

Running Head: Policy Paper – Expand Educational Access During Hard Economic Times in the
State of Florida

Policy Paper – Expand Educational Access During Hard Economic Times in the State of Florida

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Executive Summary

First, this paper presents the consideration of a policy change to be made at the Florida Board of Governors level to reflect current conditions with regards to space planning and financial allocation. The proposal reflects the concern that expansion of student access to university programs can be increased through financial support of monies already available and which will soon be allocated. The concept of the policy shift is to adjust the calculation method to reflect actual classroom space demands, and to change the allocation appropriately to expand distance learning programs across SUS. The increased access students will have during difficult economic times reflects the can-do attitude of Floridians who retain focus on the educational mission by leveraging economies of scale afforded by distance learning solutions.

Second, this paper presents the consideration of program adjustment internal to UCF in the advent of expanding faculty support services for distance learning programs. This section is intended to provide preparation and planning should the first policy adjustment be realized.

There are points in this paper that remain incomplete. Additional research is indicated within, as well as additional resources will be required to pursue the initial policy adjustment proposed. These details remain incomplete due to factors beyond this author's control, but they remain within sight of the scope of the planned policy change. They need only to be pursued should the executive teams wish to pursue the development of the policy adjustments described herein.

This paper includes the following sections:

- Background & Current Conditions Perspective
- Current Policy Presented for Revision Consideration: Capital Improvement Fee Trust Fund (CIFTF)

- Proposal to State of Florida Board of Governors – CIFTF Policy Adjustment:
Calculation Methods for Space Planning and Money Allocations to Participating
Institutions
- Proposal to UCF Leadership – UCF Specific Policy Adjustment: Supporting
Expansive Distance Learning Programs
- Remaining Follow-ups
- References

Background & Current Conditions Perspective

Economic situation

Current economic conditions in Florida are forcing difficult decisions, which will impact the State University System (SUS) significantly. As Provost and Executive Vice President of the University of Central Florida (UCF) Dr. Terry Hickey advised students, faculty, and administrators on January 11 of this year succinctly put it: “Over the past several weeks, we have closely monitored reports that another \$1 billion statewide shortfall would likely occur before the end of this fiscal year. Yesterday we received formal notification that cash disbursements to SUS universities would be reduced in preparation for an additional budget cut of at least 3.8% this fiscal year” (Hickey, T.L., 2008, Email January 11). Two and-a-half months later, Provost and President Hickey communicated even more difficult times: “The results of the March Revenue Estimating Conference foretell significant budget cuts for the next fiscal year. During a recent conference call, Chancellor Rosenberg warned university presidents to prepare for FY08-09 budget cuts of up to 10%” (Hickey, T.L., 2008, Email March 20). All through the member institutions to the SUS, deans, department heads, directors, and other institutional leaders are preparing to cut expenses, some of which will likely be faculty releases. Educational institutions then have a new conundrum: how do you teach those planned courses when you just released faculty?

Enrollment projections

Despite cuts to the educational budgets, the demand for education continues. Alceste T. Pappas, Ph.D., President and CEO of Pappas Consulting Group Inc., recently stated in a report to the Florida Board of Governors (BOG): “Florida will continue to have population growth far in

excess of the national average between 2004 and 2014 (19.5% vs. 8.9%), but that growth will be slower than in the last decade (24.6%). More importantly, the age distribution and the ethnic composition will change dramatically, with potentially severe impacts on the rate of higher education enrollment growth” (Pappas, 2008, p. 6). The severe impacts deriving from a projected shift in incoming undergraduate students to which Pappas refers originates from the growing Hispanic population in Florida, which currently sustains the lowest graduation rates from high school. Despite this, fully 59% of high school graduates in Florida go straight into educational programs in higher education. (Although Pappas argues that this number of high school graduates who continue to higher education cannot be accurate due to the achievement gap that is not widely acknowledged (Pappas, 2008, p. 7).) To make matters worse, the rate of poverty would seem to be on the increase: the number of low-income Floridians has increased from 37% in 1992 to 50% in 2004 (Pappas, 2008, p. 7). This will further impact future college enrollment in a negative way. That UCF enrollment (FTE) projections have not been met as Dr. Arlen Chase (BOG) recently commented on during a Facilities Committee meeting in January is perhaps a partial indication of the oncoming reductions in enrollment.

Call for Increases to Undergraduate Programs

In a national comparison of awarded college degrees, the 2006 report from the Florida Council of 100 titled, “Preparing for the Future,” indicates that Florida ranks 43rd for bachelors degrees per 1,000 residents (age 18-44), 33rd for graduate degrees, and 47th for graduates in science and technologies (Preparing for the Future, 2006). From SREB data, Florida increased bachelors degree production by 42.4%, masters by 58.5%, doctorates by 56.1%, and professional degrees by 39.3% (Pappas, 2008). There is some sentiment that Florida needs to increase bachelor degrees more so than graduate degrees (Pappas, 2008: Reports in the late 1990’s,

including several from the Business/Higher Education Partnership: “The Emerging Catastrophe,” “Catastrophe Forestalled,” and “Bursting at the Seams”). Given the projected growth of the population and an eventual correction to achievement differences due to ethnicity, the state of Florida is well advised to improve its capacity to produce graduates with bachelors degrees.

Call to Leverage Economies of Scale through Distance Learning

Distance education (a.k.a., “distance learning,” “e-learning,” “online learning,” as well as other permutations of the same or similar words) is maturing and gaining significant acceptance: college courses are currently estimated as growing at 33% annually nationally (Tallent-Runnels et al., 2006); while at the University of Central Florida (UCF), Web-only courses (W) have grown at an annual average of 67% over the last three years and Mixed-mode (M, also referred to as “blended” courses) grew at an annual average of 54%. By contrast, traditional face-to-face (f2f) courses at UCF grew at an annual average of 26% for the same period (Center for Distributed Learning, University of Central Florida, 2007). The University of Phoenix is reported to now be the nation’s largest private university with potentially a higher capitalization than Harvard University (Pappas, 2008), and a review of the University’s offerings will demonstrate their significant use of distance learning strategies. A recognized advantage to distance learning strategies is that such programs are perceived as highly convenient for working adults or for adults with transportation challenges. The economies of scale that distance learning programs make use of are derived from the scaling abilities that the electronic medium affords: there is no seat limit in online education and with minimal cost increases, there can be significant benefit increases (Kingma, B., 2004; Oakley, B., 2003). Pappas notes that students pursuing their studies exclusively through distance learning in SUS have steadily increased: from 1,511 in 1997-98 to 9,061 in 2003-04, with over 7,000 of those being degree-seeking students (Pappas, 2008).

However, relative to some other states, SUS institutions offer 19 undergraduate degrees by distance education, whereas Georgia has 36, and North Carolina has 97. Pappas also identifies that with “...no statewide planning and no intentional strategy, SUS has 7,000 distance education-only degree-seeking students” (Pappas, 2008, p. 32). Given the scaling potential of distance education and difficult economic conditions, it only makes sense to take a closer look at increasing distance education programs to meet enrollment demands.

Current Policy Presented for Revision Consideration: Capital Improvement Fee Trust Fund

The collection and the allocation of monies for the Capital Improvement Fee Trust Fund (CIFTF) has been the same since 1988 (Kinsley, 2008). For each student credit hour FTE (full-time equivalent), students are assessed \$2.44 for capital improvement fees and \$2.32 for building fees. The fees are collected by SUS institutions, remitted centrally, and every 2-4 years after the build up of funds, the fund level is sufficient for distribution. The finance and facilities office does a debt issuance, and the funds are allocated to the institutions proportionate to their fund contributions. The actual projections, which drive their institutional allocations, are based on two years of collection history and two years of projected history based on FTE projections. The last issuance of these funds was in 2006, when \$103M was allocated, whereof \$43M was cash and \$61M were from bond proceeds. Current fund balances from Capital Improvement fees are \$41M (projected June 30, 2008), together with fee collections, estimated interest earnings, and a bond capacity of \$104M that are available for deposit, less total debt service payments, less child care centers, the available balance is \$160M. Each university would receive the allocated balance based on entitlements (carried forward) plus the projection amount. Director Kinsley has recently

stated that the BOG will be seeking approval for the fund to become a Legislative Budget Request (LBR) package that the legislature would adopt as a budget line item.

The process for the distribution as explained by Director Kinsley is that universities would develop projects together with student governments and give a list of projects to the trustees and approve and submit to the BOG by August 1. The trustees would then take this to the BOG committee at the following meeting in September to discuss and issue projects in late Fall for projects targeted in 2009 and 2010. At the facilities committee meeting of the BOG in January 2008, one committee member initiated a dialog if the process could be expedited such that project ratification could take place prior to late Fall. Director Kinsley explained at that meeting that materials would have to be ready prior to August 1, and the committee gave Director Kinsley the direction to go forward with an expedited process to be ready for ratification on August 1.

Currently, the manner in which recommendations are made on the PECO list, which is funded through CIFTF, is driven by a calculation of space needs. Two things drive how space need is calculated. The first is called the Factors, which has been developed over ten years, that for every given FTE, so much classroom space, offices, gyms, study rooms, or research labs are calculated by discipline. Director Kinsley states that the Factors method continues to do a reasonable job at calculating and projecting reasonable space needs: “Factors times projected FTE for each university shows relative expected needs for that university” (Kinsley, 2008). Currently how monies are then distributed is that 84% of the funds will go to main campus projects, 6% to projects on branch campuses, and “...10% is other that can be distance learning or an institute, as it is not in main or branch campus” (Kinsley, 2008). Kinsley also clarifies that distance learning participation is counted as FTEs, but those FTEs are not distinguished from

FTEs resulting from traditional course takers. The board questioned Director Kinsley why his office does not distinguish distance learning FTEs from traditional FTEs, and his reply was the following: “That’s a very good point. One of the things we have found while looking at it is... I’d say most... but it may not be most... a significant portion of distance learners are students on the main campus who are taking one course, so they still need... but maybe they don’t need one classroom for one semester, but they still need the office space, the study space....” (Kinsley, 2008). From this exchange, board member and chair person Dr. Arlen Chase noted that while UCF hasn’t met the projected FTE growth, it has at the same time a nearly full utilization of available space. Dr. Chase further notes that with current projection methods, the need for space over the next five years will be underestimated in the case of UCF and FIU.

***Proposal to State of Florida Board of Governors – CIFTF Policy Adjustment:
Calculation Methods for Space Planning and Money Allocations to Participating
Institutions***

The time is right to revisit the calculation of FTEs and the apportionment of monies that are allotted to distance learning programs. The calculation of space needs must be changing as a result of increasing the practice of distance learning programs.

If we could imagine for a moment a perfect room allocation software program that optimizes classroom space for all teaching faculty, and if we could also imagine that all faculty members would be equally available to teach on any given week day and time during the semester, we could then deduce that in an environment where online learning is being practiced that any particular room will become increasingly available because faculty don't require as many classroom hours. Since we don't have a situation where faculty are equally available to teach any particular week day, the ill-defined problem becomes what institutions face today: the

problem of calculating just how much space is needed for any particular college for classroom teaching. But in the face of a space calculation problem, the fact remains that classroom space demand is decreasing in an environment where online learning practice is increasing. Any contradiction to this will be the result that our room allocation programs, or the particular day and time demands of faculty are to blame for capacity problems – up to a point. There is a point when traditional student (i.e., non-online students) growth trends will demand the construction of additional space. The point is that the growth trend for additional space needs is growing less fast because of online growth demands. Hence, the argument that the percentage allocations to different building projects can be argued as needing to be shifted from 84% main and 10% other (which includes both distance education and institutes) to a number where 84% is decreased and 10% is increased.

A review of the records collected by the Office of Finance and Facilities and presented by Director Kinsley as regards class room space utilization over the member universities in SUS indicate that on all campuses, overall classroom M-F utilization has improved from 2005 to 2007 (Kinsley, 2008, PowerPoint Slide Presentation Made to BOG Meeting on 1/23/2008). Further, the projection for planned expansion of classrooms is evident in just over half of the member institutions, but these numbers do not reflect the size of the institutions and their corresponding sizing space needs. For the institutions that aggressively promote expansion of courses delivered through distance education methods, the same classroom space needs are also not provided. But according to the logic presented previously, the increasing need for space must be flattening in proportion to the growth in students electing to take courses through distance education programs.

However, the point of shifting the policy calculation is not about quibbles over percentage points; the point is that member institutions are facing difficult decisions that will likely negatively impact students seeking educational programs, and this policy adjustment discussion is about permitting institutions to grow their educational programs by tapping into the economies of scale afforded by developing and supporting expansive distance education programs. Careful adjustment of the CIFTF calculation funds can support this mission without negatively hamstringing in any way building project planning.

The following is a review of the opportunity and policy adjustment details:

Stated Opportunity: Increase FTEs to increase student access and tuition dollars

Challenge: Improve course delivery online by building/improving in online delivery infrastructures by making use of existing monies only

Means: Shift current policy in PECO dollar apportionments to increase portions allotted to online infrastructure building

Policy Shift Calculation Details: Current policy requires a better calculation model to calculate the shift in classroom space demands

- FTEs need to be separated, so that we tabulate each M and W type courses separately from main campus and branch FTEs
- W type courses will equate to 100% reduction of room space need
- M type courses will equate to (simplified for now until better historical analyses can uphold a better calculation percentage) 50% (as most often M type instructors will meet physically 50% of the time)
- These room space calculations are to aggregate to a % shift from the 84% to the 10% and within the 10%, to specifically the distance education allocation

Urgency: Very high – BOG have indicated they intend to accelerate the normal recommendations program to be ready by August 1 instead of the time table historically taken, which would be in the late Fall. The thinking behind this acceleration is to position the allocation to offset some of the negative influences of the poor economic situation. The next round of allocation will not be for at least another two years (if historical patterns are maintained).

{Additional data needed: To strengthen the argument and case, we need to verify the institutional mechanism on how PECO dollar allotments to distance learning is conducted or calculated and determine if this mechanism is roughly the same for other institutions }

Recommendations for policy stipulations:

- **Infrastructure Development:** Significant portion of distance education allotted dollars, proportional to fund contributions, goes to distance learning infrastructure building, the details of which are to be decided by each institution
- **Program Development Motivation:** Lesser portion of distance education allotted dollars, proportional to fund contributions, will be used as incentive dollars for institutions that transform and deliver a significant portion of their degree programs into an online format with special emphasis to be on undergraduate programs, which has been identified as a SUS focus need
- **Institution Development:** A percentage taken from all university's allotment to be used to increase development of model distance learning programs from selected institutions to develop an institutional advisory role for member institutions, which do not have as well developed programs or practices – recommended institutions to become distance learning advisor institutes include UCF, ..., {ABC, and DEF -

require additional data to make these institutional recommendations and the criteria for these recommendations }

- One-Time College Specific Allotment: To protect valuable faculty members in this time of economic difficulty, a one-time allotment of a lesser percentage, proportional to fund contributions, will be made available to colleges to use where they can choose to retain faculty members who might otherwise be cut due to budget downsizing requirements

This plan would permit expanding student access during tough economic times by making effective use of existing funds and by leveraging the economies of scale of distance learning.

Expected Public Reaction to the Proposed Policy Adjustments

Reaction to the proposed policy will originate from (1) affected parties and (2) interested parties. The differences between the two are obvious: the first comprise the group that stand to lose an expected budget value, and the second comprise the group that have motivation to understand the nature of the policy, and may wish to be party to benefitting from the proposed changes.

For the former group, affected parties, we can expect that academic leaders and project managers for campus building projects, who would expect a budget derived through a calculation method that has been the same for ten years, to voice dissent to this proposal. Ordinarily, their opinion might be quite strong; however, in this case, their opinion can be regarded as only as strong as the value they would be missing if this proposal became enacted. Once calculations of distance learning student FTEs are calculated, we can expect the numbers, while growing, to still be minor when compared to traditional students. This will translate to very minor adjustments in

the PECO dollar allotment calculation, perhaps one-half of a percent, likely less. They will lose very little funding in this model since distance learning is still within its infancy and accounts for a minor portion of the total student enrollment. However, within the budgeted 10% of the ‘other’ category, monies are being specifically allotted to particular applications for building the distance learning infrastructure and demand. Still, the effect on other interested parties (e.g., institutes) will be minimal as they stand to lose nothing or very little.

For the second group, there will be questioning and posturing that can be expected from interested parties. The only groups that are expected to be the most demanding from this group will be institutions who will argue that they have greater priority in the selection process to be named an advisory institute. The portion of the policy that highlights the criteria used for such selections, will draw the most discussion, but if that portion of the policy is well-written, then here again, there will be little negative response.

***Proposal to UCF Leadership – UCF Specific Policy Adjustment: Supporting
Expansive Distance Learning Programs***

Were the preceding policy adjustments become reality, then UCF must be in a firm position to best take advantage of the opportunity. This portion of the document is a broad outline to support planning by careful consideration of options and making recommendations for an expansive program increase. Further, this author specifically includes this section based on the argument that UCF is very well positioned to fulfill the role of a distance education advisory institute as outlined in the CIFTF policy adjustment proposal. The rationale behind this thinking is that the distance education infrastructure that provides faculty training and support, as well as provides student technical support is one of few such organizations in the nation with its level of comprehensiveness. Therefore, executive leadership at UCF is in a solid position to consider

expanding its role with services it might be in a strong position to provide to SUS. This section addresses changes that should be addressed on the way to being prepared to fulfill an expanded role.

Currently at UCF, to be permitted to teach, or develop instructional content and teach, by using technologies and pedagogical strategies in online education programs, faculty must be certified by completing a faculty development program titled IDL6543. At the moment, the resource allocations necessary to support production of IDL6543 (IDL), which is the result of a complex arrangement of skilled professionals, available facilities, specific technologies, and extensive calendaring, is just near capacity. An analysis of the past several years to determine if the demand for IDL certification might increase by increases in faculty numbers requiring certification through hiring process (these numbers do not consider the CIFTF policy adjustment previously described), yielded the details indicated in Table 1 following. The areas shaded in yellow are this author's calculations based on data provided by the Office of Human Resources at UCF.

Table 1: Projected Faculty Growth at UCF

Faculty Trends*						
Fall 2003-Fall 2007						
	Fall 2007	Fall 2006?	Fall 2005?	Fall 2004?	Fall 2003?	Fall 2002?
Current Teaching Faculty-						
Main	1119	1103	1079	1056	1015	932
Regional	125	123	100	94	92	75
Total	1244	1226	1179	1150	1107	1007
Faculty Terminations	2007	2006	2005	2004	2003	5 Yr Avg
Main	111	106	94	78	109	99.6
Regional	15	7	8	9	6	9
Total	126	113	102	87	115	108.6
Faculty New Hires	2007	2006	2005	2004	2003	5 Yr Avg
Main	127	130	117	119	192	137
Regional	17	30	14	11	23	19
Total	144	160	131	130	215	156
Net Change	2007	2006	2005	2004	2003	5 Yr Avg
Main	16	24	23	41	83	37.4
Regional	2	23	6	2	17	10
Total	18	47	29	43	100	47.4
*Data Source: EEO6 Current & Historical						
Net Change (% Change from Prev Yr)	2007	2006	2005	2004	2003	5 Yr Avg
Main	1.45%	2.22%	2.18%	4.04%	8.91%	3.76%
Regional	1.63%	23.00%	6.38%	2.17%	22.67%	11.17%
% Change from Prev Yr Overall	1.47%	3.99%	2.52%	3.88%	9.93%	4.36%

Clearly, there will be no substantial growth from new hires into the UCF system, whether that is for the main campus or through branch campuses (and without including the current hiring freeze policy in effect at the university). Further, the certification process of faculty attending IDL courses has been in operation for long enough, that as compared against the total number of faculty at UCF, nearly half of the faculty has become IDL certified. This takes into account the

modest shifts of faculty who have been hired or who have left UCF. In any institution, there will always remain a group who will not elect to change their ways during times of change. In the case of UCF and distance learning practices, this equates to a falling demand that the remaining un-certified faculty will decline to agree to participate in IDL certification. This projection together with the modest projections for growth would indicate that little additional growth can be projected from the traditional sources of faculty requiring IDL certification.

However, UCF should be prepared for expansion, especially were the case be successfully argued to shift CIFTF policy funding allocations. Indeed, UCF could instead become an advisory institute, and as such might be required to conduct training and planning services to other institutions, or to train other institution faculty. In any conceivable scenario, UCF must be prepared with a plan to support expansion of operations. The following serves to address such possibilities: (1) develop and agree on an expansion plan that covers immediate needs, the short term, and a general plan for the long term; (2) agree on a staged schedule for expansion; (3) identify more suitable environs to support expansion plans; (4) agree on re-negotiated compensation and advancement terms for existing personnel; (5) a hiring plan to meet the staged schedule for expansion; and (6) discuss expansion plans beyond IDL6543.

(1) Develop and agree on an expansion plan that covers immediate needs, the short term, and a general plan for the long term

If we momentarily assume that we have the facilities, supporting technologies, and professional resources (e.g., Instructional Designers (IDs), Instructional Design Assistants (AIDS), TechRangers (student technical support team and HTML course coders), and Instructional Technology Group members (ITG – they provide technical support services

exclusively to UCF faculty)) to comfortably support any level of expansion, then we have the following potential scenarios that would support expanding the number of IDL graduates.

1. IDL6543 design remains the same as current form, but a few additional faculty participants are added
2. IDL6543 design remains the same as current form, but the number of sessions is increased
3. IDL6543 design is changed from its current form, and the priority of the social objectives is reduced (permits a variety of changes to current instructional strategies – changes such as the following):
 - a. Increase the maximum class size well beyond the current levels of 31-32 faculty participants – this becomes possible because we remove the need for relationship building within the scope of objectives, so we do not need to emphasize response-posting, or in class (LIB-157) interpersonal or small group activities
4. IDL6543 design is changed from its current form, and the social objectives are removed (permits a variety of changes to current instructional strategies – changes such as the following):
 - a. The number of class (LIB-157) meetings is significantly reduced that permits almost all of the course being delivered entirely online – the following topic areas require class meetings: Web Vet presentations, a few labs, etc.
 - b. Being delivered nearly completely online permits significant changes to the course schedule (i.e., calendar), as well as the number of the university's

offerings of IDL6543 within the academic calendar – IDL6543 could be offered more times per year with an increased number of participants per session

5. IDL6543 design is changed from its current form, and some low priority modules are removed (permits a variety of changes to current instructional strategies – changes such as the following):
 - a. By removing enough modules, the IDL6543 session can be shortened, which permits running additional sessions in a year – the problem will be to decide which modules are low priority enough to warrant removal
 - b. Instead of removing modules, multiple sections could be removed to permit re-sequencing that might lead to a more short IDL6543 session, and so allow additional sessions to be run in a year
6. IDL6543 design is not changed from its current form, but classroom facilities and supporting personnel are both increased (permits a variety of changes to current instructional strategies – changes such as the following):
 - a. With additional classroom space and with the appropriate mix of additional supporting personnel (IDs, AIDs, TechRangers, and ITG), we run concurrent sessions thereby expanding the number of participants per year
7. IDL6543 design is not changed from its current form, but classroom facilities are increased, while supporting personnel are not increased (permits a variety of changes to current instructional strategies – changes such as the following):
 - a. With additional classroom space but without the appropriate mix of additional supporting personnel (IDs, AIDs, TechRangers, and ITG), we run concurrent sessions thereby expanding the number of participants per year, but we drop all

other projects, time for research and conference presentations, and we potentially cut post session faculty consultations

Recommendation: Careful analysis of the advantages and disadvantages leaves this author to recommend Option 1 for near and short term needs and to recommend Option 6 should long term expansion needs become realized. This yields no loss to the pedagogical advantages of the current instructional design, and takes advantage of scaling the team to meet projected needs, without losing other important operations the team currently conducts, such as research, conference presentations, and other design projects beyond IDL.

(2) Staged Expansion IDL6543 Schedule

Given the necessity of expansion, and if the choice is successfully narrowed to an appropriate strategy to support IDL expansion, then it is appropriate to discuss details of how to expand, and with what schedule.

Clearly, expansion must be orderly. Underlying all the intent to provide support for expansion must be an equal intent to provide the expanded service without issues or problems that disrupt the goodwill and quality, professional service with which the team has successfully accomplished for 10 years. To lose any of the reputation that has come from long and hard effort, with such team camaraderie and professional, well researched solutions would be an enormous waste that will negatively affect in strong ways near term efforts to provide an expanded base of service support to IDL; therefore, the expansion must be carefully planned and staged.

First, the near term: the team is very close to capacity now, but this is a precarious situation: loss of any additional team member at this time, due to sickness, accident, or moving onto a new job, will significantly handicap all current efforts, and it will hamstring any plans to add additional faculty to the next couple of IDL sessions. To belay the risk the team currently

finds itself within, a search for 2 additional IDs should immediately begin – the team recognizes that a search for 1 additional team member is currently underway, but a search for one more ID should also begin. If the size of the team remains at current strength, then by fall semester 2008, the team will be ready to support 32 faculty members in IDL, and by spring 2009 an additional four faculty members. At this point, the capacity of current facilities will be met, and no further expansion, except by increasing summer session enrollment to 30, will be possible.

Short to Long Term: To move beyond the cap of approximately 100 faculty members through IDL per year, we will need different facilities and a change to the schedule by offering concurrent sessions. Two rooms that will seat up to 35 faculty members and 10 guests or non-participant observers should be the first priority, with an option for a third room if needed. This will permit expansion by permitting two teams to run twin IDL sessions. This expansion will eventually require increasing the team size, so that as IDL approaches certifying 120-150 faculty per year (up to 175 faculty per year), the production support by the ID team will reach a size nearly double what it is today. But this growth can be added parallel to planned participant increases, which must be well-planned in advance since, as explained forward, it takes one year to bring a new ID to a point ready to support IDL in the way it currently achieves the respect, gratitude, and acceptance of participating faculty.

Long Term and Forward: It is terribly difficult to plan more than 3 years from present because of the nature of the variables involved. At some point, the number of faculty members who require training will be falling, and the team will be overly large. The risk increases with speculation that this group will remain on an upward growth rate for much more than a few years. However, there will be other potential areas to provide services that this team will be in

position to provide, but this discussion does not belong at this point of analysis; it is after all, speculation.

(3) Identify Suitable Facilities to Support IDL6543 Expansion

To support any serious expansion of IDL production, the team will need to operate within suitable facilities that are appropriately configured to handle classroom size of maximum 35 participants, plus 10 visitors; and this room configuration needs to be multiplied by 3 to facilitate up to future possibilities of 3 concurrent sessions. These rooms will be required to permit projection of computer screens, audio amplification and recording, whiteboards, and fast internet connection to support both wired and wireless connectivity for up to 40 simultaneous laptops.

(4) Personnel Policy Renegotiation

Presently, the ID team has the following impressive level of experience:

- Ten instructional designers, whereof 4 have doctoral degrees, plus 1 doctoral degree in progress
- nearly 51 combined years experience within UCF
- 52 combined years experience teaching
- 87 combined years practicing ISD
- 110 combined years business experience

Despite these statistics that demonstrate solid experience, commitment to the unit's mission, goals, and objectives, compensation increases for the team, when compared to opportunities outside the university are low to nonexistent.

Further, there is absolutely no opportunity for advancement within the unit.

Further, there is and should be a policy to accept remote support: meaning that ID team members are permitted to telecommute. There presently is no permission to support telecommuting, which is included in the UCF general employee policies.

Further, sick and vacation times must be negotiated in amount, as well as when it can be planned to be taken (i.e., permit vacation planning beyond 3 months), such that the goals and objectives of the team are fulfilled and even stream-lined.

Further, compensation packages must account for current and future access to the university, which includes parking.

Further, the employment status of the ID team should be such to permit appropriate recognition and status from UCF faculty, as well as from other institutions of higher education across the United States: it is recommended that position titles be aligned with other major universities with similar job categories.

(5) Hiring Plan to Support Expansion Plan and Schedule

Presently, the team is short by 2 IDs. Hiring a new ID requires between 7-9 months. Thereafter, before an ID can be fully effective with the job of delivering IDL, an additional 3-6 months are necessary, depending upon hire date and the next IDL session through which they can be mentored. These numbers realistically reflect that the team requires nearly one year's time to bring aboard new team members to have them be effective as IDL instructors.

Expansion of IDL for immediate needs should include 2 IDs. To expand IDL to permit an increase of 10 faculty will likely require 3 additional IDs, plus 2 AIDs, 2 TechRangers, and 1 ITG member. The additions for each group reflect each group's expected workload impact arising from demand for time created by additional faculty and increasing student enrollments in distance learning programs.

(6) Expansion Plans Beyond IDL

Changes to the workload for the IDL team might not be solely attributed to IDL expansion. For example, if the team were to provide advisory services to other institutions, then new training or workshop services might need to be designed and delivered. The concept of becoming an institute requires more complex consideration. The nature of the role the institute would provide needs to be identified, and the corresponding services and supporting infrastructure well planned. However, the team that provides IDL services today is clearly in a position of national respect for the efficiencies in providing UCF faculty with an array of services that span instructional design, HTML and PHP (i.e., web technologies) programming, student technical support, faculty technical support, advanced systems programming, digital media production (i.e., graphic arts), video production, enterprise application support, and new technology research and development. This organization could clearly expand services to increase the way it provides organizational advisories to other institutions that require assistance with the development of infrastructures for their own or planned distance education programs. It is highly recommended that the leadership team consider such options, especially if changes to organizational funding might arrive through policy changes from the BOG.

Expected Public Reaction to the Proposed Policy

Reaction to the proposed policy will remain largely internal to the groups most affected by the proposed expansion plans. Those affected will wish to discuss the impact these plans have on their current work and projects, and how they stand to benefit from the expansion policy. However, mediating those affected by the policy is both part of the discussion topics treated within this policy, as well as part of the larger university policy of coordination with all appropriate university groups.

Remaining Follow-ups

Additional data need 1: To strengthen the argument and case, we need to verify the institutional mechanism on how PECO dollar allotments to distance learning is conducted or calculated and determine if this mechanism is roughly the same for other institutions.

Additional data need 2: Historical completion data for M and W class type completions over last several years and then to apply forward onto projected enrollment to generate revised FTE calculation to support the percentage shift.

Additional data need 3: To make these institutional recommendations and the criteria for such recommendations, selection criteria for which institutes should be selected and by what rationale, and then recommend those institutions.

Additional data need 4: Need to determine if it is possible to change this allocation policy and with whom dialogs must be started.

Critical decisions to make 1: Need to decide on specific percentage points, as well as the formulation argument that supports these percentage points, that will be applied to the policy directives for each of the four policy stipulations recommended in the CIFTF policy adjustment section. More than likely, this will need to be brought into a larger discussion with the other SUS institutions who participate in PECO dollar allocations.

Critical decisions to make 2: Need to decide whether to move forward with this policy adjustment plan, with whom to collaborate, and with what schedule.

Approaching Deadline: The BOG intends to set the date for allocation by August 1, 2008. If the leadership team is interested in pursuing a policy adjustment to CIFTF, then time is of the essence. The remaining details that are missing for the policy must be immediately pursued.

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