

**Technology-Enhanced Learning Implementation Group (TELIG)
Final Report**

15 December 2014

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Membership

Administrators

Curtis Bennett (co-chair)
Associate Dean, Seaver College of Science &
Engineering
Professor, Department of Mathematics

Crista Copp
Director, Academic Technology

Patrick Frontiera
Vice President, Informational Technology
Services

Dorothea Herreiner
Director, Center for Teaching Excellence
Associate Professor, Department of
Economics

Margaret Kasimatis
Associate Provost, Strategic Planning &
Educational Effectiveness

Stephen Ujlaki
Dean, School of Film & Television

Faculty

Elizabeth A. Drummond (co-chair)
Bellarmine College of Liberal Arts
Associate Professor, Department of History

Ernesto Colín
School of Education
Assistant Professor, Specialized Programs
in Urban Education

Christopher Finlay
College of Communications & Fine Arts
Assistant Professor, Department of
Communication Studies

Linda Leon
College of Business Administration
Associate Professor, Department of Finance
& Computer Information Systems

Mikael Kreuzriegler
School of Film & Television
Associate Professor, Department of
Production

Jeremy McCallum
Seaver College of Science & Engineering
Associate Professor, Department of
Chemistry & Biochemistry

Executive Summary

Following on its charge from Provost Joseph Hellige and informed by LMU's Vision Statement for Blended and Online Learning, the Technology-Enhanced Learning Implementation Group (TELIG) offers the following set of recommendations. Please see the full report for an explication of these recommendations.

1. That LMU adopt the recommended definitions of fully online, local online, high-hybrid, and low-hybrid courses for use across the university and that the Registrar use these definitions in developing a coding system in Banner (section III.A, pp. 6-7).
2. That LMU adopt the policy that enrollment caps for online and hybrid courses be appropriate for the pedagogical experience and comparable to the enrollment caps for face-to-face versions of those courses or to those for similar courses (section III.B, p. 7).
3. That LMU adopt an undergraduate cap for online and hybrid courses of 20% of LMU units (section III.C, pp. 7-8).
4. That the UCCC establish a cap for the percentage of Core courses that may be taken as online or hybrid courses and that the FYS and RA courses not be offered in online or hybrid formats (section III.C, p. 8).
5. That LMU adopt the recommended definitions for hybrid and online graduate programs (section III.D, pp. 8-9).
6. That the APRC revise its new program and program modification proposal guidelines to address the issues identified in this report (section III.E, pp. 9-10).
7. That Colleges/Schools establish a course approvals and review process for online and hybrid courses with the recommended components (section III.F, pp. 10-12; appendix 3, p. 22).
8. That the Faculty Senate review and revise the charges, compositions, and responsibilities and the CET and ATC to address faculty governance issues around online teaching (section III. G, pp. 12-13).
9. That the Provost develop an administrative structure in Academic Affairs to coordinate and oversee the implementation of online and hybrid initiatives, as well as the day-to-day administration of issues related to online teaching (section III.G, pp. 12-13).
10. That Colleges/Schools and Departments/Programs develop guidelines and processes that are attentive to faculty workload, development, and evaluation issues related to online learning (section IV, p. 13).

11. That the Provost approve the faculty development plan proposed in this report, which includes a variety of talks, workshops, and grant programs (section IV, pp. 14-15; appendix 4, pp. 23-29).
12. That an ad-hoc committee be established to review and revise LMU's intellectual property policy to take into account the particular issues raised by online teaching (section V, pp. 15-16; appendix 5, pp. 30-31; appendix 6, pp. 32-34).
13. That LMU review and assess the definitions, approvals processes, governance structures, intellectual property policy, and faculty development plan for online teaching regularly, beginning in the 2017-2018 academic year (section VI, p. 16).
14. That a comprehensive needs assessment be conducted in order to identify the resources needed in order to ensure the quality and effectiveness of LMU's online undertakings (section VII, p. 16; appendix 7, pp. 35ff).

I. Introduction

In February 2013, the Provost's Planning Council created the Technology-enhanced Learning Subcommittee, which was tasked with laying the groundwork for LMU to develop a strategic and mindful approach to the use of technology in teaching. The Subcommittee reviewed the use of instructional technology at LMU, analyzed broader trends in online course and program offerings, drafted a vision statement for blended and online learning, and made several recommendations regarding the future of online and blended learning at LMU (see report from 30 January 2014). On the basis of the Subcommittee's recommendations, Provost Joseph Hellige created the Technology-Enhanced Learning Implementation Group (TELIG) in late March 2014, which was charged with the following:

- To recommend to the Provost the composition of a governing body responsible for the oversight of and policy making for the use of technology in delivery education.
- To establish approval processes to ensure the quality of online and hybrid courses and programs.
- To create a faculty development workshops and grants program – similar to the Core Curriculum course development workshops – to be offered in the summer of 2014.
- To establish clear goals and actionable strategies for moving towards realizing the “Vision for Online and Blended Learning at LMU.”

TELIG began its work in April 2014. After conversation with the Provost, it was decided that TELIG would revise the draft vision statement on the basis of feedback from the deans, the Colleges/Schools, and the Faculty Senate. It was also decided that the timeline would not allow for summer 2014 faculty development workshops, but that TELIG would develop a proposal for a faculty development plan to begin in fall 2014. In addition, TELIG identified the following areas for action: the development of appropriate governance structures, including course and program approvals processes; the revision of the intellectual property policy in light of technology issues; the identification of resource issues; and the development of strategies for moving forward.

In completing its work, TELIG met three times during the remainder of the spring 2014 semester, five times during the summer 2014, and seven times during the fall 2014 semester. In addition, a variety of subcommittees were created to deal with specific issues – definitions, program approvals, course approvals, intellectual property, faculty development workshops, and resource considerations – and these subcommittees conducted their work throughout the summer and/or fall. At several times during the course of its work, TELIG solicited feedback from various shared governance bodies, including the Deans' Council, the Associate Deans' Council, the Faculty Senate, the Committee on Excellence in Teaching, the Academic Technology Committee, and various College-/School-level bodies. In most cases, there was no clear consensus in the feedback, and feedback from different bodies and individuals often pointed in contradictory directions. TELIG worked to find compromise positions where available – for example, by responding to clear feedback but taking dissenting opinions into

account in the recommendation, by trying to find a middle ground between divergent opinions, and so on. For a summary of the debates around the issues and questions that generated the most discussion and feedback, please see appendix 1.

II. Vision Statement

In its 30 January 2014 report, the Technology-enhanced Learning Subcommittee of the Provost's Planning Committee included a set of guiding principles in the form of a vision statement for online and blended teaching and learning. Because that subcommittee did not include any faculty members, the vision statement was forwarded to the Faculty Senate for the feedback. On the basis of that feedback as well as feedback from the Deans and Colleges/Schools, TELIG revised the vision statement. The final Vision Statement for Blended and Online Learning: Guiding Principles was endorsed by TELIG on 16 May 2014, accepted by Provost Joseph Hellige on 30 May 2014, and distributed to the University community on 17 June 2014 (see appendix 2).

III. Governance Structures

As stated in the LMU Vision Statement for Blended and Online Learning, the "development and teaching of hybrid or online courses and programs will be undertaken in a collaborative manner between faculty and administrators. Decisions about the use of online technology in instruction are fundamentally academic decisions and will be guided by principles of shared governance." In light of that guiding principle and its charge from Provost Joe Hellige, TELIG offers the following recommendations regarding the governance of hybrid and online courses and programs. These recommendations focus on University-level structures and policies as well as minimum University-wide standards for oversight. TELIG recommends that Colleges/Schools be empowered to build on top of these structures and standards provided that College-/School-level procedures are consistent with them.

A. Definitions for Online & Hybrid Courses

In order to establish clear parameters for when course approval is required as well as for when program-level thresholds are met, it is first necessary to establish University-wide definitions for online and hybrid courses. TELIG recommends the following course definitions:

- Fully Online Course: A course that takes place 100% online and that requires no face-to-face meetings.
- Local Online Course: A course that takes place between 90% and 99% online and has less than 10% of regularly scheduled face-to-face meetings at an LMU site.
- High-Hybrid Courses: A course that takes place between 50% and 89% online and has between 11% and 50% of regularly scheduled face-to-face meetings.
- Low-Hybrid Course: A course that takes place between 30% and 49% online and has between 51% and 70% of regularly scheduled face-to-face meetings for the remainder of the time.

These definitions should be reviewed every three years to consider technology advances and trends in e-learning.

TELIG recommends that courses falling into these categories be required to go through the course approvals process proposed below. While other courses may make use of blended tools that have a significant impact on the learning experience, if the use of technology changes the face-to-face schedule by less than 30%, the course is not required to go through the course approvals and review process. These definitions will also be used for program-level definitions and thresholds (see below).

Although the above definitions are based on the percent of face-to-face instruction that is being replaced by online instruction, LMU's credit hour policy does not establish a firm requirement for "face-to-face" time. Thus, it will be important for some baseline assumptions to be established for a "normal" amount of face time for the above definitions to be meaningful. Because pedagogical approaches vary across Colleges and Schools and because these differences are important for determining norms and expectations for work in and/or outside of the classroom, TELIG recommends that Colleges/Schools be required to develop assumptions about the "normal" amount of face-to-face instruction, and use those assumptions in assigning online and hybrid courses to one of the above categories.

These definitions are to be used first and foremost for governance issues, but TELIG recommends that the university be consistent in its use of definitions across all offices. As such, any coding done by the Registrar – to indicate to students which courses are fully online, to indicate whether a course is asynchronous or synchronous, for use in classroom scheduling – should follow and be consistent with these definitions.

B. Enrollment Caps for Online & Hybrid Courses

Feedback from faculty governance bodies and individual faculty indicated that there is considerable concern that enrollment caps for online and hybrid courses might be significantly higher than for non-online courses, with concerns about what that would mean both for the student learning experience and for faculty workload. To ensure the sort of quality interaction that characterizes an LMU education, TELIG recommends that enrollment caps for online and hybrid courses be appropriate for the pedagogical experience and comparable to the enrollment caps for the face-to-face versions of those courses or to those for similar courses.

C. Undergraduate Cap for Online & Hybrid Courses

The Vision Statement for Blended & Online Learning, while empowering faculty to develop online and hybrid programs at the post-baccalaureate level, recognizes that the LMU undergraduate educational experience is one that values small classes with a focus on student-instructor interaction and collaborative learning in a "high-touch" setting. At the same time, the

vision statement allows for the development of online and hybrid courses at the undergraduate level, both as a means of helping to ensure that students make timely progress towards graduation and to enable faculty to experiment with innovative pedagogical approaches.

In attempting to balance these priorities, TELIG discussed how best to ensure that students do the bulk of their education in courses that require regular face-to-face interactions. Because undergraduate students complete a number of different “programs” in completing their LMU degrees (the Core and the major at the very least, but also often a second major and/or minor(s)), it is not feasible to set program-level thresholds as is the case with graduate programs (see below; for graduate programs, the major program is the degree program, with no additional programs or courses required for graduation). As a result, TELIG recommends that limits be set on the percentage of the degree that students may complete in the form of online or hybrid courses, as follows:

- Students may take no more than 20% of their LMU units as online or hybrid courses. Thus, at least 80% of the LMU units must be completed in courses that have at least 71% of regularly scheduled face-to-face meetings.
- TELIG strongly encourages the University Core Curriculum Committee to establish an appropriate cap for what percentage of Core courses may be taken as online or hybrid courses. TELIG also recommends that the First-Year Seminar and Rhetorical Arts course not be taught as online or hybrid courses.

These caps should be reviewed every three years to consider technology advances and trends in e-learning. TELIG recognizes that Colleges and Schools have the authority to set additional limits on how many and which online/hybrid courses can satisfy requirements in their major/minor programs.

D. Definitions for Online & Hybrid Graduate Programs

The Vision Statement for Blended & Online Learning allows for the creation of online programs at the post-baccalaureate level, as a means for faculty to experiment with new pedagogies with motivated students, to develop innovative new programs and to transform existing programs, to enable working professionals to seek advanced degrees, and so on. WASC guidelines establish additional reporting requirements for online programs and define as online those programs that are 50% or more online. WASC guidelines, however, do not distinguish between online and hybrid courses or indicate how those differences factor into whether a program is considered as online. In order to ensure that LMU remain compliant with WASC guidelines, TELIG recommends the following, more precise definitions for online and hybrid programs:

- Hybrid Program: At least one of the conditions is fulfilled:
 - It is possible for students to take at least 50% of the units in their program of study as low-, high-hybrid, or online courses, OR
 - At least 30% of the required program units are high-hybrid or online courses.

- Online Program: It is possible for students to take 50% of their units in their program of study as high-hybrid or online courses.
- Fully Online Program: A program where 100% of the units in the program are Fully Online Courses, where no face-to-face time at LMU is required at any point in the program.

Any new program falling into one of these categories would be required to go through an APRC review and approval process that includes the criteria described below. In addition, modifications in program modalities such that the modified program fits one of these categories would require the submission of a modification query to the APRC and, if determined by the APRC, a full review.

As with course-level definitions and undergraduate caps, these definitions should be reviewed every three years to consider technology advances and trends in e-learning. APRC review of online/hybrid teaching and learning would occur through the normal structures of program review. TELIG recommends that program review for undergraduate programs include a required section on online or hybrid course offerings, if any.

E. Program Approvals & Review Process

The university already has a set of criteria that are appropriate for reviewing all new or modified programs, as spelled out in the Academic Program Review Committee (APRC) guidelines. TELIG recommends that the APRC add the following set of criteria specific to online and hybrid programs to its existing guidelines:

- Rationale for why the program should be offered in an online or hybrid format (this should include a consideration of the type of students who might enroll in the program).
- A plan for faculty professional development in the use online/hybrid technologies and pedagogies.
- In the absence of a university-wide system for online student evaluation of courses, a plan for how online courses will be evaluated, given that the current evaluations are administered via paper forms, in a way consistent with the current evaluation forms.
- A detailed implementation timeline that specifies the dates by which certain steps will be completed (e.g., by when will course be approved).
- A description of the relationship between two versions of the same program; that is, would they be considered separate programs or could students take classes in either version of the program?
- A list of resources for moving courses online (this should be accompanied by an IT statement similar to the Library statement currently included in the APRC process).
- Proposals must be authored by program faculty.
- Process for ensuring compliance with the LMU Credit Hour Policy.
- A five-year budget plan that demonstrates the program's financial self-sustainability, consistent with the model proposed by the Graduate Education Task Force.

- A plan for teaching out the program if it is discontinued.
- For online programs: A statement from the Accreditation Liaison Officer regarding the WASC approval process.

TELIG also recommends that the APRC modify its current guidelines in several areas, to make them more appropriate for the review of online and hybrid programs, as follows:

- Description of the curriculum: to include specific information about which courses in the program would be fully online, local online, high-hybrid, low-hybrid, or face-to-face, as well as which courses would be available in multiple formats.
- Needs assessment and marketing plan: to address specifically the question of the recruitment of online students and to insure that there will be a sufficient applicant base of sufficient quality.
- Impact on other programs: to address how changes in program modality might affect the status of other programs.
- Description of the planning process: TELIG recommends strengthening the language that requires proposal authors to describe the planning process so as to ensure that there is sufficient “faculty buy-in” for online/hybrid programs.

TELIG further recommends that these items be added to proposals for moving an existing face-to-face program to an online or hybrid modality (so to the program modification proposal guidelines). In the case of program modifications in the form of a change in modality, once a program hits one of the thresholds established in the program definitions, then there would need to be an APRC review of the program (beginning with a modification query).

Finally, TELIG recommends that APRC members go through a short (half-day at most) training program on the issues involved with reviewing hybrid and online programs, with Associate Deans and members of college/school curriculum committees also invited to attend.

F. Course Approvals & Review Process

Given the particular challenges of online teaching and learning, TELIG recommends the establishment of a College/School-based approvals and review process for online and hybrid courses. TELIG makes the following recommendations regarding the establishment of a process to approve and review online and hybrid courses:

1. Low-Hybrid, High-Hybrid, and Online courses will be subject to a peer-review based course approval process that focuses on the rationale for the course being taught in the technology-enhanced manner, the learning outcomes, and the technological feasibility and user-friendliness of the course.
2. Colleges and Schools will establish their own course approval processes that identify the roles that the Department/Program and the College/School-wide committee play. It is stressed that the review of course content shall be conducted by faculty with disciplinary

or field expertise, in a manner consistent with the review of face-to-face courses, according to established procedures at the Department/Program and/or College/School levels. Any additional College/School-level review should focus on the particularities of online teaching.

3. College and School approval processes should include the following components, at a minimum (Colleges/Schools may add components):
 - **Proposal Application** submitted by a faculty member. The course approval application must contain the following information at a minimum:
 1. The rationale for teaching the course as a hybrid or online course.
 2. The learning outcomes of the course and how the course fits into the program/Core/major/minor and/or satisfies other relevant course criteria.
 3. The percentage of the class that is projected to take place in typical face-to-face settings and the percentage of the class that is projected to be replaced by self-guided technology-enhanced studies or by online teaching.
 4. The expected technology and resource requirements for the class on LMU's and students' part, identifying what technology knowledge, if any, the students are expected to have for the class and discussing what IT support is anticipated, ideally accompanied by a statement from IT providing feedback on the technology needs and options. This section should also discuss how course evaluations will be conducted.
 5. Experience with the technology the applicant plans to use and any training the applicant may have completed or plans to complete.
 - **Provisional Course Approval** that identifies for what time frame or how many semesters (maximum of three) the course can be taught in the form described in the application.
 - **Usability Check** (before the course is first taught) for high-hybrid and online courses, focusing on the shell, communications, and navigation.
 - **Course Review** (after the course is taught) that assesses the success of the implementation in achieving the goals outlined in the Proposal Application. The review should be conducted in conversation with the faculty member and based on an assessment of student learning outcomes as well as the faculty member's observations regarding the course, technology, experience teaching the course, and envisioned future developments, including the attached criteria list (see appendix 3).
 - Upon a successful Course Review, a **Final Course Approval** based on appropriate College/School and Department/Program standards. The final course approval should be copied to the APRC and the appropriate person in Academic Affairs.
 - **Appeals Process** for decisions at any level.

- Courses should be subject to ongoing review according to established Department/Program and College/School standards. This may include existing online and hybrid courses, as deemed appropriate by Colleges/Schools.

TELIG is proposing the following timeline for the course approvals process, which assumes that the university moves to year-long scheduling. Courses will have to be submitted in the fall of an academic year to be taught in the following academic year.

- Proposal Application due by December 1 at the latest.
- Provisional Course Approval by January 15 at the latest
- Usability Check at least two weeks before the semester begins, ideally earlier.
- Course Review and Final Course Approval after three semesters of teaching experience at the latest.

For exceptional cases, an expedited process shall be designed.

TELIG also recommends that the Colleges/Schools consider developing more formal course approval guidelines and processes for all courses, to be implemented by Departments/Programs and Colleges/Schools.

G. Overall Governance & Administrative Structures

The university will need to develop an overall governance and administrative structure for technology-enhanced learning, on both the faculty side and in Academic Affairs.

In terms of faculty governance, APRC will oversee program-level issues, including the approval of new online/hybrid programs and program modifications to move programs to online and hybrid as well as regular program review. The University still needs to designate an appropriate faculty governance body to oversee and review the university-level criteria and process requirements for course approvals and review and to administer the faculty development programs and grants. TELIG makes the following recommendations regarding faculty governance:

- TELIG recommends that the Faculty Senate revise the charge, composition, and responsibilities of the Committee on Excellence in Teaching to include oversight of issues related to online/hybrid teaching, including: oversight of the course approvals process to ensure that colleges are meeting university standards, periodic review of the definitions and course and program approvals processes for online/hybrid learning, and administration of the technology-related faculty development programs and grants. If the University wants to consider online/hybrid teaching as just another type of teaching, rather than as something exceptional, then the governance of online/hybrid initiatives should occur in the same committee responsible for all teaching issues. Since no one from Academic Technology currently serves on the CET, TELIG also recommends that in revising the charge and responsibilities of the CET, the Senate also revise the

membership of the committee to include an *ex officio* member from Academic Technology.

- TELIG recommends that the Faculty Senate review and revise, as appropriate, the charge, composition, and responsibilities of the Academic Technology Committee. In reconsidering the charge of the ATC, the Senate should consider what constitutes a governance issue around technology (e.g., who weighs in on decisions about what technologies to adopt) and how best to ensure that faculty play an appropriate and systematic role in the decision-making process.

While TELIG is recommending that policies be developed and overseen by faculty committees, these committees will need an administrative structure to manage this process. TELIG recommends that the Provost's Office develop appropriate organizational structure(s)/office(s) in Academic Affairs, with *ex officio* representation on appropriate committees and having the following responsibilities:

- Serving as the Provost's point-person for online and hybrid teaching and learning;
- Tracking and coordinating the implementation of online and hybrid initiatives;
- Conducting a comprehensive needs assessment in order to ensure the quality and effectiveness of our online/hybrid offerings;
- Administering and tracking budgets for grants and other initiative;
- Administering and overseeing assessment of faculty development and grant programs;
- Tracking online/hybrid courses and changes in existing graduate programs to ensure compliance with approvals processes; and
- Administering educational efforts around relevant IP issues.

IV. Faculty Development

Given the challenges and significant work involved in developing and teaching online courses, TELIG recommends that Colleges/Schools and Departments/Programs develop clear guidelines regarding faculty workload and development issues around online and hybrid teaching. Decisions about developing and staffing online courses should be made following standard procedures in consultation with program faculty and with individual faculty members.

TELIG recommends that the University establish a policy that an online or hybrid course counts the same as any other course for the purposes of determining teaching loads. TELIG also recommends that Departments/Programs review rank and tenure standards to ensure that they take online and hybrid teaching and course/program development into account. Rank and tenure standards, the rank and tenure process, and the merit system should not be prejudiced and should take into consideration the particularities and challenges of specific pedagogical approaches.

Given the challenges involved in online and hybrid teaching, TELIG considers it essential that our efforts to move into online and hybrid teaching be accompanied by a robust plan for faculty

development, including speakers, workshops, and grants. For those to be successful, it is also essential that there be sufficient incentives for faculty participation and a clear plan for how to attract faculty who might otherwise not attend such programs.

Faculty development programs should be aimed both at idea generation, exploring what is possible in the world of online and hybrid teaching, and at capabilities development, developing the tools and skills necessary for creating quality online and hybrid learning experiences for students. Faculty development programs should also be aimed at both individual courses (and faculty) and program development. Within these broad parameters, TELIG identified four goals for faculty development around online and hybrid teaching:

1. To explore and understand possibilities for successful online/hybrid courses and programs;
2. To whet the appetite of faculty for online/hybrid teaching;
3. To facilitate course design, development, and implementation of online/hybrid courses; and
4. To guide the development of online/hybrid graduate programs.

TELIG recommends that programs focused on idea generation and exploration (goals 1 and 2) be concentrated over the course of the next few academic years, beginning in fall 2014, with workshops and grants focused on capabilities development ongoing. Making a long-term commitment to course and program development workshops and grants will ensure that individual faculty and programs are able to transition to online or hybrid modalities when it makes the most sense for them to do so and that they will have the necessary faculty development support when that time comes.

On 21 August 2014, TELIG submitted to Provost Hellige a proposal for a faculty development plan for online and hybrid teaching (see appendix 4). That proposal included 7 different types of programs:

- Speaker Series
- Hands-On Technology Workshops
- Faculty Learning Community for Online Teaching & Learning
- Group Mini-Grants
- Individual Mini-Grants
- Online/Hybrid Course Development Grants
- Online/Hybrid Program Development Grants

On 12 September 2014, Provost Hellige approved the first three programs – the Speaker Series, the Hands-On Technology Workshops, and the Faculty Learning Community – for two years each. TELIG distributed a call for applications for the FLC in early October, and the FLC subsequently held its first meeting in early November; this inaugural FLC includes 9 faculty members from all 4 colleges and the School of Film & Television. The first speaker in the 2014–

2015 TELIG Speaker Series was Lauren Cifuentes of Texas A&M University Corpus Christi, who spoke about “Easing and Jumping Into Online Teaching and Learning” during a well-attended session on 24 November 2014. The first Hands-On Technology Workshop took place on 2 December 2014, with Professor William Shaules, a part-time faculty member in the Department of Theological Studies, facilitating a workshop on “Voicethread: Engaging the New Testament with Interactive Technology.” There will be two more speakers and two more hands-on technology workshops in the spring semester.

There was a request for more information about how the Group and Individual Mini-Grants and the Online/Hybrid Course and Program Development Grants would align with curricular needs, program goals, and strategic planning initiatives in the College/School. TELIG has clarified that the Online/Hybrid Course and Program Development Grants would have an applications process modeled on the existing Core Course Development Grants, with the application including a section requiring that applicants explain the rationale for the course or program and with the signature of both the Chair/Director and Dean required. The Mini-Grants would also require the chair’s signature and, in the case of the Group Mini-Grants, the Dean’s signature as well. TELIG recommends the approval of these programs in a timely fashion, in particular the Online/Hybrid Course and Program Development Grants, so that they can be awarded in the summer 2015.

V. Intellectual Property Rights Policy

TELIG has examined a variety of complicated and important questions related to intellectual property rights as regards online and hybrid courses. However, absent legal counsel TELIG does not have the necessary legal expertise to answer these questions. Moreover, because of the rapidly changing nature of technology and approaches to online education, TELIG recommends the creation of a sustainable system to regularly review IP concerns related to online education.

More specifically, TELIG makes the following recommendations:

- As soon as possible, and no later than December 2015, the University should review and revise as appropriate LMU’s existing intellectual property policy to take into account the many issues related to online and hybrid teaching and learning. A committee comprised of representative faculty from LMU, a faculty member from Loyola Law School trained in intellectual property law, and other experts in IP should oversee this effort. This should be a majority faculty committee.
- There should be an *ongoing* review and update of the policy as technology changes on a periodic basis by a committee similar to the one that performs the initial review of the policy.
- Stakeholders in the development and delivery of online education at LMU need to be educated about the intellectual property rights of all stakeholders involved. All relevant documents should be stored in an easily acceptable university database (e.g., box or the

intranet) and should contain straightforward templates that would be signed by faculty participating in the creation and delivery of courseware.

TELIG has articulated a series of guiding principles regarding intellectual property (see appendix 5), which focus on transparency and the protection of faculty and student property rights, and recommends that the committee follow these principles in its review and revision of the IP policy. TELIG has also identified a series of issues and questions regarding online and hybrid teaching and intellectual property (see appendix 6).

VI. Assessment

The review and assessment of the definitions, approvals processes, governance structures, and faculty development plan should be conducted during the 2017-18 academic year as noted above. In addition, departments, colleges, and schools should conduct assessments of their online/hybrid course content, learning outcomes, pedagogical practices, faculty workload, etc. following established processes for their other course offerings, programs, etc.

VII. Resource Considerations

A comprehensive needs assessment must be conducted in order to identify the resources needed to ensure the quality and effectiveness of LMU's online undertakings. As LMU continues to implement technology-enhanced learning, it is prudent to track resources and consider the infrastructure that may be needed to support any implementation of its vision for this area. In the table in appendix 7, TELIG highlights key resource areas that support hybrid and online courses, students, and faculty. The table references elements of the infrastructure that the university already has in place. Additionally and in the context of this report, the table includes resource areas that need consideration by appropriate divisions of the university as the institution moves towards implementation of initiatives and policies for technology-enhanced teaching and learning and should be part of the comprehensive needs assessment.

Many of these resource considerations relate specifically to graduate programs, in particular increased enrollments at the graduate level. In light of the considerations surrounding supporting the strategic and purposeful build-out of fully online graduate programs, TELIG recommends that the recently convened Shared Services and Budget Working Group (related to the Graduate Education Task Force) review the considerations outline in appendix 7 and determine a sustainable approach towards developing these support structures. In order to be consistent with the Vision Statement for Online and Blended Learning at LMU, it is important to note that additional resources required to support fully online graduate programs be funded in a self-sustaining manner that does not compromise or risk compromising undergraduate programs at LMU.

VIII. Timelines

- Spring semester 2015:
 - Colleges and schools develop a process for approving courses.
 - Registrar's office develops a course coding system based on the recommended definitions.
 - Faculty Senate reviews and revises, as appropriate, the charges, compositions, and responsibilities of the CET and ATC.
 - Provost develops an organizational structure to deal with administrative issues.
 - Ad-hoc committee revises the Intellectual Property policy.
 - APRC revises guidelines for new program and program modification proposals.
 - Approval and establishment of the course development and program development grants, with first grants to be offered in summer 2015.
- By early fall semester 2015:
 - College/school approval processes in place.
 - Registrar course coding system in place.
 - IP policy for online/technology enhanced learning approved.
- December 2015
 - First course approvals submitted.
 - Registrar completes coding of existing online/hybrid courses.
 - Bulletin revised to reflect new policies regarding online and hybrid courses and programs.
- Fall 2016
 - First provisionally approved online/hybrid courses offered.
- 2017-18 Academic Year
 - Initial assessment and review of definitions, approvals process, governance structures, and faculty development plan.
 - IP policy review.

APPENDIX 1

Key Issues Identified in Feedback

Undergraduate Cap: There was considerable discussion around a number of issues regarding online/hybrid courses at the undergraduate level. While the vision statement for technology-enhanced learning stipulates that online programs may be offered only at the graduate level, it does allow for online and hybrid courses at the undergraduate level and thus for the possibility of hybrid programs at the undergraduate level. The difficulty of setting thresholds at the program-level, because of the multiple “programs of study” (Core, Major, Minor, etc.) as well as the possibility of courses being offered in multiple formats, resulted in the recommendation for an undergraduate cap tied to the individual student’s overall program of study. An initial recommendation was made that undergraduate students be allowed to take no more than 25% of their LMU units as online or high-hybrid courses. The feedback received from multiple sources, however, indicated that many faculty felt this cap to be too high, especially since it excluded low-hybrid courses, meaning that a student could theoretically do a majority of their coursework on line. On the basis of that feedback, the initial recommendation was revised so that undergraduate students may take no more than 20% of their LMU units as online or hybrid courses, including low-hybrid courses. In response to concerns about allowing faculty the space to experiment with technology and online pedagogies, however, the bottom threshold for the definition of low-hybrid courses was raised from 20% to 30%. There remain concerns about the issue of CAPP adjustments, where adjustments made on an individual case-by-case basis might undermine any requirement tied to the individual student, as well as about how transfer students and transfer credits should be addressed.

Core Cap: TELIG is recommending that the University Core Curriculum Committee establish a cap for the percentage of the Core that a student may do in the form of online or hybrid courses. There have been questions from faculty about whether students should be allowed to take any of the Core courses online, given its centrality to an LMU education. The TELIG consensus, however, is that one of the primary reasons for online/hybrid courses at the undergraduate level is to help students stay on track for an on-time graduation.

Course Approvals & Review Process: There was considerable discussion within TELIG about the nature of the course approvals and review process recommended as well as about the timeline. The resulting recommendation tries to strike a balance between respect for academic freedom for faculty and the principle of faculty peer review of courses, on the one hand, and the need to establish appropriate quality assurance mechanisms and to ensure that online/hybrid initiatives serve college/school strategic goals. There was disagreement about the nature of any review that would occur after the course proposal but before the course was taught, including the nature of the criteria to be used and the degree to which the course must be developed by this point. The resulting recommendation for a Usability Check is an attempt to ensure that the interface of the course works, thus helping to ensure that the student has a quality educational experience, while not putting undue burdens on faculty members. Even then, some faculty were concerned that the approvals process is too cumbersome. In response to concerns that non-

experts might be reviewing course content, TELIG has tried to make clear that faculty experts, at the department/program and/or college/school level depending on existing structures, would be responsible for reviewing content, with an additional review focusing on those things particular to online teaching. There was also considerable disagreement about the timeline for course approvals. Some faculty felt that there is too long a lag between when the approvals process is initiated and when a course can be offered, while others felt that the deadlines are too tight to allow sufficient time for faculty to build the courses.

Staffing: There were concerns about faculty teaching load and online/hybrid courses. It was suggested that it might make sense to establish a guideline about the percentage of the faculty teaching load that can be done online, though it was pointed out that this would likely vary by college/school. There were also questions about how instructors would be compensated for online courses and whether they would count as regular courses in terms of teaching load. Finally, there were a number of concerns voiced about how we can best ensure that online programs and courses do not get created only to be fully or primarily staffed by contingent faculty or tenure-line faculty, especially pre-tenure faculty, who are doing so under pressure. We attempted to address these issues by including several paragraphs at the start of the “Faculty Development” section of the report.

APPENDIX 2

Vision Statement for Blended and Online Learning: Guiding Principles

LMU's Strategic Plan calls for excellence in transformative undergraduate education, leadership in graduate education, and strategic use of resources to maintain our effectiveness in a competitive environment. In addition, LMU values innovation and encourages faculty to explore new approaches in teaching. Technology can play a key role in achieving these aims.

Blended and online learning strategies offer unique opportunities to develop innovative pedagogies that engage the learning styles of 21st-century students and foster the knowledge and skills required of a rigorous 21st-century education. In addition, online and hybrid methods of instruction facilitate the goal of expanding access to lifelong learning opportunities in post-baccalaureate programs and provide opportunities to make efficient use of scarce resources in light of the new economic realities of higher education. Consistent with Theme 6 of the Strategic Plan, LMU is committed to implementing blended and online learning in a strategic manner that is mindful of true costs and the continuing value of traditional instructional models.

In working toward these goals, LMU will be guided by the following principles:

1. Any use of technology in delivering education at LMU will be guided by the principles of the university's mission, including a commitment to academic excellence and a focus on student-centered education as embodied in the ideas of *cura personalis* and the education of the whole person.
2. LMU's use of technology will include select online courses and various blended learning strategies. Any of these approaches should be directed towards the following:
 - Making course materials more readily accessible to students;
 - Enhancing learning through intentional course design and innovative pedagogies;
 - Addressing key competencies and learning outcomes;
 - Expanding access to courses, especially summer and graduate courses, for LMU students who might not be in residence; and
 - Addressing resource issues.
3. Fully online programs will be selected based on their strategic potential to enhance the reputation of LMU; strengthen an existing program; expand access to education; or address areas of opportunity, the educational demands of society, and student need. These programs will be of high academic quality, conforming to the following guidelines:
 - Fully online programs will only be offered at the post-baccalaureate level.
 - They will use the same admissions standards as LMU's other graduate programs;
 - They will employ high quality pedagogy;

- They will be reviewed on an appropriate schedule, using the same criteria as new and existing on-campus programs;
 - Faculty resources must be appropriate to ensure the quality of the program;
 - The tuition will be set at the same levels as face-to-face programs; and
 - Online post-baccalaureate programs must at minimum be financially self-sustaining. That is, the revenue generated by the program must meet or exceed the cost of delivering the program.
4. LMU is committed to providing *appropriate* infrastructure and resources to support the use of technology in delivering instruction. Such infrastructure and resources will include:
- Hardware and software infrastructure commensurate with agreed upon goals;
 - Professional development opportunities for faculty, identified in coordination with faculty;
 - Online course design support and continuing readily available technology support for faculty as they teach courses;
 - Guidelines for the look, feel, and navigation of online courses to facilitate a consistent experience for students and appropriate for the teaching needs and learning goals of the courses and programs; and
 - Readily available support services for students.
5. The development and teaching of hybrid or online courses and programs will be undertaken in a collaborative manner between faculty and administrators. Decisions about the use of online technology in instruction are fundamentally academic decisions and will be guided by principles of shared governance (see <http://www.aaup.org/report/1966-statement-government-colleges-and-universities>), by program curricular needs and opportunities, and by the learning objectives of programs and colleges/schools. Such decisions include:
- Guidelines for evaluating quality;
 - Approval of online courses and programs including student learning outcomes;
 - Assessment of online courses and programs;
 - Protection of faculty intellectual property; and
 - Selection of campus-wide instructional software.

Prepared by the Provost's Planning Council Subcommittee on Technology-enhanced Learning (8/4/13), Revised by the Technology-enhanced Learning Implementation Group (5/16/15), and Accepted by the Provost (5/30/14; distributed to University community 6/17/14).

APPENDIX 3

ONLINE AND HYBRID COURSE CRITERIA FOR COURSE REVIEW/APPROVAL:

Criteria	Description
1. COURSE ELEMENTS: Provides course information, expectations, policies, and topic outlines typically stated in syllabus.	Includes items such as and not limited to course description, instructor contact information, course learning outcomes, pre-requisites, grading criteria, course outline of topics, required and/or recommended readings, assignments, and due dates (consult standard LMU syllabus checklist for guidance)
2. TECHNOLOGY: Advises students on technology requirements for course, provides guidance for use of technology, and indicates relevant support structures.	Contains instruction on minimum computer requirements (hardware and software) as well as any other technology that will be used. Links to tutorials, contact information for resources that provide details for setting up necessary systems, for use of technology, and for troubleshooting technical problems.
3. COURSE PRESENTATION: Shell has logical, consistent, and transparent structure and navigation.	Course structure is systematic and consistent; layout is user-friendly and straightforward; all parts of the course are appropriately identified and can be easily accessed; instructions are clear; all links are functional. In every segment, all required material is available and easily accessible.
4. STUDENT ASSESSMENT: Provides clear guidelines and procedures for student assessment and specific instructions for assignments, exams, etc.	Instructions and policies are provided for students to follow when taking proctored exams/quizzes, including identifying possible locations for exams, and/or use of technology.
5. PEER INTERACTION: Provides appropriate opportunities for student engagement and interaction and sets clear expectations and standards for both.	Where relevant, clear evidence of appropriate instructional technology in service of student interaction, e.g. discussions, blogs, wikis, journals, peer reviews, chats, live sessions, etc. ; establishes clear “netiquette” rules and expectations.
6. INSTRUCTOR INTERACTION: Provides opportunities for student and instructor interaction.	Provides opportunities and activities for instructor and student to engage throughout the course via instructional technology (e.g. office hours, scheduled feedback, synchronous meeting, chats, etc.)
7. ACCESSIBILITY: Complies with accessibility standards or provides contingency plan to satisfy accessibility standards.	In compliance with university policies.
8. UNIVERSITY POLICIES: Complies with relevant copyright rules, academic honesty guidelines, credit hour policy, and intellectual property policy.	

APPENDIX 4

Technology-Enhanced Learning Implementation Group Proposal for Faculty Development Plan

Given the challenges involved in online and hybrid teaching, the Technology-Enhanced Learning Implementation Group (TELIG) considers it essential that our efforts to move into online and hybrid teaching be accompanied by a robust plan for faculty development, including speakers, workshops, and grants. For these to be successful, it is also essential that there be sufficient incentives for faculty participation and a clear plan for how to attract faculty who might otherwise not attend such programs.

Goals

Faculty development programs should be aimed both at idea generation, exploring what is possible in the world of online and hybrid teaching, and at capabilities development, developing the tools and skills necessary for creating quality online and hybrid learning experiences for students. Faculty development programs should also be aimed at both individual courses (and faculty) and program development. Within these broad parameters, TELIG identified four goals for faculty development around online and hybrid teaching:

5. To explore and understand possibilities for successful online/hybrid courses and programs;
6. To whet the appetite of faculty for online/hybrid teaching;
7. To facilitate course design, development, and implementation of online/hybrid courses; and
8. To guide the development of online/hybrid graduate programs.

The programs described below address these goals as explained. TELIG recommends that programs focused on idea generation and exploration (goals 1 and 2) be concentrated over the course of the next few academic years, beginning in fall 2014, with workshops and grants focused on capabilities development ongoing. Making a long-term commitment to course and program development workshops and grants will ensure that individual faculty and programs are able to transition to online or hybrid modalities when it makes the most sense for them to do so and that they will have the necessary faculty development support when that time comes.

Speaker Series

The Speaker Series is intended to help LMU faculty explore and understand the possibilities and potential challenges involved in online and hybrid teaching (all goals). TELIG is recommending that the Speaker Series last two years, with two speakers per semester. One speaker each semester would focus on course-level questions, while the other would focus on program-level issues. TELIG also recommends that we bring in speakers from universities that already have considerable experience with online and hybrid teaching, to facilitate an honest

discussion of the opportunities, challenges, and pitfalls of online and hybrid teaching and to offer some lessons from their own institutions' experiences.

The Speaker Series will require honoraria plus travel and lodging for the speakers as well as a dinner with the speaker and invited faculty guests. In addition, there should be some food and drink available at the events themselves, as an incentive for participants to enter into conversation with each and the speaker. The annual budget for the Speaker Series would be \$19,000, including a maximum of \$11,000 in honoraria (\$2000 to \$3500 per speaker), \$4000 for airfare and hotel for speakers (\$1000 per speaker), \$2000 for dinners with speakers and invited LMI guests (one dinner per one per speaker, at \$500 per dinner), and \$2000 for food and drink at the events.

Hands-On Technology Workshops

Hands-On Technology Workshops are designed to enable faculty to explore and experiment with different technologies, in the hopes of getting faculty interested in teaching with technology (goals #2 and 3). Rather than showcasing what faculty have done and are currently doing with technology, the Hands-On Technology Workshops would allow faculty not using a specific technology to investigate the pedagogical possibilities offered by it.

Academic Technology will develop a list of possible technologies to be explored in these hands-on workshops. TELIG (later, the appropriate governance and administrative body) will work to identify and recruit a "faculty sponsor" for each workshop, who will work with Academic Technology in planning and running the workshop. The faculty sponsor would usually not be someone who has worked extensively with the specific, or a similar, technology, but rather someone who is intrigued by the opportunities offered by the technology and wishes to explore them further. The faculty sponsor would introduce the workshop by talking about her interest in and, if appropriate, experiences with the technology in question as well as some ideas for how one might use the technology. The rest of the workshop would allow other participants to do some hands-on work with the highlighted technology, guided by the instructional technologists. The workshops would take place in the Faculty Innovation Center provided that there is sufficient space; if more space is needed, the workshops might place in the Center for Teaching Excellence or one of the computer classrooms.

TELIG recommends that there be four Hands-On Technology Workshops, two each semester, for a duration of at least two years. The Hands-On Technology Workshops will require stipends for the faculty sponsors at a rate of \$250 for each faculty sponsor. There should also be monies set aside to provide food and drink at the workshops as an incentive for participants, a maximum of \$500 per workshop. The total annual budget for the Hands-On Technology Workshops would be \$3000.

Learning Community

The Learning Community is meant to serve as a forum where interested faculty come together to discuss the dynamics and challenges of online teaching and learning (goals #1, 2, and 3). It would be a community of a maximum of twelve faculty members (and a minimum of five), who would meet on a monthly basis over the course of the academic year. To provide a foundation for those discussions, each participant would be required to enroll in an online course during the course of the year, so as to get a sense of what pedagogical approaches and types of assignments work from the perspective of the student. It would be the learning community's responsibility to identify any additional common readings as well as the topics for discussion.

Because the Learning Community requires a significant commitment from faculty participants, TELIG recommends that participants receive a stipend of \$1000, paid in two installments, one at the beginning of the year and the second upon completion of the required reports (on a 50/50 basis). To enable participants to take real online courses, and not merely MOOCs, it also recommends that funds be provided to cover tuition, at a cap of \$1500 per faculty member. Preliminary research indicates that there are many universities that offer online courses at a cost of \$350 to \$550 per unit, and TELIG will work to develop a list of universities that offer non-enrolled, non-degree-seeking individuals access to the courses. A maximum of three participants may enroll in MOOCs, and the tuition savings there and from participants enrolling in less expensive courses can be used to subsidize participants taking more expensive courses or courses that are more than 3 units. Participants may enroll in mini-courses, whether MOOCs or tuition-based courses; participants would generally be required to enroll in a series of mini-courses equivalent to a quarter- or semester-long course, all under the same \$1500 tuition cap. Learning Community applicants would be required to identify their chosen courses in their applications, and participants would be required to complete the course and write a reflection paper in order to receive the second installment of the stipend. The Learning Community would also collectively generate a final report, which would be made public to the university community.

The total budget for the Learning Community would be \$12,000 in stipends (12 faculty members at \$1000 each), \$18,000 for course tuition (maximum of \$1500 per faculty member for 12 participants), \$2000 for food and drink at the monthly meetings, and \$3000 for speakers or dinners. The total annual budget for the learning community would be \$35,000. Depending on how the initial Learning Community runs, there might be additional Learning Communities in future years.

Group Mini-Grants

The Group Mini-Grants are designed to provide small groups of faculty (from within a department or across departments) to explore ideas for possible online or hybrid graduate programs, including possible curricular models, student demand, and so on (goals #1, 2, and 4). Grant applications would require applicants to describe the general idea for the program, to

identify the questions and issues to be explored as part of the mini-grant, and to explain how they will proceed in their work, including how they will use the grant monies. TELIG is aware that the Graduate Education Task Force is recommending that LMU encourage the exploration of ideas for interdisciplinary graduate programs, and these Group Mini-Grants might dovetail with programs that the Task Force is proposing.

TELIG is recommending that there be four Group Mini-Grants at \$500 each, for a total annual budget of \$2000, for a duration of at least two years.

Individual Mini-Grants

Individual Mini-Grants are designed to enable individual faculty to attend off-site professional development workshops (e.g., those offered by Quality Matters), to enroll in webinars, and/or to travel to conferences related to technology-enhanced learning and teaching (goals #1, 2, and 3). TELIG recommends that the Individual Mini-Grants have a total annual budget of \$10,000, lasting for a duration of at least two years, with monies dispersed according to the needs of the faculty member and the quality of the application.

Online/Hybrid Course Development Grants

The Online/Hybrid Course Development Grants are modeled on the current Core Course Development Grants and are designed to support faculty who are developing online or hybrid courses (goal #3). Participating faculty must apply for a course development grant, describing the online/hybrid courses they wish to develop and then participate in a series of summer course development workshops (typically lasting half the day and open to all faculty with or without grants). Upon completion of the workshops, by a deadline early in the fall semester, grant recipients would be required to submit a final report, including explicit discussion of how technology will be used and a draft syllabus to the grant administrator as well as a formal course proposal to the appropriate governing body. While grant recipients are not required to have participated in any of the programs described above, it is hoped that participation in those programs might lead some faculty to apply for a course development grant.

Each grant recipient would receive a base stipend of \$500 plus a stipend of \$300 per workshop attended, with a minimum of two workshops required and a maximum of five workshops allowed. Faculty stipends would thus range from \$1100 to \$2000. Stipends would typically be paid out in two installments, an initial payment based on the number of workshops attended and the final payment of \$500 (the base stipend) upon submission of the final report and course proposal.

TELIG recommends that there be a budget sufficient to award Online/Hybrid Course Development Grants to twenty faculty members. The maximum stipend budget would therefore be \$40,000. In addition to faculty stipends, the Online/Hybrid Course Development grants would also require \$12,000 for honoraria plus travel and lodging for facilitators, \$5000

for food and drink for the workshops, and \$3000 for miscellaneous expenses (dinners with external speakers, photocopying, etc.). The total annual budget for the Online/Hybrid Course Development Grants would be \$60,000. These grants would be offered each summer on a continuing basis.

Online/Hybrid Program Development Grants

The Online/Hybrid Program Development Grants are designed as summer grants to support the development of a formal program proposal and implementation plan (goal #4). The grant is designed for teams of faculty (whether in departments or interdisciplinary teams) who have well-developed ideas for online or hybrid programs, either new programs or modifications of existing programs. While grant recipients are not required to have received a Group Mini-Grant, it is hoped that some of the Group Mini-Grants will feed into the Online/Hybrid Program Development Grants. The grant application would require applicants to identify a team of at least three people (with at least half the team full-time faculty) and to include information about how they will divide the work and apportion the stipend. The application would also ask applicants to identify those areas in which they will need to draw on other university resources for project development support. The grants are intended to support summer work, though it is expected that groups will begin work before the summer of the grant and/or continue it in the following semester. Grant recipients must submit a formal program proposal to the APRC by 15 January (following the summer in which the grant was awarded).

TELIG is recommending two grants of \$9000 per year, to be paid out in two installments, on a 50/50 basis, with the second installment coming after the proposal has been submitted to the APRC. The total annual budget for the Online/Hybrid Program Development Grants would be \$18,000. These grants would be offered each summer on a continuing basis.

Governance Structure

TELIG is working to identify the appropriate governance body to administer these programs and grants. The fall 2014 programs (Speaker Series, Hands-On Technology Workshops, Learning Community, Group Mini-Grants) will be administered by TELIG, as a placeholder until a permanent governance structure is developed.

Relationship to Existing Programs

Even as TELIG is recommending a robust slate of faculty development programs around online and hybrid teaching, it is also recommending that we continue our commitment to faculty development around teaching writ large. There should be a balance between faculty development programming that is specific to online or hybrid teaching and faculty development programming around more traditional pedagogical approaches and instructional modalities. It is thus important that the Center for Teaching Excellence continue its current activities. We recommend that the Teaching With Technology Day also continue in a format like

the current one. TELIG also notes that there might be opportunities to piggyback onto existing programs.

Contingent Faculty

It is likely that contingent faculty will be called upon to teach online and hybrid courses, as currently happens in the School of Education. Thus, it is important that contingent faculty have access to some of these faculty development programs. TELIG recommends that contingent faculty be targeted for participation in the Speaker Series, the Hands-On Technology Workshops (including as faculty sponsors), and the Individual Mini-Grants. Because the Learning Community requires a year-long commitment, and LMU does not currently offer contingent faculty year-long contracts, TELIG recommends that the Learning Community be restricted to full-time (tenure-line and clinical) faculty. TELIG also recommends that Online/Hybrid Course Development Grants, in order to protect the intellectual property rights of contingent faculty, also be restricted to full-time (tenure-line and clinical) faculty, at least until IP issues are clarified. Given the important role that contingent faculty might play in many online/hybrid programs, TELIG recommends that the faculty teams applying for Online/Hybrid Program Development Courses may include contingent faculty, provided that at least half of the team consists of full-time (tenure-line and clinical) faculty.

Assessment

Assessment of the effectiveness of these faculty development programs will include three components:

- The number of faculty members participating in each program will be tracked, as will the unduplicated number of faculty participants overall.
- Participants will be surveyed about their perceptions of the extent to which each program achieved its objectives.
- Annual counts will be taken of new online or hybrid courses (whether wholly new or modified from a face-to-face format) that are developed and offered.

An annual report based on these measures will be submitted to the Provost.

Budget Summary for Year 1

Program	Faculty Stipend	Speakers' Honoraria and Expenses	Food & Drink at Workshops	Course Tuition	Other*	Total (by program)
Speaker Series	\$0	\$15,000	\$2,000	\$0	\$2,000	\$19,000
Hands-On Technology Workshops	\$1,000	\$0	\$2,000	\$0	\$0	\$3,000
Learning Community	\$12,000	\$0	\$2,000	\$18,000	\$3,000	\$35,000
Group Mini-Grants	\$0	\$0	\$0	\$0	\$2,000	\$2,000
Individual Mini-Grants	\$0	\$0	\$0	\$0	\$10,000	\$10,000
Online/Hybrid Course Development Grants	\$40,000	\$12,000	\$5,000	\$0	\$3,000	\$60,000
Online/Hybrid Program Development Grants	\$18,000	\$0	\$0	\$0	\$0	\$18,000
Total (by expense)	\$71,000	\$28,000	\$10,000	\$18,000	\$20,000	\$147,000

*Other expenses include dinners with external speakers (Speaker Series, Online/Hybrid Course Development Grants), monies to cover dinners for participants or to bring in external speakers (Learning Community), general grant monies for use as requested in application (Group and Individual Mini-Grants), and other miscellaneous expenses such as photocopying (Online/Hybrid Course Development Grants).

With all programs lasting at least two years (the Learning Community dependent on the experiences of the first year), this budget will likely be the same for Year 2 as well. Thereafter, the budget will be adjusted based on whether specific programs are phased out or expanded.

APPENDIX 5

Intellectual Property: Guiding Principles

TELIG recommends that the following principles guide the effort to revise the existing Intellectual Property Policy.

1. All parties involved in revising and implementing LMU's Intellectual Property Policy will strive for transparency.
 - a. Definitions should be clear, precise, consistent, and well-communicated.
 - b. Of particular concern are concrete and careful definitions of IP-related terminology (e.g. "exceptional contribution of resources", "courseware").
2. The policy should be revised to foster faculty and program innovation. In particular, faculty should have their content contributions protected.
3. Except in cases where faculty develop the course shell, it should be the property of LMU. Content will be proprietary to faculty.
4. Faculty should be able to opt into varying levels of IP rights based on individual situations and circumstances, and these levels should be clearly outlined to all parties:
 - a. All tenure-line faculty, regardless of their status, will be equally empowered by the IP Policy.
 - b. The IP Policy should be revised with the understanding that in compelling circumstances, an individual IP agreement should take precedence over the university-wide IP Policy.
 - c. The IP Policy should not discourage open source development.
 - d. The IP Policy should not discourage faculty from developing products with an eye to market potential.
 - e. Nothing in the IP Policy should take away the right of the faculty member to use material they prepared for one class in their other classes and presentations during their tenure at LMU and beyond.
5. Audio-visual content created via existing classroom course capture technologies shall remain the sole property of the faculty.
6. The University IP policy should be revised and revisited periodically (we recommend every 3 years) due to the rapidly changing nature of technology.
7. Student IP rights should be considered during the revision process. This is particularly important when 3rd party provider platforms and material are used in courses.
8. Should LMU desire to commission work for online content, tenure-line faculty should be afforded reasonable first opportunities to complete this work.
9. Joint authorship between faculty should yield joint intellectual property rights for both faculty. This is equally important when both faculty members are at LMU as when between an LMU faculty member and a faculty member at another institution.

TELIG also recommends that the following logistical considerations be taken into consideration when revising the existing Intellectual Property Policy.

1. The implementation of the policy should consider how to maximize compliance.
2. Clear accountability for the stewardship of data privacy should be communicated during the implementation of the revised IP Policy.

APPENDIX 6

Intellectual Property: Issues, Questions, and Considerations

TELIG has identified an initial set of issues, questions, and considerations that need to be reviewed and addressed in the IP Policy review. They are categorized according to the following themes:

- Content vs. Delivery platform (CD)
- Sponsorship and Commissions (SC)
- Exceptional Contributions (EC)
- Reuse and transfer of rights (RU)
- Multi-institution and multi-author rights (MI)
- Privacy (PRI)
- Compliance and education (COM)
- Commercialization (CMZ)

Note: (Parentheses) are used after an issue to signal when it fits in more than a single category.

Content vs. Delivery platform (CD)

- How should LMU distinguish between structure and design issues (the course shell) and course content?
- Who has ownership of the content? (EC)
- The existing definition of “courseware” has to be updated to include the internet (as both a communications platform and a computing platform) and must sufficiently account for the complexity of the medium.

Sponsorship and Commissions (SC)

- What constitutes “sponsored work”?
- What do we do in cases where a faculty member receives payment to design a course? What about a course development grant? Does providing incentives for course development mean that the faculty member relinquishes rights to the course? Are grants for faculty development enough for the course to be considered “sponsored”? Or is that only in the case of work specifically done for hire?
- What about part-time faculty? Do they have IP rights over the courses they develop and teach? Or are they considered “work-for-hire”? How will part-time faculty work within the course approvals process (e.g., won’t they always be teaching a course someone else developed)? Adjuncts teach at multiple universities, so will they be able to use LMU materials elsewhere? (MI, EC)
- In the “Between LMU and the sponsor” verbiage in the existing policy, there were questions about who would legally be considered the “sponsor”.

- The term “commissioned” in the “works commissioned at the request of the University” segment of the existing policy, lacks clarity. Are faculty “commissioned” if they are salaried faculty and they develop courseware as part of their normal 40-40-20 expectations?

Exceptional Contribution (EC)

- What happens when a faculty member works with an instructional designer? Who owns what?
- Can we have an option for work-for-hire or course shells provided for departments – e.g., where someone creates a template or course shell that the department owns?
- There was a question around the definition of “Exceptional Contribution” and how it relates to language in the existing policy about “readily and regularly” available university resources (e.g. an incremental use of a platform like Coursera would not technically be “readily and regularly” available. Would it therefore be considered an “Exceptional Contribution.” Secondly, when considering the contribution of Instructional Designers and ITAs, are these “exceptional contributions” or “readily and regularly” available resources?)
(CD)
- There are questions about how the existing policy defines “Inventor” and related terms such as “complete and operative” and “conception”. This is fundamental to the issue of content vs. platform. (CD)

Reuse and transfer of rights (RU)

- What happens when a faculty member develops a course that could be taught by multiple people?
- What about derivative work?
- During the IP subcommittee’s discussion of the “University use of courseware” section, there was a sense that the reuse of courseware to save the university costs is a tension that needs to be resolved and that this is a fundamental question for this policy. Is the “textbook” metaphor appropriate as far as courseware goes?
- The committee should consider how to address appropriate thresholds for triggering an IP discussion and agreement in those instances when an instructor may engage in an organic multiple-semester development of different elements of courseware.

Multi-institution and multi-author rights (MI)

- What happens with team-teaching? What are the implications for co-authorship?
- What happens if a faculty member develops a course with another university?
- What about international courses? Which county’s IP laws take precedence?

Privacy (PRI)

- How does the university protect our content from the world outside? **(COM)**
- Who can access all the data and related analytics? Will this data be shared with third parties, e.g., the vendors? Concerns that this may have significant FERPA implications.

Compliance and education (COM)

- What about student property rights? (By our reading of the existing policy, students own copyright to their own work). **(PRI)**

Commercialization (CMZ)

- Should LMU consider embracing the “Creative Commons” approach towards Intellectual Property issues?
- Residuals should be directly addressed in IP agreements (both those that are expected and, given the nature of digital technology, any yet to be developed).

APPENDIX 7

Resource Considerations for Technology-Enhanced Learning Implementation

As LMU continues to implement technology-enhanced learning, it is prudent to track resources and consider the infrastructure that may be needed to support any implementations of its vision for this area. The following appendix briefly highlights key resource areas that support hybrid/online courses, students, and faculty. It references elements of the infrastructure the university already has in place. Additionally and in the context of this report, the table includes resource areas that need consideration by appropriate divisions of the university as the institution moves towards implementation of initiatives and policies for technology-enhanced teaching and learning.

Resource Area	Current University Infrastructure	Level	Resource Considerations
Marketing & Advertising	Marketing and advertising is centralized. Individual schools/colleges support the funding and strategies for their specific graduate programs.	Undergraduate	
		Graduate	<ul style="list-style-type: none"> Marketing/Communication (Local, State, National, Global) for programs Funding and sustainability
Recruiting	Recruitment for undergraduate students is a centralized process handled by the university. Individual schools/colleges support the funding and strategies for recruiting in their specific graduate programs.	Undergraduate	
		Graduate	<ul style="list-style-type: none"> Staffing needs or reorganization to serve any recruitment expansion
Admissions	The admissions process for undergraduate students is centralized. Individual schools/colleges support the funding and strategies for their specific graduate programs.	Undergraduate	
		Graduate	<ul style="list-style-type: none"> Staffing or reorganization to serve any application increases/procedures Online application processes and infrastructure
Financial Aid Counseling	The financial aid and counseling process for undergraduate students is centralized. Individual schools/colleges support the funding and strategies for their specific graduate programs.	Undergraduate	
		Graduate	<ul style="list-style-type: none"> Staffing or reorganization to serve enrollment increases, financial aid counseling at a distance, etc.
Onboarding/Orientation/Student Training	Current orientation for first-year students focuses on general issues. Undergraduate orientation includes an hour-long session on general technology issues.	Undergraduate	<ul style="list-style-type: none"> Orientation module specific to online courses
		Graduate	<ul style="list-style-type: none"> Staffing or reorganization for online-student onboarding and orientation Coordination of hybrid/online student resources (counseling, technology, library, health, etc.) Coordination of student support (registration, financial aid, ARC, DSS, etc.) Possible student training
Online Registration and Payment	The process for online students is the same for on-ground students. Registration: PROWL Payment: Financial Services	University Wide	<ul style="list-style-type: none"> Staffing or reorganization to serve any distance registration procedures, systems, etc.

Academic Advising	Academic counseling is handled by college/school student services for undergraduate students. Individual schools/colleges support the strategies for their specific graduate programs.	Undergraduate	<ul style="list-style-type: none"> Professional development and/or re-organization for advising changes
		Graduate	<ul style="list-style-type: none"> Staffing, coordination, and/or reorganization for online-student advising
Faculty Professional Development	<p>Current PD resources include:</p> <ul style="list-style-type: none"> Information Technology Services = Technology Tools CTE = Pedagogical Approaches Individual college/school initiatives 	University Wide	<ul style="list-style-type: none"> Faculty Professional Development in areas such as: <ul style="list-style-type: none"> Course design standards Faculty pedagogical approaches (online/hybrid) Copyright & Fair Use Instructional materials LMS usage <ul style="list-style-type: none"> Training, workshops, guides, consultation Technology Tools (supported by university) <ul style="list-style-type: none"> Usage training, workshops, ongoing support, guides Best tool use for specific use cases Web tool integration: Usage and consultation Faculty access to online professional development
Course Design	<p>Current support personnel includes:</p> <ul style="list-style-type: none"> Information Technology Services - Sr. Instructional Designer School of Education - Sr. Instructional Designer 	University Wide	<ul style="list-style-type: none"> Staffing and/or reorganization to support instructional design and faculty course design/building¹ Consider appropriate levels of resources needed at the university level vs. school/college level
Course Building	Currently, course production process and procedures are dictated by the individual colleges/schools, based on their needs.	University Wide	<ul style="list-style-type: none"> Appropriate staffing and/or reorganization to support instructional design and faculty course design/building² Consider appropriate levels of resources needed at the university level vs. school/college level for course building Appropriate staffing and/or reorganization to support online course quality assurance processes Project management of specific college instructional design teams and course build processes Management of school/college rollout and design schedule (in collaboration with school/college administration)

¹ A traditional instructional designer works with a faculty subject matter expert to employ one of two methods of support dependent on college/school structure and choice of course production process: (A) *Instructional Designer as Consultant* or (B) *Instructional Designer as Builder* (see productions models in separate footnote)

² At least two course building models exist and TELIG suggests the university consider what models are appropriate for its vision/implementation: In one, the Instructional Designer is a “consultant,” and the faculty member builds their course and meets with instructional designer as needed during faculty build timeline. The other has the Instructional Designer as a “builder,” building the course based on the syllabus, consultation meetings, templates, aesthetic and tool specifications, etc. with the faculty member, or subject matter expert (SME).

Course Delivery Platform	<p>Current Information Technology support includes:</p> <ul style="list-style-type: none"> • LMS (Learning Management System) <ul style="list-style-type: none"> ○ BlackBoard • SIS (Student Information System) <ul style="list-style-type: none"> ○ Banner ○ Registration • 3rd Party Building Blocks <ul style="list-style-type: none"> ○ Integrations into LMS <ul style="list-style-type: none"> ▪ Kaltura (video hosting) ▪ VoiceThread ▪ Etc. 	University Wide	<ul style="list-style-type: none"> • SIS <ul style="list-style-type: none"> ○ Grading Integration and Push (transcripts) • 3rd Party Building Blocks (New, or support for existing) • LMS Analytics <ul style="list-style-type: none"> ○ Reporting for ITS, deans, specific college administration, instructors, students • Distance course exams/assessment (Academic Honesty safeguards)
Help Desk	<p>Information Technology Services currently provides this service during daytime business hours for faculty and students.</p>	University Wide	<ul style="list-style-type: none"> • An after-hours service plan for hybrid/online students • Online Technology Services (24 hr. tech support, student usage, faculty support, etc.) • Computer Support (not learning) <ul style="list-style-type: none"> ○ Appropriate student computer support (online) at a distance ○ Appropriate faculty computer support for online teaching (distance)
Career Services	<p>Career Development Services is centralized and offers support to undergraduate and graduate students. Career Counselors assist undergraduate, graduate students and alumni (in person or over the phone) over the course of the career development process with a variety of services and resources including major/career decision making, job searching strategies, interview skills, resume development, career/personality assessments, graduate school advising and much more. http://careers.lmu.edu</p>	Undergraduate	
		Graduate	<ul style="list-style-type: none"> • Appropriate career services for distance students
Alumni Community	<p>LMU currently has support for all alumni of undergraduate and graduate programs, and offers an online alumni community for alumni not residing locally. http://alumnicommunity.lmu.edu/s/1013/start.aspx?sid=1013&gid=1&pgid=61&cid=160</p>	Undergraduate	
		Graduate	<ul style="list-style-type: none"> • Appropriate alumni resources/integrations for distance students

Disability Services	<p>Disability Support Services provides specialized assistance and resources to enable students with physical, perceptual, learning, ADD/ADHD, psychiatric disabilities and students on the autism spectrum to achieve full access in all aspects of university life. We also consult with students, faculty and staff regarding disability issues. DSS consultation and support is available via phone, email, and in-person to accommodate all types of students and situations.</p> <p>http://academics.lmu.edu/dss/</p>	University Wide	<ul style="list-style-type: none"> • Accessibility/ Disability support systems and student resources <ul style="list-style-type: none"> ○ Resource coordination ○ Accessible materials, LMS, resources, offices, etc. ○ Software acquisition ○ Etc. • LMS Integration
Campus Ministry	<p>Campus Ministry is centralized and available to all students on campus or at a distance. They offer online prayer requests and phone support.</p> <p>http://mission.lmu.edu/ministry/</p>	Undergraduate	
		Graduate	<ul style="list-style-type: none"> • Appropriate campus ministry resources/integrations for distance students
Ethnic & Intercultural Services	<p>EIS is centralized and available to all students on campus. EIS offers resources, programming, student organization support, etc.</p>	Undergraduate	
		Graduate	<ul style="list-style-type: none"> • Appropriate EIS resources/integrations for distance students
Student Psychological Services	<p>SPS is centralized and available to all students on campus or at a distance.</p>	University Wide	<ul style="list-style-type: none"> • Appropriate SPS resources/integrations for distance students
Library	<p>Currently, library needs are handled centrally. LMU is part of the AJCU 24/7 Reference Librarians System. You must be faculty, staff, or an enrolled student at LMU's Westchester campus to access these resources from off-campus. Owing to the license agreements we sign with the vendors of these products, they are not available from off campus for alumni or students of Loyola Law School. However, alumni and LLS students are welcome to visit the library.</p> <p>Off-Campus http://library.lmu.edu/usingthelibrary/technology/off-campusaccess/#d.en.3007</p>	University Wide	<ul style="list-style-type: none"> • Availability of library materials at a distance • Availability of library resources, including librarians, at a distance

Bookstore	Currently, bookstore needs are handled centrally and they support online ordering and delivery. http://www.bkstr.com/webapp/wcs/stores/servlet/StoreCatalogDisplay?storeId=10690&langId=-1&catalogId=10001	University Wide	<ul style="list-style-type: none"> • Appropriate bookstore resources/integrations for distance students
Faculty Senate	Faculty Senate meets in person roughly every two weeks during the semester.	University Wide	<ul style="list-style-type: none"> • Appropriate university committee structure to support technology-enhanced learning initiatives, policies, governance, changes, etc.
Student Health Services	Student health services are centralized and available to all students on campus.	Undergraduate	
		Graduate	<ul style="list-style-type: none"> • Appropriate student health resources for distance students
Student Course Evaluations	Existing student course evaluations are generally administered via paper form. There are pilot programs with online student course evaluations in SoE and SFTV.	University Wide	<ul style="list-style-type: none"> • Online student course evaluation modification and roll out