Schools of Education Learning Collaborative

The Top Ten Things SOE Deans Need to Know This Year

Key Takeaways From Eduventures' 2011-2012
Research and Work in the Field

Eduventures Annual Member Meeting
June 11, 2012

Welcome and Objectives

The past several years have been complex and challenging for all of those who work in education and teacher preparation. Despite speculation about imminent changes in the ways this country prepares educators, no one knows exactly what path federal policy will take or in what ways SOEs will have to be accountable in the years to come.

Given all of this ambiguity, what should you know to be prepared for the future of teacher preparation…whatever it might be?

Trivia and Resources

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Answer Correct?		Trivia Topic and Eduventures Resources
Yes	No	
		Who is funding the non-university-based educator preparation reform movement?
		EV Resource: *Understanding the Movement for Educator Preparation Reform*
		Which states are producing the most teachers?
		EV Resource: *Understanding the Market for Initial Teacher Preparation*
		What tools do students use when selecting programs?
		EV Resource: *Expanding the Branding, Reputation, and Visibility of Your School of Education* (Member Roundtable)
		Is the online degree market growing?
		EV Resource: *Understanding the Evolving Market for Online Higher Education* (Member Roundtable)
		Is the master's degree market growing?
		EV Resource: *Understanding and Identifying Innovative and Entrepreneurial Business Models for Schools of Education*
		How can I make my Ed.D. programs in Education Leadership cutting edge?
		EV Resource: *Evaluation of the Market for Ed.D. in Educational Leadership*
		How can higher education use social media effectively?
		EV Resource: Website diagnostic, conducted on individual basis. Please contact Cara Strachan, cstrachan@eduventures.com, for more information
		How do vendors interact with higher education?
		EV Resource: *Evaluating Online Services Firms* (Concurrent AMM Presentation)
		What revenue streams do entrepreneurial schools of education leverage?
		EV Resource: *Understanding and Identifying Innovative and Entrepreneurial Business Models for Schools of Education*
		Do graduates of teacher preparation programs feel prepared?
		EV Resource: Upcoming Member Roundtable *Identifying Teacher Preparation Program Outcomes: Findings from the 2012 Annual Survey of Graduates* on October 24, 2 pm ET.

Agenda

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1. Who is funding the non-university-based educator preparation reform movement?
2. Which states are producing the most teachers?
3. What tools do students use when selecting programs?
4. Is the online degree market growing?
5. Is the master's degree market growing?
6. How can I make my Ed.D. programs in Education Leadership cutting edge?
7. How can higher education use social media effectively?
8. How do vendors interact with higher education?
9. What revenue streams do entrepreneurial schools of education leverage?
10. Do graduates of teacher preparation programs feel prepared for their professional roles?

Who is the top funder of the non-university-based educator preparation reform movement?

1. The Walton Family Foundation
2. The Broad Foundation
3. The Federal Government
4. Teach for America
5. The Bill & Melinda Gates Foundation

Collectively, These Foundations Contributed $509 million to Education in 2010; In Contrast, the Federal Government Pledged to Invest $405 Million in Education in FY 2011

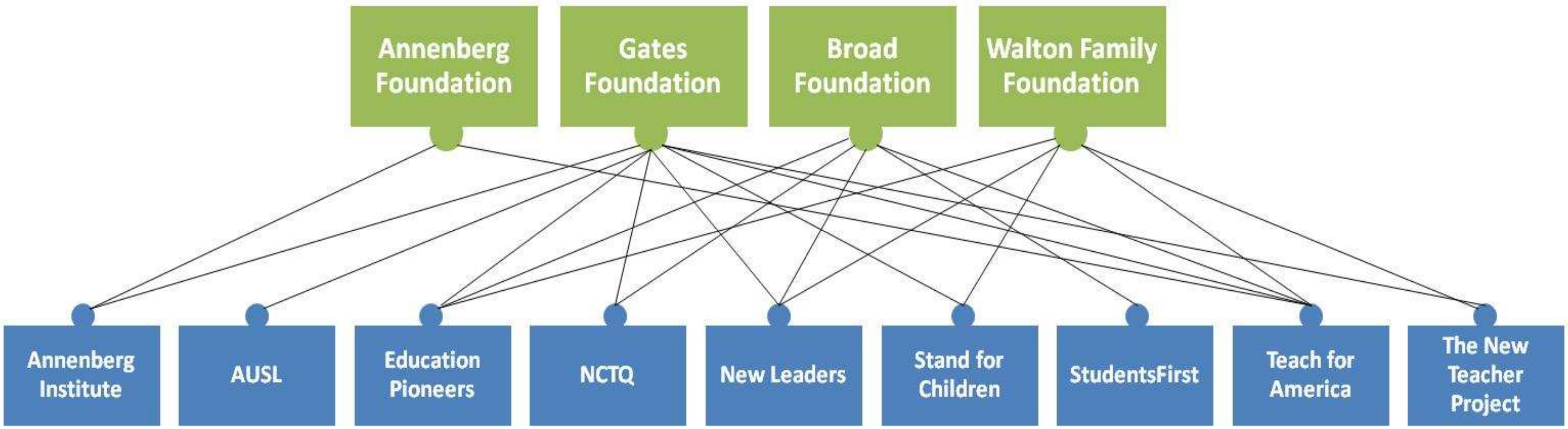
Private Foundation	Amount Invested into Education
The Bill & Melinda Gates Foundation	$310,650,000*
The Eli & Edythe Broad Foundation	$41,423,620**
The Walton Family Foundation	$157,000,000*

The $300+ million that Gates donated to education constitutes just one part of the $2.6 billion it provided in overall funding in 2010. Gates' education spending includes $236,892,000 for college readiness initiatives and $60,062,000 for postsecondary success initiatives.

*Source: Organizational website

**Source: Organization's 2010 990 tax form

Many High Profile Non-university-based Educator Preparation Reform Organizations Draw Financial Support From Multiple Foundations



Many of these foundations have explicit advocacy agendas, which necessarily influence where their dollars go. For example, The Broad Foundation, supports school choice, the charter school movement, and non-traditional programs to prepare teachers. It positions itself as an organization seeking to build "transformative federal and state policy."

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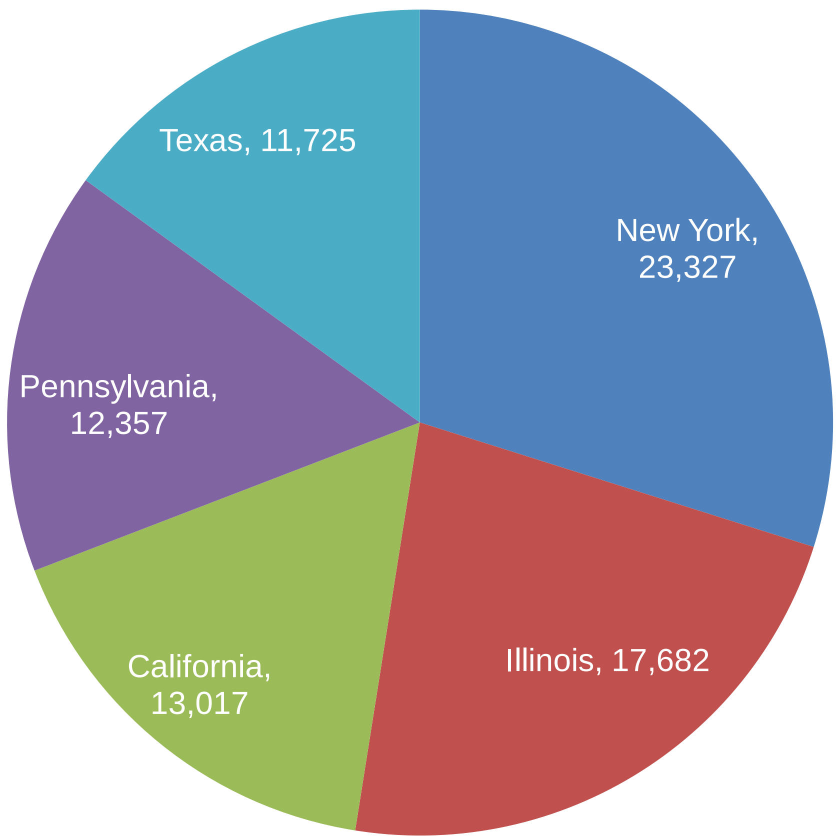
Which state is producing the greatest numbers of teacher preparation program completers via traditional routes?

1. Illinois
2. Texas
3. $\boxed{\text{New York}}$
4. California
5. Pennsylvania

For more insight on this topic, attend "The Evolving Market for Initial Teacher Preparation" at 2 pm today!

Top Five Producers of Traditional Route Program Completers, AY 2008-2009



In AY 2008-2009, these states produced 42% of traditional program completers. Traditional teacher prep programs prepared 186,488 completers* in AY 2008-2009.

In AY 2008-2009, 79% of all program completers were prepared by a traditional route program.

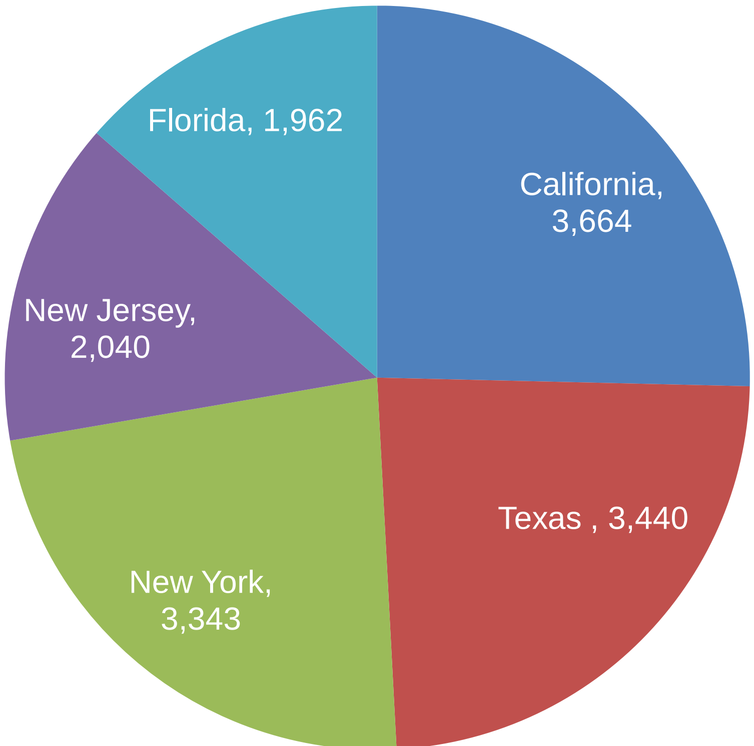
* Completer defined as a person who is documented as having met all the requirements of a state-approved teacher preparation program. This person does not necessarily have to have been recommended to the state for initial certification.

Which state is producing the greatest numbers of teacher preparation program completers via IHE-based "alternative" routes*?

1. New Jersey
2. New York
3. Florida
4. California
5. Texas

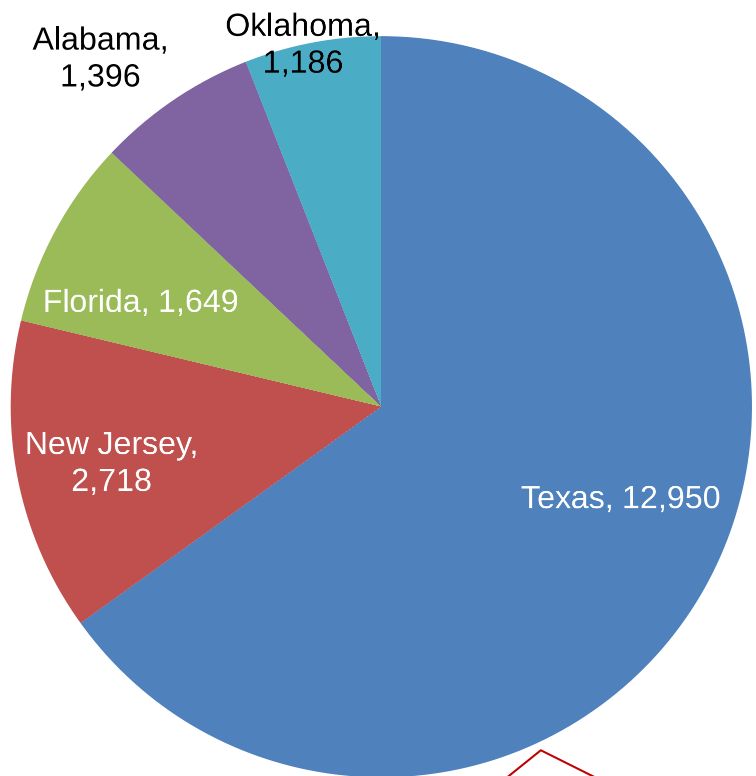
*Source: Title II data for AY 2008-2009. Title II allows each state to define "alternative route teacher preparation." However, Title II broadly considers programs alternative when they primarily serve candidates who are the teacher of record in a classroom while participating in the program.

Top Five Producers of IHE-Based Alternative Route Program Completers. AY 2008-2009



These five states produced 66% of the 21,766 IHE-based alternative programs completers. 21,766 represents a 1% increase from the previous academic year and a 2% decrease from AY 2006-2007.

Top Five Producers Non-IHE-Based Alternative Route Program Completers. AY 2008-2009



These five states produced 74% of 26, 884 Non-IHE-based alternative program completers. This represents a 1% increase from the previous academic year and an 11% increase from AY 2006-2007.

What is the most popular information source consulted by prospective education graduate students when learning about programs and making a decision about where to enroll?

1. Current or former students
2. School web site
3. Course catalogue (print)
4. Course catalogue (online)
5. Publically available rankings

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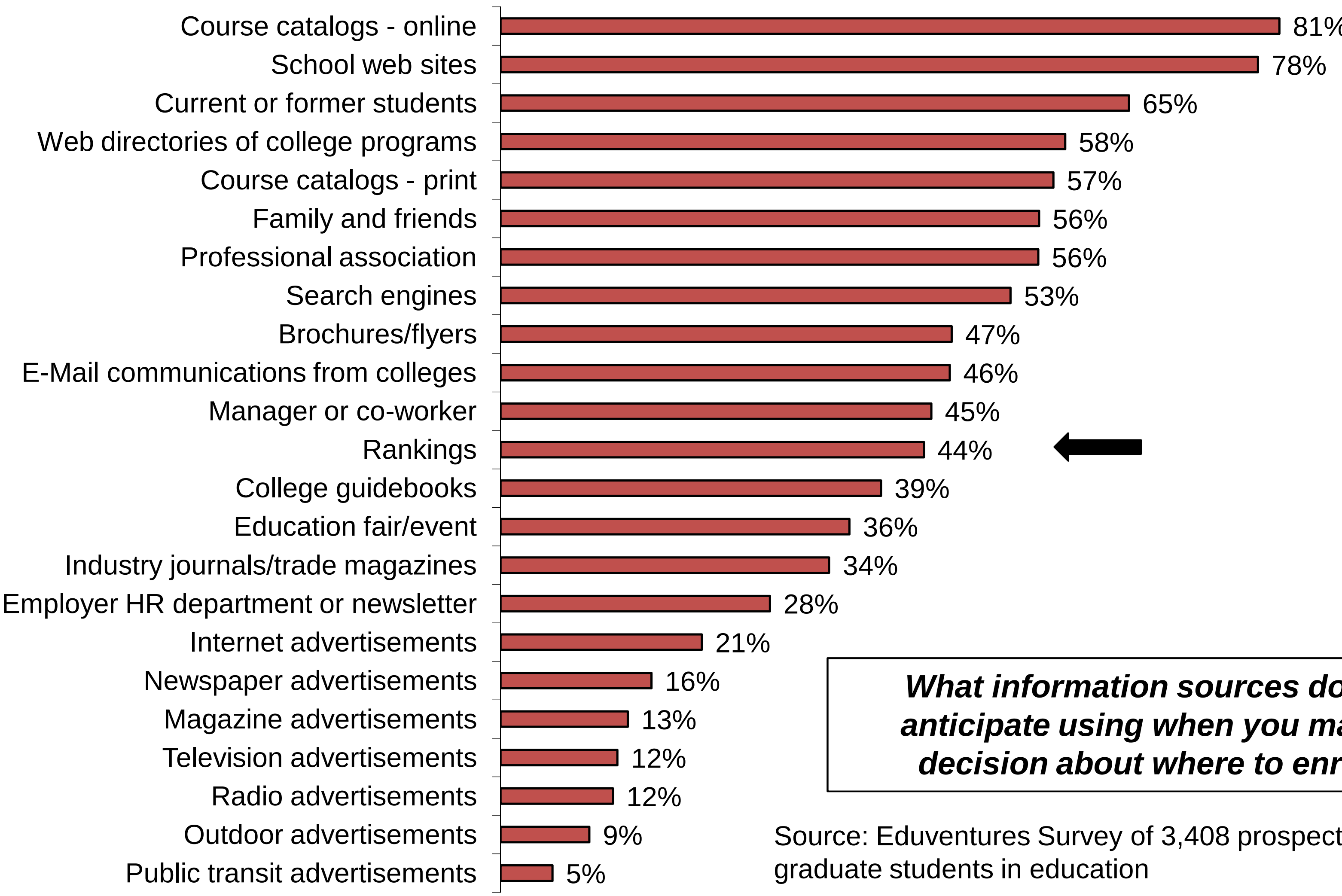
Prospective Graduate Students Use Online Curriculum, Web Sites, and References in Decision to Enroll; Rankings are Used by Less than Half



What information sources do you anticipate using when you make a decision about where to enroll?

Source: Eduventures Survey of 3,408 prospective graduate students in education

Prospective Undergraduates Rate College Board and Google as Most Useful Online Tools in Search

Marketing Channels Rated by Undergrad Prospects Interested in Education	Mean Usefulness Rating
College Board	6.11
Google	5.66
Naviance	4.97
ACT	4.92
Princeton Review	4.68
FastWeb	4.68
Yahoo	4.49
U.S. News and World Report	4.20
Cappex	3.95
Virtual College Fair	3.92
Bing	3.88
Zinch	3.84
CollegeView	3.79
College Confidential	3.75
CollegeNavigator	3.66

Please rate the usefulness of each of the following online resources as you have been gathering information on colleges.
Rating scale: 7 = Extremely useful; 1 = not at all useful.

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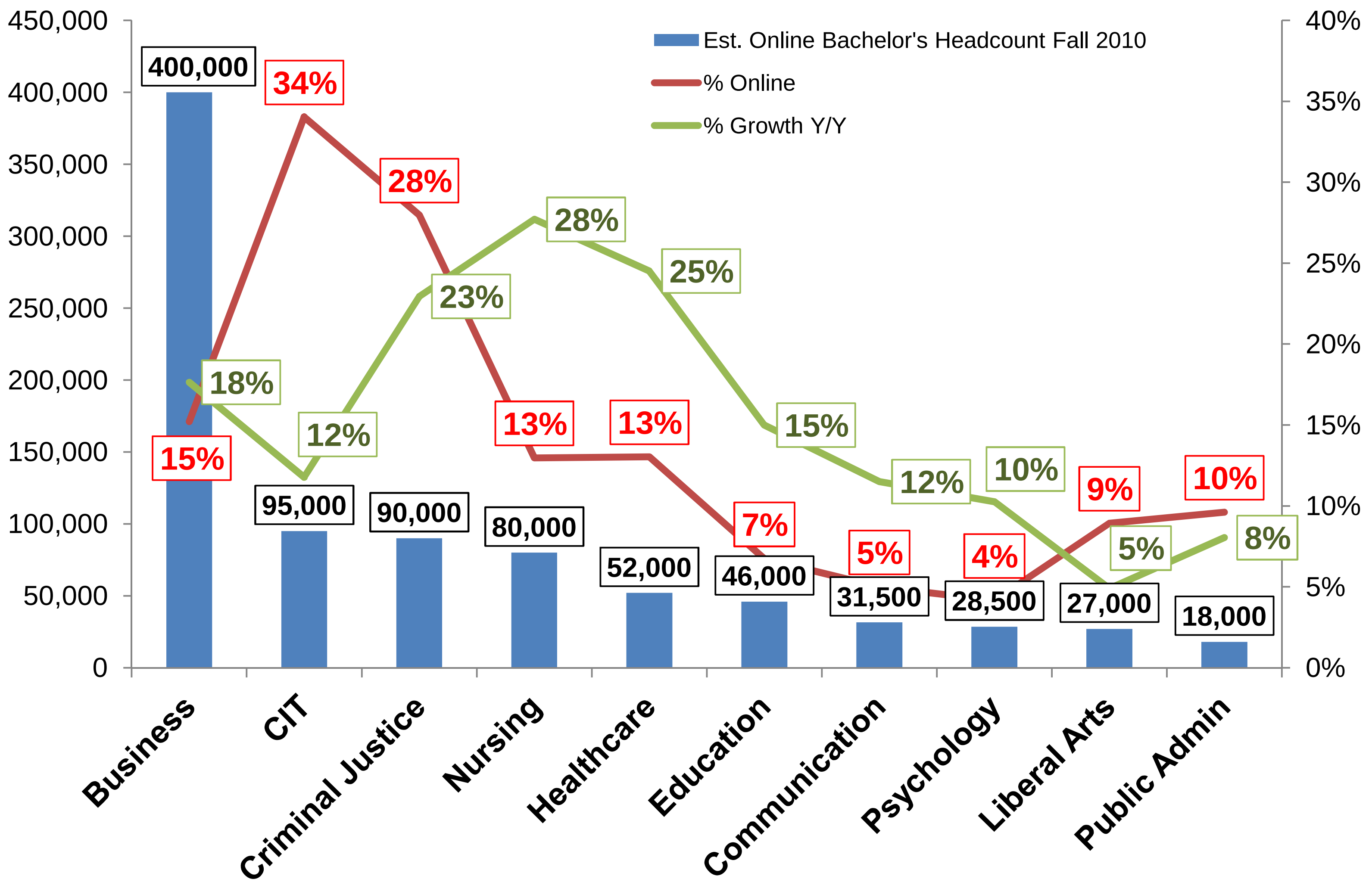
Academic Strength, Professional Growth, Reputation, and Affordability are Top Drivers Among Graduate Education Students

Top Drivers of Enrollment for Graduate Students in Education	Mean Importance Rating
Program strength in my area of interest	6.2
Perceived marketability of degree	5.9
Opportunities for professional growth	5.8
Overall reputation of the university	5.5
Overall cost of attendance	5.4
Reputation of the faculty	5.3
Tuition and fees	5.2
Opportunities for professional networking	5.0
Faculty mentorship	4.7
Financial aid	4.6
Industry ties to program of interest	4.6
Placement of recent graduates	4.5

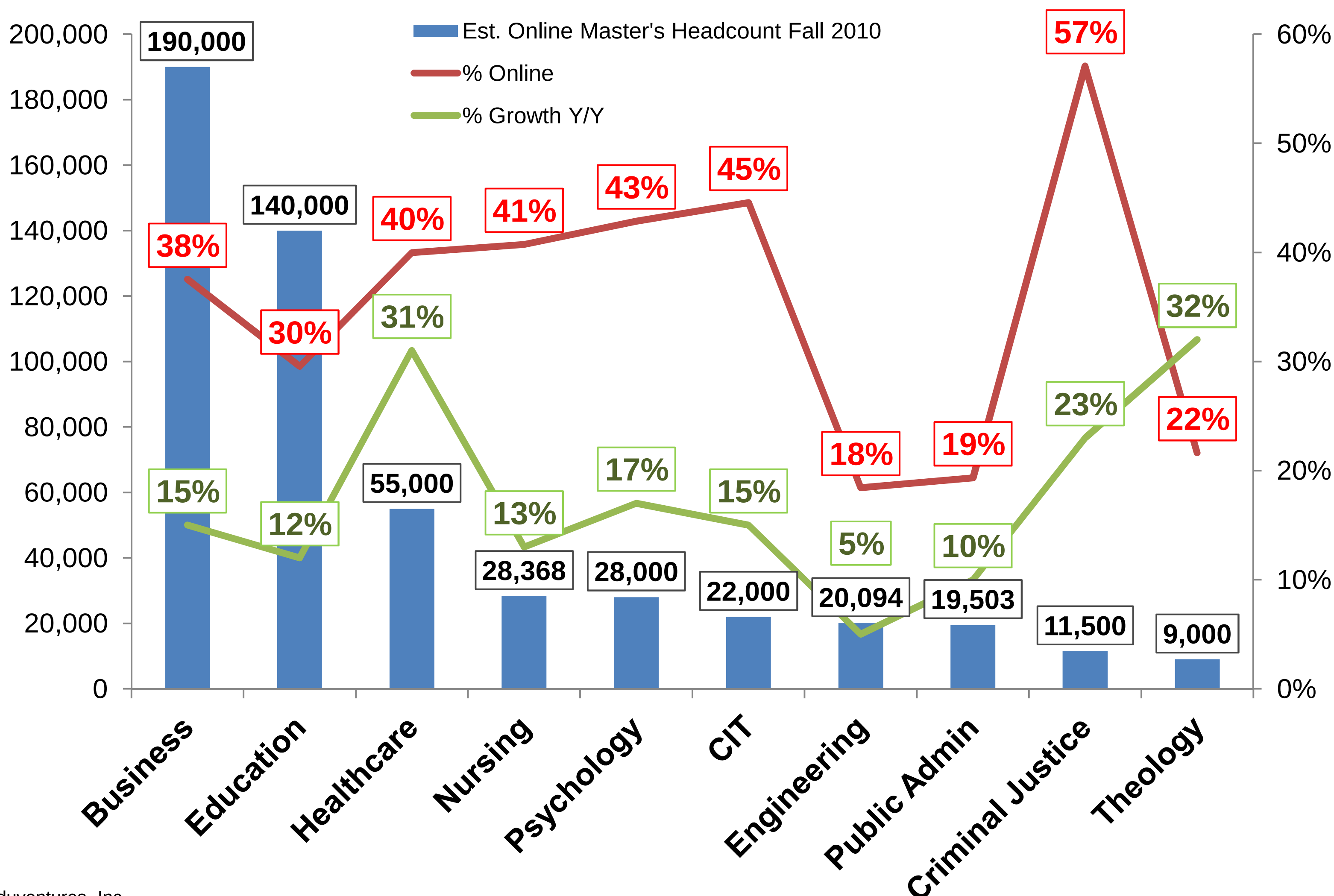
Source: Eduventures, Graduate Student Enrollment Drivers, 2009

Online Bachelor's Degrees in Education Are Estimated to Have Grown 15% Y/Y, and Have Potential For Further Expansion



Source: IPEDS, Eduventures Online Database and Eduventures analysis.

At the Master's level, online is even more mainstream than previously thought; but pace/penetration caution saturation risk, especially in Education



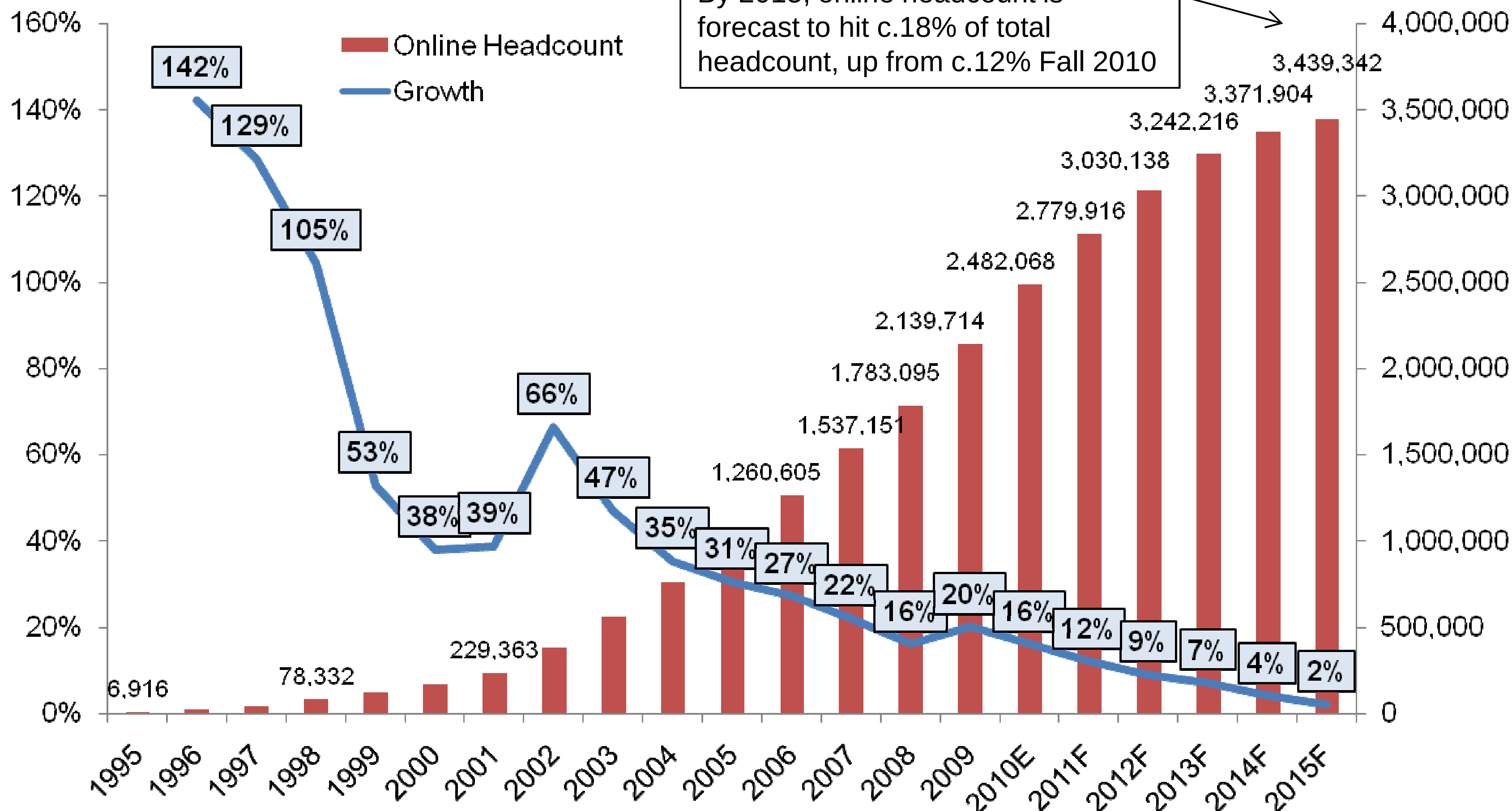
Source: IPEDS, Eduventures Online Database and Eduventures analysis

Despite steady growth in recent years, online enrollments will eventually plateau. In what year do you suppose this will happen?

1. 2015
2. 2020
3. 2025
4. 2030
5. 2050

Without experiential or market breakthrough, rapid growth in adult participation, for-profit rethink, scale and strengthening economy will see online headcount plateau by 2015

By 2015, online headcount is forecast to hit c.18% of total headcount, up from c.12% Fall 2010



<u>Online significance in the adult market-</u> Eduventures estimates that in Fall 2010, online headcount represented c.27% of total adult (aged 25+) headcount at degree-granting schools; and is forecast to hit 39% by 2015

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Although Eduventures projects decline in the overall market for master's degrees in education, particular areas hold more promise than others for immediate growth. Which of the following areas hold promise for growth?

1. Higher Education Administration
2. P-12 Education Leadership
3. Adult & Continuing Education Administration
4. Curriculum & Instruction – teacher leadership
5. Special Education

All correct!

Master's Degree Market Growth

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Given trends over the last decade, Eduventures projects that master's programs for teachers, overall, will decrease in enrollment. Within the general decline, though, there are areas that show more promise for growth than others.

As the following list suggests, one broad opportunity is teacher leadership, as public interest pushes to create a more defined career ladder for teachers and augment educators' leadership skills.

Areas projected for growth:

- Adult & Continuing Education Administration
- Higher Education Administration
- P-12 Education Leadership
- Curriculum & Instruction – teacher leadership
- ESL
- Special Education

Graduate certificates and "digital badges" may also be worthwhile pursuits for SOEs, given the increased popularity of competency-based learning and as schools/districts shift away from salary links to master's degrees.

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What percentage of the top twenty providers of Ed.D. programs in Education Leadership offer programs that are entirely online?

1. 20%
2. 30%
3. 40%
4. 50%
5. 60%

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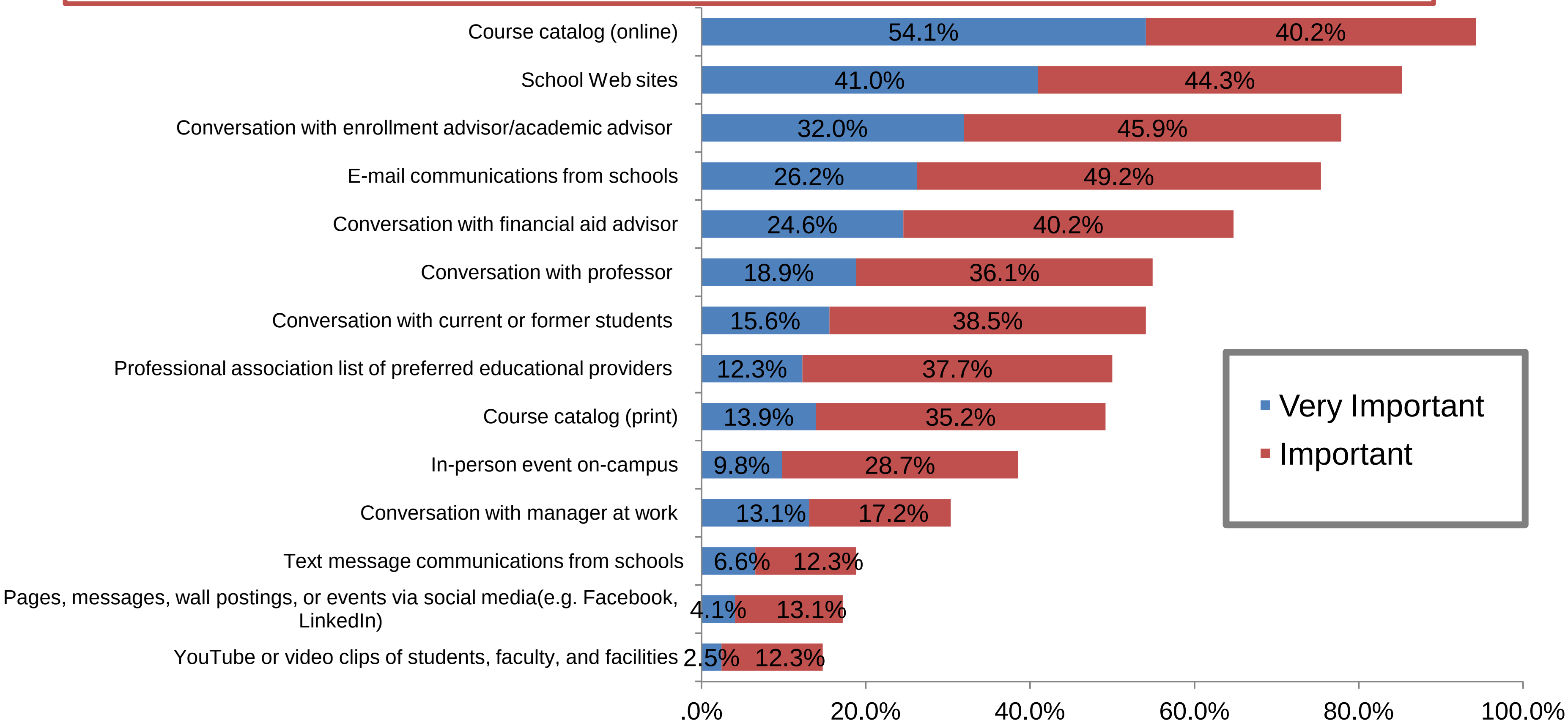
40% of the Top Twenty National Providers of Ed.D. in Educational Leadership Programs are Fully Online; 50% Include Substantial Online Components

School	2011 Market Share	Degrees Conferred 2011	2007-2011 CAGR	2011 Enrollments	Cost/ Credit	Ed.D. Delivery Mode
University of Southern California	4.6%	156	48%	446	1360	On-Campus
University of Phoenix-Online Campus	3.8%	129	44%	369	N/A	Online
Nova Southeastern University	3.2%	108	39%	309	716	Online
Capella University	2.2%	74	59%	211	440	Online
Lincoln Memorial University	1.7%	57	N/A	163	405	On-Campus
University of Missouri-Columbia	1.7%	56	217%	160	792	Hybrid
Argosy University-Sarasota	1.6%	53	46%	151	842	Online
Liberty University	1.4%	48	91%	137	445	Hybrid
Fielding Graduate University	1.3%	45	56%	129	514	Online
University of Houston	1.3%	43	76%	123	668	Hybrid
University of La Verne	1.2%	42	45%	120	685	On-Campus
Pepperdine University	1.2%	42	N/A	120	1210	Hybrid
The University of Texas at Austin	1.2%	41	46%	117	1026	On-Campus
National Louis University	1.2%	40	N/A	114	744	On-Campus
Wilmington University	1.1%	38	47%	109	395	On-Campus
East Tennessee State University	1.1%	38	43%	109	898	Online
Georgia Southern University	1.1%	37	41%	106	999	On-Campus
Argosy University-Atlanta	1.0%	35	67%	100	842	Online
University of South Carolina-Columbia	0.9%	32	71%	91	945	On-Campus
Iowa State University	0.9%	31	57%	89	1031	On-Campus

Source: National Center for Education Statistics, IPEDS

According to 122 Prospective Doctoral Candidates, Online Course Catalogs Continue to be the Most Important Information Source; School Websites are Also Important

"Please indicate how important each of the following sources is when you look for more information about schools or degree programs of interest to you."



Social media, such as YouTube and Facebook, are not very important information sources for prospective doctoral students.

Source: Eduventures' 2010 *Consumer Preferences for Adult Education*

Which institution is ranked as using social media most effectively?

1. Notre Dame University
2. Columbia University
3. Harvard University
4. Stanford University
5. Johns Hopkins University

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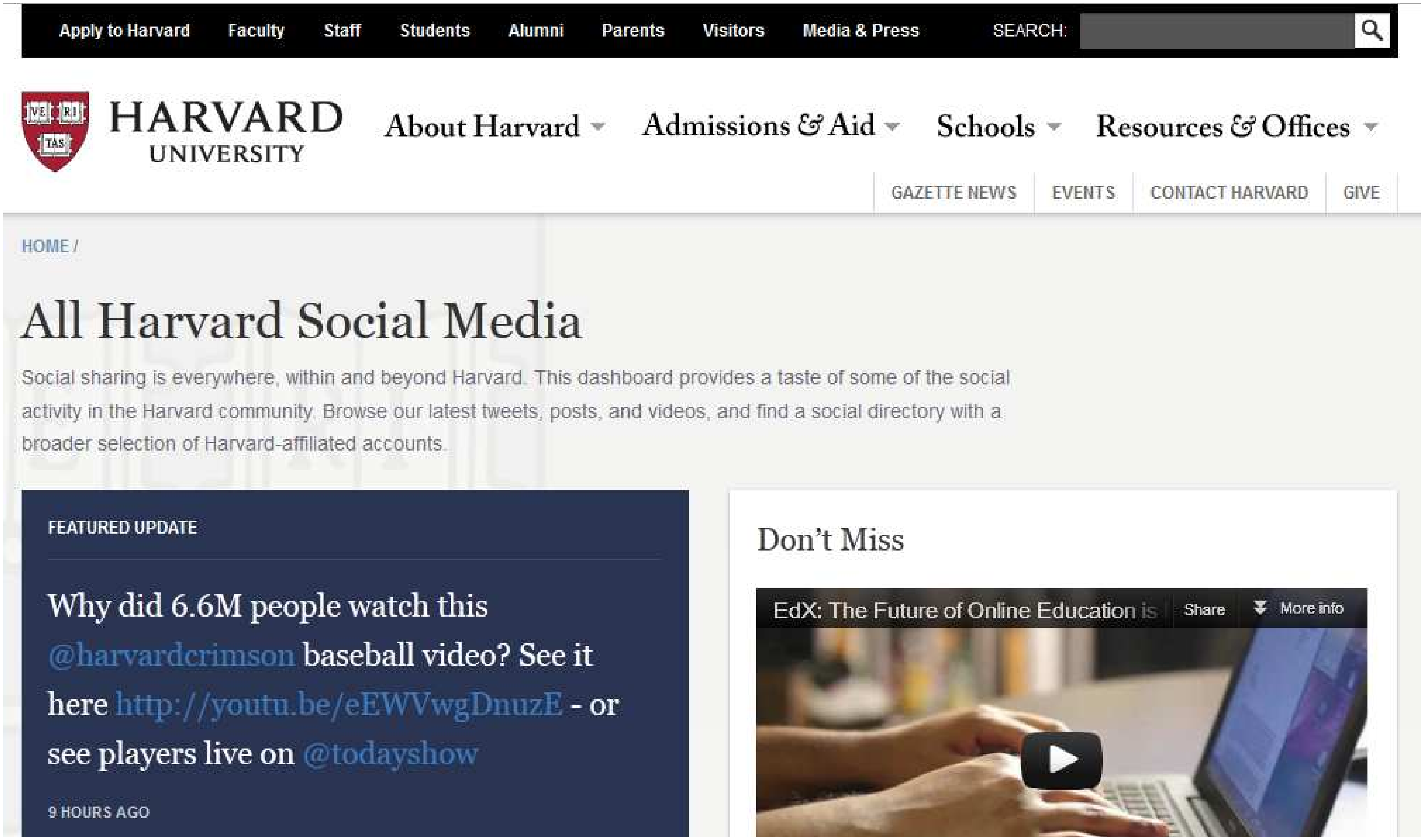
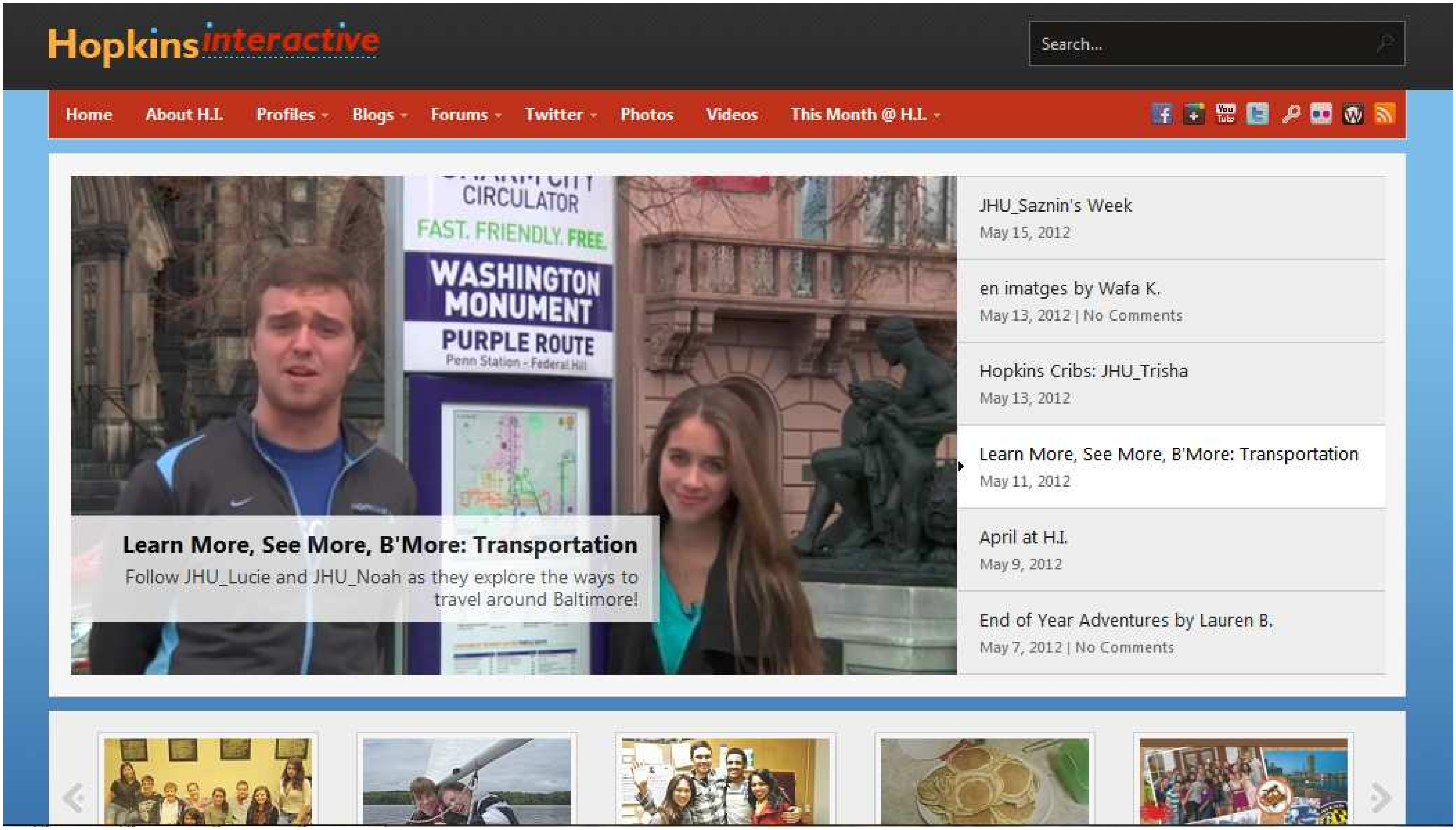
Harvard Earned Top Ratings for Its Smooth Integration of Multiple Forms of Social Media on a Single Platform



http://www.harvard.edu/all-harvard-social-media

Since 2005, "Hopkins Interactive" Has Allowed Current Students to Share Dynamic Information With Prospective and New Students



http://www.hopkins-interactive.com/

Effective Social Media Use Doesn't Just Mean Make a Facebook Page

http://mashable.com/2012/02/03/higher-education-social-media/

What is the typical contract length between a university and a vendor (e.g., instructional support vendors or curricular support vendors such as 2Tor, Deltak, or Embanet-Compass)?

1. About one year
2. 1-4 years
3. 4-7 years
4. 7-10 years
5. 10-13 years

The Typical Business Model for the Full-Service Providers Puts Little Risk on the Institution But Requires Significant Revenue Share

- ***Typical Contract Length Can Be Almost Ten Years So Vendors See ROI***
  - Contracts generally run 7 to 10 years and include 40-85% revenue share for the vendor, depending on the client's circumstances and the services provided
- ***Services Include Course Development and Span the Student Lifecycle***
  - Services generally include generating and converting leads based on admissions criteria established by the institution, program design (with faculty) and marketing, creation of online-optimized courses, IT hosting (esp. the course management system and CRM), extension of call center services into retention services
  - Market assessment and strategic planning are included, but are as much for the benefit of the vendor as for the institution, to justify investing in a new program
- ***Initial Investment for Vendors is High, While Institutions Invest Little Upfront***
  - Revenue-share business models in higher education are most developed in the end-to-end online program services segment, so the institution invest little to nothing upfront, and the risk is taken on by the vendor
  - A typical investment by the vendor for one program is $1-2 million, and it is important to note that profit margins in the "out" years need to account for losses in the early years
    - Vendors generally run losses for the first 18 to 30 months, and are profitable after that point, assuming programs prove scalable and meet targets

Evaluating Online Services Firms

Questions for the Panelists:

1. How should institutions think about the trade-off between institutional control and scale online?

2. How do institutions differentiate their online programs in today's market? What balance of marketing technique vs. unique program content works best to attract students online?

3. Looking ahead 3-5 years, what will this market look like? How will the core model evolve? What are your organizations doing to change with the needs of institutions?

What source of revenue constitutes the most significant proportion of an SOE's revenue?

1. Private contracts for Professional Development, training programs, etc.
2. Independent operations
3. Net tuition revenue (either directly or indirectly realized)
4. Private and affiliated gifts
5. Grants for scholarly research

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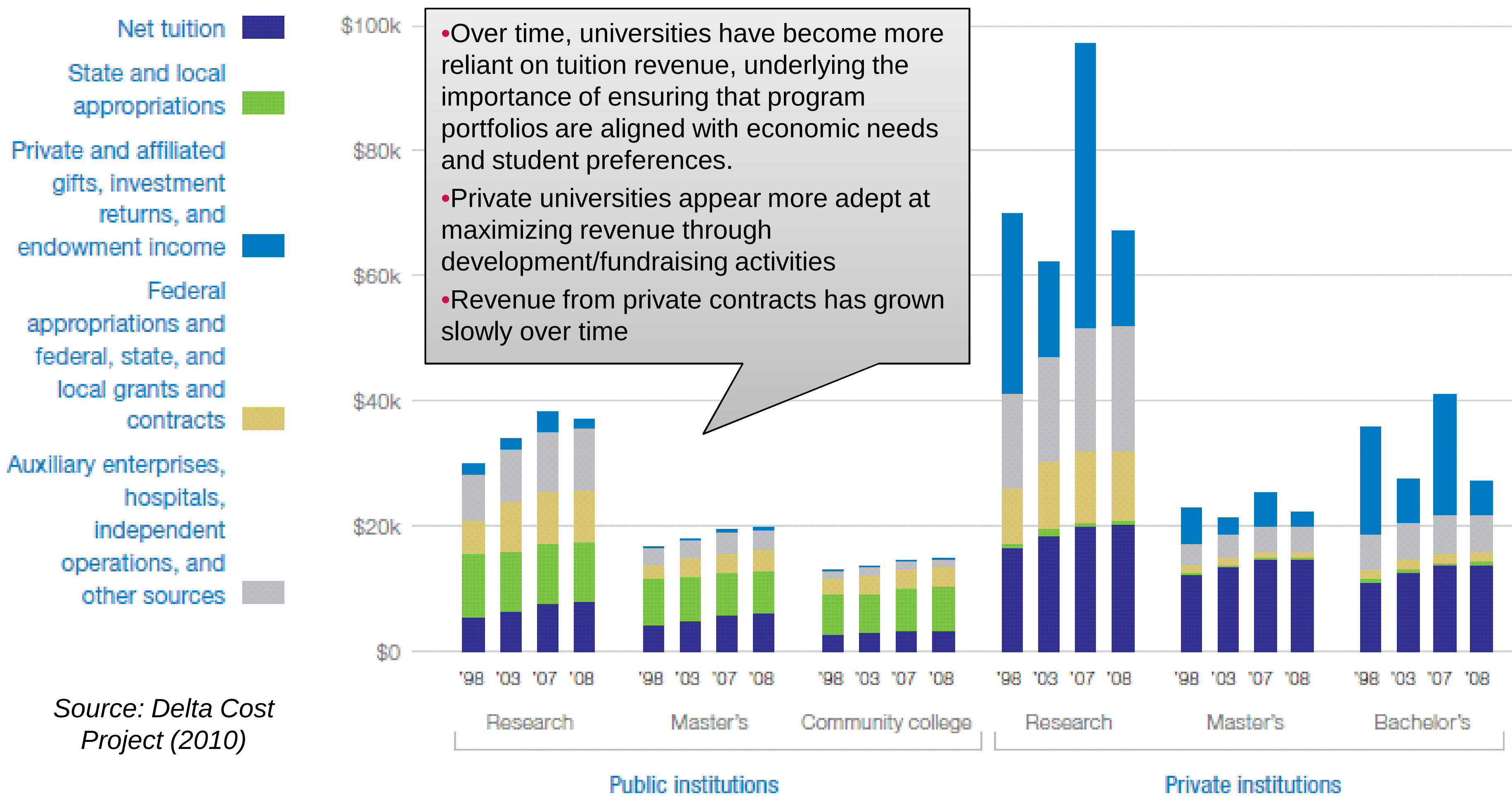
Entrepreneurial Schools of Education Address and Maximize All Revenue Streams, but Certain Revenue Streams are Emphasized

- Net tuition revenue
- State and local appropriations (for public universities)
- Private and affiliated gifts
- Investment returns and endowment income
- Private contracts for professional development, training programs, or other services
- State/Federal appropriations or contracts
- Grants for scholarly research or program development
- Auxiliary sources that generally furnish a service to students, faculty, or staff (athletics, residence halls, food services, etc.)
- Independent operations and other sources

Entrepreneurial Schools of Education pay close attention to student, faculty, school/district, and teacher needs in order to develop new or different programs and services that meet those needs. Market research and strong partnerships with schools/districts play a large part in driving development in these areas.

Universities Do Not Uniformly Rely on Revenue Sources; However, Across All Groups, Tuition Revenue Has Consistently Grown Over Time

Total Revenues Per FTE Student *AY 1998-2008 (In 2008 Dollars)*



Source: Delta Cost Project (2010)

Entrepreneurial Schools of Education

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Campuses: Twin Cities Crookston Duluth Morris Rochester Other Locations

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News Release

University of Minnesota launches startup Early Learning Labs

Company is second internal business unit to be spun out of U

Contacts: Matt Hodson, University News Service, mjhodson@umn.edu, (612) 625-0552
John Merritt, Office of the VP for Research, jmerritt@umn.edu, (612) 624-2609

MINNEAPOLIS / ST. PAUL (05/02/2012) —The University of Minnesota recently launched startup company Early Learning Labs, which will commercialize a suite of tools for monitoring ongoing growth and development of preschool children. The suite, coined myIGDIs, is a combination of a test kit and assessment system as well as a web-based management and reporting framework designed for schools, teachers, and early childhood specialists.

The myIGDIs assessment measures (Individual Growth and Development Indicators) are based on 15 years of research on the measurement of essential skills in preschool children. The measures provide both periodic "snapshots" and a measure of growth over time in a child's early literacy development. The assessment tools require little technical knowledge or training to administer, and teachers can track results over time. Researchers hope the assessment will ensure children in need of individual attention in school will get it. Early Learning Labs is the first U of M startup to result from research at the College of Education and Human Development.

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IGDIs
Individual Growth + Development Indicators
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PreK IGDIs | Information gathering for:
Individual-focused Screening
Periodic monitoring identifies children making adequate progress, and children who may be "at-risk" and need further learning support.

According to an Often-cited 2006 Report by Arthur Levine, 62% of Teacher Education Alumni Believe that SOEs "Do Not Prepare Graduates for Classroom Realities."

TABLE 4

Percentage of Alumni Agreeing Education Schools Do Not Prepare Graduates for Classroom Realities by Carnegie Type

Criticism	Overall	BG	BLA	DRE	DRI	MI	MII
Schools of education do not prepare their graduates to cope with classroom reality	62%	62%	58%	60%	53%	66%	57%

BG=Baccalaureate General, **BLA**=Baccalaureate Liberal Arts, **MI**=Masters Granting I, **MII**=Masters Granting II, **DRI**=Doctoral Research Intensive, and **DRE**=Doctoral Research Extensive

Source: Alumni Survey

Source: Levine, A. 2006. Educating School Teachers.

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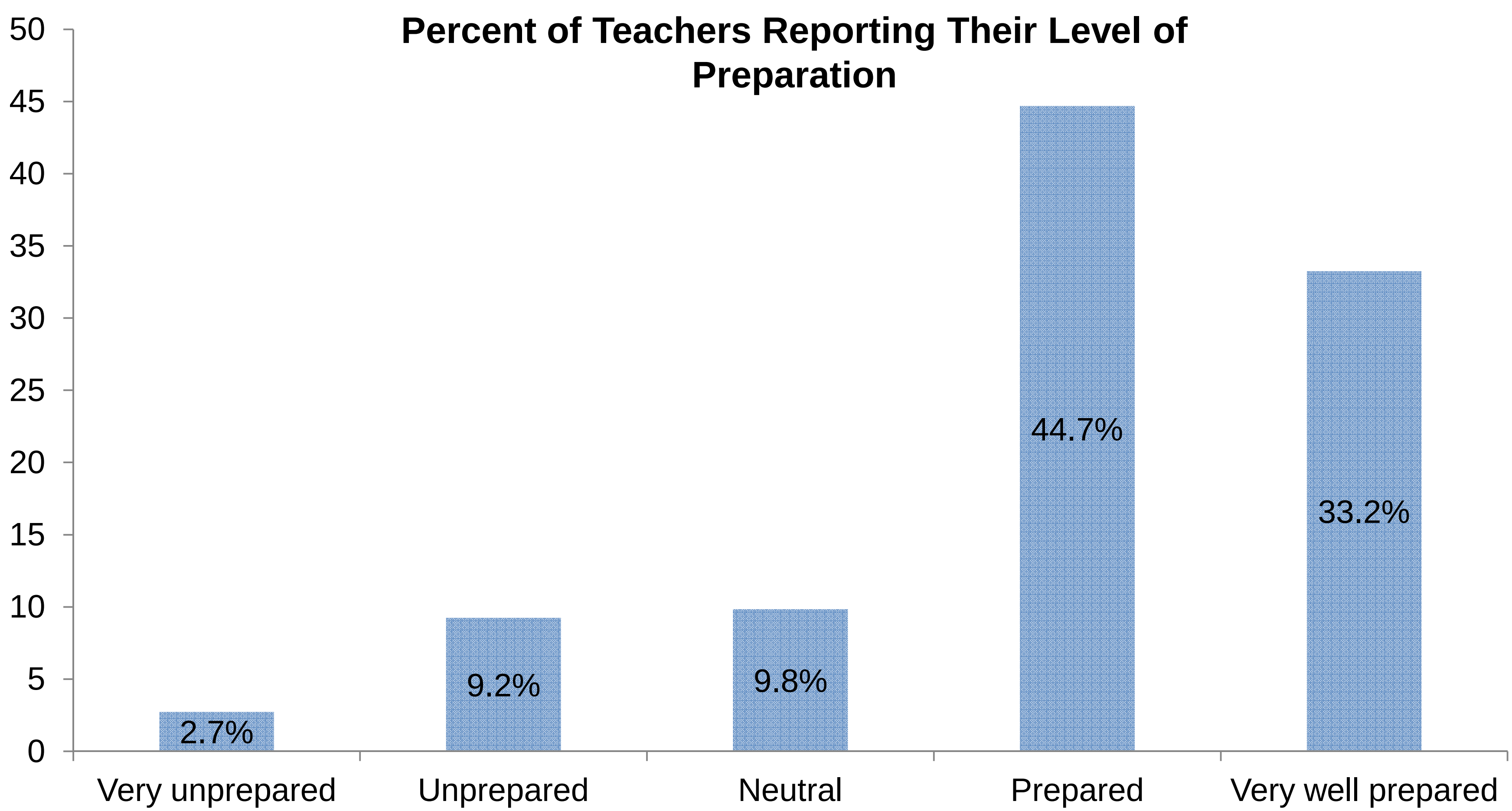
In 2009, Eduventures Found That 78% of Teachers Who Entered the Field in the Last Five Years Felt Prepared or Very Well Prepared



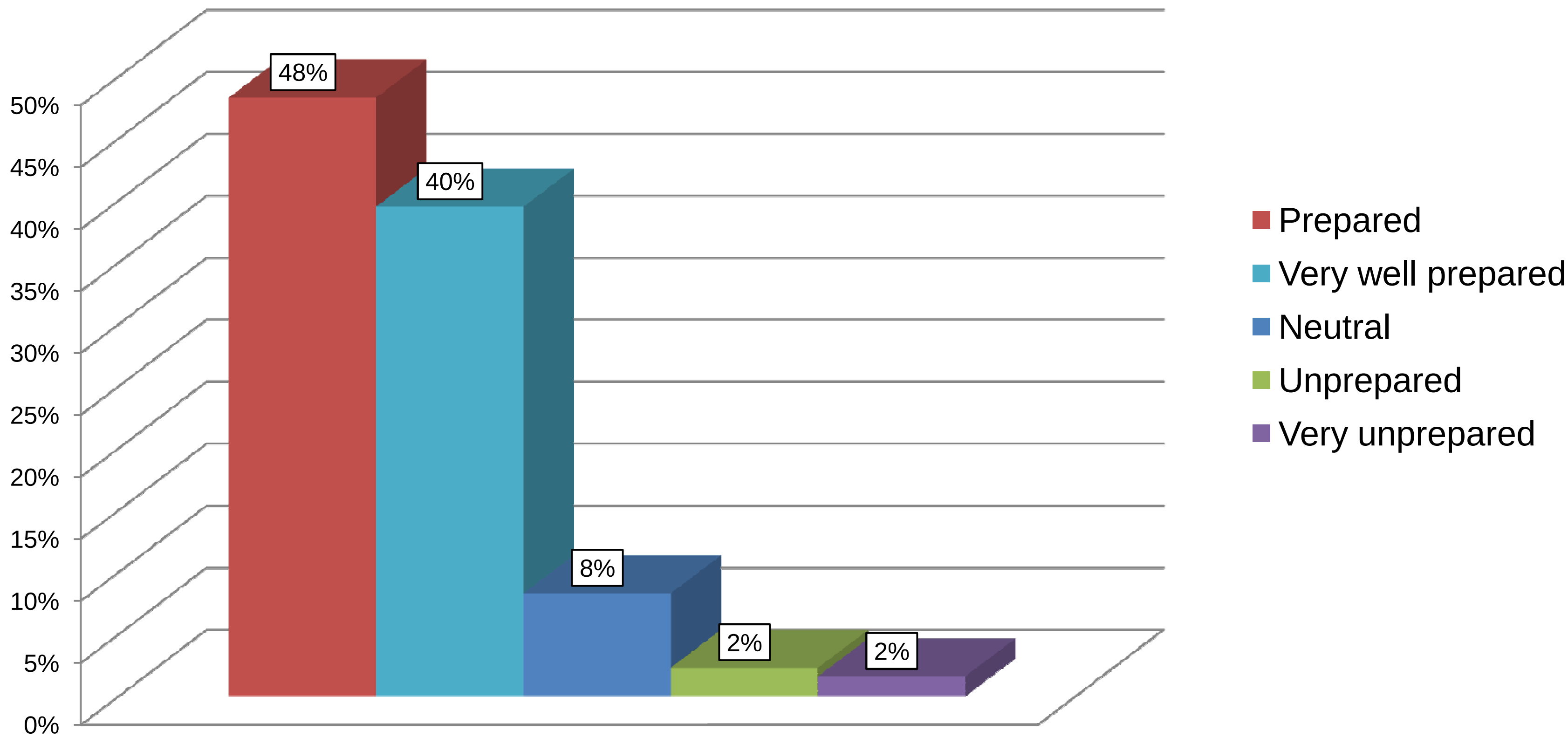
Source: Schools of Education Learning Collaborative, National survey of current teachers & administrators, N=1,504

In Eduventures' 2009 report, 78% of new teachers felt prepared for their role. According to Eduventures' 2012 Annual Alumni Survey, the percent of recent alumni who feel prepared by their initial teacher preparation program is approximately:

1. 20% lower
2. 10 % lower
3. The same
4. 10% higher
5. 20% higher

88% of Alumni Survey Respondents Feel Their Initial Teacher Education Program Prepared Them to be a Successful Teacher

Overall, how well do you think your program prepared you to be a successful teacher? *N = 516*



Our Member Roundtable on October 24 will explore questions like this in more detail and highlight major findings from our 2012 Annual Alumni Survey.

Your feedback is important to us; please complete the surveys for this session by visiting http://www.eduventures.vovici.com/se.ashx?s=53CDA9F50F7DD8EC and entering the code found on the back of your name badge.