearson;*** started in July 2013. So far there is a high level of satisfaction."

Cal State Online FAQs re: renegotiated deal with Pearson: http://www.csusm.edu/senate/quicklinks/PDFs/CalStateOnlineFAQ_Nov%202013.pdf

Provides very brief answers to a variety of questions about what system universities under the 'online umbrella' can expect. It appears that the centralized board will serve coordinating and informational functions, specific arrangements and adoption of Pearson options will be campus-specific.

Sidney Fussell. 2018. "Pearson embedded a 'social psychological' experiment in students' educational software." *Gizmodo.com*. 18 April. https://gizmodo.com/pearson-embedded-a-social-psychological-experiment-in-s-1825367784

Benjamin Herold. 2018. "Pearson tested 'social psychological' messaging in learning software, with mixed results." *Education Week*. 17 April. http://blogs.edweek.org/edweek/DigitalEducation/2018/04/pearson_growth_mindset_software.html

Pearson employed a large (9000 students, 165 institutions) quasi-experimental design to study 'mindset-based interventions' by varying problem-level messaging in its online software (MyLab Programming), finding that some versions of text seemed to increase students' persistence in completing an assignment. Pearson did not seek consent in what was characterized as 'low-level psychological experimentation'. Educators seemed concerned that this was happening without students' consent, and that it appeared less focused on learning than on monetizing social psychological insights into product development and, ultimately one presumes, learning.

Anya Kamenetz. "Pearson's quest to cover the planet in company-run schools. 12 Apr, 2016. *Wired*. https://www.wired.com/2016/04/apec-schools/.

Discusses Pearson's efforts to partner world-wide with other for-profit companies to create private primary and secondary schools as part of its 'Global South Strategy' to serve the world's poorest countries and populations.

Jaschik, Scott. "Protest of Outsourced Review of Teacher Ed Students." *Inside Higher Ed*., 7 May 2012. https://www.insidehighered.com/quicktakes/2012/05/07/protest-outsourced-review-teacher-ed-students

Teacher Education Students at the University of Massachusetts are declining to participate in a pilot study to simplify the process for evaluating teaching proficiency. The study is a joint venture of Pearson and Stanford University, being conducted in many universities. Dissenting students objected to being evaluated by some video samples of teaching and a lengthy take home exam, submitted to Pearson personnel who had no other knowledge or interaction with the students.

Rory Gallivan. 2017. "Pearson loss widens; to cut dividend in 2017." *MarketWatch*, 24 Feb. https://www.marketwatch.com/story/pearson-loss-widens-to-cut-dividend-in-2017-2017-02-24

Pearson has its headquarters in the United Kingdom, where it has exercised broad influence on the British educational system. In 2016 Pearson reported a substantial loss of revenue.

Deborah Greenblatt and Kate O'Hara. 2015. Buyer beware: Lessons learned from edTPA implementation in New York State. *The NEA Higher Education Journal* (Summer):57-67.

Pearson's recent incursion into teacher training (edTPA, Teacher Performance Assessment Portfolio) is impersonal, with arguably subjective assessments for achieving certification. Although it emphasizes the most readily measurable variables, which may not be the most important to professional judgment. Nor does it treat all classroom settings equally or accommodate the complexities of a more diverse classroom. Teacher trainers interviewed considered the instrument a poor predictor of quality and performance. There is an extensive list of references. http://www.nea.org/assets/docs/h-Greenblatt_O.Hara_SF.pdf

A series of links about an OPM at Maryville University in Missouri:

- (indication of) enrollment numbers: https://www.maryville.edu/mpress/maryville-university-sets-fall-enrollment-records/ (the growth was primarily in online Masters (*not* undergraduate) programs)
- Overview of Maryville: https://www.maryville.edu/about/maryville-at-a-glance/
- Example of Maryville online advertising campaign https://www.maryville.edu/mpress/maryville-pearson-launch-national-ad-campaign-highlighting-online-degree-attainment/

Litigation involving Pearson (cases accessible from this site) https://dockets.justia.com/search?query=Pearson+Education+Inc.

Identifies court cases involving Pearson, as both plaintiff (often in lawsuits enjoining other OPMs) and defendant. Type in 'Pearson' and 'Education' in the home page search field. Note as well there are numerous pages with basic information on litigation where Pearson and its legal team is either a target or initiator of legal action.

Pearson's track record on testing is assessed. https://www.washingtonpost.com/news/answer-sheet/wp/2016/04/21/pearsons-history-of-testing-problems-a-list/?utm_term=.081ccc419ebb

Harber, Jonathan. *Education Datapalooza*, 2012. https://www.youtube.com/watch?v=xgV9DssLsXg

Harber is CEO of Pearson's K-12 operation. He discusses in this video what he perceives as a transformation from textbooks (which Pearson mass produces) to data. Teachers can not only search and find content online, but 'content can find them.' Mr. Harber is less forthcoming about how decisions about what content is 'easy' to find are made, and by whom.

Singer, Alan. "Pearson Can Run But It Cannot Hide." *Huffington Post*. 15 Dec. 2014. https://www.huffingtonpost.com/alan-singer/pearson-education-can-run_b_6327566.html

Blog post by Hofstra University Professor of Education Alan Singer on recent problems in Pearson's dealings in K-12.

Singer, Alan, and Eustace Thompson. "Pearson and the Neoliberal Assault on Public Education." 17 May, 2017. *unite4education.org*. https://www.unite4education.org/resources/unclassified/pearson-and-the-neo-liberal-global-assault-on-public-education/

More in-depth essay by Hofstra University Education professors on Pearson's practices, ethics, reputation, and effects on public education globally. Abstract: "Pearson, the British-based mega-publisher, testing company, and Third World edu-entrepreneur, has inordinate influence over education policy around the world, yet it also has serious vulnerabilities. Corporate over-reach generates inefficacies that alienate its customer base and contributed to 'blowback' campaigns against the company."

Ravitch, Diane. "Pearson Cares. Really." Diane Ravitch's Blog. 11 July 2016. https://dianeravitch.net/2016/07/11/pearson-cares-really/

Blog post from NYU Professor Diane Ravitch, who has written extensively on corporatization and privatization in education. She is commenting on an interview with Pearson CEO John Fallon, and the contradictions of nominally promoting greater equity while endorsing standardized testing, which Ravitch describes as 'baking in' inequities.

Strauss, Valerie. "Pearson's History of Testing Problems: A List." *Washington Post.* 21 April 2016, https://www.washingtonpost.com/news/answer-sheet/wp/2016/04/21/pearsons-history-of-testing-problems-a-list/?utm_term=.1527894852db

65 documented instances of problems, dating back to 1998, with Pearson's standardized testing, compiled by the non-profit organization, National Center for Fair and Open Testing (FairTest).

Stanford, Jason. "Mute the Messenger: When Dr. Walter Stroup Showed that Texas' Standardized Testing Regime is Flawed, the Testing Company [Pearson] Struck Back." *Texas Observer*, 3 Sept. 2014. https://www.texasobserver.org/walter-stroup-standardized-testing-pearson/

U of Texas Associate Professor Walter Stroup laid out the evidence/research-based issues with Pearson's standardized testing in a state legislative hearing. Pearson responded after the hearing by attempting to discredit Stroup's research (which showed that standardized testing mostly measured test-taking vs learning) by launching a 'whisper campaign' and casting doubt because of a minor error on a spreadsheet. Pearson has donated over $1 million to UT's Education College. Stroup's subsequent promotion review in the college became a controversial issue.

Strauss, Valerie. "The Case against Pearson—and its Response." *Washington Post*. 21 April 2016. https://www.washingtonpost.com/news/answer-sheet/wp/2016/04/21/the-case-against-pearson-and-its-response/?utm_term=.c00c5c7c5b64

Davis, Michelle, and Michelle Molnar. "Educators Carefully Watch Pearson as it Moves to Sell of K-12 Curriculum Business." *Education Week*. 3 March 2018. https://www.edweek.org/ew/articles/2018/03/07/educators-carefully-watch-pearson-as-it-moves.html?utm_source=OrEdNews+%7C+Oregon%27s+Education+News+Connection&utm_campaign=78a3a168b7-+&utm_medium=email&utm_term=0_4cbba54a4b-78a3a168b7-158143773

Article discusses Pearson's move to sell curriculum division in the US and focus on its lucrative standardized testing and assessment business in K-12 education.

Sweeney, Mark. "Education Publisher Pearson Reports Biggest Loss in its History." *Guardian*. 24 Feb. 2017. https://www.theguardian.com/business/2017/feb/24/education-publisher-pearson-loss-us-penguin-random-house

Describes losses Pearson suffered in the billions in 2016, owing largely to flagging textbook sales in the US. CEO John Fallon points to the digital changes that are transforming education, and that are at the forefront of Pearson's global business model.

ACADEMIC QUALITY AND INTEGRITY IN ONLINE LEARNING ENVIRONMENTS

Poritz and Rees (May-June 2017) "Academic Governance on the Virtual Shop Floor." *Academe* (American Association of University Professors): https://www.aaup.org/article/academic-governance-virtual-shop-floor#.Wh-FlVWnHIU

Educational technology now makes it possible for colleges and universities to "unbundle" the functions of professors. Whether by outsourcing lectures to faculty members from elsewhere running their own massive open online courses (MOOCs) or turning over essay grading to computer programs sold by Silicon Valley start-ups, administrators have access to technology that threatens today's faculty with obsolescence.

The most obvious sign of this kind of top-down administration is the imposition of mandatory LMS usage, usually at community colleges where faculty appointments are often too precarious or faculty members themselves are too busy to resist.

Computer programs that read and grade student essays have become increasingly sophisticated in recent years. Related technologies have also become a common way for students to do math homework, under which the practice of "drill and kill" has been rebranded as "personalized learning." While all such programs continue to have many problems, the prospect of using even imperfect technology to replace more expensive faculty labor has become increasingly likely.

Any educational technology that can monitor student progress could easily be modified to monitor faculty effort as well.

The potential threat such monitoring poses to academic freedom is clear.

Straumsheim (2016) "Are You Being Watched?" *Inside Higher Education*: https://www.insidehighered.com/news/2016/03/15/our-lady-lake-university-faculty-raise-questions-about-learning-management-system

"Without notifying the faculty or asking for permission, professors say, the university has given administrators the ability to add themselves to courses in Blackboard Learn, the university's learning management system. The faculty members only discovered the monitoring after a professor noticed the new names on the course roster while composing an email. Word then spread to other faculty members, who noticed the same in their own courses."

"One faculty member, who is on the tenure track and spoke on condition of anonymity, expressed concern that administrators would read emails intended for students in the class -- schedule changes, canceled class sessions and so on -- without the context of what goes on in the classroom. The university, however, said it did tell the faculty, and that the practice is strictly for administrative purposes, calling it a "a necessary cost of using enterprisewide technology systems.""

Alec MacGillis. 2018. How Liberty University built a billion-dollar empire online. *Propublica*, April 17. Accessed: https://www.nytimes.com/2018/04/17/magazine/how-liberty-university-built-a-billion-dollar-empire-online.html?hp&action=click&pgtype=Homepage&clickSource=story-heading&module=second-column-region&region=top-news&WT.nav=top-news.

"The real driver of growth at Liberty, it turns out, is not the students who attend classes in Lynchburg but the far greater number of students who are paying for credentials and classes that are delivered remotely, as many as 95,000 in a given year. By 2015, Liberty had quietly become the second-largest provider of online education in the United States, according to The Chronicle of Higher Education, its student population surpassed only by that of University of Phoenix. Liberty [unlike Phoenix] is classified as a nonprofit, which means it faces less regulatory scrutiny even as it enjoys greater access to various federal handouts."

"By 2016, Liberty's net assets had crossed the $1.6 billion mark, up more than tenfold from a decade earlier. Thanks to its low spending on instruction, net income was an astonishing $215 million on nearly $1 billion in revenue, according to its tax filing."

"Chris Gaumer taught English courses both on campus and online at Liberty after getting his bachelor's degree on campus in 2006. The difference between the two forms of teaching was startling, he told me. As an online instructor, he said, he was not expected to engage in the delivery of any actual educational content. That was all prepared separately by L.U.O.'s team of course designers and editors, who assemble curriculums and videotaped lectures by other Liberty professors."

"Gaumer, who now works at Randolph College in Lynchburg, said the steep drop-off in quality from the traditional college to the online courses was both openly acknowledged among Liberty faculty and not fully reckoned with. The reason was plain, he said: Everyone knew that L.U.O. was subsidizing the physical university. "The motivation behind the growth seems to be almost entirely economic, because it's not as if the education is getting any better."

American Association of University Professors. 2014. "Academic Freedom and Electronic Communications." https://www.aaup.org/report/academic-freedom-and-electronic-communications-2014

Describes AAUP recommendations related to academic freedom, intellectual property, and privacy in online learning environments as well as in electronic communications and situations in which faculty and student data may be accessible by outside contractors. Ex. "Online teaching platforms and learning-management systems may permit faculty members to learn whether students in a class did their work and how long they spent on certain assignments. Conversely, however, a college or university administration could use these systems to determine whether faculty members were logging into the service "enough," spending "adequate" time on certain activities, and the like. *Such monitoring should not be permitted without the explicit and voluntary permission of the instructor involved*."

PERCEPTIONS OF POSSIBLE ETHICAL ISSUES AND/OR CONFLICTS OF INTEREST

Some source material describing other OPMs and similar for-profit online partnerships in higher education that preceded them:

- Concerns a lawsuit filed by the California Attorney General in connection with this contract: https://www.washingtonpost.com/news/grade-point/wp/2017/11/29/california-attorney-general-sues-for-profit-bridgepoint-education/?utm_term=.8f349ebd51cc
- Ashford University press release (2009): "Bridgepoint Education's Ashford University Forms Articulation Agreement with the Colorado Community College System". Bridgepoint Education was the corporate entity behind Ashford University.
- U.S. Senate Committee on Health, Education, Labor, and Pensions report on Ashford/ Bridgepoint's predatory recruting practices (2012): https://www.help.senate.gov/imo/media/for_profit_report/PartII/Bridgepoint.pdf
- Ashford University/Bridgepoint press release (2010) describing deal with Pearson's LMS: https://www.ashford.edu/about/media-room/press-releases/bridgepoints-educations-ashford-university-makes-successful-transition-to-the-pearson-ecollege-online-learning-platform

Tim Matthews and David Vande Pol. 2015. Tackling the next phase of online program growth: 5 step approach. May 24, Pearson Learning Services.

11-slide presentation of Pearson Embanet's strategy and generic market research geared toward opportunities in online program development. Dr. Matthews is on the faculty of Eastern Kentucky University; Mr. Vande Pol was an executive on the Pearson Embanet Business staff (slide 11).

Blume, Howard, Victoria Kim, and James Rainey. "FBI seizes LAUSD records related to troubled iPad program." *LA Times.* 02 Dec. 2014. http://www.latimes.com/local/education/la-me-lausd-ipads-20141203-story.html#page=1

"Records showed that Deasy had meetings with top Apple and Pearson executives before the bidding process. The draft of a five-year district technology plan mentioned only those companies and no other vendors. Similarly, a pilot program at 13 campuses was designed to include only the iPad. Aquino worked for a Pearson affiliate before joining the district, but he has insisted that he obtained clearance from district legal staff before participating in discussions with his former employer."

EOU BRANDING EFFORTS

East Oregonian. 2018. Our view: EOU a rural rescue. March 14. http://www.eastoregonian.com/eo/editorials/20180313/our-view-eou-a-rural-rescue

Describes an effort undertaken to attain legislative designation as 'Oregon's Rural University' as EOU considers quintupling, through Pearson-aided nationwide recruiting strategy, its online enrollment

Sutton, Alyssa. 2018. Eastern soon to be Oregon's official 'rural university. *Observer*. March 2. http://www.lagrandeobserver.com/news/6054155-151/eastern-soon-to-be-oregons-official-rural-university

Similarly describes rural university designation to local community, including the following claim from Senator Hansell: "Eastern Oregon University has been serving rural Oregon since its founding in 1929," Senator Bill Hansell (R-Athena) said in a press release. "Giving EOU this official designation will allow the university to appeal to potential students across the nation and leverage federal funds. Is there any part of the Pearson partnership or national recruitment effort focused specifically on "rural" students? How would EOU retain its "rural" designation for funding or political purposes if a wide majority of students online did not fit this profile?

House Bill Designating EOU as Oregon's Rural University:
https://olis.leg.state.or.us/liz/2018R1/Downloads/MeasureDocument/HB4153/Introduced.

MEDIA COVERAGE AND PUBLIC COMMENTARY ON PEARSON PROPOSAL

Alyssa Sutton. "EOU postpones bringing on OPM." 30 May 2018. http://www.lagrandeobserver.com/home/6275854-151/eou-postpones-bringing-on-opm

Discussion of decision by EOU to postpone Board of Trustee vote on OPM until Nov 15. Sources include both administrators and faculty.

EOU DOCUMENTS AND MATERIALS RELATED TO OPM PROPOSAL

EOU Request for Proposals for OPM Services, 31 Aug. 2017.
https://secure.orpu.org/bid/system/attachments/6166/original/RFP%202016-17-09%20Online%20Program%20Management.pdf?1504213178

EOU OPM website: https://www.eou.edu/provost/opm/

EOU Faculty Senate Request for Information on Pearson OPM Proposal. 20 March 2018.
https://docs.google.com/document/d/1YSuU7vvAbQdh62d1fffJ2iJzHt4vgjlFm5t0_rCohPc/edit?usp=sharing

Materials Provided by EOU Administration in Response to Senate Info Request: None to date

MATERIALS PROVIDED TO EOU FROM PEARSON

PEARSON CONTRACTS WITH OTHER UNIVERSITIES

Rutgers University:
http://senate.rutgers.edu/PearsonEcollegeContract.pdf

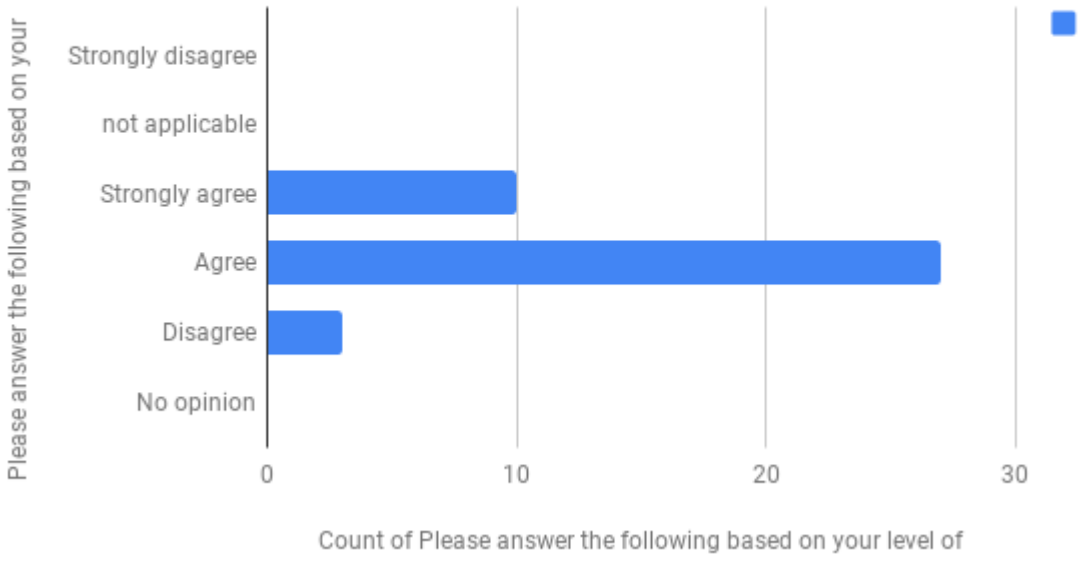
Washington State:
http://production.tcf.org.s3.amazonaws.com/assets/OPM_contracts/WashingtonStateUniversity_Pearson.pdf

Links still to be added/sorted:

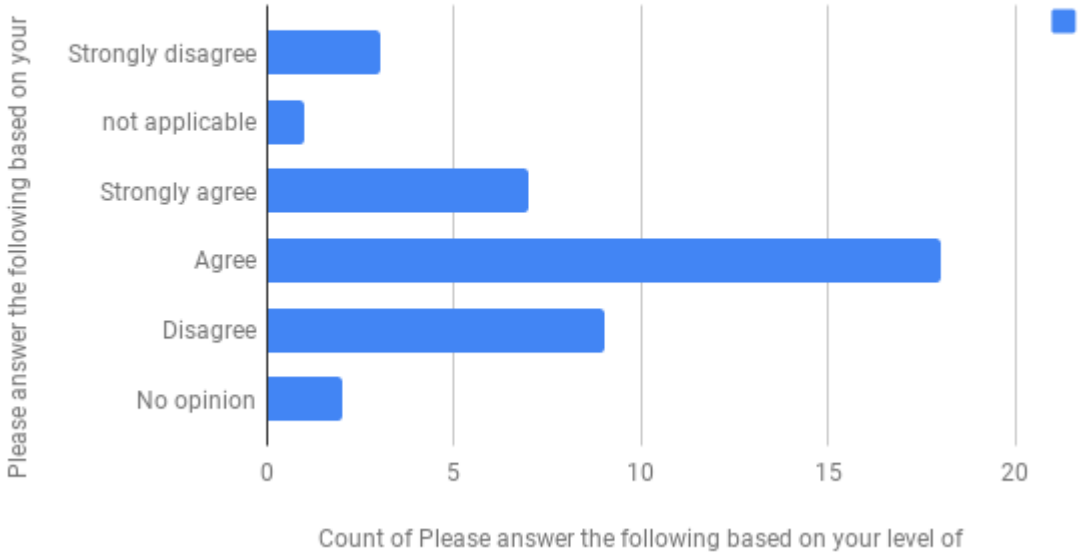
- https://www.chronicle.com/article/Faculty-Members-at-One-More/241788
- https://www.republicreport.org/wp-content/uploads/2016/06/Halperin-Friends-In-High-Places.pdf
- https://www.huffingtonpost.com/davidhalperin/corruption-threatens-obam_b_4450048.html
- http://www.prweb.com/releases/online-learning/learning-management/prweb8375959.htm
- https://www.sandiegoreader.com/news/2013/may/08/citylights1-profit-college-recruit-homeless/#
- https://www.insidehighered.com/news/2013/06/20/new-online-learning-portal-profit-veteran
- https://www.aft.org/periodical/aft-campus/summer-2015/power-pearson-threatens-academic-integrity
- https://www.insidehighered.com/news/2015/10/23/less-two-years-after-launch-u-florida-reboots-online-education-initiative
- https://www.chronicle.com/article/There-s-a-Reason-the/239954
- http://www.clintonherald.com/news/local_news/how-did-ashford-go-from-boom-to-bust/article_4a1cbf22-6aab-5a34-aca8-a3b433b162a5.html
- https://www.insidehighered.com/news/2012/10/17/pearson-buys-embanetcompass-expand-its-online-learning-business
- https://www.insidehighered.com/news/2013/06/28/after-pearson-deal-leaders-leaving-embanet
- https://www.insidehighered.com/news/2017/08/08/report-influence-online-learning-companies-could-undermine-public-higher-ed
- https://link.springer.com/article/10.1007/s12528-010-9037-0

Appendix C: Survey of Faculty attitudes, beliefs and behaviors surrounding proposed OPM/Pearson partnership (n=40, open for completion from 5/31-6/4)

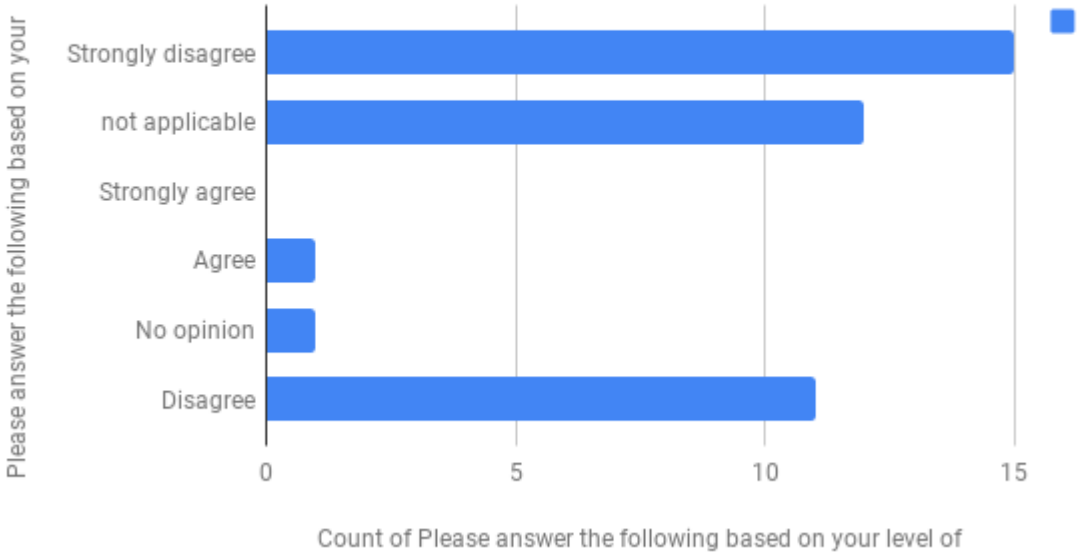
1. I have followed the Pearson/OPM decision-making process closely.



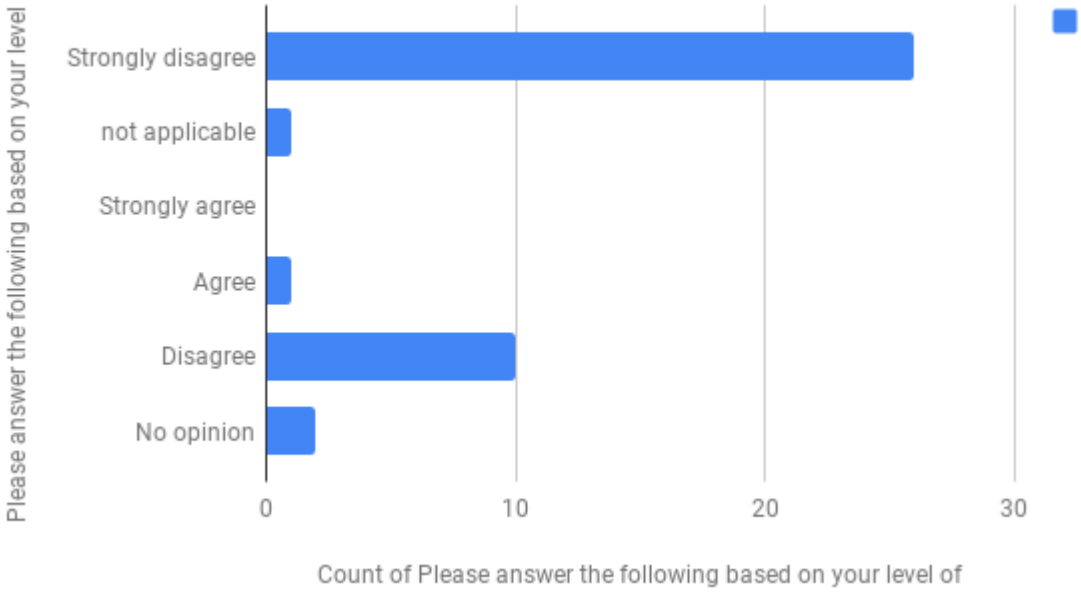
2. I have read extensively on the private OPM movement in higher education.



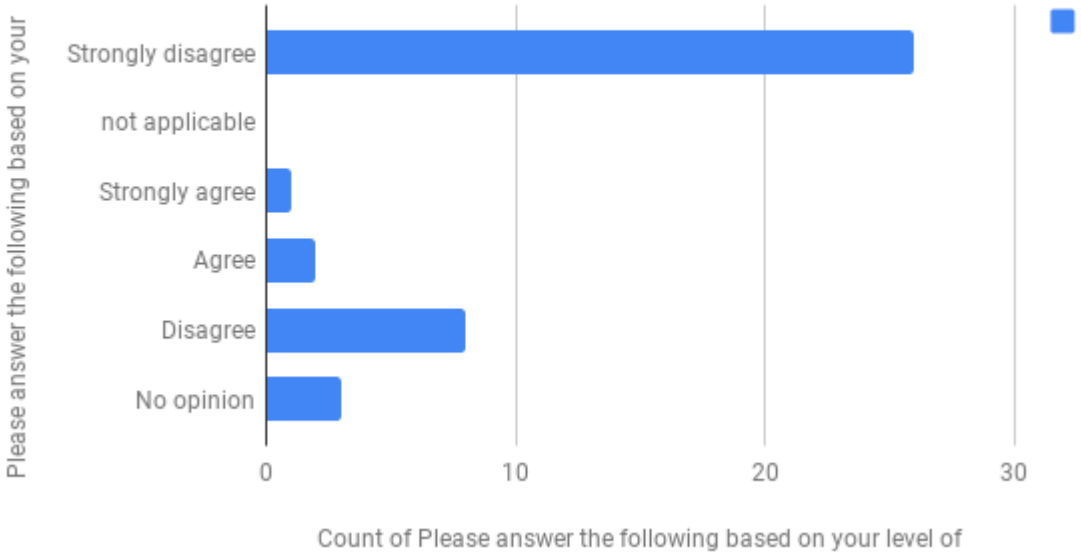
3. I have personal professional experience in a higher education setting working with an OPM.



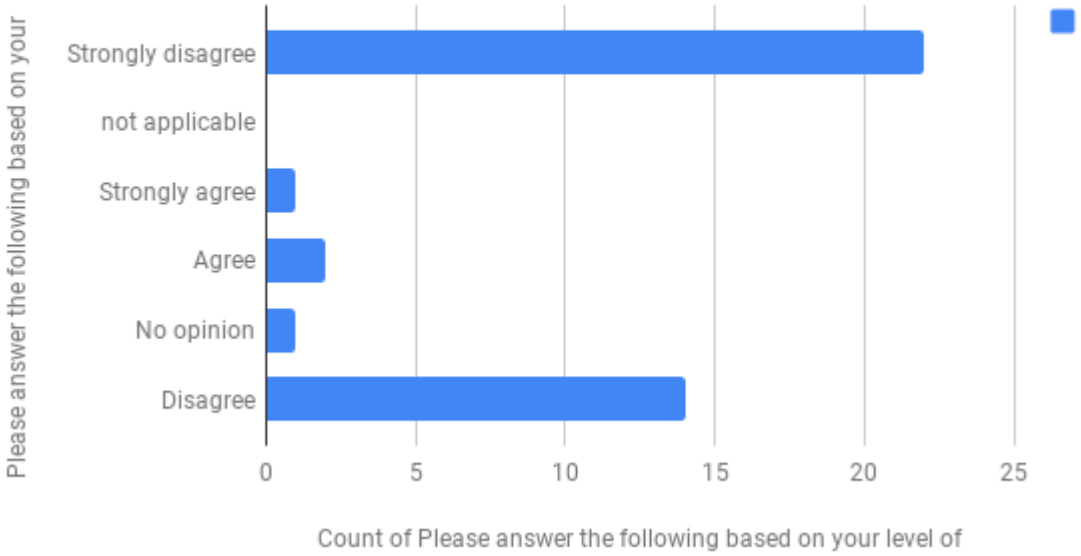
4. The administration has presented faculty with a wide range of viable options to consider in addition to partnering with a for-profit OPM.



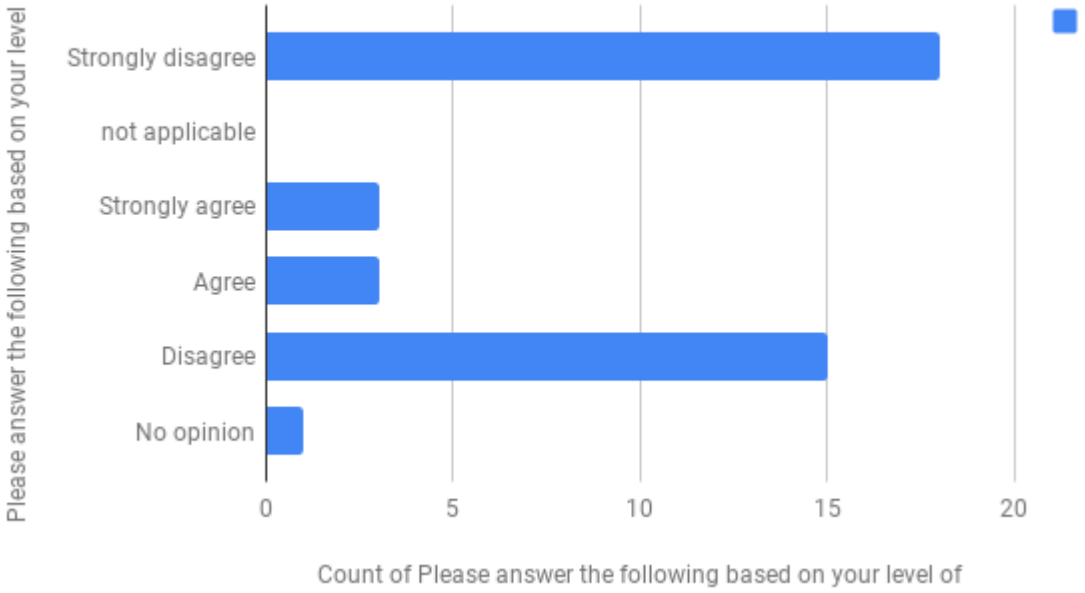
5. I am optimistic that partnering with Pearson will solve EOU's enrollment and revenue problems.



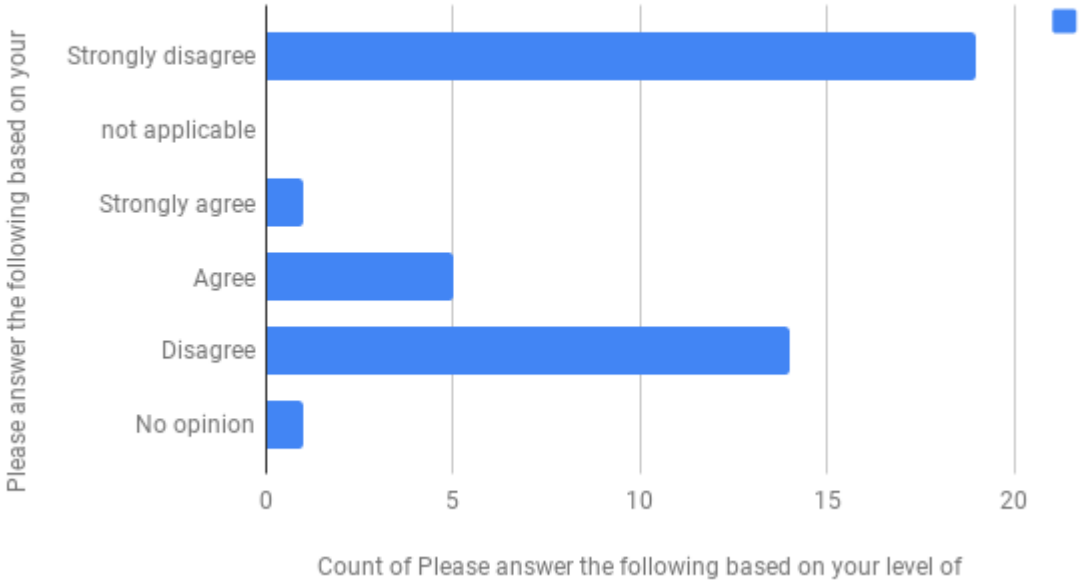
6. Based on what I have learned so far, I expect Pearson to serve students well.



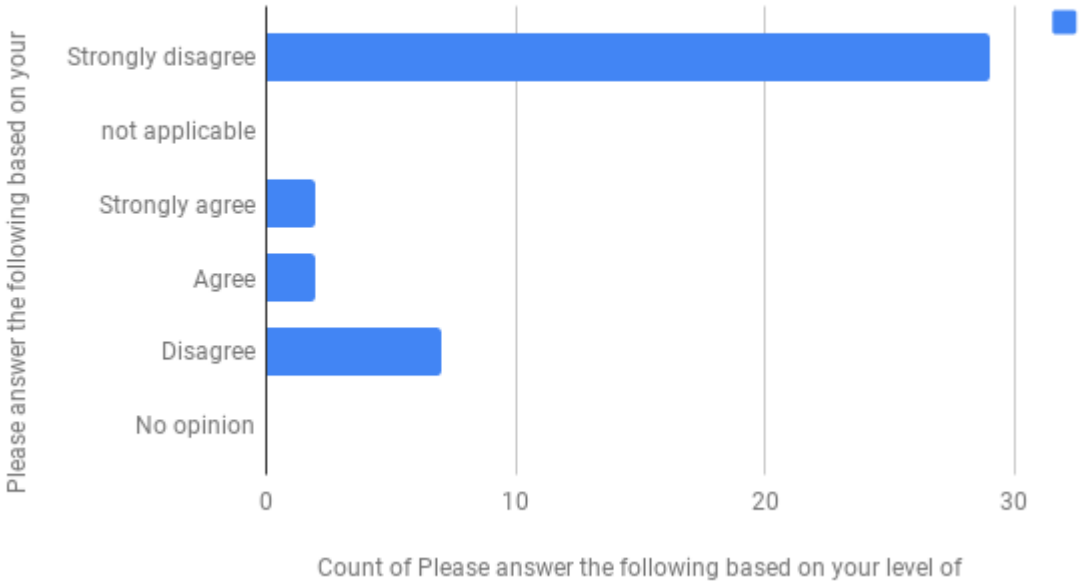
7. EOU leadership has accurately identified the pressing problems EOU faces, and the investment of time and resources in considering a private OPM is well-placed.



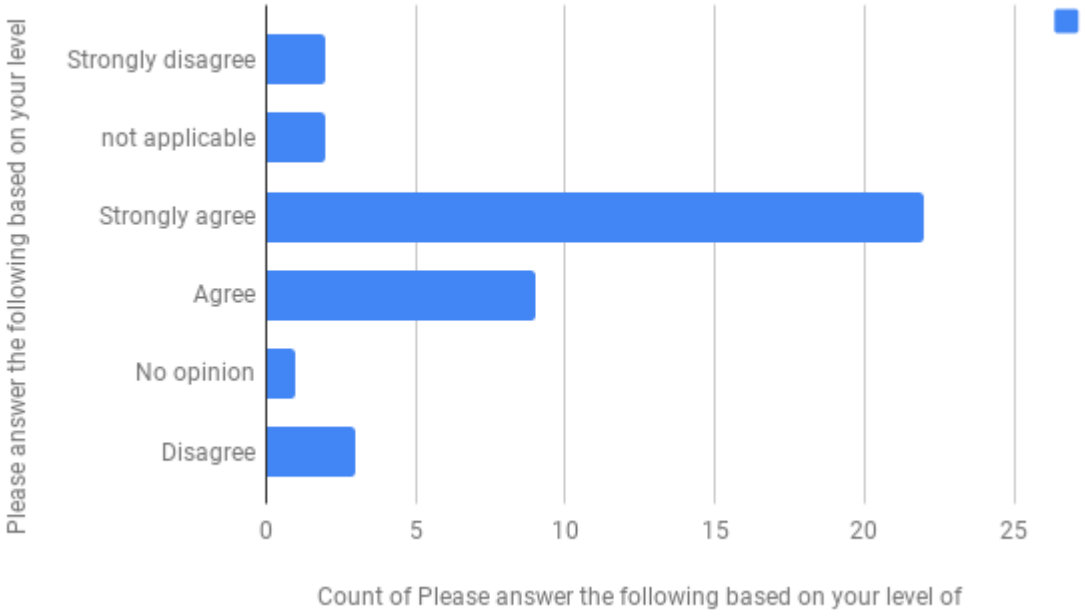
8. Faculty have had adequate opportunity to provide public and meaningful input on the future direction EOU should take in confronting its enrollment decline.



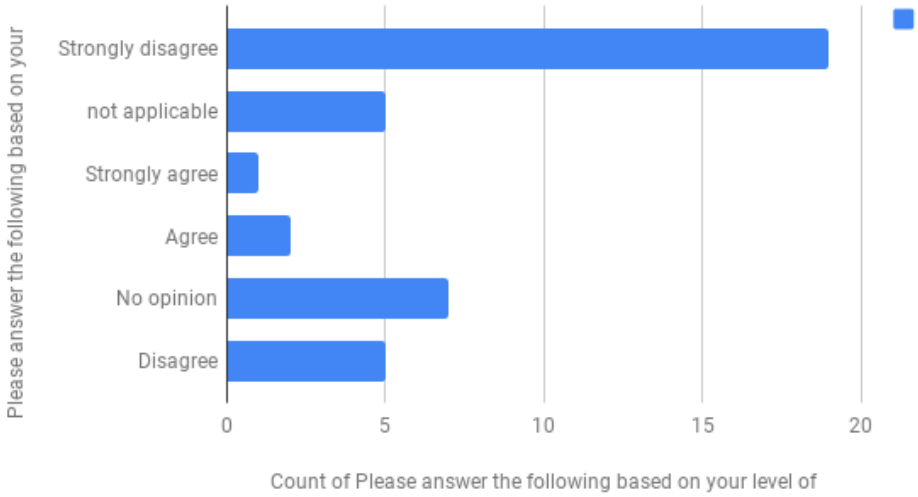
9. EOU leadership has no obligation to involve faculty in the decision on whether or not to partner with a private OPM/Pearson.



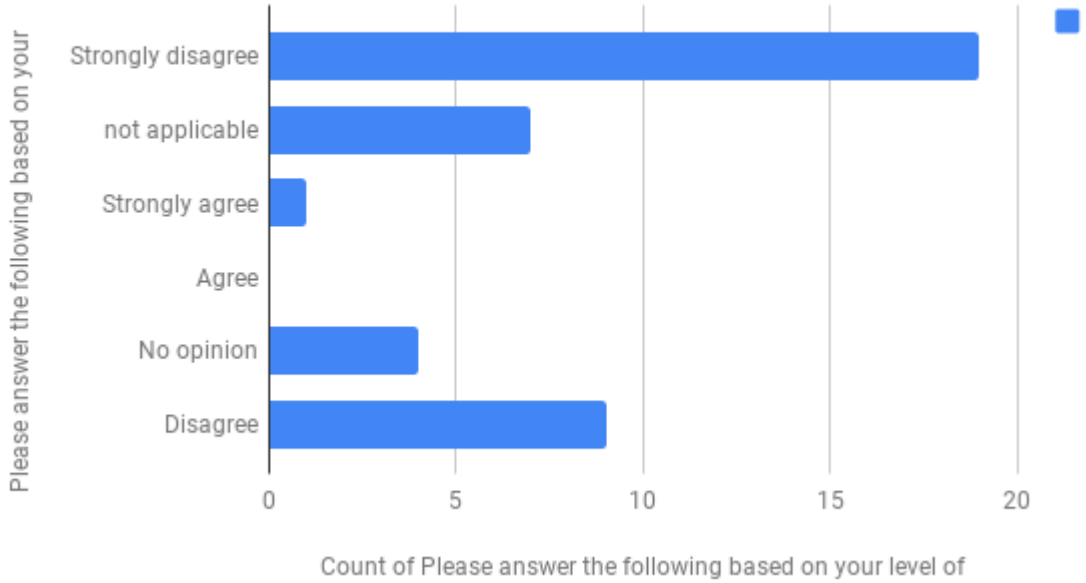
10. Our program has little or no inclination to partner with Pearson.



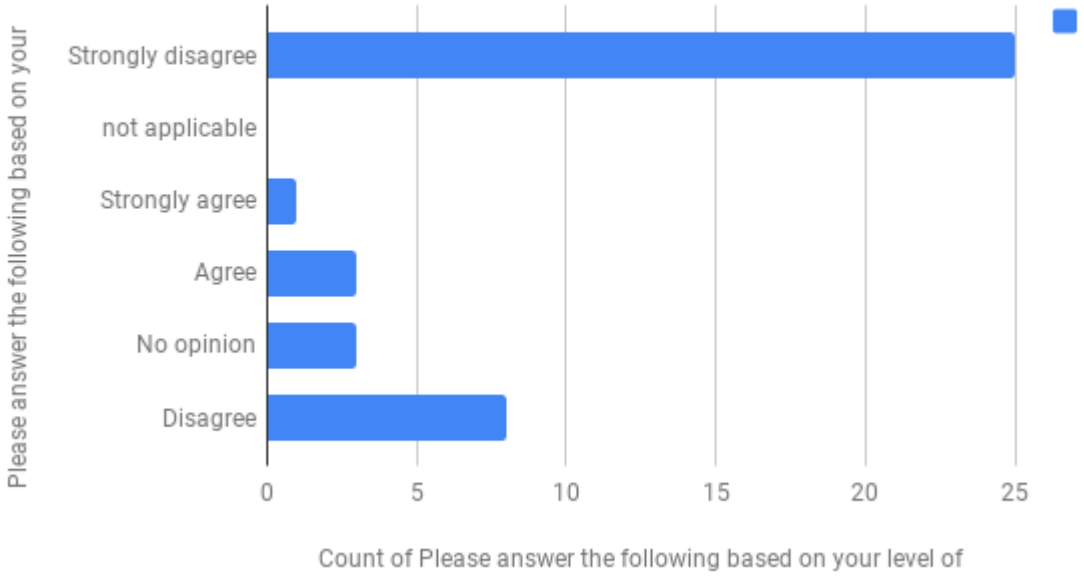
11. I have confidence that the Pearson representatives with whom I have interacted to date have the necessary skills and expertise to deliver on their promises.



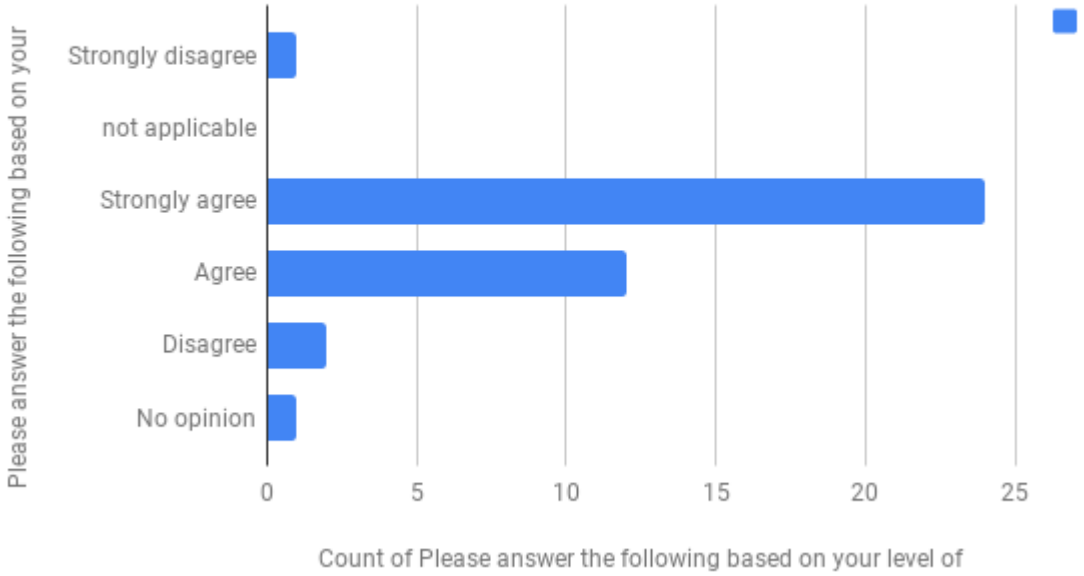
12. Work samples produced by Pearson to date (including proposed course rotations) accurately reflect our program and its potential for rapid online expansion.



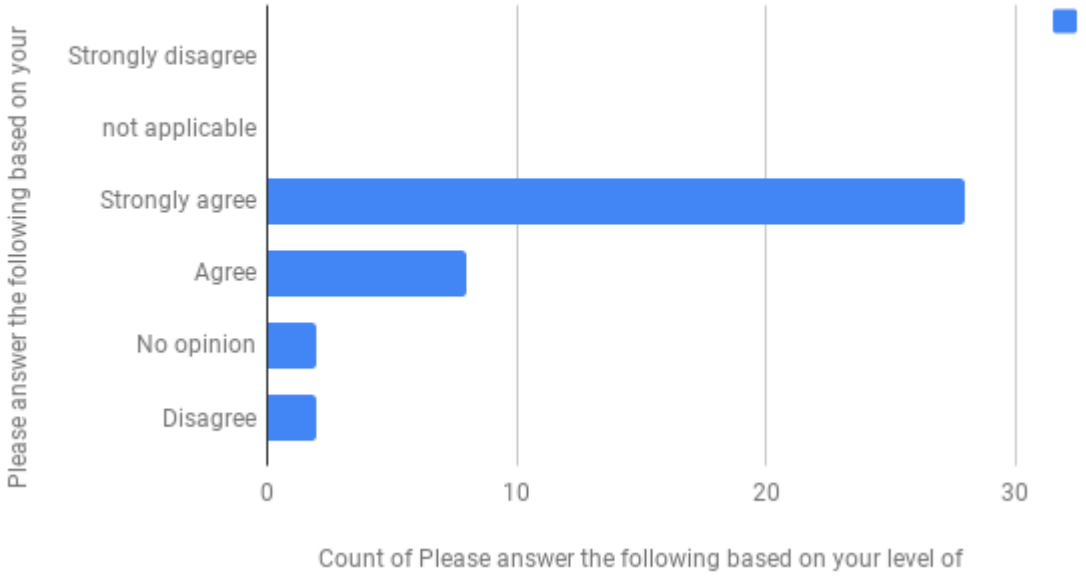
13. A long-term partnership with Pearson will have minimal effect on EOU's regional mission and core values.



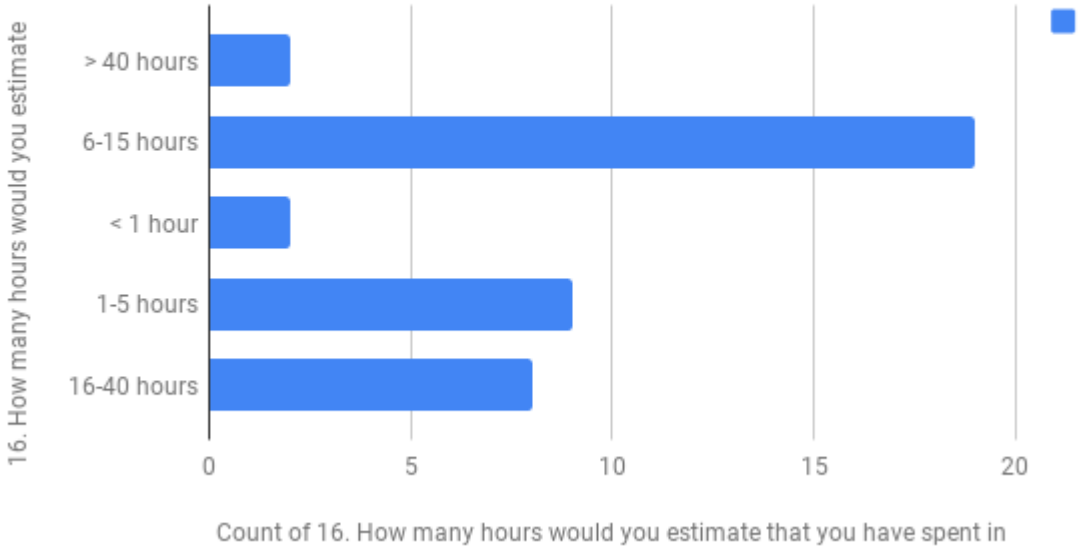
14. I am concerned that EOU will lose its identity if we rapidly expand into the online market through the hiring of adjunct instructors.



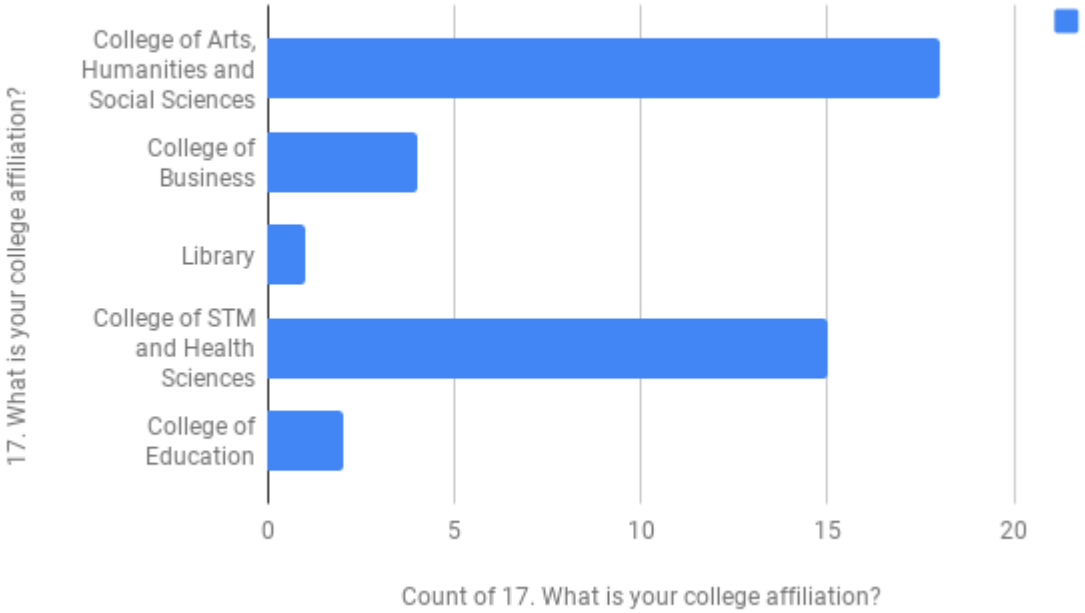
15. I would like to see research that EOU leadership conducted on alternatives to rapid online expansion via a private OPM partnership model.



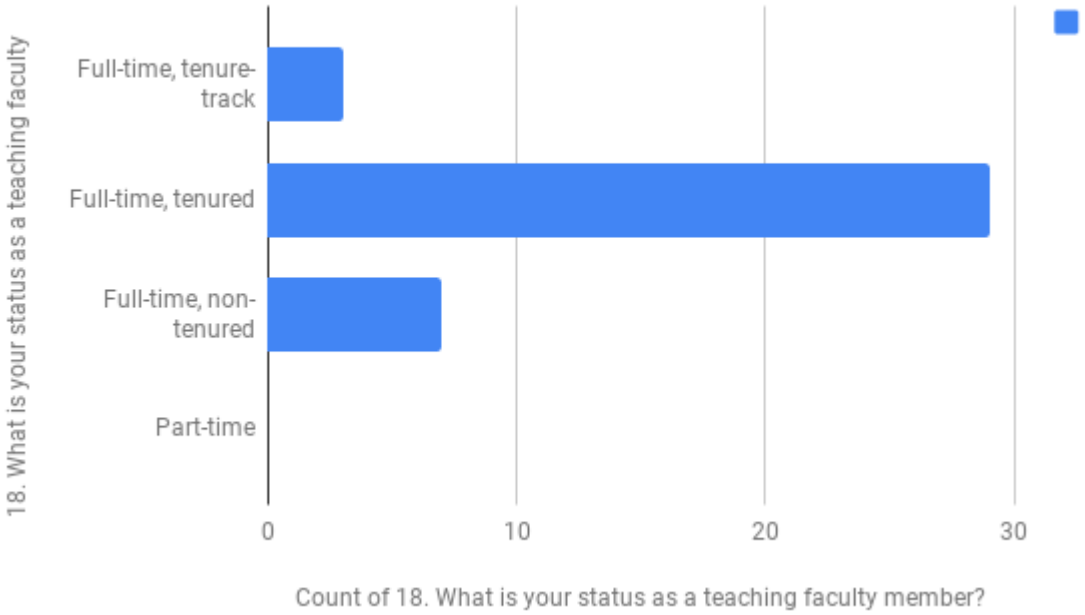
16. How many hours would you estimate that you have spent in meetings discussing Pearson/OPMs, doing research on the OPM industry or related topics, or actually meeting with Pearson representatives?



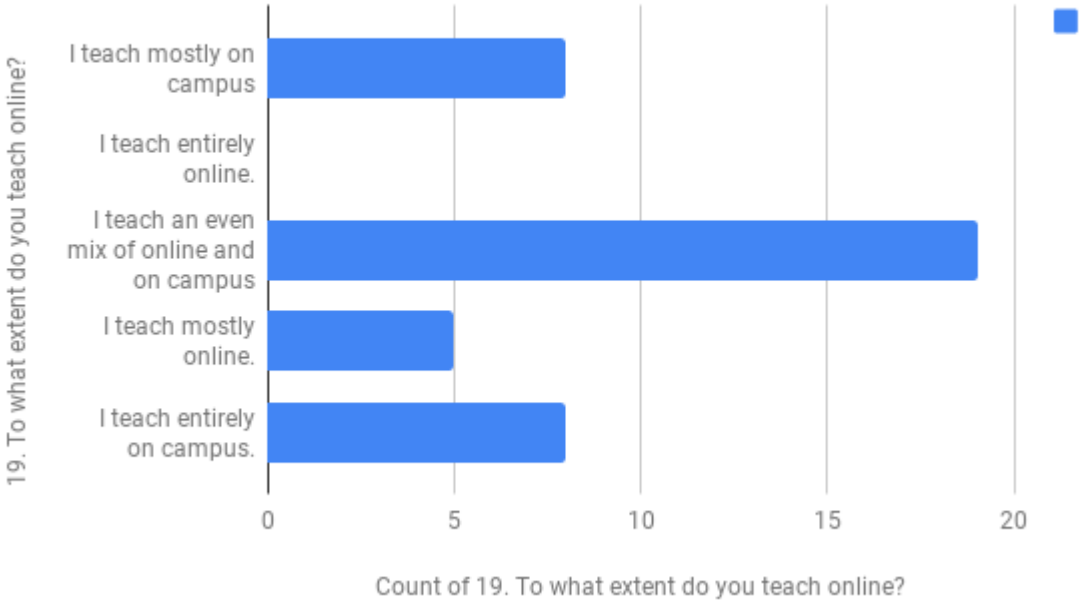
17. What is your college affiliation?



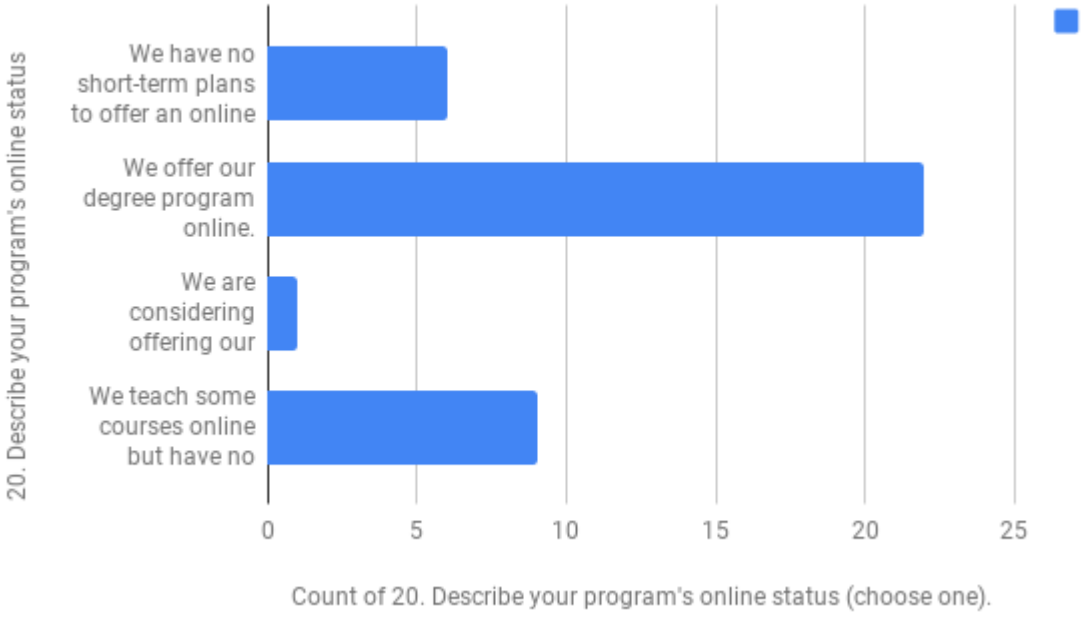
18. What is your status as a teaching faculty member?



19. To what extent do you teach online?



20. Describe your program's online status (choose one).



Appendix D: Online Program Management Evaluation General Timeline (beginning with RFP review in Oct 2017)—author: EOU administration

This is a general timeline that is subject to change—see revised version below.
It is not inclusive of all the meetings and communication.

ACTIVITY	UNIVERSITY ENGAGEMENT	TIMELINE
RFP review	EOU leadership team	October 2017
RFP finalists presentations	Cabinet, Deans, and Executive Director ROI	October 2017
Site visits RFP finalists	President, Provost, Executive Director ROI	December 2017
Online Program Management firm selection for evaluation	EOU leadership team	December 2017
College meetings	Deans, Executive Director ROI, and Faculty	January 2018
Institutional and Program Readiness meetings with Pearson representatives	Academic programs and student services	January & February 2018
OPM evaluation presentation and discussion	EOU Board of Trustees	February 2018
Gathering information and questions through a variety of meetings and the feedback form	University community	February - early May 2018
College meetings with the President	Faculty, staff, and advisors	March 2018
OPM evaluation update and discussion	EOU Board of Trustees committee meetings	April 2018
OPM evaluation update and discussion	EOU Board of Trustees	April 2018
Pearson financial pro forma	President and TBD*	April 2018
OPM evaluation update and discussion	EOU Board of Trustees committee meetings	May 2018
EOU overlays costs to financial pro forma	President and TBD*	April and May 2018
Modeling and contract negotiation	President and TBD*	April and May 2018
President recommendation	EOU Board of Trustees	May 2018
(*addition*) Deferral of decision announced, April 28, 2018	EOU Board of Trustees vote	Nov 15, 2018

*At this time, it is not clear how broadly the Pro Forma/Modeling can be shared due to Pearson's proprietary rights.

Online Program Management Evaluation General Timeline (original Mar 6; update shared June 5)

This is a general timeline that is subject to change. It is not inclusive of all the meetings and communication.

ACTIVITY	UNIVERSITY ENGAGEMENT	TIMELINE
RFP review	EOU leadership team	October 2017
RFP finalists presentations	Cabinet, Deans, and Executive Director ROI	October 2017
Site visits RFP finalists	President, Provost, Executive Director ROI	December 2017
Online Program Management firm selection for evaluation	EOU leadership team	December 2017
College meetings	Deans, Executive Director ROI, and Faculty	January 2018
Institutional and Program Readiness meetings with Pearson representatives	Academic programs and student services	January and February 2018
OPM evaluation presentation and discussion	EOU Board of Trustees	February 2018
Gathering information and questions through a variety of meetings and the feedback form	University community	February through early May 2018
College meetings with the President	Faculty, staff, and advisors	March 2018
OPM evaluation update and discussion	EOU Board of Trustees committee meetings	April 2018
OPM evaluation update and discussion	EOU Board of Trustees	April 2018
Review of proposed course delivery for existing programs	Deans, Program Chairs	May 2018
Review of potential new programs	Provost, Deans, Program Chairs	June 2018
Partner track record review	Provost, ROI, Admissions, Faculty	May 2018 through June 2018
Financial modeling	Consultant, Executive Leadership, Deans, Budget Office, Institutional Research	July 2018 through October 2018
Financial pro forma	President and TBD*	August 2018
President recommendation	EOU Board of Trustees	November 2018

Appendix E: Proposed OPM partnership with Pearson:
Selected questions posed and answered by President Insko

Sent on March 6

Question: What is an Online Program Management (OPM) company?
Answer: An OPM specializes in operational aspects of offering online degree programs. These companies assist institutions in taking their programs online or expanding existing offerings to grow enrollments, taking a share of tuition revenue in return.

Question: Why is EOU exploring an OPM partnership?
Answer: To determine if an OPM partnership offers an acceptable path forward for addressing recent online enrollment declines, achieving strategic enrollment growth objectives, and accessing emerging best practices and innovations in student success support systems.

Question: Has EOU already decided to partner with an OPM?
Answer: No. We are currently evaluating the potential of partnering with an online program management company.

Question: Have other options been considered to address performance gaps/opportunities?
Answer: Yes. While continuing to implement improvement initiatives we have considered options for building internal capability and capacity as well as fee-for-service partnerships. At this point, we are electing to investigate the Online Program Management (OPM) option. We can launch in a much shorter timeframe and maintain control over growth and execution with reduced downside risk to the university.

Question: Does an OPM "run" EOU's online programs?
Answer: No. An OPM works behind the scenes on operational aspects of online programs. Among other things, they provide marketing, recruitment, market analytics, and student support services to facilitate enrollment growth objectives. You would not see an OPM company brand or logo on materials. The courses would be taught by EOU faculty.

Question: Does EOU relinquish operational controls or management to an OPM?
Answer: No. EOU would maintain operational controls and management on all key policies and processes for admissions, recruitment, student support, and marketing. EOU would maintain policies and processes governing operational requirements and management of academic quality, standards, faculty hiring and evaluation, and curriculum.

Question: Is there a cost associated with using an OPM?
Answer: Yes. There would be no upfront costs. Instead, OPMs take a share of tuition revenue derived only from enrollment increases tagged by the partnership.

Question: How will growth in online enrollment impact our on-campus enrollment?
Answer: It is expected that growth of EOU's online programs would generate additional resources available for the entire institution. Additional visibility gained through increased marketing and promotion would influence students seeking campus and on-site enrollments, and additional student support resources.

Question: How will we maintain quality with growth?
Answer: Goal 2 of EOU's strategic plan is "transformational education--enrich academic quality and enhance intellectual vitality." Regardless of the methods used to achieve our strategic growth objectives we remain committed to this goal.

Question: How will we hire and manage quality online adjuncts while growing and managing on-campus faculty for that same quality?
Answer: EOU would continue to use current systems for hiring both on-campus and online faculty. Applicants meeting posted qualifications would be vetted by program faculty and hired by the college deans. Management of quality would follow established review and evaluation processes and guidelines for faculty and adjuncts.

Question: How will an OPM company interact with EOU faculty, staff, and students?
Answer: It is expected that an OPM company would serve as a true partner with faculty and staff so shared objectives were accomplished. Online students would experience improved service and support as a partnership yields best practices implementation.

Question: Will there be a redundancy of jobs?
Answer: No. Redundancy of jobs would be cost prohibitive. It is expected that an OPM would add jobs required to perform operational tasks as detailed in a contract and EOU would add positions, as necessary, to support growth in operations at the institution. Specifics are unknown at this time given there is no definitive agreement.

Question: How do we plan to maintain our culture through this change?
Answer: EOU maintains its culture through the implementation of curriculum and personnel. Pearson Online Learning Services would learn about us so they could reflect EOU in their work in the partnership.

Question: Why Pearson Online Learning Services? Why not 2U or another company?
Answer: Pearson Online Learning Services is one of the top Online Program Management companies (OPMs) in the country representing both smaller regional brands and large universities. They have a successful track record of over 25 years and are aligned with our culture and objectives: significant online growth while maintaining and promoting the culture of EOU.

Question: How did we come to select Pearson Online Services?
Answer: An RFP was issued in August and followed established EOU guidelines. The Learning House and Pearson Online Learning Services were invited to campus for initial presentations to university leadership. Following onsite visits with both companies, we then elected to conduct a comprehensive evaluation of services and opportunities with Pearson.

Question: What services are we looking for Pearson Online Learning Services to provide?
Answer: We would consider marketing, student recruitment, advisement, and retention services for our online programs. We would also consider having them assist us with instructional design and new program development.
Question: Are there examples of institutions that only chose certain services? What are the high-return services that OPMs demand be part of a contract? What are the 'best practices' with respect to retention?

Question: Are there other universities that have partnered with Pearson Online Learning Services?
Answer: Pearson partners with over 45 colleges and universities, including smaller schools like Marysville University and large institutions like Arizona State University.

Question: How does Pearson Online Learning Services operate?
Answer: Like most Online Program Management companies, Pearson Online Services would work "behind the scenes" to support our enrollment strategies. They have cross-functional teams of marketers, recruiters, and retention specialists who would act as an extension of their partner university. All Pearson Online Learning Services staff that represent EOU would be trained by EOU to assure that the culture is maintained.

Question: What if we enter into this partnership and then one of us decides they want out?
Answer: A contract would contain conditions for this event that would be negotiated by both parties.

Question: How is student information protected during the application process?
Answer: Pearson's recruitment, advisement, and retention services would not require access to all of the student's confidential information; however, they would need "read only" access to specific fields to be able to answer students' questions about the status of their application materials, whether or not they were registered and for which courses, and whether or not the student successfully completed a course. There would not be access to grades or other personally identifiable information like social security numbers.

Question: How will their "retention services" work with EOU's Center Directors and online advisors?
Answer: EOU's Regional Centers are strategically placed throughout the state to provide face-to-face advisement and retention services to local and distant students who access EOU online or onsite. Pearson Online Services would augment EOU's capacity in advisement and retention services as we grow.

Question: Where are we in the process? What's next?
Answer: We have invited Pearson to campus again for another round of meetings with the university community. By April, we expect to have additional financial reviews and projections and a full review by May with the EOU Board of Trustees.

Timeline Additions (submitted June 5, 2:00 pm):

When and how will the President respond to the Faculty Senate Ad Hoc Committee questions and bibliography?
In general, questions from the university community are answered in a thematic manner and added to the list of Frequently Asked Questions on the OPM website. The President intends to take the same approach with questions posed by the Faculty Senate. Some answers are already available in the FAQ, however, many answers are pending the financial modeling work that is yet to be completed.

How are university stakeholders involved in the evaluation process?
The following is a list of some of the evaluation activities and involved stakeholders:
Program Readiness Assessment: Program Faculty and Deans
Institutional Readiness Assessment and Process Mapping: Executive Leadership, Admissions, ROI, Student Success, Financial Aid, Institutional Research, Advisors, Registrar's Office, Library, Learning Center, and ASEOU
Partner Track Record Review: Faculty, Regional Outreach and Innovation, Admissions, and Provost
Financial Analysis: Consultant while working with the Budget Office, Institutional Research, Deans, and the Provost and President

What instructional models are being considered as part of a potential partnership? What are the potential impacts to adjuncts?
It is likely that EOU would continue to utilize its current model of department chairs recommending to the Dean on adjunct hires and continuation based on peer and Dean review of teaching quality. As this model becomes unsustainable due to enrollment growth, EOU would need to invest in some administrative FTE at the program level to support the deans in the systematic review and management of online adjuncts.

What is the RFP process? How is conflict of interest addressed?
Please reference the EOU Procurement and Contracting of Goods Policy.

How is the institution identifying and contemplating the financial implications of a partnership?
EOU will engage a consultant whose scope of work includes, but is not limited to: project management support during the partnership evaluation process, financial modeling incorporating existing and future costs associated with the partnership, review of partnership contract terms and counsel on potential modifications to mitigate risks to the institution.

Appendix F: McDonaldization and the accommodation required by institutions in an environment of rapid enrollment expansion

The available information from the bibliography (Appendix B) describes some of the outward opportunities and risks facing institutions that have pursued OPM partnerships and pathways of rapid enrollment expansion. Universities looking to grow quickly must strike a balance between student learning and traffic management. For their part OPMs offer capital and extensive expertise in market research. When/if enrollment growth takes off, cascading problems must be addressed and systems in place to handle admissions, advising, enrollment, opening of additional course sections, and staffing of instructors. Then come the challenges of retention. Universities committed to this path may have to initially at least err on the side of traffic management—expediting everything from matriculation through degree completion.

One of the changes Pearson representatives discussed with EOU programs was the adoption of a 'carousel' model, which creates multiple entry points for students, presumably located elsewhere, to begin (or resume) their studies. The changes in Oregon's own higher education system, which have emphasized an 'outcomes-based' model, demand ease of completion, because public universities in the state are reimbursed based on degrees completed. The focus is on quantitative measures, in this case degrees conferred. The changes wrought by a system that treats all four terms the same, to maximize ease of entry and exit, creates a tension between online and on campus operations and complicates the work of faculty who must deliver degree programs (and who are concerned about the other side of this crude equation—quality of learning). After two rounds of discussions with faculty in disciplines currently offering or considering online programs, Pearson representatives still seem to be assuming a fairly standard pace of progress through the curriculum for most students. Our 'traditional' online student population does not fit that profile, as most are working and taking courses at a manageable, slower pace. They want the degree, to be sure, but most faculty will report that our online students taking courses at a distance are also intellectually engaged, not simply seeking a credential as fast as possible. Obviously, the difference can be fleshed out in an effective marketing campaign, but the internal contradictions inherent in a campaign promising both quality and speed may yield lower retention.

This is not to suggest that an online program *guarantees* a lesser quality education. But a modestly-sized university seeking a rapid expansion in scale—a five-fold enrollment increase in ten years, for instance—would quickly encounter traffic management challenges, and the literature makes clear that the most economically expedient response is to hire adjunct instructors to accommodate accelerated expansion. Pearson's representatives presented a model in which permanent faculty control curricula and syllabi, and spend less time teaching and more time managing adjunct instructors, who are hired on an as-needed basis. It is a system driven by numbers and the pressure of time.

The system proposed by Pearson, as presented to EOU faculty, reflects a form of 'McDonaldization.' McDonaldization is a term popularized by sociologist George Ritzer to describe how facets of social life begin to assume the character of a fast food restaurant, where a premium is placed on convenience. Ritzer distills the concept into four key principles: **efficiency, calculability, control, and predictability**. We will briefly describe each and its relevance to this report's purpose.

Efficiency involves streamlining processes, which may be an emergent property in a complex organization that is increasing in size and complexity. Digital technologies capture efficiencies that have

made online education possible—EOU has been offering online degree programs for longer than the vast majority of American universities, since the early days of public access to the Internet. Realizing efficiencies doesn't require compromising quality. Online enrollment for instance is much more efficient than paper enrollment. A student knows immediately if he/she has successfully added a course, and those courses can be integrated into a database (Webster/Banner) and software program (Degree Works) that streamlines the process of advising and likely, degree completion.

Other aspects of efficiency are more problematic. Streamlining a curriculum by adding adjunct instructors, with disciplinary expertise but little knowledge of or loyalty to the institution implies for the student a lack of program continuity. Pearson's approach, based on reports of faculty engaged in discussions, seems to be that managing this tension between casual employees and program coherence is best approached through scheduling and course rotations. Pearson's second iteration of program proposals showed how difficult predictable scheduling is rendered when it must accommodate a 'turnstile' enrollment pattern subject to appreciable variation from term-to-term. Maintaining program coherence can be a time-consuming challenge, as can control over pedagogy and instruction by the full-time faculty in charge of the program, when those faculty are increasingly engaged in managing and staffing courses.[4] In addition, efficiency in the fast food setting often implies getting the customer to do unpaid work (busing tables, filling drinks, forming an orderly queue). It is efficient to have students enroll themselves—with advising support from professional advisers and faculty, of course—but the savings go further. Online students don't require a state-funded place to study, to attend classes, they provide their own technology devices. But they don't have some of the other support services a brick and mortar school provides, and if they have questions must navigate what is hopefully a user-friendly system that accommodates their needs in a personal way, at a distance.

The same issues confront faculty in the adjunct setting. They provide their own office space, perhaps even their own internet connections. There might be some services related to training on some basic IT services (such as Canvas). However, in the McDonaldized setting with few promotions or options to convert to tenure track, longevity is less certain, up-front training is often minimal and could involve little more than a series of canned tutorials to be checked off, with a customer service contact email or number.

McDonaldized **calculability** implies two important features: first, quantity is valued above quality, and second, meticulous attention is devoted to fiscal considerations and maximizing revenue, in the academic setting reducing the likelihood of injecting creativity and experimentation into pedagogy.

Efficiency and calculability complement each other. Efficiencies are often designed to realize cost savings, and in the McDonaldized program course scheduling and staffing may be valued over the quality of the learning taking place. Students in OPMs take classes and may receive degrees, taking courses taught by instructors. 'We offer classes taught by instructors that lead to degrees' isn't much of a tagline, however. One presumes that faculty who have cultivated productive working relationships with students enhance the quality of the learning experience, whether online or on campus. Expansion via OPMs can diminish this relationship—faculty may be managing low-paid adjunct instructors, who may or may not continue to teach depending on fluctuating enrollments in a capitated payment system, or availability of less exploitative job opportunities. 'Degree completion' as a means of reimbursing

[4] There are also issues related to membership in the collective bargaining unit where faculty assume greater management responsibilities.

institutions does not speak to quality, and in fact might encourage institutions of lesser integrity to place conferring of degrees over the quality of their learning and teaching.

The Pearson model also involves the 'bundling' of services, adoption of each with some unspecified impact on an OPM's willingness to enter into a contract with a university. These include marketing services, 'success coaching,' personal tutoring, advising, and instructional design. It is difficult for the university to know which services offer the highest rates of return for the OPM, but faculty know which are valued and would be used, and which wouldn't. The support services—fundamental to student success and retention—would be outsourced for students recruited by Pearson to a call center located in Chandler, Arizona, as part of a (in their representatives' words) 'dedicated team' that would only work on the EOU contract.

In the conventional scenario, Pearson's support services can be triggered by quantitative measures (for instance, a student whose grade in a class was below a certain threshold, or who hadn't logged in for a week).[5] In any case, this would on the surface represent several potentially fundamental changes to the organization and its culture: EOU would no longer be a regional, rural institution—the majority of its students would very likely come from large cities in other states, where Pearson's marketing suggested a demand for whatever programs EOU might offer (this was a quite cogent and direct description from one of their marketing representatives), and who would be served by people in call centers they'll never meet in person. Second, the quality of education for the online EOU student would be affected, many students in academic programs might not have a class from a permanent, non-adjunct faculty member until his or her senior year, for instance in a capstone course.[6] An additional change in organizational culture is underway at EOU, reflected in the pervasive quantification of organizational metrics through 'key performance indicators' (notably focusing its sights primarily on faculty and teaching), or KPIs. This report was in part an outgrowth of a top-down decision making process in which faculty were first told of this 'strategic initiative,' begun six months prior, one week before Pearson representatives were scheduled to meet with programs.[7]

In short, there would be risks to the EOU 'brand' that would affect students past, present and future, as well as faculty and programs based on campus, but in some cases with online components. A simple measure, or 'key performance indicator,' of McDonaldization would be the adjunct-to-regular faculty ratio. Where that ratio is increasing, a university may be risking the quality of the educational experience to achieve increased enrollment and revenue. EOU has in recent years asked programs to develop quantitative measures of learning, presumably allowing it to gauge changes amid any period of rapid expansion. However, disagreement exists over what some of these 'key performance indicators' actually measure, and who benefits from the calculability implied in the quantification of learning assessment, beyond the need to maintain accreditation. Last, especially in a system that values quantification over more involved qualitative assessments, the best teachers may not be those with the highest ratings (especially among students primarily seeking degree credentials over true learning). If those instructors perceive themselves to be underpaid, they may seek other better-paying opportunities, which can affect not only the quality of instruction and the perception of that quality

[5] OPM access to LMS course shells could at the least compromise privacy, in the worst case enable mining of data that could then be used in future marketing campaigns for other clients.

[6] A third possible consequence might be negative impacts on enrollment and investment by the university adversely affecting those academic programs that choose not offer online programs.

[7] Appendix D includes an initial and revised timeline, but their starting points are in October. The decision to explore an OPM partnership was made in late spring/early summer 2017.

among students, but the reputation of an institution (among future prospective faculty hires) as a place where attention to creativity and innovative pedagogy are rewarded.

The above dilemma, a more likely outcome during a period of rapid expansion, leads into the third aspect of McDonaldization, **control**. McDonaldized control refers to both automating processes, and creating a system of conformity that leads to greater uniformity of product. In a system where 'regular' faculty manage adjuncts paid by the course, where the latter teach courses from syllabi produced by regular faculty who are engaged, along with deans, in their management, the need for control becomes essential to ensure that one course section taught by one adjunct doesn't vary greatly from a section of the same course taught by a different adjunct. In such a setting true pedagogical innovation can easily give way to technological gimmickry that 'involves' students in, for instance, online 'interaction via blog posting. These may even be considered 'high impact practices,' and if such practices' adoption increases, the university may declare improvement in quality of education. The adjunct may have limited latitude to make a course his/her 'own,' and the pay scale likely would reflect that the instructor is simply following a 'boiler plate' syllabus created by the 'home' faculty team. If the ratio of adjuncts to regular faculty increases dramatically, this also puts an additional strain on evaluation and personnel processes, with the risk of McDonaldizing adjunct evaluation in ways that may err on the side of expediency (vs quality of instruction).

Conversely, an onerous evaluation process for adjuncts creates an inherent risk of reducing incentives to stay with an organization, and the commitment to students moving through a degree program. But control is a precondition for uniformity of product in a McDonaldized system—again, a focus on quantity of courses taught, degrees conferred. Conscientious educators will always insist on attention paid to quality of learning, but that may increase the overall cost per degree conferred.

Last, calculability implies a 'bottom line.' Partnerships that public institutions enter into with for-profit entities involve a promise of profit that may prioritize returns to investors vs students. A school with a large online component managed by a private OPM has likely negotiated a revenue sharing agreement. Much of that revenue from tuition dollars may never circulate through the local community's economy, accruing instead to investors, staff or faculty located elsewhere.

Neither would it be unusual behavior for a corporation to seek to 'externalize' some costs of doing business. A growth model places greater emphasis on responsive management in a fluid environment. The University may believe it is buying some level of management of its online operations (however the value faculty and advising would place on some of those services offered is unclear). The private contractor wouldn't have to endure the dizzying acceleration of hiring, firing, contract renewals, performance evaluation, anticipated increases in grievances and hearings, etc. Faculty participation in mid-level management would likely increase. Lost in much of this back-and-forth are the impacts on the quality of the learning experience to our current and future students. Such costs and who might bear them have barely been identified, much less analyzed, or at the least certainly not shared with the constituents who would be affected by these decisions. Pearson has been engaged in 'competency-based' programs for working adults that are developed to be fully automated, with instructors (it is unclear whether they are adjuncts or not) available as 'a last resort.'[8]

[8] Northern Arizona University partnered with Pearson and developed a 'Personalized Learning Division' that calculated faculty, on average, spending 30 minutes per week per student (Steve Kolowich. 2011. "Competency loves Company." July 11, Inside

Over time the universities that are 'successful' as measured in enrollment increases may be those that underhire permanent faculty and contract solely for instructional services, altering a traditional academic model where faculty engage in teaching, scholarship, service to the institution, (in EOU's case) outreach to the community, and more generally, the life and enduring culture of the university. Organizational structure may more likely resemble a top-down business, one that produces diplomas. Faculty are more likely to be evaluated based on quantitative criteria, integrated into personnel processes, ultimately reflecting a top-down decision-making structure where the most experienced teachers spend increasing proportions of their time not teaching, but managing the less-experienced (and often less credentialed and lower-paid). Scarce resources may be doled out based on numbers, divisions of the organization may compete with each other based on enrollments and degrees produced. Inherent in such a system is a form of control embedded in faculty's incentive structures for promotion and possibly tenure, or at the least pay raises.[9] The risk for current faculty, or those who might consider a career in academe at EOU, is clear: such a system risks siphoning off professional judgment and embedding it in an organizational structure, 'unbundling' professorial functions, in a system ultimately managed by mostly non-academics tasked with making sure there is ample money to make payroll and keep the doors open.

The fourth principle of McDonaldization is **predictability**, which can be conceived of as the outcome of increased control and standardization. On average faculty in a McDonaldized setting have less formal education and fewer credentials (especially from the most reputable institutions), less latitude in the classroom, more students, but the organization compensates for any perceived deficits through the employment of standard syllabi that lead to a predictable experience on the part of students (quantity valued over quality). We have already seen even at EOU the spreading contagion of a 'customer satisfaction' mentality. This is commonplace in for-profit institutions, where faculty are more likely to be rewarded (with pay raises, promotions, invitations to develop syllabi for adjuncts, and at some minimum continued employment) based on easily quantified measures on student evaluations. Grade inflation is endemic. Ironically, though—considering the emphasis on numbers—for-profit institutions graduated students at much lower levels than not for-profits, yet have benefited from federal financial aid programs that did not differentiate nor consider tuition disparities (the for-profits generally charging much higher tuition rates), often working symbiotically with predatory lenders (and presumably, putting some portion of tuition dollars into legislative lobbying to ensure regulations don't harm their business models). Some of the same companies that preyed upon students and the federal loan system during the for-profit growth period of the 2000s have sought entrance into the burgeoning OPM industry. Securing their students access to financial aid is a centerpiece of their business models.

Institutions that McDonaldize their products and services do so generally to increase their revenue or profit potential. The consequences for quality are clear, if troubling, and can be seen across the American economic landscape, from fast food to health care to news organizations to national-level political campaigns and, ultimately, education (which may affect the public's perception of the other possibly McDonaldizing spheres of social life). No self-respecting academic enters the teaching profession to train workers for uncreative jobs or unexamined civic lives.

Higher Ed. https://www.insidehighered.com/news/2012/07/11/northern-arizona-u-partners-pearson-competency-based-degree-programs.

[9] It should be noted that in larger institutions, the OPM may operate almost as a separate corporate division, with less of an impact on organizational culture (although the impact to reputation will only be understood in the long-run). Arizona State, Washington State, and Penn State are examples of large institutions separating their campus brand from their online product.

There are a range of possible outcomes of adopting, either intentionally or simply via some business-driven management philosophy, McDonaldization of an institution. First, in a setting where rules and incentive structures are clear and top-down, outcomes (in this case, degrees conferred) may increase, but at a cost—work is likely less remunerative, less secure, and creativity or experimentation less valued. It is also possible that a McDonaldized structure is imposed on an institution, but the staff do not comply where they perceive it as maladaptive or counterproductive (more likely when dealing with a workforce composed of professionals with masters and doctoral degrees). The system may function more like a traditional university, but what may be lost are the expected increases in degrees conferred. A third possibility is that principles of McDonaldization are selectively adopted. Faculty have witnessed this in recent years with meetings on KPIs, core themes, various alignments between quasi-quantitative outcome measures for courses, programs, curricular components (such as general education, and the university.

There have been few studies suggesting faculty are primarily responsible for drops in enrollment, and faculty who teach in the classroom are quite familiar with the narrative's subtext, and the realities students face—financial distress, poor adjustment to college life and newfound independence, the need to balance remunerative work, future debt, and time, as well as issues related to students' personal lives. The Delaware study showed only about 11% of students leave because of academic issues. A clear-eyed analysis would scan the organization and look for underperformance, relative to comparator institutions. EOU lacks as yet—in 2018—clear information on the most fundamental problems faced by every university, such as causes of student attrition (easily tracked via a professionally produced and validated exit survey).

Institutions that adopt principles of McDonaldization, however, aren't necessarily embracing the whole model—there are efficiencies to be considered, for example in sharing a marketing professional between EOU's four colleges. Any promise of using revenue shared with Pearson to invest in on-campus operations is simply a promise unsupported by any analysis. If the administration has actually put some thought into this—especially as there are examples suggesting online expansion can come at the expense of on campus vitality—it needs to make the case publicly to a possibly hopeful, but skeptical audience unwilling to take on faith assurances that could change the nature of the institution and the work we do as academic professionals. However, entering into a process that increases the pervasiveness of McDonaldization within an organization, without some awareness of the risks to (in this case) a university's integrity and commitment to its mission, its staff, the workplace, and most importantly, its students, may be a recipe for producing unintended, and likely unwanted, consequences.

Appendix G: Infoline memo from President Insko
announcing deferment of Board of Trustees vote on OPM

(April 28)

Colleagues,

What a fantastic week this has been with the blessing of sunshine and the fresh spring growth surrounding us on our beautiful campus.

I would like to provide a brief update on the online program management partnership evaluation process. As has been shared previously, we were targeting completion of the evaluation with Pearson Online Services (POLS) on May 25 with the expectation of providing a recommendation to our Board of Trustees at their board meeting on that date. In reviewing the status of the evaluation work, we have decided to extend the evaluation period with a new target date of November 15.

I do not take lightly this delay in making a determination on a partnership with POLS. Institutions across the nation and the state face enrollment pressures and EOU is not immune from these challenges. We must move forward boldly and with purpose if we are to set ourselves apart from other institutions and this is why we are engaged in this evaluation. However, as I have stated from the beginning, we will conduct this evaluation in a prudent manner that allows for a fully informed decision.

Even with all the work that has been completed up to this point there remain many open questions, opportunities for continued and deeper employee engagement, and greater clarity on partnership details that necessitate delay. Consequently, we still lack some critical information that is needed to accurately model the impacts of a potential partnership.

Some may question an extension of almost six months. Given the depth of review and analysis, a desire to provide for ample engagement with the university community, and the realities of balancing this work with other work demands, November 15 seems appropriate.

There will be continued opportunities for input and engagement as we continue with this process and I appreciate all the feedback and assistance received up to this point. Please remember, you are welcome to submit questions or feedback via the OPM website.

Sincerely,

Tom

Tom Insko, '94
President, Eastern Oregon University