Sample Information and Methodology
An online data collection methodology was employed to ensure and meet the stated objectives and criteria for this initiative:

<table>
<thead>
<tr>
<th>Completed Interviews</th>
<th>Total (n=1001)</th>
<th>CA (n=501)</th>
<th>Western Region (Excluding CA) (n=250)</th>
<th>Remaining U.S. (Excluding Western Region) (n=250)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate – Traditional Students (16-24 years)</td>
<td>500</td>
<td>250</td>
<td>125</td>
<td>125</td>
</tr>
<tr>
<td>Bachelor’s Degree Intenders/Enrolled</td>
<td>386</td>
<td>183</td>
<td>102</td>
<td>101</td>
</tr>
<tr>
<td>Associates Degree Intenders/Enrolled</td>
<td>114</td>
<td>67</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>Undergraduate – Adult Students (25+)/Advanced Degree Intenders</td>
<td>501</td>
<td>251</td>
<td>125</td>
<td>125</td>
</tr>
<tr>
<td>Bachelor’s Degree Intenders/Enrolled</td>
<td>147</td>
<td>79</td>
<td>41</td>
<td>27</td>
</tr>
<tr>
<td>Associates Degree Intenders/Enrolled</td>
<td>106</td>
<td>53</td>
<td>26</td>
<td>27</td>
</tr>
<tr>
<td>Advanced Degree Intenders</td>
<td>248</td>
<td>119</td>
<td>58</td>
<td>71</td>
</tr>
</tbody>
</table>

As a point of reference, below is breakdown of high school GPA:

<table>
<thead>
<tr>
<th>Completed Interviews</th>
<th>Total (n=1001)</th>
<th>CA (n=501)</th>
<th>Western Region (Excluding CA) (n=250)</th>
<th>Remaining U.S. (Excluding Western Region) (n=250)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPA: 3.5 and above</td>
<td>372</td>
<td>199</td>
<td>88</td>
<td>85</td>
</tr>
<tr>
<td>GPA: 2.6 – 3.4</td>
<td>629</td>
<td>302</td>
<td>162</td>
<td>165</td>
</tr>
</tbody>
</table>
Target Audience: Individuals who would consider enrolling in a UC online course

- Online Interested Responders represent an opportunity to model future marketing efforts and online course development
- Online Interested Responders are the 34% of those who indicated they would “very likely” consider enrolling in a UC online course

E1. For each of the institutions listed below, how likely would you be to consider enrolling in online college level courses that would transfer credits to an undergraduate degree? (ADVANCED DEGREE INTENDERS:) undergraduate courses that you need to prepare for an advanced degree program?

10 point scale: 1 = Not at all Likely, 10 = Extremely Likely Base: Total Respondents
### Intended Major of Study

<table>
<thead>
<tr>
<th>Major</th>
<th>Total Sample</th>
<th>(A) UC/Interested</th>
<th>(B) UC/Possible</th>
<th>(C) UC/Not Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional and Applied Sciences</td>
<td>60%</td>
<td>61%</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>Business</td>
<td>19%</td>
<td>22%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Health Sciences</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Journalism/Media</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Education</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>10% A</td>
</tr>
<tr>
<td>Social Work</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Nursing</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>4% A</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>22%</td>
<td>28% BC</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Psychology</td>
<td>11%</td>
<td>14% B</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Political Science</td>
<td>3%</td>
<td>6% B</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Natural and Formal Sciences</td>
<td>28%</td>
<td>28%</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>Life or Biological Sciences</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Computer Sciences</td>
<td>11%</td>
<td>10%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Humanities</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

A2 What is your intended major or area of study? More than one major could be selected
Base: Total Respondents
Segment Profiles

- Education cost is key to UC/Is and most work full or part-time while attending school
- Most were intending a bachelor or advanced degree.
- 2/3 of those in school were eligible for financial aid

<table>
<thead>
<tr>
<th></th>
<th>(A) UC/Interested</th>
<th>(B) UC/Possible</th>
<th>(C) UC/Not Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Education Level Goals</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Degree</td>
<td>29%</td>
<td>45%</td>
<td>26%</td>
</tr>
<tr>
<td>Bachelor Degree</td>
<td>34%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Advanced Degree</td>
<td>39%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Full-Time Student (Current/Planned)</strong></td>
<td>73%</td>
<td>71%</td>
<td>75%</td>
</tr>
<tr>
<td><strong>Proportion of Undergraduate Work Completed</strong></td>
<td>54% B</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Student Employment Status</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-Time</td>
<td>26% C</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Part-Time</td>
<td>39%</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Impact of Cost on Education Decisions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All/Most Decisions Cost Based</td>
<td>34% B</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Important, But Not Only Factor</td>
<td>59%</td>
<td>67% A</td>
<td>64%</td>
</tr>
<tr>
<td>Minor Factor</td>
<td>8%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Educational Funding Sources</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self/Family</td>
<td>50%</td>
<td>46%</td>
<td>45%</td>
</tr>
<tr>
<td>Grant/Scholarship</td>
<td>37%</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Loans</td>
<td>27%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Receive Financial Aid</strong></td>
<td>69%</td>
<td>68%</td>
<td>72%</td>
</tr>
</tbody>
</table>
Segment Profiles

- UC/Is represent a significantly high percentage of CA residents

<table>
<thead>
<tr>
<th></th>
<th>(A) UC/Interested</th>
<th>(B) UC/Possible</th>
<th>(C) UC/Not Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Age (In Years)</td>
<td>28 BC</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>California</td>
<td>73% BC</td>
<td>42% C</td>
<td>32%</td>
</tr>
<tr>
<td>Western Region</td>
<td>14%</td>
<td>28% A</td>
<td>34% A</td>
</tr>
<tr>
<td>Remaining U.S.</td>
<td>13%</td>
<td>30% A</td>
<td>34% A</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>47% C</td>
<td>47% C</td>
<td>37%</td>
</tr>
<tr>
<td>Female</td>
<td>54%</td>
<td>53%</td>
<td>63% AB</td>
</tr>
<tr>
<td>Education Level Completed (Median)</td>
<td>College, Junior</td>
<td>College, Sophomore</td>
<td>College, Sophomore</td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White/Caucasian</td>
<td>48%</td>
<td>67% A</td>
<td>70% A</td>
</tr>
<tr>
<td>African American</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>17% BC</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Asian</td>
<td>23% BC</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Household Income</td>
<td>$52,200</td>
<td>$54,000</td>
<td>$53,700</td>
</tr>
</tbody>
</table>

- Academic standing is similar among all three interest groups

<table>
<thead>
<tr>
<th></th>
<th>(A) UC/Interested</th>
<th>(B) UC/Possible</th>
<th>(C) UC/Not Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>College GPA</td>
<td>3.4</td>
<td>3.4</td>
<td>3.5</td>
</tr>
<tr>
<td>High School GPA</td>
<td>3.5</td>
<td>3.6</td>
<td>3.5</td>
</tr>
<tr>
<td>High School Class Rank</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top 10%</td>
<td>36%</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>Top 11-25%</td>
<td>34%</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>ACT Score</td>
<td>28</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>SAT Score (1600 Scale)</td>
<td>1230</td>
<td>1253</td>
<td>1232</td>
</tr>
<tr>
<td>SAT Score (2400 Scale)</td>
<td>1847</td>
<td>1823</td>
<td>1847</td>
</tr>
<tr>
<td>Number of AP/IB Courses</td>
<td>2.9 B</td>
<td>2.2</td>
<td>2.4</td>
</tr>
</tbody>
</table>
Perceptions of UC
UC is a well regarded university

• More than 50% of responders “agree” online courses from UC will enhance their academic background
• Roughly 70% of responders recognize UC as a nationally known, research university

Note: Each respondent rated 7 institutions; all respondents were asked UC and Local/Community College, five other institutions were randomly selected

B1. Please indicate how well you think each statement describes the institution by using a scale of 1 to 10. 10 point scale: 1=Does Not Describe at All, 10=Completely Describes
Base: Total Respondents (“Don’t know” responses have been removed from the base)

D2. How much you agree or disagree that online courses offered by each of the institutions below would enhance your academic background because of the institution’s reputation? 10 point scale: 1=Completely Disagree, 10=Completely Agree Base: Total Respondents (“Don’t know” responses have been removed from the base)
71% describe UC as having an excellent reputation for the quality of education provided

Note: Each respondent rated 7 institutions; all respondents were asked UC and Local/Community College, five other institutions were randomly selected

• Relative rankings similar to these were found for the various universities for perceptions of being academically challenging, nationally known, having leading-edge faculty, or for reputation as a research university.
Online Course Interest
25% of survey responders are “somewhat likely/very likely” to enroll in an online course

- An additional 32% of survey responders indicated “maybe” for whether they would enroll in an online course offered by an institution other than the college or university from which they plan to receive/received their degree.

C1. How likely are you to enroll in an online course offered by an institution other than the college or university from which you plan to receive/received your degree?
Base: Total Respondents
Survey participants are planning to enroll in courses at different types of universities in order to complete their degree

- 64% of responders are planning to attend an In-state public college/institution with 52% of those expecting to take courses online

<table>
<thead>
<tr>
<th>Institution Types Plan to Attend</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>100% Online</td>
<td>12%</td>
</tr>
<tr>
<td>Community/Junior College</td>
<td>27%</td>
</tr>
<tr>
<td>On Campus Courses</td>
<td>35%</td>
</tr>
<tr>
<td>On Campus and Online Courses</td>
<td>65%</td>
</tr>
<tr>
<td>In-State Public</td>
<td>64%</td>
</tr>
<tr>
<td>On Campus Courses</td>
<td>48%</td>
</tr>
<tr>
<td>On Campus and Online Courses</td>
<td>52%</td>
</tr>
<tr>
<td>Out-of-State Public</td>
<td>10%</td>
</tr>
<tr>
<td>In-State Private</td>
<td>17%</td>
</tr>
<tr>
<td>Out-of-State Private</td>
<td>9%</td>
</tr>
</tbody>
</table>

A3 What types of college institutions you have attended to take credit-bearing courses? Base: 763
A5 For each of the college institutions you have attended, please indicate if you took classes online, on campus or both Base: Varies dependent on A3
A6 What types of colleges do you plan to attend to complete Base: 1001
A8 For each type of college you plan to attend to complete your degree, advanced degree pre-requisites, please indicate if you will take classes online, on campus or both. Base: Varies dependent on A6
Overall, 96% interested in pre-requisite and introductory courses (net)

<table>
<thead>
<tr>
<th>Name of Courses</th>
<th>Percent Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. History</td>
<td>39%</td>
</tr>
<tr>
<td>Psychology</td>
<td>34%</td>
</tr>
<tr>
<td>Freshman Composition / Writing</td>
<td>34%</td>
</tr>
<tr>
<td>Sociology</td>
<td>31%</td>
</tr>
<tr>
<td>Computer Science (e.g. Fundm Computing, Data Structures and Programming)</td>
<td>29%</td>
</tr>
<tr>
<td>American Gov &amp; Politics</td>
<td>29%</td>
</tr>
<tr>
<td>College level math (e.g. Pre-Calculus, Calculus, Differential Equations, Linear Algebra)</td>
<td>27%</td>
</tr>
<tr>
<td>European or World History</td>
<td>26%</td>
</tr>
<tr>
<td>Modern Language (e.g. Spanish, French, German)</td>
<td>23%</td>
</tr>
<tr>
<td>Statistics</td>
<td>21%</td>
</tr>
<tr>
<td>Biology (e.g. General, Ecology, Evolutionary Biology)</td>
<td>20%</td>
</tr>
<tr>
<td>Accounting</td>
<td>20%</td>
</tr>
<tr>
<td>Macro and Micro Economics</td>
<td>18%</td>
</tr>
<tr>
<td>Astronomy</td>
<td>14%</td>
</tr>
<tr>
<td>Chemistry (e.g. General, Organic, Physical)</td>
<td>14%</td>
</tr>
<tr>
<td>Physics</td>
<td>11%</td>
</tr>
</tbody>
</table>

Overall, 67% interested in elective courses (net)

<table>
<thead>
<tr>
<th>Name of Courses</th>
<th>Percent Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities and Arts (e.g. American Cybercultures, Survey of Dance: Cultures and Context, Acoustics and Digital Music Creation and Production, Art, Science and Technology)</td>
<td>43%</td>
</tr>
<tr>
<td>Social Sciences (e.g. Water Policy, African Diaspora, Psychology of Aging, Agricultural Economics, Silicon Valley Entrepreneurialism)</td>
<td>36%</td>
</tr>
<tr>
<td>Sciences (e.g. History of the Universe, Nanotechnology for Future Presidents, the Chemistry of Food)</td>
<td>29%</td>
</tr>
</tbody>
</table>

D3a. Assuming you wanted to take an online course that would transfer credits to your undergraduate degree/prepare you for an advanced degree program, which of these following kinds of courses would you be interested in enrolling in?
Online enrollment consideration appeared to be slightly higher when UC was introduced as the institution providing online course offerings

- When survey participants were asked whether they would consider enrolling in a UC online college level course for credit or for prerequisites, 34% indicated a strong consideration to enroll at UC.
Enrollment consideration for a UC online course decreased slightly when price was introduced

- Consideration for a UC online course decreased when price was introduced
- Only 26% would consider compared to 34% that would consider a UC online course if price was not introduced
- CA residents were presented $1400 and Non-residents were presented $1750

E2. Assume that the cost of a standard length course is (CA: $1400, Outside CA: $1750) at University of California. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely  
Base: Total Respondents
20% consider UC online courses a “very good value” when the price is presented

- Almost 50% consider UC an “average value” when the price is presented
- CA residents were presented $1400 and Non-residents were presented $1750

E3. Do you consider [CA: $1400, Non-CA: $1750] for a standard length online course at University of California a good value? 10 point scale: 1=Poor Value, 10=Excellent Value
Base: Total Respondents
Online enrollment consideration was higher for CA residents

- CA residents more interested when UC is revealed. Interest drops by about 1/3 when price is revealed.

### CA resident

- **UC and Price Not Introduced**
  - Not Likely At All: 21%
  - Somewhat Unlikely: 19%
  - Maybe: 33%
  - Somewhat Likely: 19%
  - Very Likely: 8%

- **UC Introduced and Price Not Introduced**
  - Not Likely: 17%
  - Neutral: 33%
  - Very Likely: 50%

- **UC and Price Introduced**
  - Not Likely: 31%
  - Neutral: 33%
  - Very Likely: 36%

---

E1. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely E2. Assume that the cost of a standard length course is (CA: $1400, Outside CA: $1750) at University of California. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely Base: Total RespondentsE4. Assume now that the cost of a standard length course is $1400 at University of California. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely Base: 500
Enrollment consideration varies by region and price

- Enrollment interest among Non-residents is stable at the price of $1,750 and increases slightly when the price is reduced to $1400.

E1. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely

E2. Assume that the price of a standard length course is (CA: $1,400, Outside CA: $1,750) at each of the institutions. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely

E4. Assume now that the cost of a standard length course is $1400 at University of California. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely

Base: Total Respondents
UC Interested Respondents
Roughly 90% of UC/Is describe UC positively on key institutional attributes

- More than 50% of UC/Ps and UC/NIs describe UC positively

B1. Please indicate how well you think each statement describes UC by using a scale of 1 to 10. 10 point scale: 1=Does Not Describe at All, 10=Completely Describes
Base: Total Respondents (Don’t know responses have been removed from the base)
37% of UC/Is consider a UC online course a good value at the base price

- Although roughly 90% of UC/Is described UC on institutional attributes, only 37% UC/Is consider UC a good value at the price point provided
- CA residents were presented $1400 and Non-residents were presented $1750

Note: UC/I = 34% of total sample or 342 total. All were not presented the same list of universities – note the “n” in graph

E3. Do you consider [CA: $1,400, Non-CA: $1,750] for a standard length online course at each of the institutions a good value? 10 point scale: 1=Poor Value, 10= Excellent Value  Base: Non-California Residents
Note: Each respondent rated 7 institutions; all respondents were asked UC and Local/Community College, five other institutions were randomly selected
UC/IIs value consideration of a UC online course varies by region and price

- 39% of UC/IIs in CA consider a UC online course a “very good value” at $1400
- More UC/IIs who are not CA residents consider UC a “very good value” at $1400 vs. $1750

E3. Do you consider [CA: $1,400, Non-CA: $1,750] for a standard length online course at University of California a good value? 10 point scale: 1=Poor Value, 10=Excellent Value

E5. Do you consider $1400 for a standard length online course at University of California a good value? 10 point scale: 1=Poor Value, 10=Excellent Value

*Small base
57% of UC/Is in CA are “very likely” to consider online course enrollment when price is introduced

- Not all UC/I responders were presented the same six selected universities in addition to UC
- The segment, UC/Is, was further analyzed to identify other institutions that respondents also would “very likely” consider individual online course enrollment when price is introduced

Note: UC/I = 34% of total sample or 342 total. California residents are 251. All were not presented the same list of universities—note the “n” in graph

E1. For each of the institutions listed below, how likely would you be to consider enrolling in online (UNDERGRADUATE INTENDERS/ENROLLED:) college level courses that would transfer credits to an undergraduate degree? (ADVANCED DEGREE INTENDERS:) undergraduate courses that you need to prepare for an advanced degree program? 10 point scale: 1=Not at all Likely, 10= Extremely Likely

E2. Assume that the price of a standard length course is (CA: $1,400, Outside CA: $1,750) at each of the institutions. How likely would you be to consider enrolling in online college level courses for credit/undergraduate courses to prepare for an advanced degree? 10 point scale: 1=Not at all Likely, 10= Extremely Likely Base: Varies
UC Online Education
Common Learning Environment (CoLE)
Principles.

Innovation
Open Source Path
Re-Use of the Good Accessible Solutions
Transfer of Assets
Sharing
Learn As We Go
Success of CoLE is more than technology

Instructional Design + Content + Learning Environment
Decisions.

Use UC as General Contractor
Combine insource (campuses or OP) and outsource (vendors)

Leverage inter-university consortia
Bring OIPP requirements to influence next generation learning environment in Sakai OAE

Use Moodle and Sakai platforms as rapid capacity vehicles (Initial UCOE courses)

Direct development funds into paths that enable Sakai and Moodle transitions
Open Academic Environment.

Next generation – Modern / Open platform
- Permeable
- Social
- Personal
- Remixable

Single Integration Handshake
Consortium-based
- Sakai Foundation project
- Commercial vendors + HE Institutions
Strategy.

Strategy.

Harness talent.
— Instructional design
— Audio-visual & media design
— Programming

*Build stronger communities of practice.*

[and leverage more...*]
Iterate.

Winter 2012

Loosely Integrated

OAE Portal + Sakai

Spring/Summer 2012

Targeted Hybrid

OAE + Sakai + m

Fall 2012 (iteration 1)

OAE

CoLE

*
Milestones.

- Sept. 1 – Strategic Path Summit
- Sept. 4 – Direction/Goal Set
- Oct. 15 – Finalized PSA/Hosting agreement
- Nov. 8 – Release CLE to internal team for configuration
- Nov. 15 – First course start upload and design
- Nov. 30 – OAE release to internal team for configuration
- December – Choose video platform
- January – Deliver first courses as loosely coupled (*content)
- February – Analytics deep dive
- March – Deliver Spring / Summer courses as hybrid

* March – May -- Scope Wave II courses
Challenges.

Building the road and the bus while driving

Single Sign-on with campus ID

Building staffing capacity

Building an online team – faculty + staff

Content

Working through campus mind-set
Under Construction
UC Online Education
DRAFT Business Planning Document
Mission

Business Model

Marketing Strategy

Supply Chain Management

Operating Infrastructure
We are nothing without mission.
UCOE’s three-part mission statement.

UCOE will **innovate** by delivering unparalleled lower-division undergraduate education online to UC and non-UC students for UC credit. In doing so, UCOE will **serve** three constituencies:

1) For UC Students, UCOE will enhance choice, alleviate overcrowding in high-demand classes, and **improve student time to degree**

2) For UC, UCOE will **drive new revenue** into academic departments and build capacity for online delivery

3) For Non-UC Students, UCOE will **broaden access** to high-quality education designed by world-class faculty
Two pillars.
UCOE will **innovate** by delivering unparalleled lower-division undergraduate education online to UC and non-UC students for UC credit. In doing so, UCOE will **serve** three constituencies:

1) For UC Students, UCOE will enhance choice, alleviate overcrowding in high-demand classes, and **improve student time to degree**

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**Without revenue from the third constituency, the first two cannot be served.**
Mission
Business Model
Marketing Strategy
Supply Chain Management
Operating Infrastructure
Generate new tuition, and drive it into academic departments. It’s that simple.
Our business model is straightforward.

1. Offer unique product.

2. Use it to bring in new tuition revenue.

3. Pay critical expenses like marketing and technology.

4. Send the rest to campuses.

…and do it in the simplest, most transparent way possible.
Three key business-model parameters.

1. $6.9 million startup loan.
2. Small footprint at OP.
3. Variability is the manager’s enemy (keep it simple).
Four key principles.

1. Source everything outside UCOP.
2. Invest in institutional capacity wherever possible.
3. Take advantage of existing campus online resources.
4. Focus, focus, focus.
One revenue goal. Accumulate nothing at the center.

Where does UCOE business model leave UCOE?

**With nothing. That’s the point.**

Our goal is to run a breakeven business. A job well-done: Net Income = $0.

Because that means we’ve sent every possible dime to campuses.
## Simplified pro forma.

<table>
<thead>
<tr>
<th></th>
<th>FY11-12</th>
<th>FY12-13</th>
<th>FY13-14</th>
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</table>
Assumptions about simplified “best case” pro forma.

Off-campus student course enrollments grow from 3,700 to 8,000 and repay loan.

**No price discrimination:** Off-campus students pay $1,400 tuition per 4-unit course.

Off-campus student course enrollments garner $300 paid by UCOE to the academic department offering the course.

During summer, all students are considered off-campus students no matter where they hail from. Because in summer, all students pay course-enrollment costs over and above any UC tuition they may already pay.
What happens when start-up costs are covered?

Because UCOE holds its expenses steady, it accumulates surplus revenue which can be:

- distributed to academic departments by increasing the $300 that it pays for enrolling students

AND/OR

- accumulate net revenues and distribute them to campuses according to some formula.

Either way UCOE Net Income = $0.
Goal while loan is being repaid: Grow this line.

<table>
<thead>
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Why put all upside initially into enrollment compensation?

Because it encapsulates the **two most important behaviors** we need from academic departments in order to succeed:

Enrollment + Teaching

…so we ought to pay for it.
UCOE income statement: bird’s eye view.

$1,400
Gross Tuition

$1,100
UCOE Overhead

$300
Instructor/TA Cost

All Off-Campus Students Pay →

All other UCOE expenses

“Enrollment compensation” expense
Mission
Business Model
Marketing Strategy
Supply Chain Management
Operating Infrastructure
Start with what you know.
Zuckerberg did not build Facebook for Cornell.

- Start at home.
- Focus on a single market, with a single product.
- Gain experience
- Build capacity
- Generate buzz.
- Be prepared to pivot.
Several viable markets.

...which one to tackle first?

- UC Students on Leave
- Internat’l. Exchange
- Academic Prep
- Transfer
- Corporate Continuing Ed
- Degree Completion
- UC Online Master’s
- Military
- Internat’l. Gifted & Talented
Strategy out of the gate.

**Market:**
California Academic Prep

**Revenue:**
Non-UC Tuition

**Product:**
Lower-Division Undergraduate Courses

**Channels:**
Wholesale vs. Retail

**Value Proposition:**
It’s the Real Thing

**Message:**
“Improve your chances of enrolling at a 4-year college” (implied pathway)
Capture mix of California wholesale and retail.

**Retail:**
- High school students
- Parents of high school students

**Wholesale:**
- Professional School Deans whose programs require prereqs
- K-12.com
Keep in mind we are different.
Our product is competitively unique.

It’s the **real thing**!
What makes it the real thing?

…**real** UC courses.

…for **real** UC credit.

…taught by **real** UC faculty.
Understand the path.

**Experiment**
November 2011 ~ March 2012

- Run OIPP
- Collect valuable feedback from UCEC
- Learn how to develop courses
- Build capacity

**Strategize**
January 2012 ~ June 2012

- Select market and the curriculum to support it
- Tap full-service marketing partner
- Document out-of-the-gate recruitment strategy
- Build application website

**Enroll**
April 2012 ~ September 2012

- Build wholesale relationships
- Generate and qualify leads
- Convert leads into enrollments
- Transact, onboard, remediate, retain
- Pivot
Mission
Business Model
Marketing Strategy
Supply Chain Management
Operating Infrastructure
What does all this mean for participating faculty and departments?
Motivate the supply chain.

At its core, UCOE is a supply chain that incentivizes faculty and departments to:

Develop courses.

Put them in the Common Learning Environment (CoLE).

Teach them to UC and non-UC students.

...but how do the faculty and departments get paid?
## Three ways.

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<td>$ -</td>
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= “Academic Income”

---

*UNIVERSITY OF CALIFORNIA*

11/28/11 | 31
Up-close look at “Academic Income.”

UCOE pays $300 per enrollment (regardless of UC vs. non-UC). UCOE pays $2,000 royalty every time the course is offered. UCOE pays $55,000 to develop the course with faculty.

<table>
<thead>
<tr>
<th>UCOE Course</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Year 1 (100 students per offering)</th>
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<tr>
<td>Offered 4x per year</td>
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<td><strong>Academic Income</strong></td>
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<tr>
<td><strong>Total</strong></td>
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<td>$32,000</td>
<td>$32,000</td>
<td>$32,000</td>
<td>$183,000</td>
</tr>
</tbody>
</table>
There is no waiting.

Faculty and academic departments don’t have to wait for UCOE to repay its loan in order to benefit.

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</tr>
</tbody>
</table>

A single course. A single year. $183,000.
See the potential.

A single course. A single year. $613,000.

<table>
<thead>
<tr>
<th>Scenario 1: $1,400 no matter what.</th>
<th>Year 1 (100 students per offering)</th>
<th>Year 2 (200 students per offering)</th>
<th>Year 3 (300 students per offering)</th>
<th>Year 4 (400 students per offering)</th>
<th>Year 5 (500 students per offering)</th>
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<td><strong>Total</strong></td>
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Why $300?

It appears to work for the scenarios below… And…it’s simple.

<table>
<thead>
<tr>
<th>TA Ratio:</th>
<th>1 25% TA per 100 students</th>
<th>1 50% TA per 100 students</th>
<th>1 25% TA per 50 students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment:</td>
<td>100</td>
<td>200</td>
<td>300</td>
</tr>
<tr>
<td>Instr. of Record</td>
<td>$ 11,000</td>
<td>$ 11,000</td>
<td>$ 11,000</td>
</tr>
<tr>
<td>1st TA – Wages</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
</tr>
<tr>
<td>1st TA – Fees</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>2nd TA – Wages</td>
<td>--</td>
<td>3,000</td>
<td>3,000</td>
</tr>
<tr>
<td>2nd TA – Fees</td>
<td>--</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>3rd TA – Wages</td>
<td>--</td>
<td>--</td>
<td>3,000</td>
</tr>
<tr>
<td>3rd TA – Fees</td>
<td>--</td>
<td>--</td>
<td>5,000</td>
</tr>
<tr>
<td>4th TA – Wages</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>4th TA – Fees</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>5th TA – Wages</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>5th TA – Fees</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>6th TA – Wages</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>6th TA – Fees</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Instr. / TA Cost:</td>
<td>$ 19,000</td>
<td>$ 27,000</td>
<td>$ 35,000</td>
</tr>
<tr>
<td>Cost per Enrollment:</td>
<td>$ 190</td>
<td>$ 135</td>
<td>$ 117</td>
</tr>
</tbody>
</table>
Understand the advantages.

UCOE courses retain distinctive UC character because the $300 enrollment compensation level lets departments afford:

- Good student:faculty ratio, enabling “high touch” interaction

- Ladder faculty who wish to act as instructors of record

- Smaller class sizes (e.g. 30) to be viable
What about cross-campus instruction?

At EAP, UCDC, and UC Sacramento Center, students’ tuition and registration dollars go to the programs…

…offsetting program costs and the cost of student instruction.

Students’ home campus keeps:
• State funds that support instruction of in-state students
• Supplemental tuition paid by non-resident students
• All campus fees
When applied to UCOE, the model looks like this.

Through intra-location transfer, UC Student Would Pay About →

$1,000
Gross Tuition

$700
UCOE Overhead

$300
Instructor/TA Cost

All other UCOE expenses

“Enrollment compensation” expense
What’s wrong with this picture?

UCOE still needs its $1,100 per enrollment for overhead. Every student that does not bring full freight ($1,400) to support UCOE costs means that UCOE has to impose internal quotas to keep the student mix financially viable. We’d rather not do this.
Issues UCOE is not addressing.

Faculty workload (this is a departmental decision guided by Senate policy).

How the $300 enrollment compensation flows once it reaches a campus (although we prefer to deal with a small number of predictable budget offices on each campus).

Decisions about instructor and/or incremental TA hiring – these rest entirely with the instructing department. UCOE simply pays the department the $300 per student course enrollment, which the department can spend as it sees fit.
How will UCOE ensure budget transparency?

Through a governing committee that acts in the way similar committees act for other systemwide instructional programs (EAP, Washington Center):

- **Reviewing** revenues and expenditures annually.

- **Recommending** the level at which per-course fees are set.

- **Recommending** the amount paid by UCOE to participating academic departments for each off-campus students it enrolls.
Mission
Business Model
Marketing Strategy
Supply Chain Management
Operating Infrastructure
Wrap the core with best-fit partners, from both inside and outside UC.
…but surely it doesn’t have to be this complicated.
Streamline.

Marketing
- Market Research
- Opportunity Analysis
- Strategy/Positioning/Planning
- Value Proposition
- Branding/Messaging
- Media Buys
- Sub-Contractor Management

Enrollment
- Market Segment Analysis
- Lead Generation
- Qualification
- Direct Response
- Wholesale Relationships
- Retention / Continuous Improvement Analytics
- Application Website

Student Services
- “Shield” Registration
- Financial Transacting
- Orientation
- Remediation
- TA Onboarding
- Academic Support
- Advising/Mentorship/Coaching
- 24/7 Tech Support
- Course Scheduling
- Course Development
- UCOE Courses
- CoLE
- Organization of Instruc.

Placement
- Articulation Agreements
- 2-Year Transfer
- 4-Year Transfer
- Employer Development
- Internships
- Career Services
- Alumni Engagement
- UC Placement

UC Promotion
UC Recruitment
Registrar
Transcripting
Kaplan
TBD
rSmart
UCOE
Campus Partner
Campus Partner
Campus Partner
UCOE
CoLE is a stake in the ground.

CoLE provides the University with:

- Migration path.
- Sandbox.
- Single handshake.
- More flexible option.
- Modern platform.
  - Personal
  - Permeable
  - Social
- New engagement models.
Iterate to excellence.

Start from where we are.
Focus on our aspirations.
Communicate them.
Iterate in achievable steps.
Bring partners along
Find successes and build.
Find the right partner.

Get the research from Kaplan.

Talk to potential full-service marketing + student services providers (Blackboard, Embanet-Compass).

Talk to potential marketing “subs” (Noel-Levitz, EMG, Target X, guerrilla SEO and social media experts, etc.).
Meanwhile, get our internal house in order.

Creating the conditions where UCOE can

- enroll and create transcripts for students who participate for transferable credit in courses offered and managed by academic departments on 9 general campuses during summer and regular terms
- ensure academic quality and integrity of courses and instruction
Recommendation.

1) Courses designated by UCEP as systemwide courses using established Senate policy.

2) Courses given distinct label e.g.:
   UC | home_campus | Course_Number | Course_Title

3) Courses listed in single catalog:
   - so UC and non-UC students can find out about them in a reliable and consistent manner that is not dependent on highly varied local campus practice
   - so UC registrars and campus and departmental articulation officers have reliable and consistent information about the courses on other campuses that their students might take.

4) Course enrollment and student transcripting managed by a single entity for non-UC and cross-campus (UC) students.
In this guise, UCOE is most like a summer session. It:

- acts administratively to organize instruction for UC and non-matriculated students in courses created and offered by academic departments
- has a business / budget model that incentivizes departmental participation
- focuses primarily on lower division and general education courses.

There are key differences too. UCOE:

- works with academic departments on all nine general campuses
- works during summer and regular terms
- issues transcripts for courses as “systemwide courses”
- works exclusively with online courses
Yes, there are alternatives…

• UC students taking courses across campus could be processed as simultaneous enrollments or as inter-campus visitors

• non-UC students could enroll concurrently in UCOE courses through the University Extension at the campus where the course is offered

But their costs, including:
• CoLE’s integration with 18 student information systems (9 campus, 9 extension);
• 9 x 9 integration of campus registrar systems
• A user interface that forces students to navigate wholly different course administrations

are prohibitive and destroy UCOE’s viability.
Thank You