

# Online Learning as a Strategic Asset

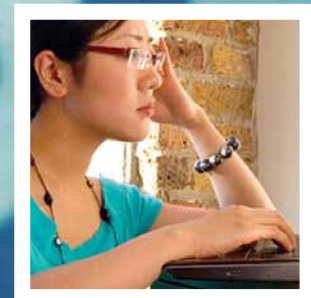
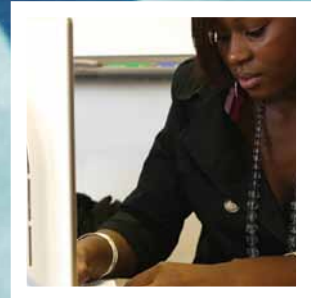
*A Survey of AIHEC Tribal College and University Presidents*

PREPARED BY  
NASULGC-SLOAN NATIONAL COMMISSION  
ON ONLINE LEARNING

OCTOBER 2007



**NASULGC**  
A Public University Association





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# Acknowledgements

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# NASULGC Initiative in Online Learning

In May 2007, the National Association of State Universities and Land-Grant Colleges (NASULGC, A Public University Association), in cooperation with the Alfred P. Sloan Foundation, appointed the NASULGC-Sloan National Commission on Online Learning. This president-led commission is intended to assist and challenge college and university leadership to increasingly view online learning as a strategic tool to achieve broad institutional goals which, in turn, should lead to substantial benefits for today's post-secondary learners. For the purposes of this initiative, we have defined online learning broadly, from mediated learning (partial online content) to fully online courses and programs.

The effects of an increasing technologically proficient population have generated institutional change in numerous segments of society, such as online banking and the media, which have made dramatic alterations in their operating strategies to meet developing and changing audiences. In these industries, generations-old operating strategies increasingly incorporate a blend of the newer technological opportunities. In a large part, these changes are attributed to institutional leadership and strategic planning. Higher education has begun to make similar changes, but must be equipped with the tools needed to do so on a larger scale.

The Alfred P. Sloan Foundation has a long and successful history of monitoring and encouraging the increased use of online learning. Sloan-supported surveys have polled education-oriented adults and university faculty and staff, including many Chief Academic Officers. However, public higher education presidents and chancellors are assuming an increasingly visible and integral role in the integration of online education into the functions and missions of their institutions. The National Commission was appointed, in cooperation with NASULGC, to better understand the knowledge base and experience of these institutional leaders relative to the strategic use of online learning.

Data collected by the Alfred P. Sloan Foundation (Allen & Seaman, 2005; Allen & Seaman, 2006) clearly show that online learning continues to emerge in the mainstream of higher education in both size and breadth of course and program offerings. Nearly three and a half million U.S. students enrolled in at least one online course in Fall 2006, with enrollments over the past four years increasing at an annual compound rate of approximately 21.5% per year. To put these data into perspective, NASULGC's 215 member institutions currently enroll approximately 3.6 million students in total, and the overall growth rate of higher education enrollments is 1.5% annually.

The initial effort of the Commission was to survey presidents and chancellors of NASULGC institutions to better understand their views and experiences relative to online learning, and specifically to explore the role of online learning in their strategic thinking. Respondents were also surveyed to determine what they saw as barriers to their strategic use of online education and what role NASULGC might play in the incorporation of online learning into their institutions' strategic planning. The initial results of that survey were insightful and have been used to generate a national dialogue among presidents and chancellors through a series of president-led discussions at national and regional gatherings.

## American Indian Higher Education Consortium

As a part of its overall initiative, the NASULGC-Sloan National Commission on Online Learning has partnered with the American Indian Higher Education Consortium (AIHEC) to better understand the knowledge base and experience of Tribal College and University presidents relative to the strategic use of online learning. A survey of the CEOs, conducted in September 2007, was designed to stimulate a peer-to-peer dialogue among the presidents about the opportunities and challenges they face in more fully utilizing online learning at their institutions. The results of the survey, summarized in this white paper, will be the focus of an in-depth discussion among the presidents during the AIHEC Board of Directors meetings in October 2007.

AIHEC was founded in 1972 by the leaders of the nation's first six tribal colleges as an informal collaboration among member institutions. Today, AIHEC has grown to represent 36 Tribal Colleges and Universities (TCUs) in the United States and one Canadian institution. Unlike most professional associations, AIHEC is governed jointly by each Regular Member institution.

AIHEC's mission is to provide leadership and influence public policy on American Indian higher education issues through advocacy, research, and program initiatives; to promote and strengthen Indigenous languages, cultures, communities, and tribal nations; and, through its unique position, serve member institutions and emerging tribal colleges.

TCUs were created over the last 30 years in response to the higher education needs of American Indians. Reservations served by TCUs are located in remote areas and their populations are among the poorest in the nation. On average, median household income levels are only about half of the level for the US population as a whole. As a result, in a relatively short period of time, TCUs have become increasingly essential to educational opportunity for American Indian students. Tribal Colleges and Universities are unique institutions on many levels. Because of the government to government relationship their chartering tribes share with the U.S. Federal government, they are the only institutions of higher education, save for the U.S. Military Academies and Howard and Gallaudet Universities, to have their basic operating budgets funded by the Federal government. Additionally, their mission within their respective communities is far reaching. In addition to college level programming, TCUs provide much-needed high school completion (GED), basic remediation, job training, college preparatory courses, and adult education. Tribal colleges fulfill

additional roles within their respective communities functioning as community centers, libraries, tribal archives, career and business centers, economic development centers, public meeting places, and childcare centers. An underlying goal of TCUs is to improve the lives of students through higher education and to move American Indians toward self sufficiency.

Tribal Colleges and Universities serve American Indians from more than 250 Federally recognized tribes in 14 states. As community colleges, TCUs have open admission policies and serve a growing number of non-tribal students who reside in their isolated communities. Since the vast majority of Tribal Colleges and Universities are located on Federal trust lands, states have no obligation and, in most cases, provide no funding toward the operations of tribal colleges. In fact, most states do not even provide funds for the non-Indian state residents attending a tribal college, leaving the TCUs to absorb the per student operational costs for the non-Indian students they enroll. These students account for approximately 20 percent of TCUs' student population.

A fall 2005 "snapshot" of 32 TCUs compiled by AIHEC showed an enrollment of nearly 17,000 degree seeking students, about 80 percent of whom were enrolled members in federally recognized Indian tribes. Women outnumbered men nearly 2 to 1, and about half of all the students were enrolled full time. Certificate and degree programs at the TCUs vary widely, and collectively, the colleges offer more than 64 different degree programs designed to meet local tribal social and economic needs. While a majority of students seek degrees in liberal arts, education, business, nursing, and the social sciences, a growing number of students are majoring in computer science/technology and natural or physical sciences. In recent years, the average age among TCU students—particularly first time entering students—has declined, as more and more Indian students enroll in their local TCU directly from high school. These younger students pose new challenges for TCU faculty, administrators and presidents, ranging from an increased need for student housing and venues for social activities, to an increased demand for state of the art learning technologies, including multimedia learning environments, online information resources and even downloadable iPod-ready lectures.



# Executive Summary

*The NASULGC-Sloan National Commission on Online Learning “Survey of AIHEC Tribal College and University Presidents: Online Learning as a Strategic Asset,” is a critical addition to the body of knowledge concerning the attitudes of college and university CEOs on issues of online learning. Supported by the Alfred P. Sloan Foundation and based on responses from 26 Tribal College Presidents, this study addresses the following key questions:*

## What is the role of online education in the strategic thinking of Tribal College leaders?

**BACKGROUND:** Over the past decade, enrollments in online courses and degrees have been growing at substantial rates, with more than 90% of public institutions of higher education reporting online course offerings or degrees in Fall 2006. However, the strategic “positioning” of online learning in the formal long-range planning at colleges and universities has received more limited attention and has not been previously polled from the vantage point of presidents and chancellors.

**THE EVIDENCE:** TCU leaders confirm a strong interest in the strategic importance of online learning.

- 61.5% of respondents noted that online education was critical to the long-term strategy of their institution.
- 15.4% responded noting that online learning played no strategic role.

## How is online education currently represented in the strategic plans of Tribal Colleges?

**BACKGROUND:** Whereas leaders at the surveyed TCUs confirmed the strategic importance of online learning, to what degree is this belief represented in their formal, written long-range plans?

**THE EVIDENCE:** Online learning is present in the strategic plans of the polled Tribal Colleges, although in less than one-third of schools responding.

- 26.9% of respondents noted that online education was represented in the institution’s strategic plan.

## Online learning is strategically important in which segments of institutional operations, according to Tribal College leaders?

**BACKGROUND:** Online or distributed education can influence individual sectors of an institution's operations, proving to be a strategic asset in a variety of ways for differing university audiences.

**THE EVIDENCE:** Strategically, TCU leaders surveyed link online learning primarily to issues of increasing strategic partnerships and increasing enrollments/access.

- 42.3% of respondents linked online education to “increasing strategic partnerships.”
- 38.5% looked to online learning to “attract students from outside the traditional service area.”
- 34.6% linked distributed education to “growing professional and continuing education.”
- 34.6% tied online education to “increasing student access.”

## What barriers exist to the strategic use of online learning to further institutional goals and mandates?

**BACKGROUND:** Sloan-supported nationwide surveys have identified a number of areas of concern for the growth of online course and degree offerings, including faculty acceptance of online education and the time and effort required to teach online. Do Tribal College leaders share these concerns?

**THE EVIDENCE:** TCU presidents responding are most concerned with student discipline and the higher costs of development/delivery of distributed learning as barriers to expanding online learning opportunities, but do not strongly emphasize lack of faculty acceptance.

- 95.1% of respondents noted that “students need more discipline to succeed in online courses” was Important (34.6%)/Very Important (61.5%).
- 76.9% rated the “higher costs to develop online” as Important (23.1%)/Very Important (53.8%).
- 73.1% ranked the “higher costs to deliver online” as an Important (38.5%)/Very Important (34.6%) barrier.
- Only 42.3% noted “a lack of acceptance of online instruction by faculty” as Important (34.6%) or Very Important (7.7%).

# Detailed Survey Findings

## **What is the role of online education in the strategic thinking of Tribal College leaders and the strategic planning of their institutions?**

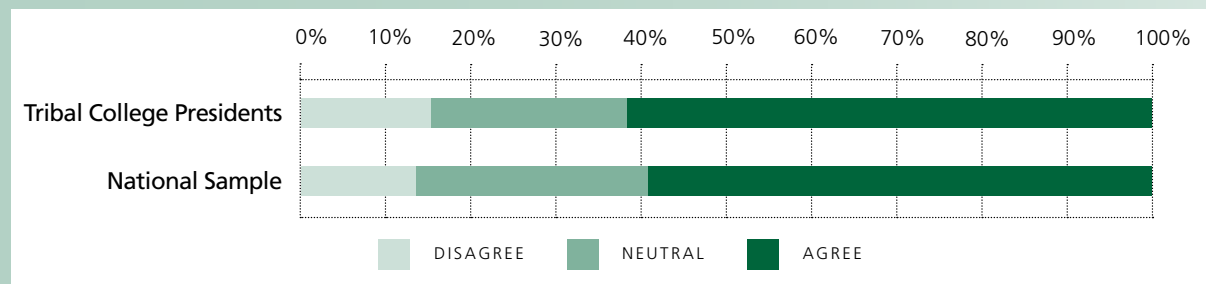
In the face of significant, growing enrollment over the past decade, has online learning penetrated into the strategic thinking and planning of university leaders? Over the past decade, enrollments in online courses and degrees have been growing at substantial rates, with more than 90% of public institutions of higher education reporting online course offerings or degrees in Fall 2006. However, the strategic “positioning” of online education into formal long-range planning at Tribal Colleges and Universities has received more limited attention and has not been previously polled from the vantage point of presidents.

A preliminary, interview-based study (Smith & Smith, 2006) indicated a high level of interest by college and university heads in online learning as a strategic asset, with a majority responding that online or asynchronous learning was critical to their long-range planning. The survey of Tribal College CEOs yielded similar results, with 61.5% of respondents noting that online education is “critical to the long-term strategy” of their institution. The TCU presidents’ responses corresponded to those of chief academic officers at colleges and universities across the country who are surveyed every year by the Sloan Consortium (“National Sample”).

Tribal College presidents as a group are very similar to the national sample on the issue of whether online learning is important to their long-term strategic plan. Surprisingly, it is those Tribal institutions that do not yet have any online offerings that feel most strongly about this.

## ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY SCHOOL

	Disagree	Neutral	Agree
Tribal College Presidents	15.4%	23.1%	61.5%
National Sample	13.5%	27.4%	59.1%



### Tribal College Presidents

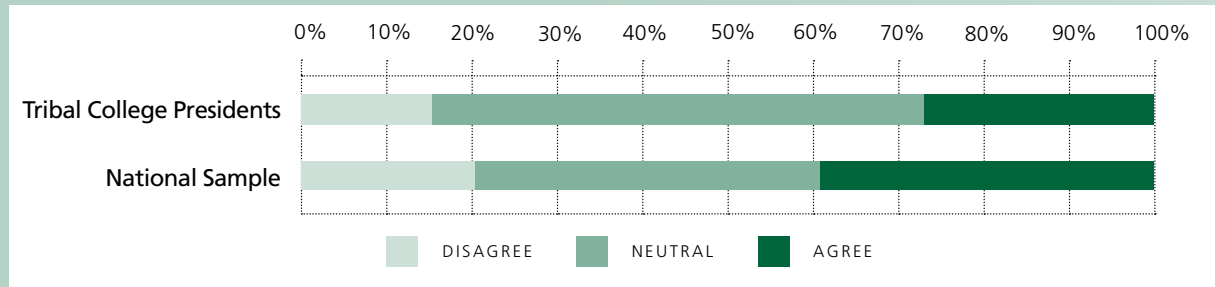
	Disagree	Neutral	Agree
Have Online	23.5%	17.6%	58.8%
No Online	0.0%	25.0%	75.0%

A second survey item focused on the representation of online learning in the institution’s strategic plan, where only 26.9% of respondents noted that online education was present—a significantly lower level than the National Sample.

TCU presidents are less likely than the national sample to say that online is “significantly represented in my institution’s formal strategic plan.” Tribal institutions that do not yet have any online are even less likely to respond in the affirmative.

**ONLINE EDUCATION IS SIGNIFICANTLY REPRESENTED  
IN MY INSTITUTION’S FORMAL STRATEGIC PLAN**

	Disagree	Neutral	Agree
Tribal College Presidents	15.4%	57.7%	26.9%
National Sample	20.4%	40.4%	39.3%



**Tribal College Presidents**

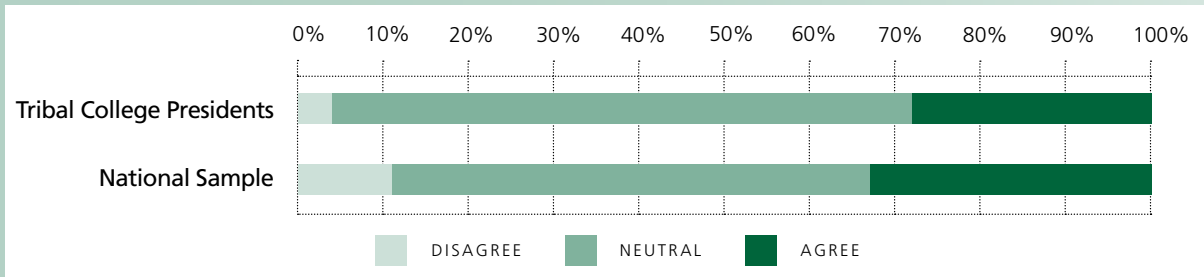
	Disagree	Neutral	Agree
Have Online	17.6%	47.1%	35.3%
No Online	12.5%	75.0%	12.5%

## To what degree is faculty acceptance of online learning an issue for Tribal Colleges and Universities?

The issue of faculty acceptance of online education has been cited as an important barrier for all the years of the Sloan survey on online education. TCU leaders' opinions on this issue are a close match to the national sample, with none of the tribal institutions without online offerings agreeing that their faculty "accept the value and legitimacy of online education."

### FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION

	Disagree	Neutral	Agree
Tribal College Presidents	4.0%	68.0%	28.0%
National Sample	11.0%	56.1%	32.9%



### Tribal College Presidents

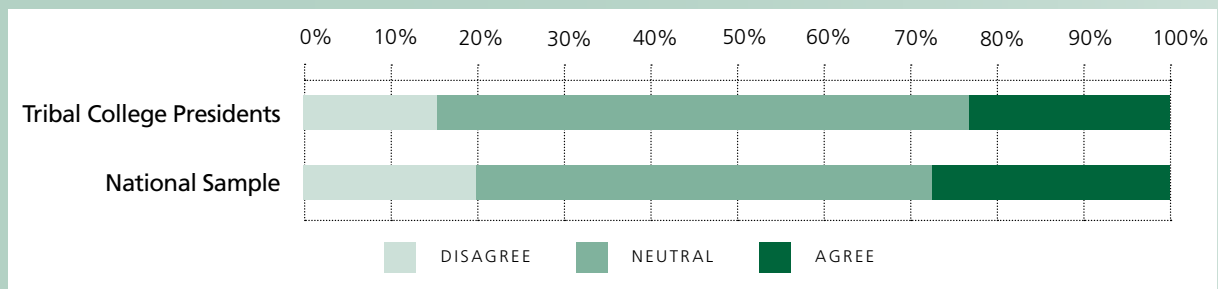
	Disagree	Neutral	Agree
Have Online	6.3%	56.3%	37.5%
No Online	0.0%	100.0%	0.0%

## Is respect for online degrees a significant area of concern among Tribal College presidents?

TCU presidents are slightly less positive about the level of respect for online degrees than the national sample; they are also slightly less negative. Those tribal institutions without any online offerings are the most positive on this issue.

### ONLINE DEGREES HAVE THE SAME LEVEL OF RESPECT AS FACE-TO-FACE DEGREES

	Disagree	Neutral	Agree
Tribal College Presidents	15.4%	61.5%	23.1%
National Sample	20.0%	52.6%	27.4%



### Tribal College Presidents

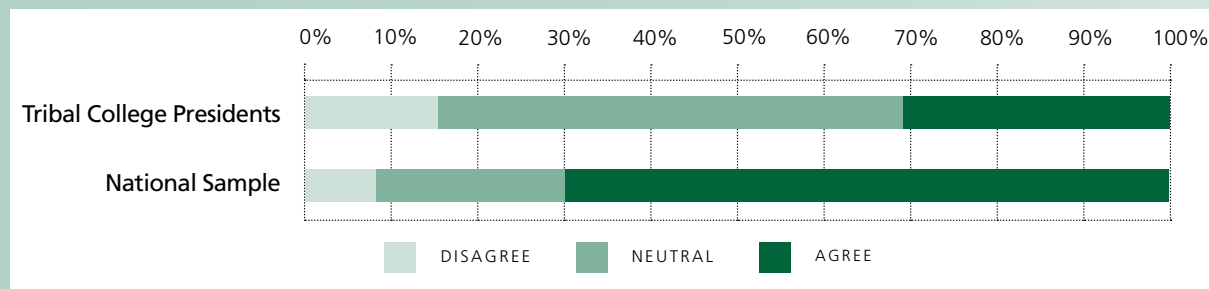
	Disagree	Neutral	Agree
Have Online	23.5%	58.8%	17.6%
No Online	0.0%	62.5%	37.5%

## What is the future demand for online learning?

The largest difference in the results of the TCU leader survey and the national sample is on the issue of whether student demand for online education is growing. Nearly 70% of the national sample feels this to be the case, while only thirty percent of the TCU leaders responded that they thought student demand for online was growing.

### STUDENT DEMAND FOR ONLINE LEARNING IS GROWING

	Disagree	Neutral	Agree
Tribal College Presidents	15.4%	53.8%	30.8%
National Sample	8.1%	22.0%	69.9%



### Tribal College Presidents

	Disagree	Neutral	Agree
Have Online	17.6%	47.1%	35.3%
No Online	12.5%	62.5%	25.0%



## Why engage in online?

The four *most* important strategic purposes of online learning cited by Tribal College presidents are “Increase strategic partnerships with other institutions” (42.3%); “Attract students from outside the traditional service area” (38.5%); and “Grow continuing and/or professional education” and “Increase student access” (both at 34.6%).

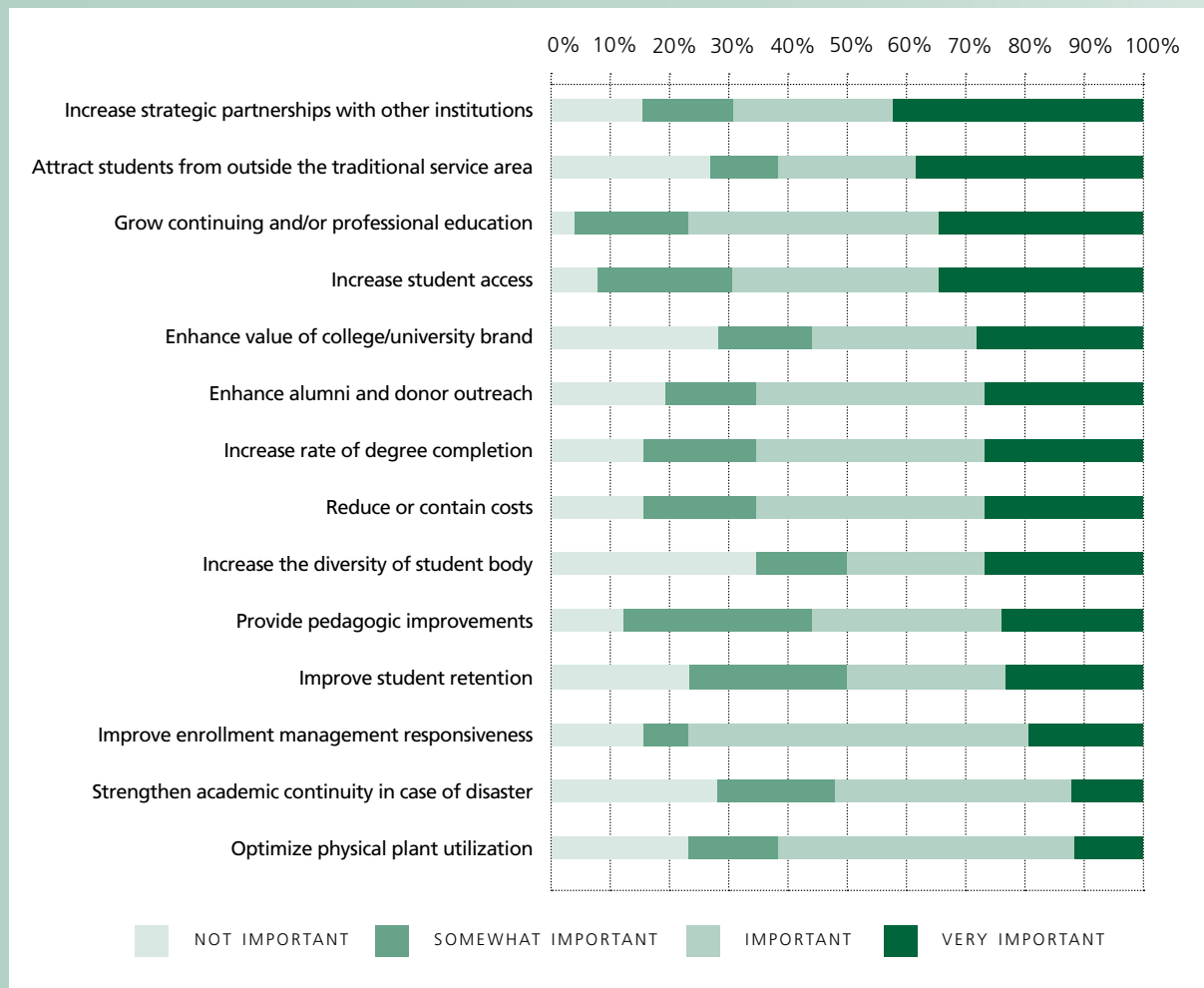
However, when the two measures “Important” and “Very Important” are combined, the primary areas of focus for online learning broadens considerably to include: “Grow continuing and/or professional education” and “Improve enrollment management responsiveness” (both at 76.9%); “Increase strategic partnerships with other institutions” and “Increase student access” (both at 69.2%); and “Enhance alumni and donor outreach,” “Increase rate of degree completion,” and “Reduce or contain costs” (all at 65.4%).

### ONLINE EDUCATION IS STRATEGICALLY IMPORTANT FOR MY INSTITUTION TO:

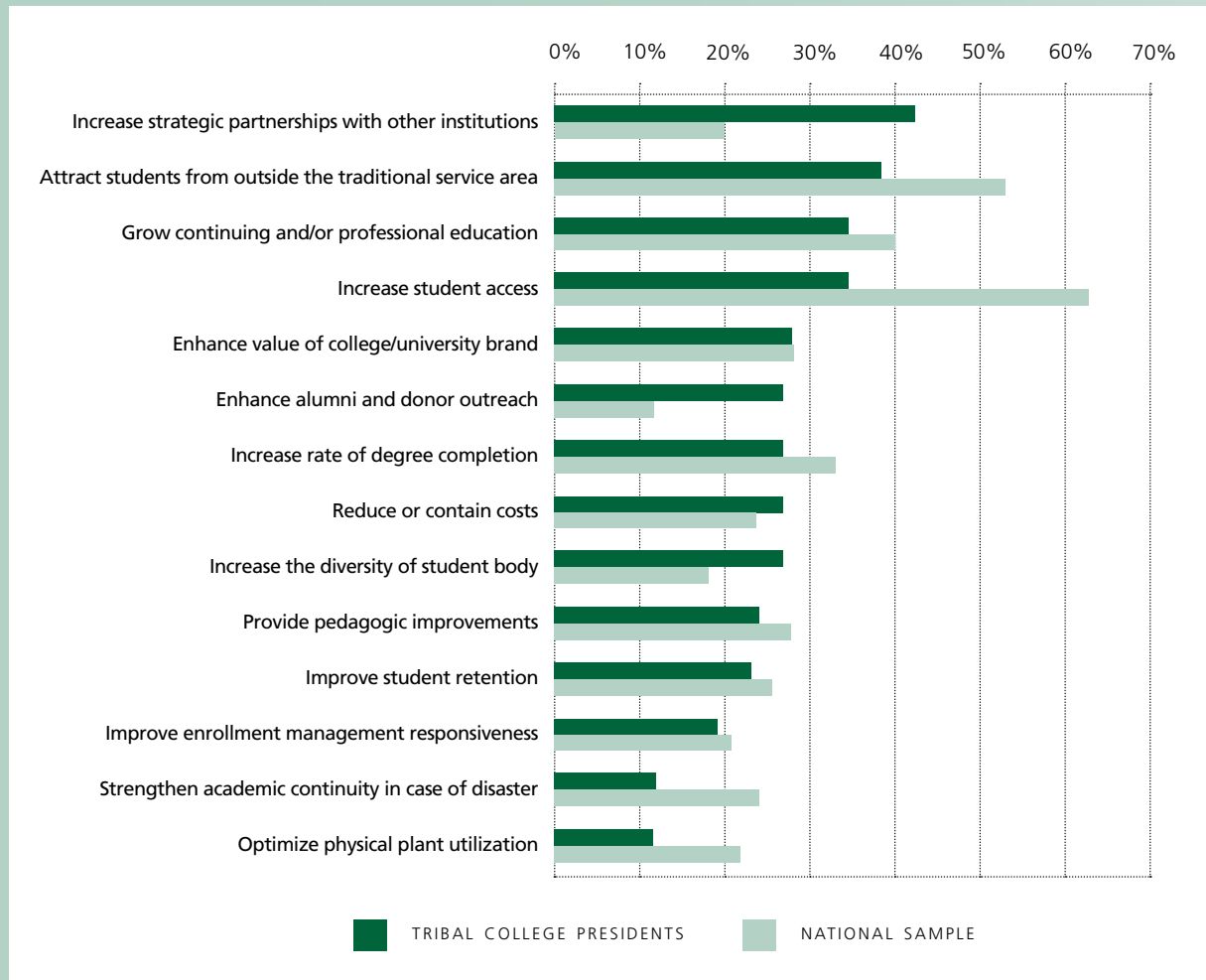
TRIBAL COLLEGE PRESIDENTS	Not Important	Somewhat Important	Important	Very Important
Increase strategic partnerships with other institutions	15.4%	15.4%	26.9%	42.3%
Attract students from outside the traditional service area	26.9%	11.5%	23.1%	38.5%
Grow continuing and/or professional education	3.8%	19.2%	42.3%	34.6%
Increase student access	7.7%	23.1%	34.6%	34.6%
Enhance value of college/university brand	28.0%	16.0%	28.0%	28.0%
Enhance alumni and donor outreach	19.2%	15.4%	38.5%	26.9%
Increase rate of degree completion	15.4%	19.2%	38.5%	26.9%
Reduce or contain costs	15.4%	19.2%	38.5%	26.9%
Increase the diversity of student body	34.6%	15.4%	23.1%	26.9%
Provide pedagogic improvements	12.0%	32.0%	32.0%	24.0%
Improve student retention	23.1%	26.9%	26.9%	23.1%
Improve enrollment management responsiveness	15.4%	7.7%	57.7%	19.2%
Strengthen academic continuity in case of disaster	28.0%	20.0%	40.0%	12.0%
Optimize physical plant utilization	23.1%	15.4%	50.0%	11.5%

TCU presidents differ from the national sample on several of the reasons cited for engaging in online learning. Tribal College CEOs are over twice as likely to cite as very important “Increase strategic partnerships with other institutions” (42.3% versus 19.9%) and “Enhance alumni and donor outreach” (26.9% versus 11.8%). Conversely, they are far less likely to cite a student access issue “Attract students from outside the traditional service area” or “Increase student access” than those in the national sample.

**ONLINE EDUCATION IS STRATEGICALLY IMPORTANT FOR MY INSTITUTION TO:**



**ONLINE EDUCATION IS STRATEGICALLY IMPORTANT FOR MY INSTITUTION TO:**  
 (% citing Very Important)



**ONLINE EDUCATION IS STRATEGICALLY IMPORTANT FOR MY INSTITUTION TO:**  
 (% citing Very Important)

	Tribal College Presidents	National Sample
Increase strategic partnerships with other institutions	42.30%	19.90%
Attract students from outside the traditional service area	38.50%	53.00%
Grow continuing and/or professional education	34.60%	40.10%
Increase student access	34.60%	62.80%
Enhance value of college/university brand	28.00%	28.20%
Enhance alumni and donor outreach	26.90%	11.80%
Increase rate of degree completion	26.90%	33.20%
Increase the diversity of student body	26.90%	23.70%
Reduce or contain costs	26.90%	18.20%
Provide pedagogic improvements	24.00%	27.80%
Improve student retention	23.10%	25.60%
Improve enrollment management responsiveness	19.20%	20.90%
Strengthen academic continuity in case of disaster	12.00%	24.00%
Optimize physical plant utilization	11.50%	22.00%

## Barriers to online

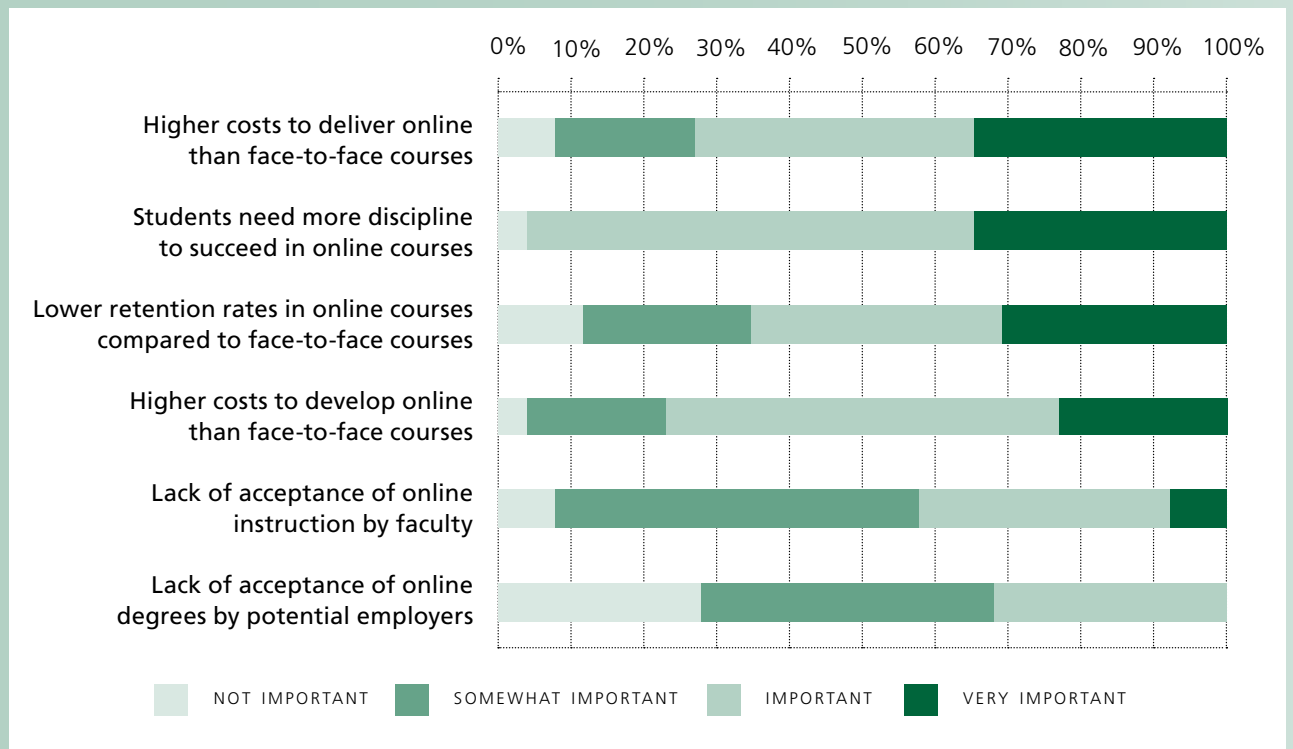
Previous Sloan-supported survey research has delineated “barriers” to the implementation of online classes and degrees, a list which traditionally includes the high costs of course production and delivery, the costs of faculty/staff time to teach online, the need for higher levels of student discipline prior to independent study and a lack of acceptance of online instruction by faculty.

Tracking closely with outcome data reported in *Growing by Degrees: Online Education in the United States (2005)* and *Making the Grade: Online Education in the United States (2006)*, Tribal College presidents have responses that are similar to the national sample on the relative importance of three potential barriers to the widespread adoption of online education; “Students need more discipline to succeed in online courses,” “Lower retention rates in online courses compared to face-to-face courses,” and “Higher costs to *develop* online than face-to-face courses.” They are much more likely to be concerned with “Higher costs to deliver online than face-to-face courses,” and much less likely to worry about either “Lack of acceptance of online instruction by faculty” or “Lack of acceptance of online degrees by potential employers” than the national sample.

## BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING

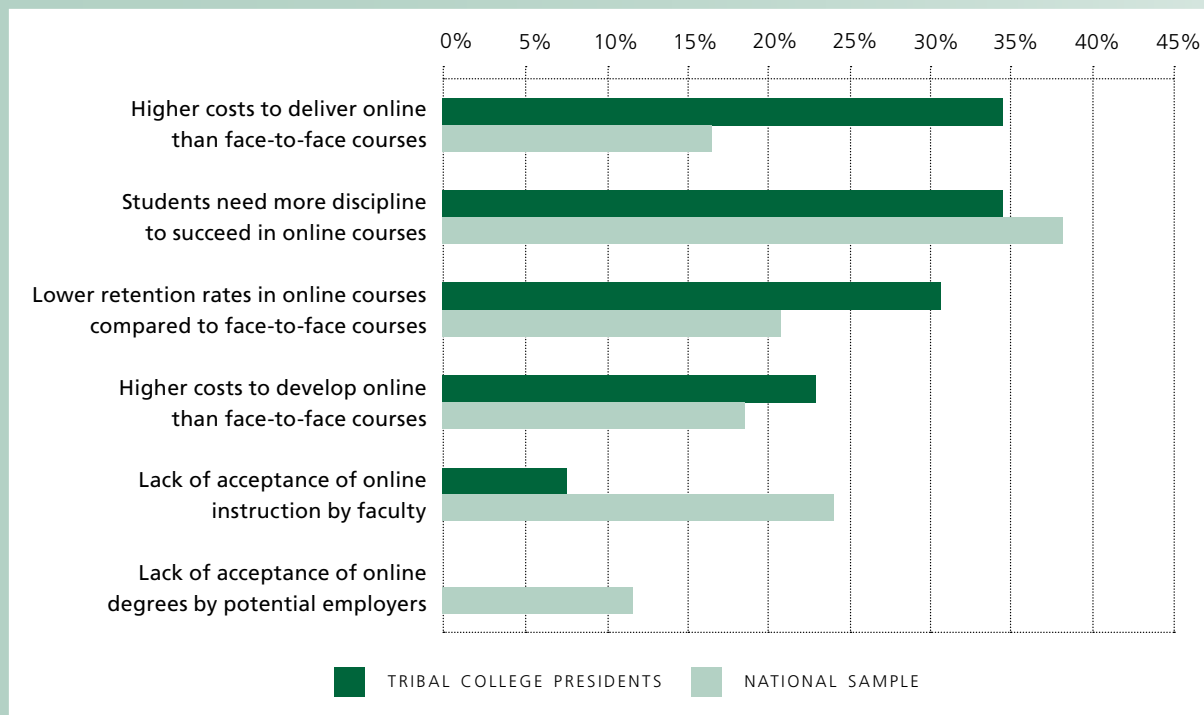
TRIBAL COLLEGE PRESIDENTS	Not Important	Somewhat Important	Important	Very Important
Higher costs to deliver online than face-to-face courses	7.70%	19.20%	38.50%	34.60%
Students need more discipline to succeed in online courses	3.80%	0.00%	61.50%	34.60%
Lower retention rates in online courses compared to face-to-face courses	11.50%	23.10%	34.60%	30.80%
Higher costs to develop online than face-to-face courses	3.80%	19.20%	53.80%	23.10%
Lack of acceptance of online instruction by faculty	7.70%	50.00%	34.60%	7.70%
Lack of acceptance of online degrees by potential employers	28.00%	40.00%	32.00%	0.00%

## BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING



**BARRIERS TO WIDESPREAD ADOPTION OF ONLINE LEARNING**  
 (% responding Very Important)

	Tribal College Presidents	National Sample
Higher costs to deliver online than face-to-face courses	34.60%	16.60%
Students need more discipline to succeed in online courses	34.60%	38.30%
Lower retention rates in online courses compared to face-to-face courses	30.80%	21.00%
Higher costs to develop online than face-to-face courses	23.10%	18.70%
Lack of acceptance of online instruction by faculty	7.70%	24.20%
Lack of acceptance of online degrees by potential employers	0.00%	11.70%



The survey of Tribal College and University CEOs reveals many similarities and attitudes toward online learning as the national sample. Several areas that are worthy of additional inquiry include the predominant view among TCU leaders that demand for online learning will not grow in the future and barriers to online, including the costs of development and delivery and student discipline and retention.

# Survey Methodology

The survey and analysis of Tribal Colleges and Universities presidents is based on the methods used to produce the annual Sloan surveys of online learning (Allen & Seaman, 2005; Allen & Seaman, 2006). Like the Sloan surveys, the study was conducted by the Babson Survey Research Group using the same software and methods as in the annual Sloan surveys. Unlike the Sloan survey, however, the target respondent is the president of the institution rather than the chief academic officer of the institution.

The statistical universe for the analysis is composed of all presidents of AIHEC member institutions. All presidents were sent an invitation email and two reminders, inviting their participation and assuring them that no individual responses would be released. The email invitation included a link to a web-based survey form, modeled after those used for the annual Sloan survey of online learning (Allen & Seaman, 2005; Allen & Seaman, 2006).

Contact information for the sample universe of 35 institutions was provided by AIHEC. A total of 26 responses were received, representing a 74.3 percent overall response rate. Institutional descriptive data came from the College Board Annual Survey of Colleges and from the National Center for Educational Statistics' IPEDS database (<http://nces.ed.gov/ipeds/>); this information was merged with the president and chancellor responses for analysis.

# Citations

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Allen, I.E. & Seaman, J. (2006). *Making the Grade: Online Education in the United States*, 2006. Needham, MA: Sloan Consortium.

NASULGC-Sloan National Commission on Online Learning (2007). *Survey of Presidents and Chancellors: Online Learning as a Strategic Asset*. Washington, DC: NASULGC.

Smith, S.H. & Smith, S.H. (2006) "Positioning Online Learning as a Strategic Asset in the Thinking of University Presidents and Chancellors." Paper presented to the 12th Sloan-C International Conference on Online Learning and to the 2006 NASULGC Annual Meeting, Houston, TX.



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