

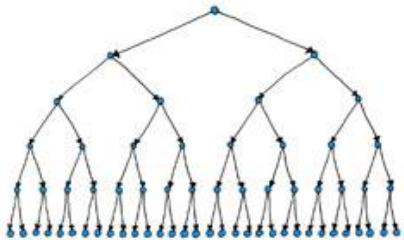


# DIGITAL LEARNING INITIATIVE

Wednesday, May 23, 2018

James Garner Ptaszynski, Ph.D.  
Vice President, Digital Learning

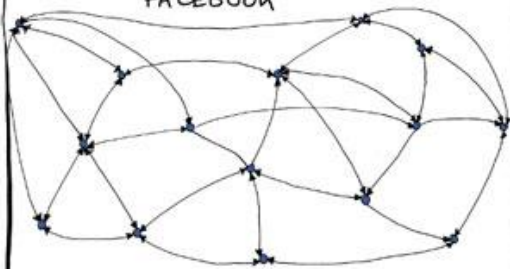
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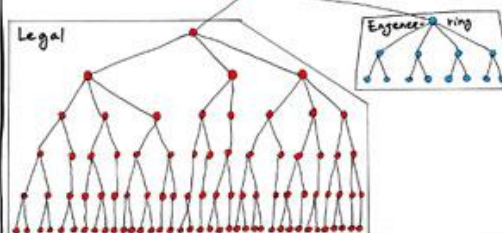
MICROSOFT



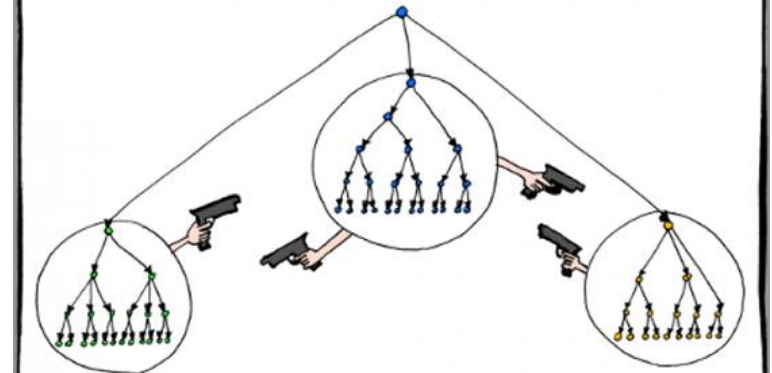
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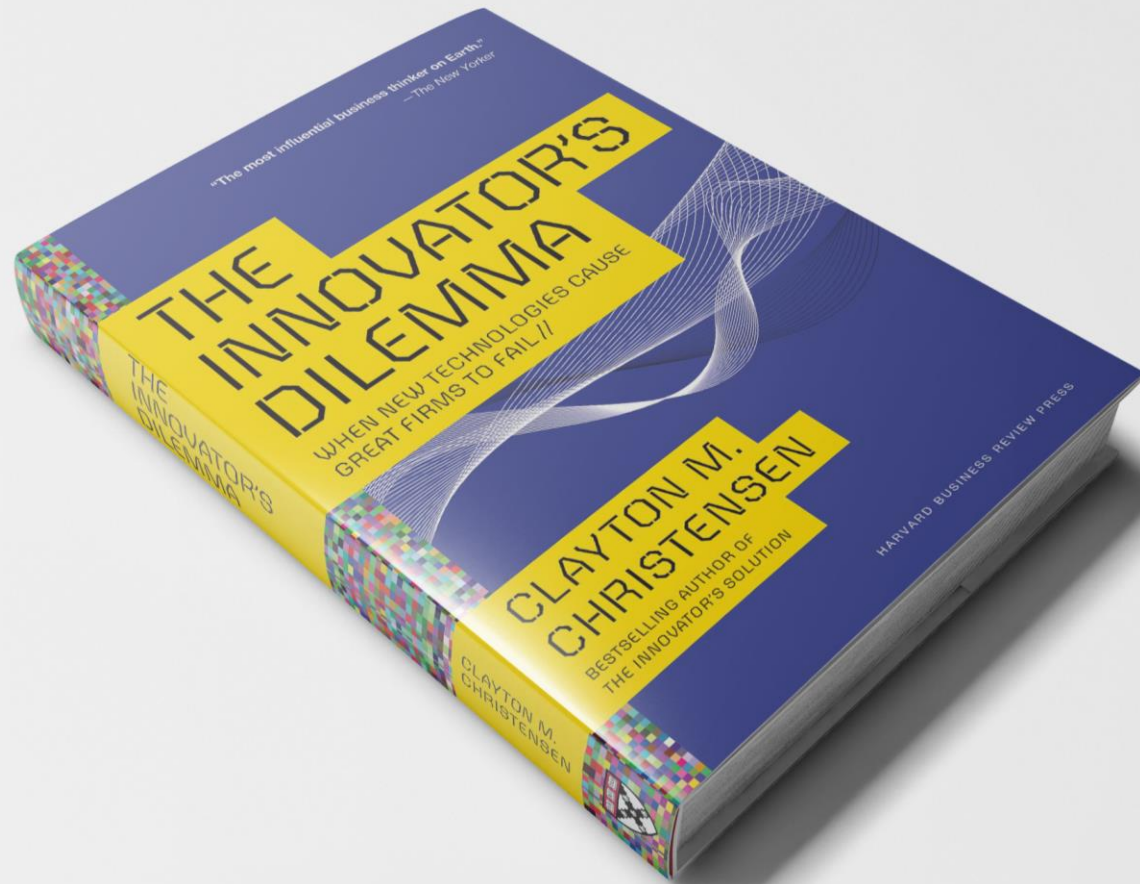








# Our Innovator's Dilemma







# Evolutionary vs Transformative Change





# AUG. 6, 1997: APPLE RESCUED — BY MICROSOFT

**1997:** Microsoft rescues one-time and future nemesis Apple with a \$150 million investment that breathes new life into a struggling Silicon Alley



In a remarkable feat of maneuvering, Apple founder Steve Jobs got more than 10% of the voting shares — and an additional \$150 million in support Office for the Macintosh — from Microsoft to drop a long-running lawsuit. The deal copied the look and feel of the original Macintosh to make Internet Explorer the default browser on the computers — but not the only one.



When was the first iPhone released?

## June 29, 2007

On January 9, 2007 Steve Jobs announced the iPhone at the Macworld conference. The first iPhone was released on June 29, 2007.



# Evolutionary vs Transformative Change



# Why Do This? – Possible Goals

---

1. Revenue growth
2. Reduce costs
3. Growth in digital learning (partial or full)
4. Increase in student success (graduation rate)
5. Reach underserved populations (rural, military, out-of-state)
6. Employer\county economic needs
7. Growth in traditional students (digital is a pipeline)
8. Future proof system against new environment\competitors
9. Create reputation of system as leading edge

# Possible Outcomes

---

- **Disruption\Change**
  - Impact on teaching & learning process
  - Administrative process
  - Funding models
  - Culture & Climate of institutions
  - Anxiety within faculty & staff
- **Efficiency**
  - Master (common) courses
  - Shared services (instructional designers, IT)
- **Effectiveness**
  - Student success
  - Course\program redesign
  - Born digital



# Possible Investments

---

- **Specialized faculty**
  - Course design faculty (Knowledgeable but \$\$\$\$)
  - Teaching faculty (Expert instructors and less \$)
- **Specialized staff**
  - Instructional designers
  - Technology support
  - Advisors\mentors
- **Best-of-breed IT infrastructure**
- **Program\course selection** – meeting needs of employers and counties
- **Program\course development** – Born Digital
- **Centralized vs decentralized control**



**IS THERE A OPPORTUNITY FOR THE  
UNC SYSTEM?**

# Some Observations by Tyton Partners

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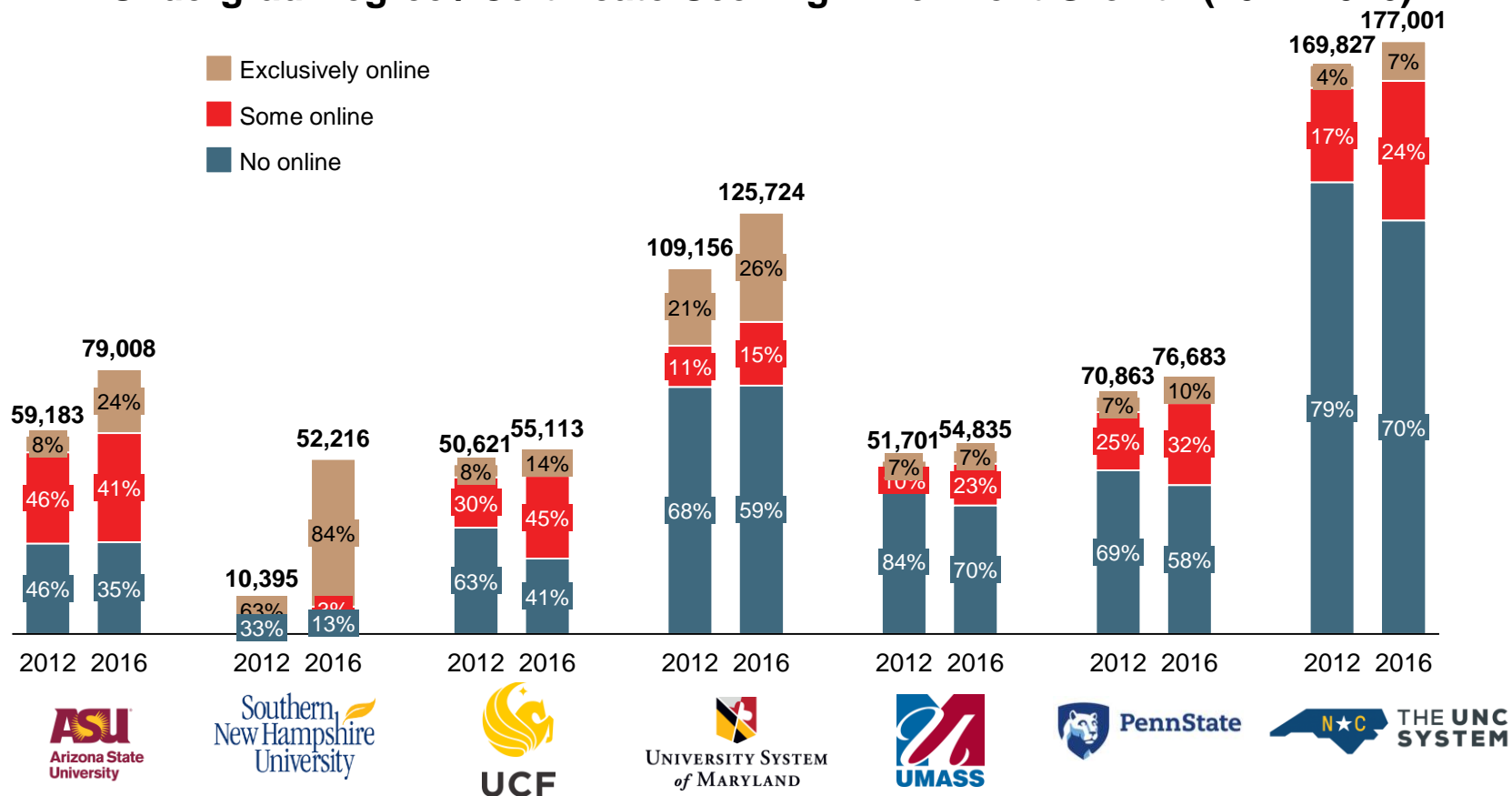
- The growth in “online” in recent years is as much about the opportunity in blended as it is in 100% online programs; institutions must consider a coordinated approach to digital learning in order to ensure maximum access, flexibility and efficiency
  - Relative to select peer institutions, UNC has seen limited growth in online
  - UNC’s relatively decentralized approach to offering online programs may limit the campus’ ability to increase access and flexibility for students
- The adult learner population represents a significant opportunity; however, serving this population requires specialized competencies and offerings
  - UNC is under-weight in serving this population
  - Corporate / employer partnerships and alternative credentials are critical
- There are a number of institutions that have achieved significant scale serving adult learner populations that may offer interesting case studies and examples

**UNC’s online growth options span opportunities to better serve its existing market with partner / build scenarios as well as opportunities to serve new learners and markets through buy scenarios**



# Institutional Comparisons

## Undergrad Degree / Certificate-Seeking Enrollment Growth (2012-2016)



A national exclusively online program strategy can be accomplished via build or partner

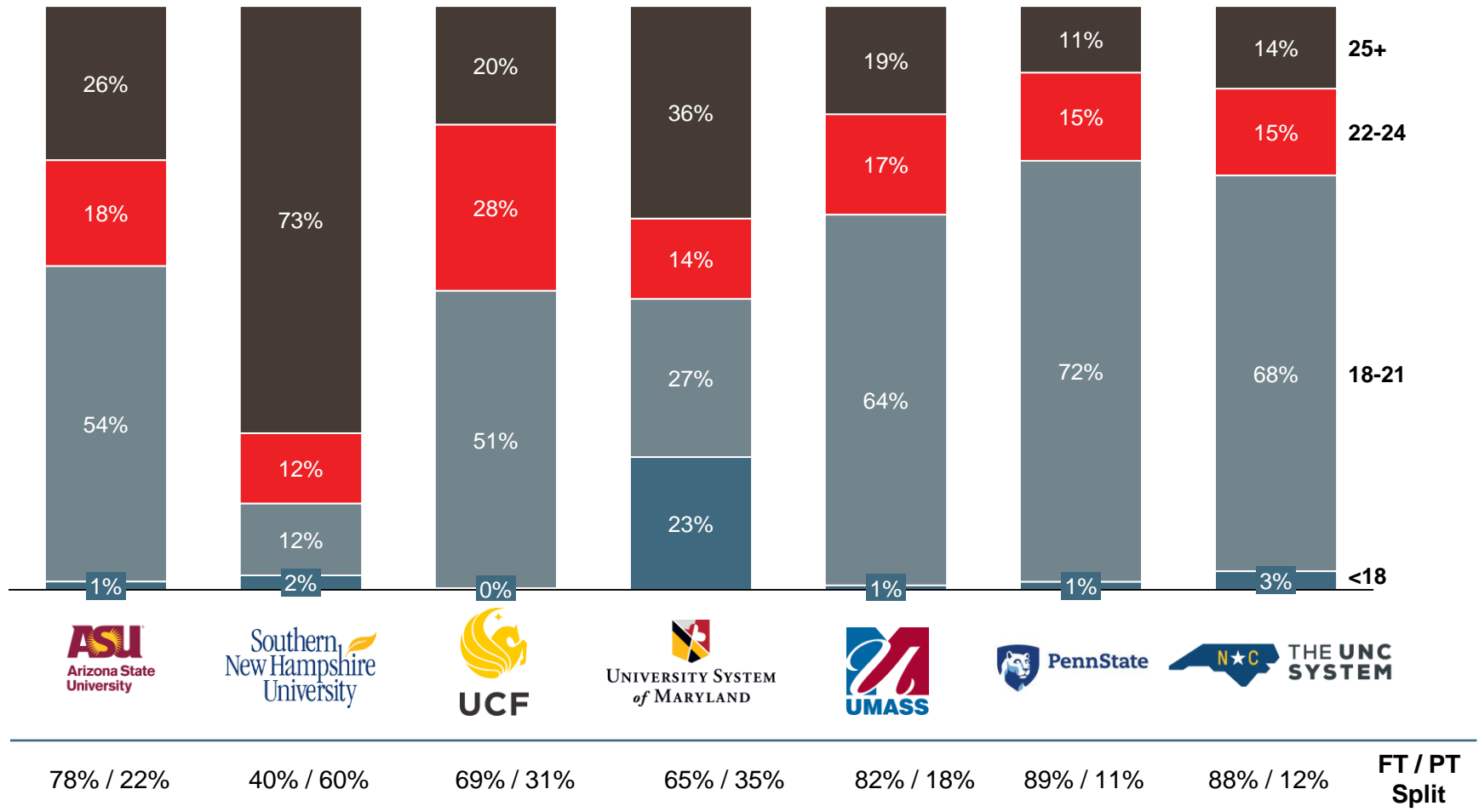
Blended is critical for serving regional students

Multi-institution systems' success is driven by funding model, governance and structure

# Institutional Comparisons

UNC has an opportunity to attract more adult learners

Undergraduate Enrollment by Age (2016)



Sources: IPEDS 2016; Tyton Partners analysis

Note: Penn State System's age breakdown is from 2015 data as it is latest reported in IPEDs



# MAJOR COMPETITIVE FORCES

- Traditional Universities
- Corporations Enter the Market
- The 800 lbs. Gorilla







**THE UNIVERSITY OF  
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# TRADITIONAL UNIVERSITIES

Evolutionary Change

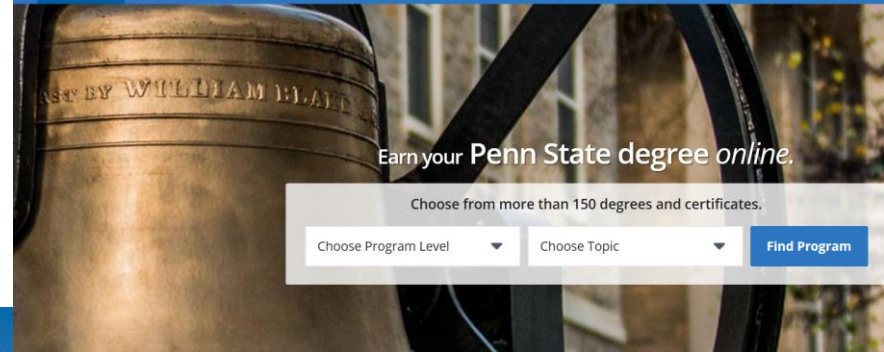


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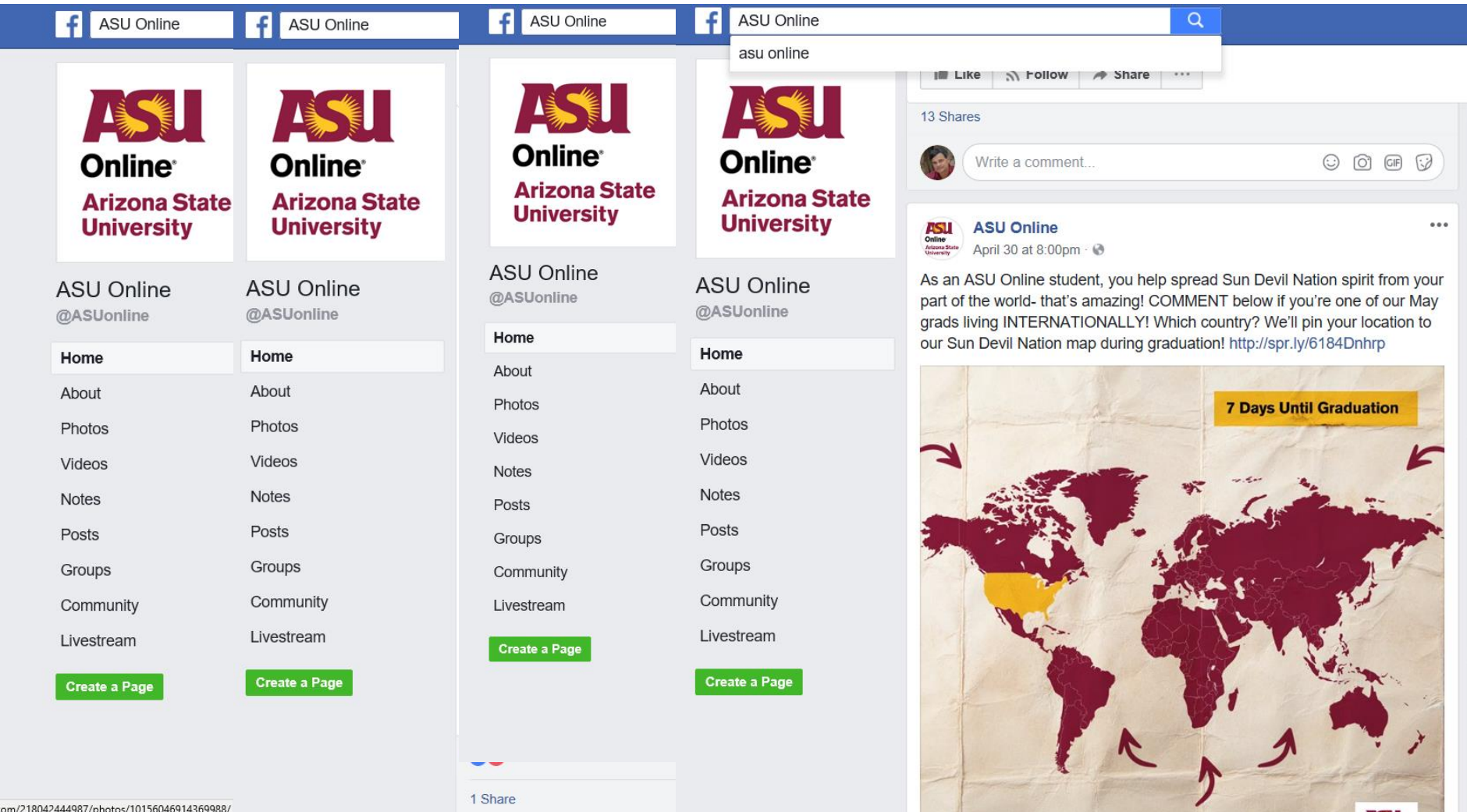
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# LOCATION OF STUDENTS ENROLLED EXCLUSIVELY IN DISTANCE EDUCATION COURSES 2015

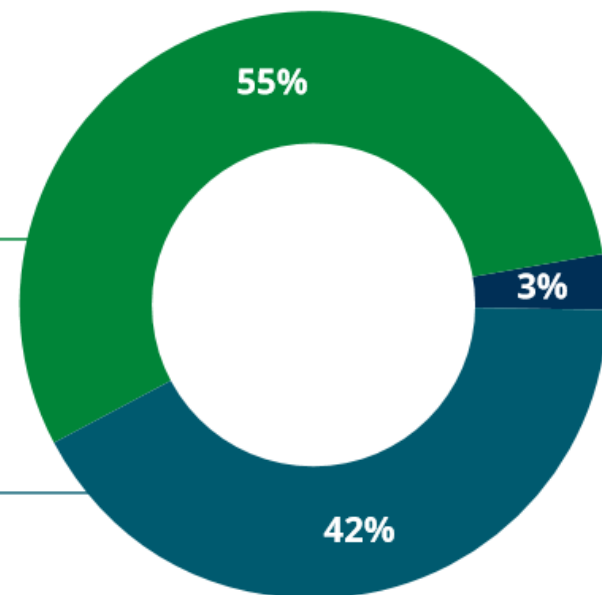
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The majority of “exclusively distance” students **live in the same state** as their institution.

---

But a surprising **42%** are studying at **out-of-state institutions.**

---



■ Different state    ■ Same state    ■ Other/Unknown

# NC Students Attending Online Institutions Out-of-State

	Liberty University	VA	6,638	
	University of Phoenix	AZ	5,256	
	Grand Canyon University	AZ	1,765	
	Penn Foster College	AZ	1,361	
	American Public University	WV	6,138	
	Colorado Technical University	CO	1,270	
	Kaplan University	IA	2,147	
	Capella University	MN	2,377	
	Southern New Hampshire University	NH	2,319	
	Excelsior College	NY	2,029	
	Western Governor's University	UT	845	
	Strayer College	DC	4,711	
	Ashworth College	GA	2,696	
	Columbia Southern University	AL	1,023	
			40,575	

**The New York Times Magazine**

## How Liberty University Built a Billion-Dollar Empire Online

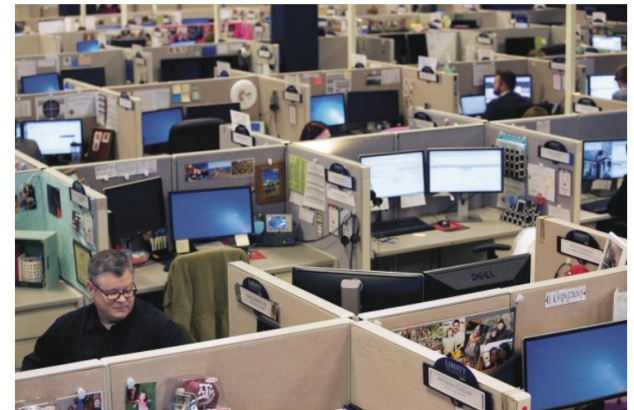
With a hard sell to prospective students and huge amounts in taxpayer funding, Jerry Falwell Jr. transformed the evangelical institution into a behemoth.

By ALEC MacGILLIS/PROPUBLICA APRIL 17, 2018



## THE CHRONICLE OF HIGHER EDUCATION Online Kingdom Come

Liberty U. became an unexpected model for the future of higher education



More than 800 people work in Liberty's online-recruitment division, housed in a former Sears.

Chris Tyree for The Chronicle

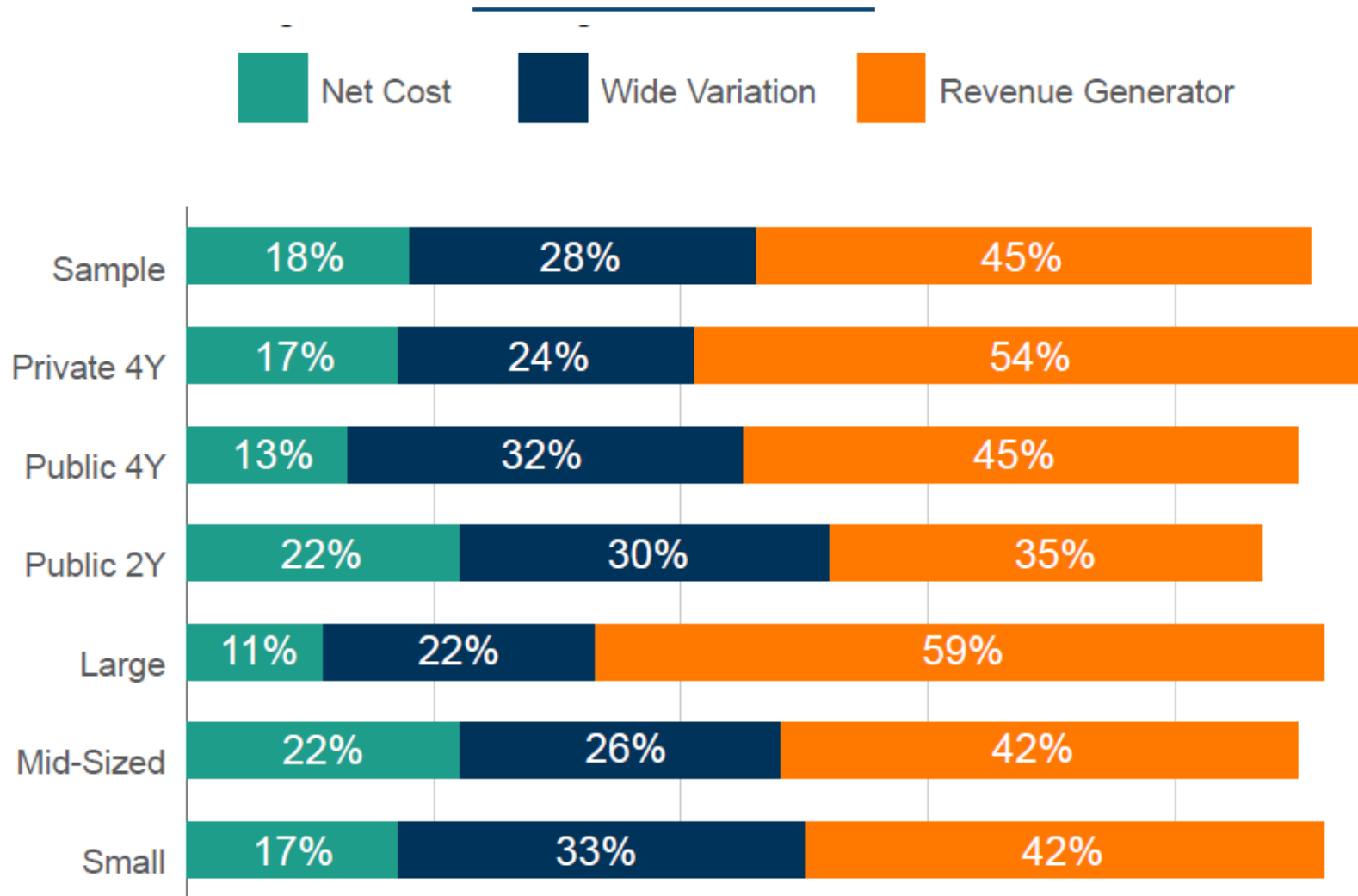
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# Billion-Dollar Blessings

How Jerry Falwell Jr. transformed Liberty University, one of the religious right's most powerful institutions, into a wildly lucrative online empire.

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, its net income was an astonishing \$215 million on nearly \$1 billion in revenue, according to its tax filing — making it one of the most lucrative nonprofits in the country, based simply on the difference between its operating revenue and expenses, in a league with some of the largest nonprofit hospital systems.

# Online Programs: Net Cost or Revenue Generator?





# Lessons Learned From a \$75 Million Failed Experiment

Closure of Texas System's innovation arm shows that ed-tech start-ups need similar things -- including business models and faculty buy-in -- whether Silicon Valley or a university fund them.

By Doug Lederman // February 21, 2018



Starting in 2011, the Texas system **invested nearly \$100 million** in the institute (\$23 million remains unspent) to try to drive digital technologies into the approaches its campuses use to reach, educate and graduate students. Over five years, the institute helped several UT campuses launch distinctive new academic programs and developed three core pieces of technology that, among other things, deliver online learning and students' transcript information via the blockchain. But its total **revenue over the five years: \$1 million**, *The Texas Tribune* reported.

# Some Lessons

---

"Before you establish an organization, you have to be very clear about its goals," said this official. "It cannot be these broad fuzzy things, like 'drive innovation through change' or 'drive student success.'"

Understanding how and why Texas' Institute for Transformational Learning failed -- and even some of its fans acknowledge its failure -- is important. Because whether the institute itself was a good idea, most colleges and universities will need to experiment, in ways big and small, to thrive going forward.



# CORPORATIONS

Limited Goals – For Now

# Battle Royale

## Blinded by Assumptions

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### Value Proposition

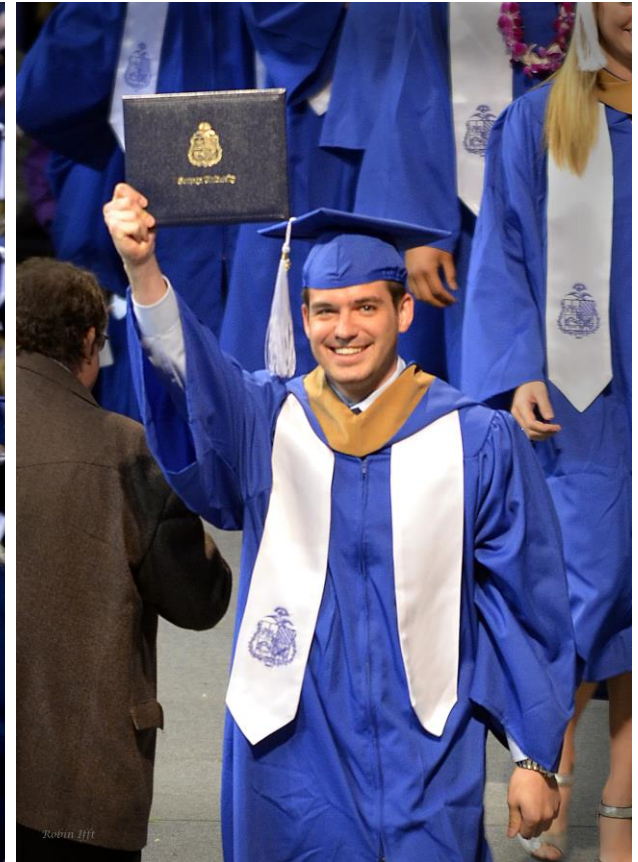
- Features
- Security
- Privacy
- FERPA
- Legal

### Marque Clients

- Medical Schools
- Law Schools
- Business & Industry

### Value Proposition

- Free
- Internet-based
- New - NYPE



**Accreditation**

**Access to federal financial aid**

**Diplomas**

**Reputation**

**Degrees**

**Credibility**



# Battle Royale

---



**BRIEF**

**Is Amazon moving into the e-learning space?**

## Value Proposition

- Accreditation
- Federal Financial Aid
- Degrees
- Diplomas
- Credibility

## Value Proposition

- Direct links to job market
- No or low cost
- Available now
- Internet-based



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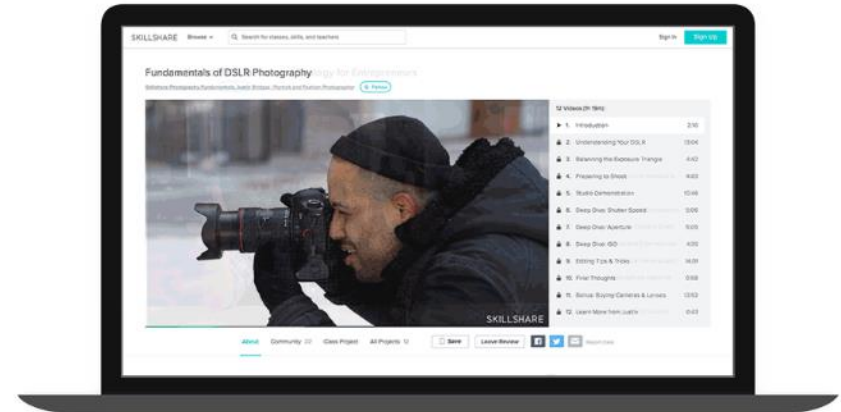
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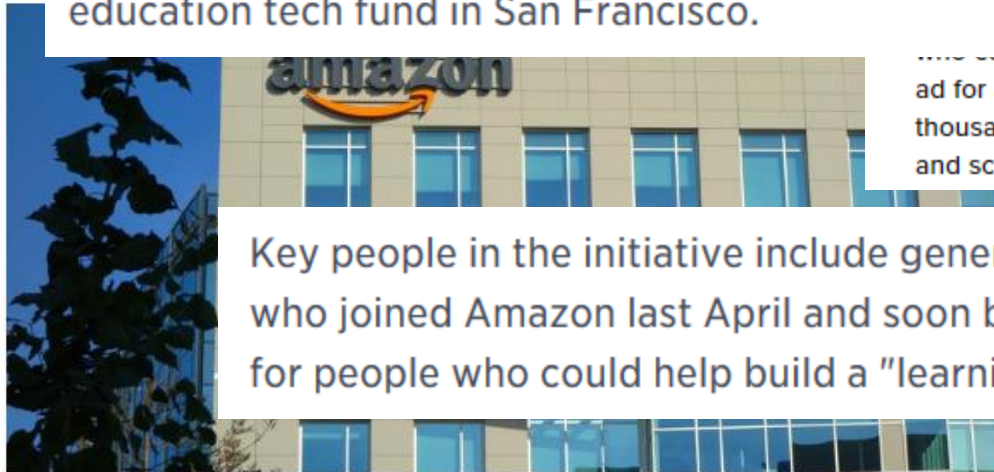


### Instructor Accreditation

Member educators receive complimentary AWS training and discounts for AWS Certification as part of instructor accreditation.



"If you see Amazon take a strong step into this space, then it's recognition of 'lifelong learning' and career-centric up-skilling," said Tory Patterson, co-founder and managing partner of Owl Ventures, an education tech fund in San Francisco.



into the online education space, 2017 have advertised for people who could help build a "learning platform." As recently as December, an ad for a solution architect cited an opportunity to "enable hundreds of thousands of businesses in 190 countries around the world to transform and scale their learning initiatives."

Key people in the initiative include general manager James Urquhart, who joined Amazon last April and soon began advertising job postings for people who could help build a "learning platform."

BRIEF

## Amid speculation, Amazon continues to inch its way in

A job [opening](#) for a solution architect that appeared in December hinted how things could play out. "This is an opportunity for an experienced technologist to be on the ground floor of building a learning platform that will enable hundreds of thousands of businesses in 190 countries around the world to transform and scale their learning initiatives," Amazon wrote.

The move suggests Amazon Web Services sees ready-to-use services, rather than raw computing and storage resources for roll-your-own application development, as vehicles for maintaining the rapid growth of its cloud and keeping its lead ahead of the likes of [Google](#) and [Microsoft](#). If the move is part of a broader effort to move into enterprise software, individuals can go as far as [Amazon](#) as videos to gain skills, and

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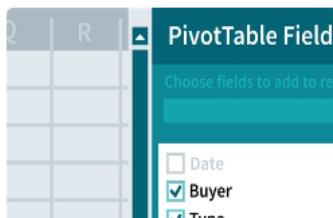
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## Faculty

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rkrawiec@email.unc.edu



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End:	12/14/18
Last Date to Register:	08/27/18 (subject to change)
Delivery:	Web
Meeting Pattern:	
Pre-requisites:	None Listed
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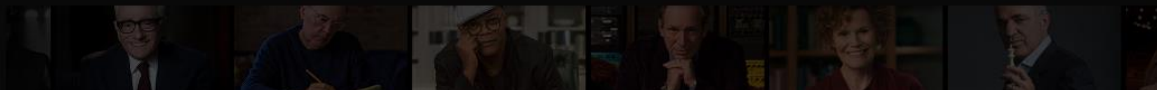


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For James, conducting in-depth research not only makes his writing better, it also boosts his credibility with his readers. Find out when and how James conducts his research and how he incorporates it into his writing in a thoughtful way.
- 06 Outlines: Part 1**  
James' secret weapon is a comprehensive outline. Learn how he sets himself up for a fast and successful first draft. No matter what, don't skip this lesson!
- 07 Outlines: Part 2**  
James has never shown the outline for his best-seller *Honeymoon* to anyone (not even his publisher) until now. Follow along with the outline provided in your *Class Workbook* as James further explains his process.
- 08 Writer's Block**  
Even when you've written as many books as James has (76 best sellers and counting), there's still nothing scarier than staring at the blank page. Here's how to conquer those fears.
- 09 Creating Characters**  
From Alex Cross to Michael Bennett, James has mastered the art of creating complex and memorable characters. Hero to villain, learn how to make your character stay with your reader well beyond the last page.
- 10 First Lines**  
Grab your reader's attention quickly and make them hold on for dear life. James shares his tips for getting your reader hooked from the very first line.
- 11 Writing Dialogue**  
Dialogue should always push the story forward. Listen to James explain a few common dialogue pitfalls and easy ways to avoid them.

- 12 Building A Chapter**  
James is well known for his numerous short and snappy chapters. Learn how he propels the reader through the book outline as his roadmap.
- 13 Writing Suspense**  
The secret to suspense is...
- 14 Ending The Book**  
We've all read great books with terrible endings. Of the infinite possible endings, learn how James chooses the right one.
- 15 Editing**  
James is liberal with a red pen; his editing is key to keeping the reader engaged. Learn how to trim the fat with our in-class editing assignment.
- 16 Working With A Co-Author**  
When does James decide to use a co-author and is it a true collaboration? In this lesson, we meet two of his most trusted authors who share their process for making a collaboration truly successful.
- 17 Getting Published**  
Author of 76 best-sellers and holder of the Guinness World Record for the first person to sell over 1 million eBooks, James knows a thing or two about getting published. In this lesson he shares what he's learned.
- 18 Book Titles And Covers**  
Readers do judge books by their covers. What should they think about yours?
- 19 Marketing The Patterson Way**  
Before publishing his first book, James was an executive at a top ad agency in New York. Find out what James learned from his time in advertising and how he used it to change the book marketing game.
- 20 Hollywood**  
What happens when Hollywood takes an interest in your story? Sit back and listen as James shares the best and worst from his time on the set.
- 21 Personal Story**  
Every master begins as a student. James shares his long, winding path to becoming the world's best-selling author.
- 22 Closing**  
You've been given the tools to help write your next book. Now what?



Mr. Patterson is not only a great writer,  
but a natural teacher as well. His style is  
casual, uncomplicated and  
straightforward. Highly recommended.

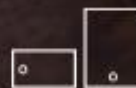


Max Rogue  
Writer from Virginia

100%

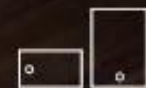
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JAMES PATTERSON

CONTINUE



# CHINA

The Master Plan

Buying Education Technology Companies

International Students

Buying Collages and Accreditation

# US Commerce Secretary calls China 2025 plan “Frightening”

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Money

US Commerce Secretary  
calls China 2025  
plan 'frightening'

China's plan to transform itself into the global technology nexus is a "frightening" one that puts American intellectual property at risk, US Commerce Secretary Wilbur Ross said Tuesday.

China's plan to transform itself into the global technology nexus is a "frightening" one that puts American intellectual property at risk, US Commerce Secretary Wilbur Ross said Tuesday.

"It's a huge, huge problem," Ross told a gathering of fabric industry executives about the repeated theft of technology. "And it's not going away."

He said Beijing's development plan -- Made in China 2025 -- maps out the country's strategy to dominate "every hot industry" from space to telecommunications to robotics to electric cars.

# Higher Education Plans

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## Project 211

Project 211 is the Chinese government's new endeavor aimed at strengthening about 100 institutions of higher education and key disciplinary areas as a national priority for the 21st century. There are 112 universities in the project 211.

## Project 985

Project 985 is a constructive project for founding world-class universities in the 21st century conducted by the government of the People's Republic of China. On May 4, 1998, President Jiang Zemin declared that "China must have a number of first-rate universities of international advanced level" so Project 985 was launched. In the initial phase, 9 universities were included in the project. The second phase, launched in 2004, expanded the program until it has now reached 39 universities.

In 2003 China supported 1,552 institutions of higher learning (colleges and universities) and their 725,000 professors and 11 million students (see [List of universities in China](#)). There are over 100 [National Key Universities](#), including [Peking University](#) and [Tsinghua University](#). Chinese spending has grown by 20% per year since 1999, now reaching over \$100bn, and as many as 1.5 million science and engineering students graduated from Chinese universities in 2006. China published 184,080 papers as of 2008.<sup>[5]</sup>





# World Class Universities

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## China to develop 42 world-class universities

(People's Daily Online) 15:41, September 21, 2017



*Tsinghua University*

Chinese authorities on Thursday released a selected list of universities and colleges, which will participate in the country's construction plan of world-class universities and first-class disciplines.

The plan, also known as the "Double-First Class" initiative, aims to ultimately build a number of world class universities and disciplines by the end of 2050, in an effort to make China an international higher education power. The project will run on a five-year cycle, while around 100 disciplines will be supported, including those that are related to national security and vital interests, as well as emerging and interdisciplinary subjects.

According to the list jointly released by the Ministry of Education (MOE), the Ministry of Finance (MOF), and the National Development and Reform Commission (NDRC), 42 universities and colleges will be developed into world-class educational institutions, while 95 universities will focus on building their preponderant disciplines into first-rate ones.

# World University Rankings

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27 Peking University  
China

30 Tsinghua University  
China


44 Hong Kong University of Science and Technology  
Hong Kong

56 University of North Carolina at Chapel Hill  
United States

58 Chinese University of Hong Kong  
Hong Kong




**#34**  
Tie **University of North Carolina--Chapel Hill**

 United States Chapel Hill, NC

**#64** **Tsinghua University**

 China Beijing

**#65** **Peking University**

 China Beijing

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# The University of China at Illinois

The University of Illinois at Urbana-Champaign enrolled 37 undergraduates from China in 2000. Now it has close to 3,000. What are the implications of such a shift?

By [Elizabeth Redden](#) // January 7, 2015

56 COMMENTS 



ELIZABETH REDDEN

The quad at the University of Illinois at Urbana-Champaign.

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# Many Colleges See a Drop in International Students, Chronicle Survey Finds

By Karin Fischer | SEPTEMBER 06, 2017 ✓ PREMIUM



Liz Kaye, IU Communications

Members of the international-office staff help students register during orientation for this term at Indiana U.-Purdue U. at Indianapolis. The campus had a small rise in overall international enrollments, although there was softening, particularly at the master's level.



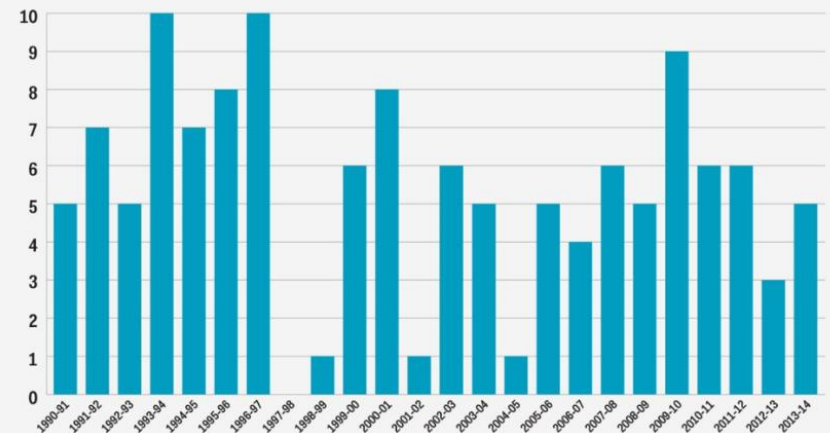
## Websites Tracking America's Failed Colleges Show That Struggles Are Nothing New



Steven Bley

Buildings belonging to the former Bennett College, in Millbrook, N.Y., have stood empty since the institution closed, in 1978, after years of financial distress.

### College Closings, 1990-2014



Source: National Center for Education Statistics

BUSINESS INSIDER

# China: Competing from within

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Chinese Companies Are Buying Up Cash-Strapped U.S. Colleges  
[bloomberg.com](http://bloomberg.com)



## China Moves on U.S. Schools

Voice of @BruceEinhorn

Source: KaiWen Academy

@tictoc

by Bloomberg

Chinese companies are setting their sights  
on American colleges

2016年 北京凯文学校由清华附中负责教育教学管理



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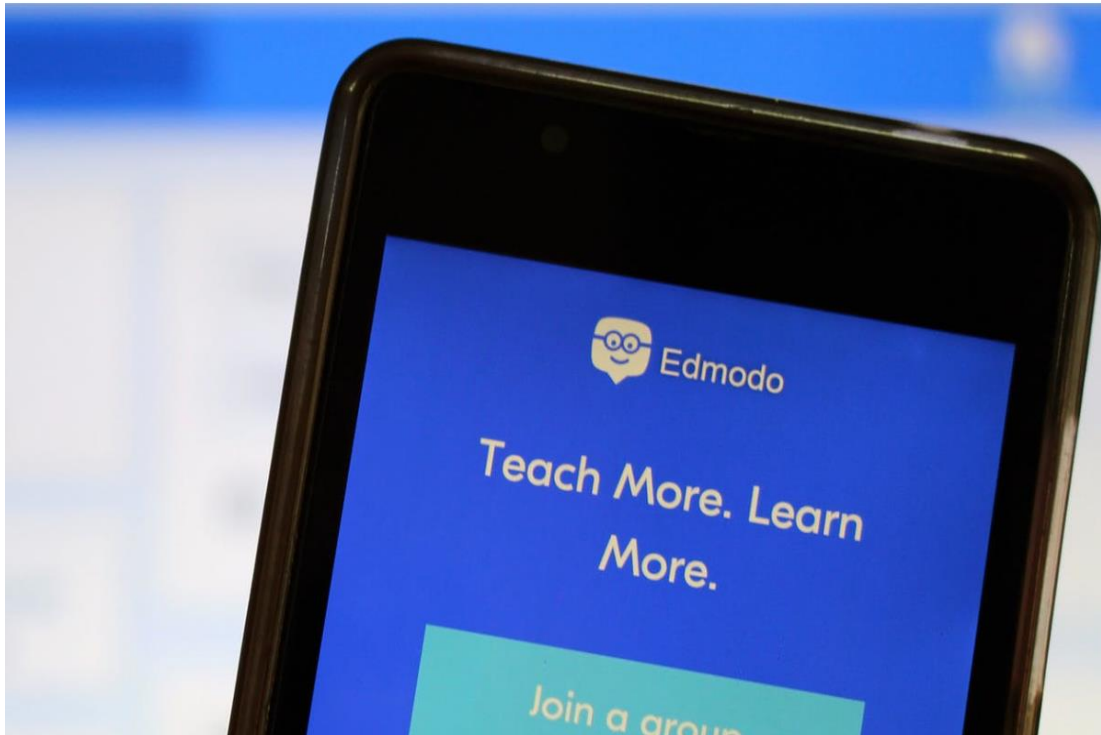


China Moves on U.S. Schools

# And they are buying technology companies

## China's NetDragon to Acquire Edmodo for \$137.5 Million

By Betsy Corcoran and Tony Wan Apr 9, 2018



China's NetDragon has gobbled up another education technology company. This time, it's Edmodo, one the largest online social communities of teachers and students in the world.

NetDragon Websoft, a publicly-traded company based in Fuzhou, China, has agreed to pay \$137.5 million for Edmodo. That deal includes a modest cash outlay of approximately \$15 million and a significant chunk of equity (about \$122 million worth of shares in NetDragon's education subsidiary.)

Edmodo was started in 2008 by a teacher and IT support person as a “Facebook-like” community aimed at connecting educators with students and with one another. Also like Facebook, Edmodo grew rapidly. Currently, the company, now based in San Mateo, Calif., claims more than 90 million registered users (both teachers and students) in 400,000 schools across 192 countries.



# Reported Censorship at a Confucius Institute

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A journalist at *Foreign Policy* wrote that a reference to her reporting experience in Taiwan was deleted from her biography when she gave a talk at Savannah State University's Confucius Institute, one of more than 500 such centers worldwide funded by the Chinese government to teach language and culture. The journalist, Bethany Allen-Ebrahimian, wrote that she later learned the reference to Taiwan in her biography was deleted at the request of the institute's co-director, Luo Qijuan, who argued that it challenged Chinese sovereignty and threatened to boycott the event if it was not removed. Neither Luo nor the university responded to *Foreign Policy*'s request for comment.

By Elizabeth Redden // May 10, 2018

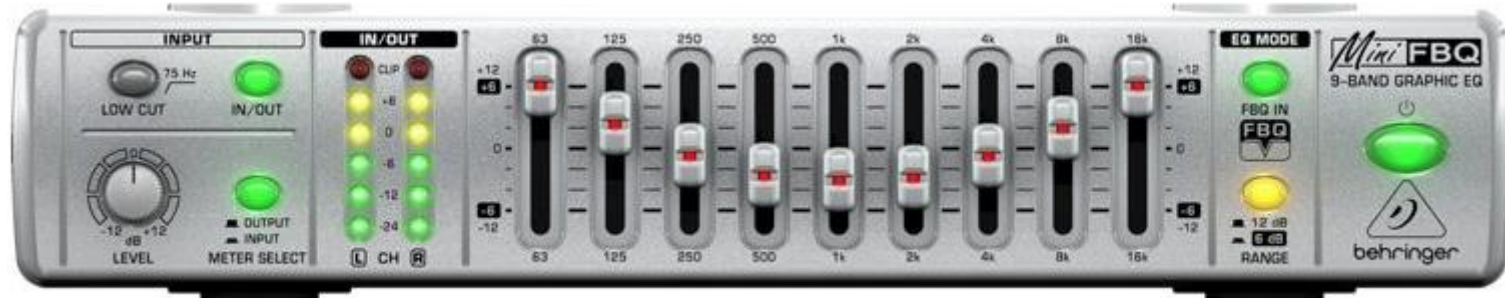






# THREE MODELS

# Equalizer



Pre-Sets for Rock – Jazz – Classical – Spoken Word and Custom Settings

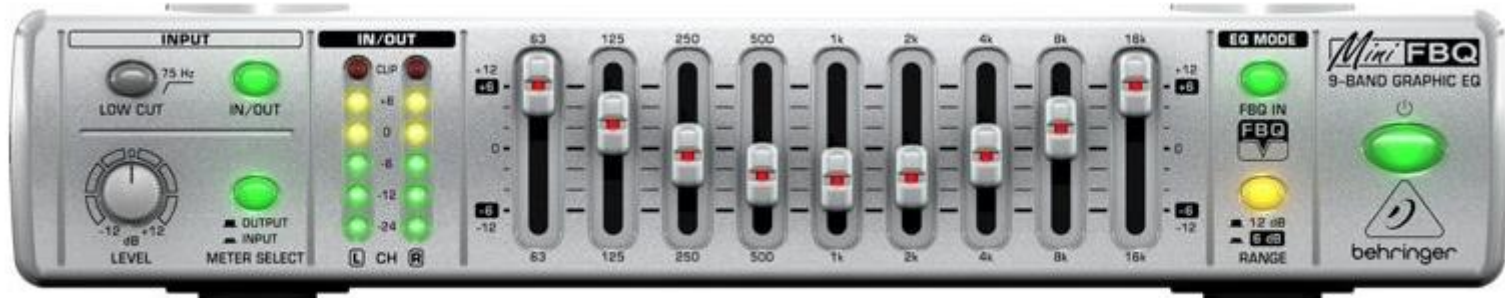
# Equalizer

Goals

Outcomes

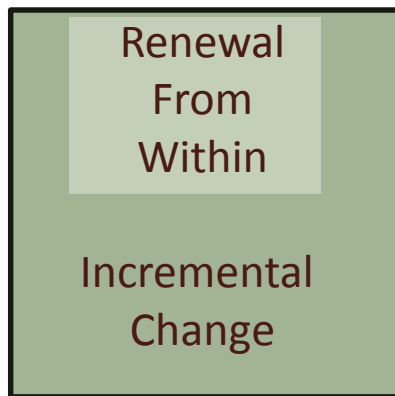
Investments

Revenue Growth  
Cost Reductions  
Growth all students  
Student success  
Disruption/change  
Effectiveness  
Rural, Military  
Efficiency  
Reputation as leading edge



# Three Models

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# QUESTIONS?

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