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Advancing an Educational Technology Shared Services Strategy for Ontario: Province-wide Consultation Phase

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Executive Summary

Following on a continuing process to advance an educational technology shared services strategy for Ontario public post-secondary institutions, Peter Wolf and Vivian Forsmann, on behalf of Carleton University, hosted 4 online workshops scheduled between November 1 - 28, 2018, inviting representatives from all 45 Ontario public colleges and universities to participate. The workshops brought together 82% of member institutions (37 institutions), with a total of 76 participants, representing IT, academic administration, teaching & learning centre staff and librarians.

The workshops were designed to validate findings from the August 2018 Educational Technologies Shared Services Survey and inform a collaborative go-forward strategy.

Based on analysis of participant contributions, three categories of sharing educational technology services, with 7 sub-categories, emerged:

1. Classic -
Procurement
2. Technological -
Application Implementation
Infrastructure (likely cloud-based)
Application Integration Tools and Code Libraries
Standards and processes
3. Communities of Practice -
Sandbox
Wise use support for students/faculty/staff

The workshops clarified 3 categories of primary motivators for institutions to engage in educational technology shared services, and each of these would benefit from direct focus early in the next stages:

1. Cost and process efficiencies
2. Compliance, foundational and access requirements
3. Teaching and learning research and innovation

There are 3 key recommendations and several sub-recommendations, based on both the input of the participants and the expertise of the facilitators:

Recommendation #1

Initiate a representative eCampusOntario Shared Services Steering Committee, with oversight, strategic and consultative responsibilities.

- 1.1. Articulate eCampusOntario's role in educational technology shared services with other players in the Ontario higher education shared services landscape, with a differentiated and coordinated strategy.
- 1.2. Develop and coordinate a strategic approach to piloting a variety of educational technology shared services in separate pilots, balancing the motivations for sharing and the types of services to be shared.
- 1.3. Develop Terms of Reference for each pilot shared services initiative, considering
 - Commitment and engagement
 - Stakeholder representation
 - Priority considerations

Recommendation #2

Determine which educational technologies to pilot as a shared service, correlated to each of the 3 identified motivations, recognizing multiple motivations likely exist. For each service shared, consider the 7 sub-categories of services that can be shared. Recommended technologies include:

1. Captioning and Transcription
2. Academic Integrity
3. LinkedIn Learning (Lynda.com)
4. One of:
 - Lab Simulations
 - Virtual/Augmented Reality
 - Virtual Proctoring
 - Experiential Learning tools

3. Recommendation #3

Create a sandbox environment for participatory engagement and evaluation of potential educational technology shared services and to provide data to help prioritize options, based on aggregate of current state inventory

Background and Approach

One of eCampusOntario's key strategies for 2018-2021 is *building capacity through shared and collaborative services*. The objective of this strategy is to research, evaluate and implement shared and collaborative services that leverage knowledge, experience and infrastructure and reduce costs among our post-secondary system partners.

To address this strategy, eCampusOntario convened a meeting of CIO and AVP (Teaching & Learning) stakeholders in Spring 2018; they recommended gathering further input from the Ontario post-secondary community, through a survey, prior to initiating further action.

In Summer 2018, University of Ottawa, on behalf of eCampusOntario, designed and distributed a survey to 45 Ontario colleges and universities, to gauge interest in educational technologies shared services (Survey results available here in [English](#) and [French](#)), The survey had a response rate of 76% and results indicated strong continuing interest in educational technology shared services. The educational technologies deemed the highest priority as potential shared services include captioning & transcription services, virtual labs, learning analytics, academic integrity software and virtual simulations (VR/AR). Most respondents supported further exploration of a shared services strategy, based on the primary identified benefit of maximizing combined purchasing power and enriching learning experiences. However, 64% of respondents had reservations that might influence their engagement. Collaborative governance, overlapping with existing processes and inclusion of diverse educational and institutional contexts were identified as priority challenges.

Following the interpretation of survey results, eCampusOntario chartered a subsequent phase, seeking a broader round of consultation and input from post-secondary institution leaders, to validate findings and inform a collaborative go-forward strategy.

In the period November 1-28, 2018 Carleton University, on behalf of eCampusOntario, invited collaboration and consultation with Ontario post-secondary CIOs and academic leaders (e.g. Directors of Teaching and Learning Centres, Librarians, and others) through four participatory web conferencing workshops (November 20, 22, 26, 28). The workshops brought together 82% of member institutions (37 institutions), with a total of 76 participants, with 32 representing CIOs/IT and 44 representing administration, teaching & learning centres and libraries.

The workshops were designed to:

- build on the survey results, provide opportunity for deeper discussions for shared understanding, and ideally foster consensus and action plans on key themes drawn from the survey data;
- optimize province-wide information-sharing and participation through online presentations and participatory conversations;
- invite participants to co-develop common values for educational technology shared services, articulate the starting point for eCampusOntario-led shared service initiative(s); inform the criteria for choosing which shared services are given priority; and offer input into guidelines for shared services governance and procurement management.

Following the workshops, this report was developed. It represents a synthesis of the contributions, outcomes of the workshops, and some directed approaches for moving

to the next stage of action. There are rich comments from the workshop discussions. We have chosen to capture all comments in **Appendix E: Record of Web Conference Comments** rather than embed comments directly in this report.

To realize the benefits of shared services a project roadmap will need to be developed. It will likely involve relationships with outsource partners who provide some elements of shared services. These roadmap details were not confirmed through the web conferences, which were intentionally designed to inform feasibility and value as the first critical stage.

Consultation Process

The workshop approach was designed to build on the survey results; provide opportunities for deeper discussions for shared understanding, foster consensus on key themes drawn from the survey data; and optimize province-wide information-sharing and participation through online presentations and participatory conversations.

To assure this consultation phases was inclusive, we offered online workshops so no participant would be inhibited with travel costs and time. Prospective participants were offered a choice of 4 dates/times over a 2-week period. We encouraged representation from both CIO and academic leadership and/or teaching-and-learning communities to represent multiple perspectives on priorities.

Meeting invites were sent to participants to assure the preferred workshop time was on their calendar, and each participant was provided background reading; a meeting reminder was sent the day before each session, providing technical information about accessing the web conference.

We integrated a synchronous web conferencing tool (Big Blue Button) - used for presentation of slides, video feeds of facilitators, and some interactive conversation - with Google Docs, which was used for anonymous idea-and-input capture. We received very positive reviews of this integration of tools, especially since it afforded focused collaborative and anonymous participation.

We have provided detailed project tasks undertaken for this initiative, as a template which eCampusOntario may use for similar projects in the future. See **Appendix A: Project Tasks**.

Recommendations and Discussion

Recommendation #1

Initiate a representative eCampusOntario Shared Services Steering Committee, with oversight, strategic and consultative responsibilities, including:

- Strategic planning for shared services
- Coordination across programs and schools
- Oversight of technology acquisition
- Setting policies

Providing meta-institutional strategic leadership and pilot oversight will be critical to evolving a province-wide educational technology shared services strategy forward. eCampusOntario is well-situated to support the next phases of educational technology shared service in Ontario.

Shared and Collaborative Services in Ontario: Current State

There are several organizations and communities who currently provide some degree of shared services for higher education. A deeper dive into their websites suggests that priorities are currently focused on administrative systems, hardware, standard enterprise technology products (e.g. Microsoft licenses), and consumables. Educational technology shared services are not yet a significant portfolio for any of these organizations. (See **Appendix B: Shared Services in Ontario**)

Recommendation 1.1 – *Articulate eCampusOntario’s role in educational technology shared services with other players in the Ontario higher education shared services landscape, with a differentiated and coordinated strategy.*

What Services to Share

The 2018 Educational Technology Shared Services: Survey Results indicated respondents had multiple perspectives on the definition of shared services – what exactly was to be shared, why, how, etc. To get to the next stage of common understanding, in the web conferencing workshops, the facilitators introduced a diagram (**Appendix C: What Do We Mean by Shared Services**) to illustrate the potential value-realization. Based on the feedback received, we have adapted this illustration into the table below, to be used for further evaluation and prioritization of shared services.

Resource: Educational Technology Services to Share

	Service	Benefit
Classic	Shared Procurement (licenses and services)	reduce licensing cost; smaller institutions have access to technology services with fair and transparent pricing; increase accessibility to tools across institutions
Technological	Shared Application Implementation	reduce licensing cost; reduce operational overhead through cloud-based applications
	Shared Infrastructure (e.g. servers and operating systems)	reduce localized operational overhead through cloud services and shared data centres, where applications are centrally managed and hosted (aging on-premise infrastructure moves to cloud software services)
	Shared Standards and Processes (e.g. open, LTI, Operating Systems, etc.)	ability to scale, and integrate tools into LMS and Student Information Systems, for optimal learner experience but... scaling demands some process standardization and streamlining (e.g. the

		experience of software-as-service)
	Shared Application Integration Tools	code library to support ed-tech integration with LMS and other enterprise systems
Communities of Practice	Shared Technical and/or Pedagogical Support for Students/Faculty/Staff	improve the adoption/diffusion cycles and better support the learner experience, through guides, tutorials, approaches for integrating ed-tech into curricular objectives, and possibly shared 24/7 helpdesk for some products
	Shared Sandbox	getting beyond the “vendor pitch” this services operates as a prototyping environments to develop deeper understanding of features, experience design and integration possibilities

Why Share Services

Identified throughout the consultation process were three key interrelated yet distinct motivations to share services. Though all motivations may come into play for any educational technology service, there typically is a primary motivator to seek educational technology shared services:

1. Cost and process efficiencies - For commonly-used technologies where current procurement practices are local
2. Compliance, foundational and access requirements - To meet commonly-held goals and interests in educational technologies
3. Teaching and learning research and innovation - To further approaches and tools for educational purposes. These may be broadly used and/or discipline-specific

Recommendation 1.2 - *Develop and coordinate a strategic approach to piloting a variety of educational technology shared services in separate pilots, balancing the motivations for sharing and types of services to be shared.*

Resource - Decision Matrix for educational Technology Shared Services Pilots

	Basic	Technological				Communities of Practice	
Primary Motivation / Type of Shared Service	Procurement	Application Implementation	Infrastructure	Application Integration	Standards and processes	Sandbox	Wise use technical and/or pedagogical support for Students, Faculty, Staff

Cost and process efficiencies							
Compliance, foundational, & access requirements							
Teaching & learning research & innovation							

Working in Partnerships

There was much discussion about governance, membership interests, representation, knitting member needs and goals while respecting autonomy and creating demonstrable value to sharing in a complex environment. Primary amongst the issues raised were:

- Given the multiple providers in Ontario, who is the right one to work with - What criteria might inform the choosing of a best partner? Is there value in going directly to, for example, Microsoft Azure or Amazon Web Services?
- How to share technical support - this might include application maintenance, although in a cloud-based application environment, this is typically mediated by the service provider. There were comments from smaller post-secondary institutions who may value in sharing end-user support for various application. Our experience of using Big Blue Button, an open source tool managed through a service provider (BlindsideNetworks) may be an example of a third-party end-user support organization.
- Improving the student experience, which is fundamentally at the basis of adoption and diffusion of appropriate educational technologies to support an enhanced learning experience.
- Setting priorities, and the frameworks and resources identifies in this report are intended to assist in prioritization.
- Getting out of data centres and into the cloud. Whether this was mentioned as an option for Basic procurement, or as a strategy to reduce the costs and dependencies of on-premise data centres, there are many drivers to consider shifting from the infrastructure management demands of on-premise servers and applications.
- Developing an inventory of current tools in use, as input into making prioritization decisions for shared services, and to immediately share knowhow around optimizing educational technology for pedagogical and technical interests.

Recommendation 1.3 - develop Terms of Reference for each pilot shared services initiative, considering:

Commitment and engagement:

- clearly articulate motivations to share services
- clearly articulate types of services that will be shared

- engage 20% of membership for an agreed-upon duration
- develop opt-in and opt-out contingencies
- make explicit required financial and other investments needed

Stakeholder representation for each initiative:

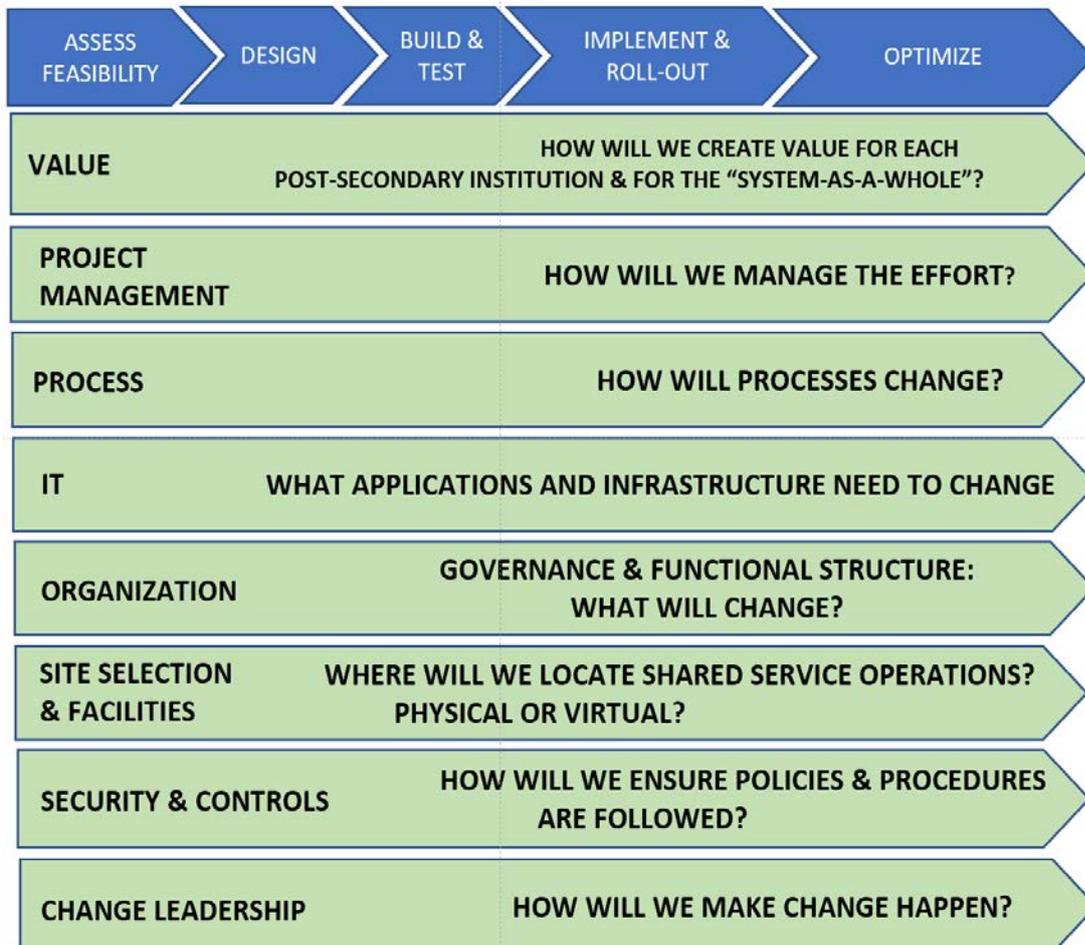
- 1 member per institution – consider most appropriate representatives given the service(s) to be shared
- student engagement required
- engagement across diversity of member institutions type, by size & language, if possible

Priority considerations for each initiative:

- data security and privacy standards
- accessibility standards
- potential for adoption by all interested members (e.g. across different LMSs)
- bilingual capabilities (e.g. an English-only cloud service would be acceptable if a syllabus of translated menus and messages is offered)

For each initiative, it is recommended to use the *Roadmap Consideration for Optimizing Shared Services*, to help guide processes and considerations needed for optimizing the potential for educational technology shared services.

Resource – Roadmap Considerations for Optimizing Shared Services



Adapted from Deloitte Shared Services Handbook
<https://www2.deloitte.com/content/dam/Deloitte/dk/Documents/finance/SSC-Handbook-%20Hit-the-Road.pdf>

The workshop discussions guided participants to focus discussion on “defining value” and “assessing feasibility” (see top left corner of this diagram). As a shared services project and operational environment gets underway, there will be requirements to (for example) design processes, build-and-test application and infrastructure elements, and implement change leadership. This is where a Steering Committee needs to guide shared services from participatory governance to operational management.

Based on this roadmap framework, the eCampusOntario Shared Services Steering Committee, in collaboration with eCampusOntario staff, might now move towards defining an organization structure to support this initiative, review potential procurement and hosting partners (as previously noted in Recommendation 1.1), develop a high-level roadmap, and determine a stakeholder communication strategy (**Appendix D: Roadmap Considerations**).

Recommendation #2

Determine which educational technologies to pilot as a shared service, correlated to each of the 3 identified motivations, recognizing multiple motivations likely exist. For each service shared, consider the 7 sub-categories of services that can be shared.

A framework for determining which pilots move forward emerged through the workshop discussions, leading to a recommended focus on primary motivations to share and a desired focus on *student-facing educational technology* shared services as a starting point. The sharing of services related to administrative educational technology (e.g. Adobe Creative Suite; curriculum mapping) is to be considered in future.

Using the three categories of primary motivations for members to seek shared services as made explicit through the workshops is a promising way to provide a diversity and range of shared services - 1) *Compliance/foundational/access*; 2) *Cost and process efficiencies*; and 3) *Supporting teaching and learning research and innovation*.

Recommendation 2.1-*Consider the following as recommended technologies to pilot, as identified through the survey, workshops and insights of the facilitators:*

*2.1.1. The prioritizing of **Transcription and Captioning** as a shared service was highlighted by member institutions in the 4 workshops as well as through the survey, as the highest priority for educational technology shared service led by eCampusOntario. The primary motivation for this is meeting compliance/foundational/access goals.*

*2.1.2. **Academic Integrity** was consistently highly prioritized. This technology is currently already deployed at many institutions, suggesting cost and process efficiencies as primary motivations to consider as a shared service.*

*2.1.3. Evolve the already existing shared services of **LinkedIn Learning (Lynda.com)** to realize its full benefits and to build on this currently deployed shared service. Consider engaging a community of practice for pedagogical and wise use recommendations. This would enable a pilot focused on Supporting*

Teaching and Learning Research and Innovation, identified as a core motivator for sharing services.

Supporting Teaching and Learning Research and Innovation

Specific technology priorities focusing on *Supporting Teaching and Learning Research and Innovation* had less obvious common shared interest through the workshop process compared to the survey process. Virtual labs, virtual and augmented reality platforms, and learning analytics, highlighted in the surveys, received scant mention as priorities in the Google Docs co-created by participants during the workshops.

Recommendation 2.2 - Given the lack of clarity of which specific educational technologies services to share in this category, we recommend a short poll be undertaken with institutions, with a limited and more defined subset of educational technology shared services. These educational technologies include:

*2.2.1. **Virtual Lab Simulations** integrate theory, practice and quizzes, and offer students interaction with virtual lab equipment often not possible in a physical lab. Virtual labs may supplement physical labs, in institutions where scheduling and space constraints make it difficult for all students to be in a wet lab.*

*2.2.2. **Virtual/augmented reality (VR/AR)** is an emerging technology that blends physical objects with virtual reality, with learning experiences in health care, tourism, STEM, and other disciplines .*

*2.2.3. As access and integrity are the themes already indicated as priorities, perhaps sandboxing **Virtual Proctoring** would have value. Increased access to this category was only moderately prioritized, but opportunities to extend virtual proctoring to those who cannot easily access campuses or face-to-face proctored settings will allow for use not just for students at a distance, but potentially on-campus students as well. Given the ongoing adoption of online learning, as evidenced in the 2018 National Survey on Online and Digital Learning, there is likely a requirement to address this functionality.*

*2.2.5 **Experiential Learning** – Given recent trends and policy directions on the value of experiential learning in the Ontario context, and the likelihood of experiential learning and its reporting becoming an increasingly high priority, tools which support experiential learning may shift towards a compliance motivation.*

Recommendation #3

Create a sandbox environment for participatory engagement and evaluation of potential educational technology shared services and to provide data to help prioritize options, based on aggregate of current state inventory

Given the exploratory nature of many of the educational technologies, and motivated by a desire to Support Teaching and Learning Research and Innovation, we recommend that eCampusOntario should develop a self-updating process for a cross-institutional inventory of educational technologies to help clarify opportunities for shared services. This information can become the basis for building communities of practice that further exploration of educational technologies in a shared sandbox environment.

A Sandbox service will require:

- Information on current-and-desired state of educational technology in each institution which can serve to inform sandbox priorities
- A process for prioritization of educational technologies that fits into participatory sandbox evaluation;
- A technical test plan that ensures functional elements work as specified, with procedures for system, integration, performance, network and usability tests;
- A technical environment to test, evaluate and even pilot products, and would ideally be set up to pilot both proprietary and open-source environments;
- An evaluation framework which includes user experience, integration and support issues, costs, benefits, etc.
- Evaluation of tools which includes all stakeholders, including students.

Other Insights

In addition to CIO's, academic leaders, and directors and staff drawn from teaching and learning centres, there was participation of a few librarians in the web conferences. This stakeholder community could be more formally included in ongoing consultations, to bridge teaching-and-learning-focused support units in post-secondary institutions. Librarians already participate in effective shared services and can thus offer lessons-learned and examples of effective operational models.

It was also noted that no students participated in this process and that going forward direct involvement will be important.

This initiative effectively used an integration of online conferencing, polling, and collaborative note-taking. The response from participants on the consultation approach was very positive. We suggest continuing facilitated consultations using synchronous and collaborative tools.

Maintaining an eCampusOntario list of stakeholder's email addresses would help to minimize the administrative overload of setting up this kind of web conference consultation. While there is turnover of many people in the community of CIOs, Directors of T&L Centres and Librarians, there are self-managing ways for developing and maintaining stakeholder lists.

To further explore successful models of shared services within academic settings, refer to OCUL/OCLS, BCNet and the recent work in the California state system.

Acknowledgements

Vivian Forsmann and Peter Wolf, working on behalf of Patrick Lyons of Carleton University would like to acknowledge the direct support of the following people and organizations:

- Blindside Networks (Big Blue Button)
- Carleton University
- eCampusOntario
- Bob Gagne
- Lisa Grothier
- Luc Roy

Appendix A: Project Tasks

PROJECT INITIATION

1. Discussion with project sponsor on engaging the eCO team
2. Discussion between eCO team, Carleton University, and consultants re proposed consultation approach (via Zoom meeting)

CONSULTATION WORKSHOPS: DESIGN & DEVELOPMENT

1. Reviewed eCO Shared Services survey results as basis for design of consultation phase
2. Researched shared services practices in higher ed and in general; settled on [Deloitte Shared Services Handbook](#); built a visual to illustrate phases for establishing shared services (a modified version of a Deloitte diagram)
3. Consultation with eCO re: Ontario organizations offering shared procurement services; built a visual to capture this info
4. Developed slide deck to highlight (1) survey results, (2) Ontario current state; and (3) shared services practices
5. Develop workshop session script and timing between presentation material and participation, via Google Docs
6. 2 practice sessions (tested method for BBB presentation material, polling capability, and then toggling over to Google for participatory activity)

STAKEHOLDER COMMUNICATIONS AND WORKSHOP REGISTRATION PROCESS

1. eCO shared email lists from CCVPA and OCAV
2. Carleton University undertook name sorting and initial mailout
3. Established mail invite tactics
 - a. AVP list and CIO lists via Lisa Grothier (St Lawrence College) and Luc Roy (Laurentian)
 - b. Sent emails with a link to Doodle for people to choose preferred session
 - c. Sent initial calendar invitation with Backgrounder document
 - d. "Day before" reminder with BBB instructions
4. Managed registrations (this was challenging since we used free-version Doodle; it required searching for everyone's email address and post-sec role on institution's website before people could be confirmed on reg list and sent initial meeting invite)
5. Vivian participated via Skype in OCCCIO Fall meeting, with background on upcoming web conferences
6. Authored "Backgrounder on Educational Technology Shared Services" for distribution to invitees

TECHNICAL SET-UP:

1. Carleton University provided access to Big Blue Button (BBB) via BliindsideNetworks
2. Explored capabilities and tested features (did a one-hour online training session with tech support); required further technical guidance through Blindsight networks tech support
3. BliindsideNetworks refined BBB landing page for easier entry into each web conference;
4. BliindsideNetworks tech support participated in each session to make sure we had an effective working environment; performed some on-the-spot troubleshooting with people having connection issues.
5. Only in first session we gave a phone-in option; dropped this for subsequent sessions because it inhibited participation in Google docs

WORKSHOP FACILITATION:

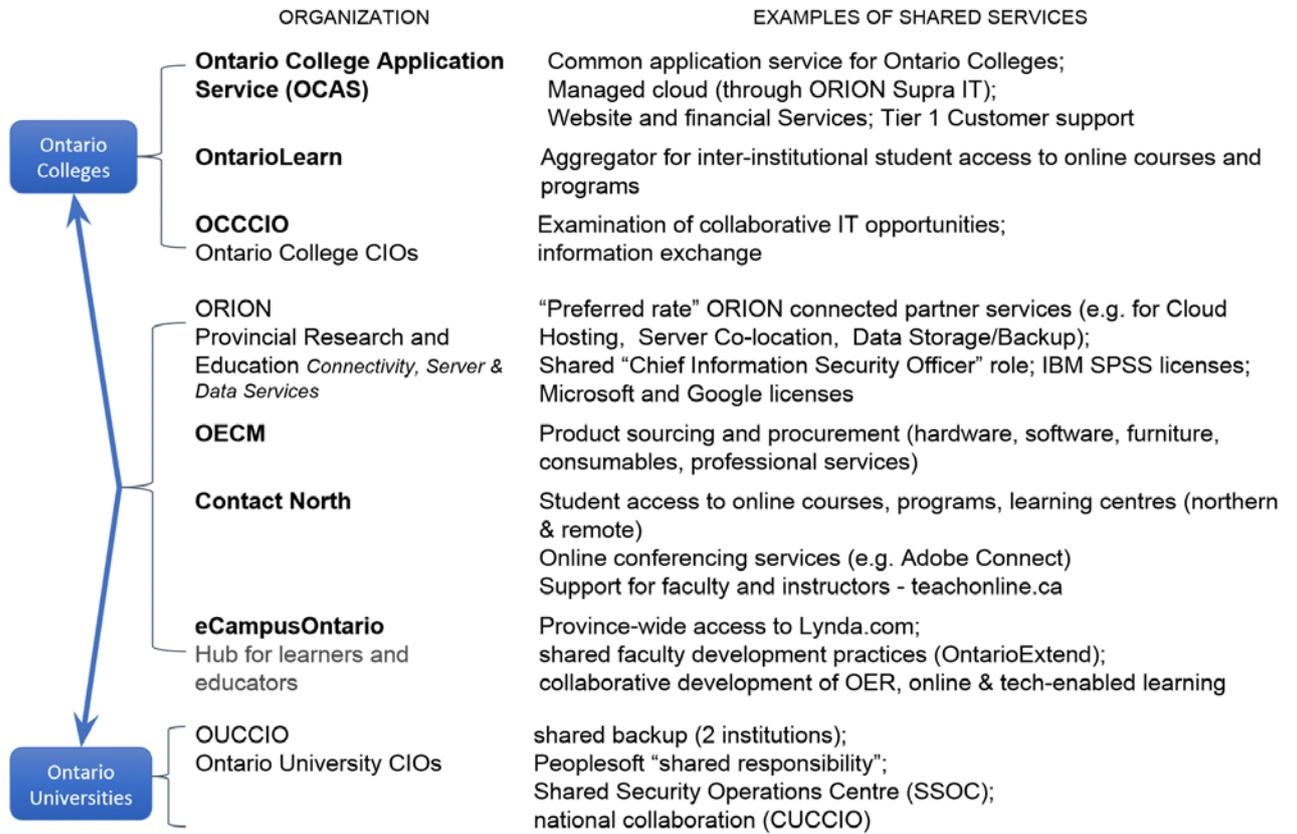
1. Facilitated 4 web conferences (Nov 20/24/26/28) through 2 facilitators; there were 76 participants who represented 37 Ontario post-secs.
2. Some connectivity issues in first session resolved for subsequent sessions.

SYNTHESIS AND REPORT:

1. Reviewed Google responses; synthesized comments into themes
2. Built out metrics on registration and participation
3. Built out rubrics/matrices of governance and criteria and principles for shared services
4. Developed draft report with recommendations for technology and groupings to move forward
5. Final Report reviewed by Carleton University and submitted to eCO

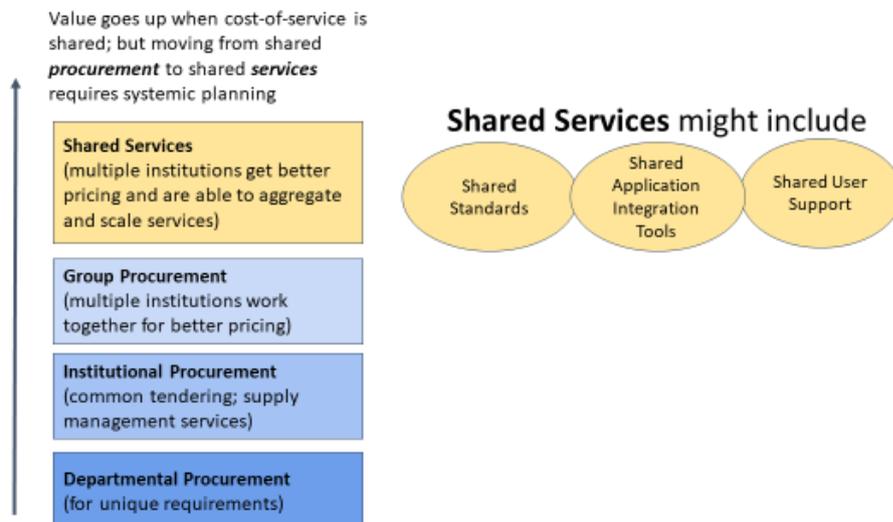
Appendix B: Shared Services in Ontario

Current Shared/Collaborative Services in Ontario



Appendix C: What Do We Mean by Shared Services

What We Mean by *Shared Services*



Appendix D: Roadmap Considerations

Continue to gather more info (while getting underway with an initial shared service)

1. Get all post secs to participate in an ed-tech inventory – this could be done through a Google Doc “event” that is then maintained by CIOs and Directors of T&L Centres. An ed-tech inventory will reveal common ground, gaps, etc. that will aid in longer-term decisions and prioritization
 2. Convene an exploratory discussion with Directors of Teaching and Learning, and Student Services, on what tools might best support experiential/career support learning
- A. Shared Services “Operations”
1. Identify an operating partner (e.g. Orion?) and eCO project lead
 2. Identify a governance committee that is tasked with prioritization and ongoing governance (mix of Directors T&L and CIOs); governance needs to be emergent, guided by “what other shared services communities have found to be successful”)
 3. Identify a technical committee (CIOs) that evaluates cloud and data centre rationalization, as foundations for shared services; and resolves integration and data issues
 4. Proceed with investigation and pilot of captioning/transcription services with a few very interested institutions (ideally including a bilingual institution from the get-go); shake down the processes; within 24 months, roll-out-to-many (use the roadmap developed for BCNet Kultura as a blueprint)
- B. Shared Services “Innovation”
1. Set up a sandbox for piloting tools that support student success (peer assessment, eportfolios, self-publishing in Wordpress), and invite eCO learner experience design team involvement.
 2. Invite a working group to get more informed on possibilities for VR/AR and Virtual Labs
 3. Invite BCcampus Sandbox and BC Open Ed Tech teams to extend share approaches with Ontario
- C. Shared Procurement – quick wins
1. Adobe Creative Suite
 2. Invite an open process for RFPs (so other Higher Ed institutions might leverage the purchasing/subscription of these applications/tools)
- D. Longer term
1. Consider common LMS (at least in college system or regionally) to achieve benefits as per California colleges (Michael Feldstein article)

Shared Service benefits realization is greatest in colleges and small universities.

Appendix E: Record of Web Conference Comments

Tagging was applied to web conference comments to sort theme and frequency of comments. Comment themes are presented in order of frequency (e.g. high interest)

ORG	Multiple providers in Ontario – who is the right one to work with?	5
SUPP	How to share technical support	5
PRI	Setting priorities	4
CLOUD	Get out of data centres and into the cloud	4
INV	Get an inventory of current tools in use	4
STU_EXP	Improve student experience	4
OPT	Opt-in	3
PIL	Piloting/sandbox	3
META	Meta-strategy? (as per Feldstein article) – e.g. LMS	3
DATA	Issues re data integration and security	2
COST	Fiscal benefit realization	2
DIV	Diversity of institutions	2
CoP	Sharing practices	2
LAN	Language/bilingual	1

Comments on Context and About Shared Services

For reference:

- 1) the slide illustrating [current procurement and shared service providers in Ontario](#)
- 2) The slide illustrating all the [elements for getting shared services underway](#)

Examples of how shared services is working in BC

1. [BCcampus Sandbox](#) - a place to test tools, and if enough uptake, moves to BCNET for shared procurement
2. [BCNET - Kaltura](#) (hosted at UBC for all Opt-In institutions in BC)
3. [Open Ed Tech Community](#) - sharing technical and pedagogical practices for open source environments, like Wordpress
4. Example of a system-wide approach to shared “purpose” (California Community Colleges) [Towards Operational Excellence at Student Success](#)
Michael Feldstein, e-Literate, Nov 27

University of Ottawa has a bilingual imperative.	LAN
Will there be a requirement to participate in shared services? Or can institutions pick and choose? (thinking of the Lynda.com implementation),	OPT
I am concerned if we adopt a shared service and later potentially realize it may not be right for us that we'd be committed to staying - should a principle be opt-in and opt-out?	OPT
Does opting out increase costs for remaining participants?	OPT
Ability to opt in/opt out is critical.	OPT
I am hopeful that institutions will be able to pilot/try various service offerings or shared resources before having to formally commit	PIL
This sounds like "sandbox" idea - that should be the first phase	PIL
A shared sandbox for faculty to be able to access technologies as they try to decide on implementation in their courses/classroom.	PIL
Shared service sounds like a very idealistic concept given the large amount of diversity in the Ontario post-secondary landscape. I feel that in order to make some positive steps with this initiative that an approach could be to start with shared services around the 'simplest' of services. For example, captioning of videos is a relatively simple service that is largely interfacing with institutional staff instead of students, so this might be a good candidate service to start with.	DIV
Will the shared delivery be scaled for different sized institutions?	DIV
I would be concerned about future costs for continued participation. Even lynda.com is only a 3 year commitment, and it might just be setting the stage for disappointment if the services were to disappear .	COST
One thing to keep in mind is that it might not always lead to cost savings - we have found that in a lot of cases we are able to negotiate better costs than the consortial price point	COST
Makes complete sense to share best practice with one another - how could this be done effectively?	CoP
I feel that there is so much time and energy spent reviewing products that other colleges are using. If we were using shared services we could use the evidence gathered by others to be of use to us all as a group.	CoP
What kinds of educational technology would speak to students? Can you provide some examples? How do we get students involved in this process? peer assessment, eportfolios, self-publishing in WP, etc For some reason, experiential learning didn't come up in the survey. Seems like a lost opportunity. That might be an example of a, educational technology that is on the near horizon but not big on the radar at this exact moment?	STU_EXP
Priority List doesn't speak to the students I would agree with this statement. Too much focus on faculty driven/institution driven priorities Good point. If the technology is going to serve the students, perhaps they need a voice.	STU_EXP
Agree with focus on students as top priority; need to align with the spirit of eCampus with regards to open educational practices	STU_EXP
What about a shared experiential learning platform? Again, some schools already have this. Is there a way to reduce cost by sharing? Great benefit when students move from 1 school to another while maintaining same profile (and co-curricular).	STU_EXP
How will ET products be determined?	PRI
Is there a way to identify which potentially shared services are highest impact in a cost-benefit framework?	PRI

is it one-size fits all? the priority services listed potentially require very different approaches (consortium licensing, vs shared access)	PRI
I think it is important to focus on non-differentiating services and clearly establish what those non-differentiating services are. Non-differentiating services are easier to adopt as shared services.	PRI
Perhaps preliminary info on how institutions are using these technologies effectively (e.g, like the lynda.com casebook)	INV
It will be important to take inventory of existing shared services so that we don't reinvent the wheel and fragment the environment. I guess what I was saying there is that these technologies may rely on other shared services (e.g. identity management) and we need to be consistent in how we create these underlying shared infrastructure pieces	INV
An inventory would be a great starting point. It would be helpful to define educational technologies? What do they include and how are they defined. How would shared services work for educational technologies that are customized to the organization, like the Learning Management System??	INV
It would also be important to take an inventory of vendors that that are already playing a large role in the examples that were mentioned, for example there are several institutions that are already using 24X7 user support services (e.g. service desk services) delivered by vendors. Also, OCAS is also playing in this user support space.	INV
I really like the idea of shared space for FOSS tools like WP, BBB, etc.	CLOUD
We should focus on an Ontario Higher Ed private cloud and get out of the business of building our own Data Centres	CLOUD
I think as we consider moving more to cloud-based technology shared technology will be easier to manage and support. When we consider data centre based services shared services is a challenge.	CLOUD
The majority of the services we use are moving to the cloud. It isn't always users driving this but now vendors as well. Being flexible and offering multiple solutions may need to occur. Not a single solution under a shared service umbrella to meet preference, experience, desire, etc..	CLOUD
Question: what problem we want to solve. For procurement, we have OEMC. Most universities have Wordpress enviros for faculty; so not sure how a shared enviro would offer.	ORG
Too many organizations pitching Shared Services : ORION, eCampus Ontario, Ontario Learn, Contact North also OEMC and OCAS) - I would agree with this statement. - I suppose the number of organizations pitching shared services suggests there is a need for something to serve all institutions Maybe there aren't enough shared services, but we should not be replicating efforts also.	ORG
The OCCIO has had some great cost savings by leveraging existing shared services to save on software licensing (microsoft) We have looked at the costs of doing just the analysis (Not the project) to consolidate ERP's and it is extremely intimidating. And not great for those who have a lot of customization (eg. bilingual) The change management costs for things like an LMS are astronomical and need to be considered in any business case	ORG
There are likely some good lessons learned in the initiatives (Archibus PIF, KCC, and OCUL-CF effort).	ORG
I'd need to understand the value proposition. We have OCAS, ORION, OEMC, etc. already all trying to build out shared service - I agree with that.. Shared services are also starting up from our vendor partners as they evolve into SaaS organisations. Looking at O365 from Microsoft is an example. What do these other groups not currently offer?	ORG

I'm bewildered by the fact that we are replicating software and services related to our online environments (LMS's) over 40-odd institutions. The annual licensing costs alone are horrific...let alone the fact that most of us do essentially the same things in terms of support and training. Why can we not pursue centralizing all of these services maintaining individuality through separate instances. Fundamentally agree!!	META
I see it as setting a standard for technologies used in Ontario education. Sharing a particular service would result in a more standardized technological experience across universities which might make it appealing for online learners who might be afraid of taking a course because of the technology. In addition to shared services, if at all possible, it would be nice to have shared resources (e.g. developer funding to create a service that might not currently exist)	META
I like the idea of using our combined purchasing power. I also like that perhaps we can leverage the combined talents of the vertical to perhaps advance certain agenda with reinventing the wheel. I hope people are taking the proposed opportunity seriously and will be open to perhaps making change within their organization to take advantage of new possibilities.	META
Concern about data security and privacy with edtech user agreements	DATA
Some kind of process to assist with privacy / data and external tools - Ontario-wide PIA would be useful	DATA
Agree that the primary value for shared services include cost and access to a wide range of edtech services. As a small college, we are limited in terms of expertise and budget to implement a wide range of services. As a start, I would focus on shared software platforms, not necessarily support in the first instance. I.e: cloud based platforms. I think that faculty support needs to be closer to home, at least in the beginning. Perhaps support could be for the "supporters".	SUPP
I fully agree with sharing tech support, however how do we also take care of the contextual specificities and characteristics and individual institutions and needs. The balance between shared support which demands some standardization and flexibility for specific contexts.	SUPP
Shared technological support would be helpful, especially for groups with small staff but knowing what's out there would be helpful. Also, what about keeping ahead of technological and support related needs? Cloud based with be very helpful.	SUPP
Shared technological support is interesting. I think it will be important to ensure bilingual services. I support the opt-in idea. Training support will also be essential, especially for smaller institutions.	SUPP
Shared support with the right set of principles and governance would be helpful.	SUPP
Shared services sounds like a bad idea for anyone working for the federal government. Consider the possibility of a failed project.	
Concerns re: the consortium approach being dissolved after full buy-in by faculty and staff?	
How will existing agreements be handled?	
Shared services sounds like a bad idea for anyone working for the federal government. Consider the possibility of a failed project.	
Love that you're using google Docs!	
I was a little disappointed that in the existing structures IT was seen as a roadblock verifying security. I would expect that cybersecurity was also a a must have for any shared services	
With regard to the discussion on cutting IT out due to their focus on information security. Note that it might not be possible to cut IT out, as they will still be required to integrate any new solution.	

2. Comments on Shared Survey Results

What surprised you about the survey results? What are the big messages? What did we miss?

What were the labels used for the three-point scale regarding candidate technologies? (did not see survey)
I think Captioning Services would be a really easy win towards a shared services model.
In my view, Virtual Proctoring should rank higher on the list. It's an expensive service and I feel that it will be a service that will be increasingly deployed to students over the next decade in Ontario. However, I realize that there are a lot of vendors in this space and that technology affordances are making the field fairly fluid. So negotiating price and shared services for more than one Virtual Proctoring service might be an interesting idea.
Not clear on what the differences are between virtual labs and virtual simulations
I'm a little surprised that really expensive products/services weren't higher, like LMS, portfolios, media management/lecture capture/, and other enterprise tools.
And those technologies (see above) are easier to implement in shared environment
Where would shared services be less useful? I'm wondering about Video/audio streaming for example.
is it one-size fits all? the priority services listed potentially require very different approaches (consortium licensing, vs shared access)
my take: low deployment priorities are about removing barriers to entry; high participation priorities are about reducing costs or commodifying a service; commodity services are not differentiators for your institution and thus can be shared
When I consider eLearning Authoring Tools (ranked 10th on the list), there are a few hallmark products that would be great to get shared pricing on - for example, Adobe Creative Cloud.
Where there commonalities/differences between colleges and universities?
Motivations: cost reduction, access to tools we don't have, access to tools we could not justify investing in because they are niche but could be very useful
Would like to see this list broken down between Colleges and Universities, Colleges and University priorities don't always align due to teach philosophy
Motivations - include space constraints, virtual offers opportunities to maximize current space restrictions; practicum opportunities - limitations; it is challenging to launch - development required, faculty knowledge;
What are the quick wins for us a system?
What did we miss - Student Input
I wonder if we can target something like an integrity tool as a pilot for shared service. This category is high in priority and deployment. My guess is that most institutions who have deployed this software are likely using Turnitin.com, so the common product might mean it's an easy start point because we may not have to negotiate on which tool to use.
Some things on the list are rather low cost to organizations when there are other "high cost" challenges like internet services and costs for internet that would really have an impact
Motivations: how can we create engaging learning, one on one, making the online experience just as <i>viable</i> as face to face - plus how open to technology the individual departments are, or the expectations they have for delivering an immersive experience.
Focus in the top ten seems to lean towards compliance and/or surveillance Follow-up question: What would the alternative look like? Open? Teaching and learning tools?

Based on the priority of the Captioning Service I think Accessibility is a big message, particularly updating course content to be accessible and paying for all of these updates.
There's always an element of "flavour of the month" when identifying priorities in anticipated product adoptions.
High volume, low differentiation services are one carrot. Another type of services, those that are stretch/emergent as sandbox option are attractive for different reasons.
I see this as having a piece related to the solution and it's cost, but there could also be a true service piece here.
Happy to see captioning and transcription services hit the top of the list! Yes, we all do this, but it is a bit challenging to make arrangements with service providers and maintain good quality and good service for small and large jobs, as well as time-limited work -- hoping that provincial procurement will help with this. Also excited to see that there was such great interest in simulations and virtual learning environments.
Glad to see Ar and Vr in the top 5. Hopefully sharing this type of service will make it more accessible.
It seems that part of the message is that it seems that institutions are more willing to consider technologies that are not as mature in their own organization. Emerging technology is both risky, but may also offer the most opportunity.
Some of the results may be of function of timing largely - e.g. more people have chosen web conferencing and/or video streaming 4 or 5 years ago but many institutions have these systems in place now
Interesting to see in the top 5 a mix between low hanging fruit commodities like captioning and more emergent tech like simulations/VR/AR
Lack of experiential learning tools or mention of any other career-oriented technology/tools
All of these are about tools, which leads to a procurement practice. What about developing shared service implementation practices, data exchange, integrations. That would be a shared service, rather than a bulk buying club. Improving digital literacy is an important foundation to be considered.
Personally, I'm surprised digital publishing or data storage wasn't at the top of the list?! *Maybe the publishing piece is seen more as the domain of the libraries?
Agree with the comment on career/experiential tools and that absence in the list.
You may want to look at ones that will be successful (low risk) in terms of driving benefit. Need to build trust early on. If we do something too out there and fail, we won't get to do the next one.
Not clear on how shared services will help audio/video streaming...need to think about that.
Audio/ video streaming could be like an Ontario YouTube, private (to a class/group) video streaming for institutions not open to the world. Useful in online and blended courses.
I really feel that the shared contract for remote proctoring could be of great value and hope that it will perhaps come a bit further up the list. Also badging and AR/VR
One reason that you might see high interest in something like accessibility (transcription) is that we all have to do it for AODA compliance. Those who have gone early may not be satisfied with their solution.
I am wondering if the survey results differ depending on the respondent's main role at the institution.
Shared interest however just looking through the priorities this seems balanced with our institutional priorities... I would have expected Web conferencing and Collaboration tools would have been a bit higher. Also, I am surprised Digital Credentialing / Blockchain was so low considering this is a major outcome of the institutions.
Surprising that the top priorities are somewhat ancillary to the institution, not bread and butter services that are essential to the institution, such as the LMS. Follow-up question: where is the need from your perspective? In bread and butter services or in more innovative

<p>technologies which might present more barriers to implement? I would suggest that institutions are looking for innovative services to replace the existing “bread and butter” services. Thanks! Bread and butter services need to be customized to the institution as well - might be more of a need to do that work individually? California example with Canvas would be interesting to look at</p>
<p>There is probably an inverse correlation of priority and deployment because where the technology has been deployed, there is less interest in a shared service, except where there is particular concern re escalating cost (e.g. anti-plagiarism).</p>
<p>I am not surprised by the results. They directly connect with goals of AODA compliance and work integrated learning - key priorities in our institutions. These are big ticket items that we are struggling to deploy in a wholesome way.</p>
<p>I think the role of the participants reflect the results, perhaps. This said, I was not surprised by the results. Accessibility standards are important, which reflect the first item in the results. I think they also reflect costing. Some of these services are expensive and with shared services, certain initiatives and software might be more attainable and realistic for smaller institutions.</p>
<p>There was no real surprises, in the survey. It helped me understand my College’s position as they compare to other Colleges. In some cases we are behind and in some cases we are way ahead!! AODA requirements are important and I’m happy to see this is a high priority.</p>
<p>Overall, the survey results point to the college system looking to provide a base level of services and shared services should not be about a competitive advantage to one institution over another. We are also looking to this to help us control and ideally reduce our costs. As an example, closed captioning is something we all have to do and it does not provide a competitive advantage to one institution.</p>
<p>I agree the products and technology that are available to date, if declared we’d have a fuller response to the survey.</p>
<p>Some results demonstrate also the lack of familiarity with some technologies, but the sense that they will be important in a near future in education, hence the interest to have these less used technologies for now being part of the top priorities for shared services.</p>
<p>In some cases we may just want to share solutions and not necessarily provide them in a traditional shared service environment. The value in not having to perform all the research on a new topic area and to simply purchase something based on others’ research is high.</p>
<p>Currently deployed vs. future plans would be interesting.</p>
<p>Difference between deployment and usage.</p>

3. Criteria for decision-making

What was the criteria you used to decide a response to the poll question? What other criteria should be used to decide which technologies to be shared?

Many are in agreement that captioning/transcription services are a high priority because of accessibility requirements.

TOOL/SERVICE	Criteria
Captioning/transcription	Accessibility and compliance
Academic integrity	Faculty CoP; bring down cost
Online Collaboration	Student benefit
LMS	Number of students impacted? Bring down cost – is this a college focused approach?

	Number of students impacted? Pedagogical innovation? Student benefit? Ease of implementation? Low-hanging fruit?
--	--

I voted based on what is the most top of mind need in my organization. Perhaps we should consider a survey on what organizations are currently struggling with as a way to prioritize among the top ones?
I decided based on what I feel is a gap at my institution. We have a variety of tools that support captioning/transcription - they aren't perfect, but we have them. Academic integrity software is a need/gap.
I voted based on our current institutional need.
I think to begin with, in order to show an early win, we should try to choose a technology that is simple enough that the chance of success is high in deploying a shared services model.
This is the only candidate technology that has a mandatory/legislative component
I voted based on a service we likely could not afford on our own
High likelihood for success; immediate impact, and high impact in terms of being for both students and faculty; low complexity in implementation; also necessary for compliance (transcription) - means universal participation (all opt in) NB - you may have different criteria for other types of priorities - e.g., decreasing risk and cost for something that is new/unproven
factors/criteria to consider should be one that best reduces the cost and barriers to participation and increases access.
Many institutions may not already have a clear solution for this
Criteria could include choosing technologies that smaller institutions have more difficulty deploying on their own. For example, shared services around top-tier LMS solutions would be great!
Something that works the same for most institutions, and lends itself to standardized solutions, like captioning.
Seems the easiest service to outsource
Easier win, but also likely to be successful.
Compliance issues can drive a requirement. For example, AODA can drive the need for Captioning Services.
Need to start with elements that are LMS independent since we all have different systems.
The most commonly used services at most campuses. I agree--best bang for the buck!
Greatest need throughout an institution - education and otherwise.
Easiest to implement across the province (e.g. not too many tools that need to be considered and decided upon)
What would have the most impact - you can't improve what you don't measure. I agree! Follow-up How do we measure success and impact? Number of students impacted? Pedagogical innovation? Use within the institution? Ease of implementation? Successful career achievement? Moving on to a position aligned with the degree? Great follow up question: Agree entirely with the need for this to guide our planning
Which option will create the biggest impact potentially for students?
Should have an option for none of the above - other. Didn't find value in the shared services in the poll. Should have an option of other
We chose a technology based on our lack of internal expertise and greatest student benefit (having labs for experiential qualities

Captioning is also very important as it speaks to all of our needs for technological solutions to accessibility challenges of students. If we all started to use the same service, would they be able to keep up with the demand?
I chose Captioning and transcription services because: -It's something that can't really be done in house, unless only a small number of videos need captioning -Most services have a "the more you buy the more you save" approach -It's something we need to do in order to comply with AODA policies
Why not leverage the other institutions who have certain of these services already. If we added a clause when going out to RFP that others Higher Ed institution can leverage the same agreement would facilitate the purchasing/subscription of these applications/tools
Where are we struggling now and where do we need to make an investment?
What is it that is keeping me up at night (other than my kids)? Collaboration tools for group work! Like? Hypothes.is ? Video conferencing? Note taking? Yes--all of these. Students really struggle with online collaboration for group work. Forums leave something (serious) to be desired. Absolutely!!! There isn't even a way to do a "control F" sometimes on the history of the forum. Thank you!
Established services are a focus (e.g., captioning, integrity software) as we know they are embedded accepted technologies where we repeat supports and licensing across most institutions. These are far easier to share as there's more understanding and adoption of these technologies.
Greatest pedagogical impact - supports sound pedagogical practice - impacts could be large number of students, or it could be a large impact on a small group e.g. French-speaking, FNMI - Open first wherever possible - legal requirements (e.g. AODA etc) - emerging tech that we don't have the capacity to invest in individually - tools that are extensible, cross-platform - standards compliant - a mix of technologies that have high impact on numbers (for gov purposes) and high impact on other things but maybe don't impact millions
Quick and easy win that delivers tangible value that many people could use without too much change. Also known as "low hanging fruit".
I would like to see us go together on an LMS! <ul style="list-style-type: none"> - Good idea, but I think this will be one of the most challenging tools to decide on. Everyone who has D2L license coming up in the next two-three years could be a good starting point. :-) - YES!!!! - This is something I've thought about a lot. It's so surprising why the provincial governments don't gravitate to this idea. Yeah, me too! - K12 does it via Ministry of Ed; yes, but not all schools actually use the provincially supported LMS - very frustrating! - California did it with Canvas, opt-in for institutions
California is doing a lot in the way of shared services. We should take a look at how they do it.
What was feasible to do - something that drives success quickly and allows a win, so we can do more like this
Available in both English and French. I second this!
Thinking about the cost involved in producing excellent virtual simulations for the students to participate in - our mandate is to include more simulated learning in programs and courses - virtual simulations would also be beneficial to our online courses and programs
Legal and ethical obligations (AODA compliance, Ontario Human Rights) i.e. that's why captioning is so important
I chose B. Reason is that this is already deployed, and I'm looking for a better price, and to see if ecampus can deliver - I like this argument.
Concern for accessibility for students; concern for cost and quality of transcription and captioning; a desire to ensure that reliable access to high quality service becomes available so that the need to have good captioning and transcription in place does not slow the final stages of preparations for elearning materials (not always easy to find

service provision).
Something that will be very focused, will have “phased” gains, fewer “governance” hurdles. And will contribute to student success. Follow-up: what are the features of the low-hanging fruit?This is a great question :-) - Contributing to student success!
High Cost and most impact on the most students across institution
Service without a lot of other dependencies - captioning is a good example - also need for compliance so compelling need at all institutions.
We are young with VR/AR. This would be our way in.
What don't I have yet
Steeper climb to adopt learning analytics could benefit from more voices/ideas. More complexity in deployment
I don't think a sandbox for niche or whizbang technologies should be a criteria for a shared service with an arguably lower pay off as far as student learning - I agree with this
learning analytics requires complexity in standardization of data formats and governance. Ability to share is extreme stretch goal. At OUCeL we had a showcase of approaches to course information tracking (ie syllabus info as a basis) - this was a good starting point
Path of least resistance and biggest bang for the initial buck with captioning - low risk, relatively high impact and also not currently available at our institution
Don't pick things that are unique to courses/programs/schools. You won't drive success.
Always available in french.Toujours disponible en français!
Accessibility and scalability
Does it contribute or support High Impact Practices? Does it help with SMA metrics / tracking?
criteria: Challenge in deployment, escalating cost, skills
Something that should be of service to all, and fairly simple to deploy provided it can accommodate a number of different input systems and types. Would provide the same value to all participants.
We chose an area that is a new initiative for our school and is very resource intensive.
Most complex to implement, but high impact institutionally
Addressing unfunded mandates
Cost and collaboration potential as well as support of pedagogical approach and needs.
Small institution that Cost
What technology is the least disruptive in deployment. If the collaboration is mostly on the procurement level that would translate to less disruption when deployed at the institution. Follow-up: what are the features of a technology that would make it less disruptive? How could we lessen the burden on institutions from a deployment perspective?
Non-differentiating service that is common to all and addresses compliance requirements
Costs, demands from students, AODA requirements for transcription services. No student should be left behind because the College doesn't have a transcription services..

Institution wide use
Small institution with multiple stakeholders engaged in the activity, cost and support important.
Control standards AODA and how we deliver services.
Supporting learners' engagement and quality of learning experience
We can look at models of shared services that aren't focussed on educational technology - those are probably easier to find. Their governance structures might have some lessons for us https://www.education.ie/en/The-Department/Public-Service-Reform/Education-and-Training-Sector-Shared-Services-Plan-2017-2020.pdf
Governance structure should think holistically - procurement, T&L, libraries staff
ORION is currently formalising our governance structure for our shared CISO , that involves 5 universities and 3 colleges and we're expanding. Happy to share our experiences on that - Eloise

4. Governance

What are your recommended practices for governing educational shared services? What advice do you have related to governance?

For your reference: This slide may inform your thinking about the roadmap, with its elements and [categories](#) to consider for governance of educational technology shared services.

What Governance Issue/Opportunity?	What could work?
It will be important to identify the appropriate organizational stakeholders to be involved in the process.	
Critical to include not only who the institutional stakeholders are but whose budget(s) would be affected, particularly with a new technology (e.g., we currently do not have one budget that covers closed captioning)	
Governance may refuse to admit failure	Look for much less than 100% buy-in, and be prepared to drop projects which are failing or delayed. Try for something like 60% buy-in.
How to ensure equity based on institutional size	
Manage concerns relating to institutional differences (colleges and universities, small vs. large institutions). Minimize politics. Data driven decisions.	
Needs could change/evolve	How could we use the power of group size to lobby for changes that may be needed? Example - there may be an alternative to opting-out.
Common standards are desirable, but remember people don't have to adopt what they don't like.	
Offer means of moving between different standards. If you can't, that's a case against the standard	
Implementing a sandbox process may prove difficult or ineffective dependent on the technology (e.g., closed captioning as a sandbox technology)	

Have regular input/review cycle of all participating institutions	
Should talk to TUG (tri-university library group) longstanding successful collaboration :-)	
Need process for choosing pilot institutions especially if a popular service; should there be an "implementation fund" for pilots?	
Who negotiates shared licensing? How are institutions represented? And who supports the ongoing administration of the licensing, contracts, etc.?	
Vivian here - I was referring to the BC Libraries Cooperative, which runs services all across Canada for smaller academic and public libraries - they operate as a cooperative	
Look at BCNET * BCCampus governance structure	
Maybe we need to think about securing 2-3 solutions for the same problem so that there is some degree of choice within the shared service environment. In other words, find 2-3 solutions for something like transcription services and let people choose based on their unique circumstances.	<p>WE MAY HAVE TO START SMALL, AND JUST TRY OUT ONE PARTICULAR SERVICE/SOFTWARE -- A Pilot!! tAKING ON TOO BIG A PICTURE SLOWS IT DOWN AND WE MAY NOT GET THERE. SORRY FOR THE ALL CAPS!</p> <p>This is a really important point. All Caps appropriate.</p> <p>With some less big-time services/technologies?</p> <p>With some less big-time services/technologies?</p> <p>Good idea for providing choice. Might be harder to negotiate a "good deal" if we approach 2 or 3 providers, but this idea would help to solve the bilingual challenge.</p> <p>I think academic integrity software might be a good place to start. Many institutions have already deployed this service (76%), and my guess is most are using Turnitin.com.</p> <p>Anonymous 08:12 22 Nov</p> <p>Yeah, there are different definitions of low hanging fruit, for sure. One of them might be complexity of implementation. One of them might be current deployment rates</p> <p>UWindsor OpenLearning 08:16 22 Nov</p> <p>Could things that are already deployed be seen as a challenge though because they have existing relationships and practices that would potentially need to be changed to engage?</p>
Scaling to nature of institutional priorities and capacity; undergraduate liberal arts needs are different; in a sector where universities are comprehensive with vastly richer resources to draw upon; also faculty culture is different in a learning analytics context. Resistance to surveillance and monetization rather than academic freedom etc.	<p>There has been a lot of learning related to governance on the ORION Shared CISO project. First and foremost, have face to face meetings so that the players get to know each other....governance via email is extremely challenging in the beginning</p> <p>Great point</p>
SAMPLE: The overhead of multi-institutional coordination may result in longer time-to-deploy in a shared services environment	<p>pilot a technology with a few very interested institutions; shake down the processes; then roll-out-to-many</p> <p>I agree - Difficult to move a big ship</p>
In regards to the services that are already deployed at some institutions, would be interesting to know if the institution is	

<p>satisfied with the deployed solutions. This is a great point! What about seeing what is already working - they (these resources that) have been battle-tested, and so maybe can already be leveraged to the larger group (instead of doing new things all over again)</p>	
<p>Need not be afraid to move ahead with a coalition of the willing so that we do not get into an all or nothing mindset. Participation will grow in time as value is realized.</p> <p>Good point. We don't have to stick with the same shared tool forever, too. If we find our original choice is not working or if something new comes up, we can always change.</p>	
<p>SAMPLE: Shared services could complicate technology adoption and retirement cycles;</p>	<p>Establish reasonable opt-in/opt-out policies that would not impact our buying power</p>
<p>Need to make sure people feel their voice is heard!</p>	
	<p>On bilingual ... there may be an opportunity for a province-wide policy on what is acceptable to the French community (for example - a school cannot translate a cloud service, unless the service offers it; but could there be a policy that an English only cloud service be acceptable if a syllabus of translated menus and messages is offered. Also, is there now a void from the elimination of the French Provincial Office where eCampus can (or should) fill?</p>
<p>What we have found at OCCCIO is that not everyone needs to opt in....if you have an interested sub-group, it can still be a good thing and may grow organically</p>	<p>Be inclusive - open to anyone who wants to should be able to opt in - be OK with failure in the sandbox or pilot phase - don't implement just because we have invested a year of pilot in it - bi-lingualism of the tool and its vendor should be high priority</p>
	<p>This will take a LOT of time and you may never get there.</p>
<p>Getting commitment to participation and resourcing for implementation. I agree - this is hard with all the diversity</p>	<p>Subsidize cost initially. Provide funding incentives for institutions to invest admin time in set up/implementation/support planning. I agree - greasing the wheels to get going will free up local resources for things that work and are proven,</p>
<p>I like this - do a proof of concept with a coalition of the willing and able. Show success and then move on to more schools</p>	
<p>Find other regions/organizations that have done this and done it well, study and apply the learnings (both successes and challenges) in terms of governance to this initiative</p>	<p>There are many regional provincial and national academic library consortia working in these and like spaces. These include governance models, selection rubrics and processes, pricing, negotiation and liscensing, technical implementation etc etc I agree - lots to learn from others... Learn from what doesn't work well.</p>
<p>Spend the time necessary to come to common, agreed upon principles of governance that all members who intend to engage can support.</p>	<p>Look to existing successes such as those in the library sector.</p>
<p>If you fund properly this should not be an issue.</p>	

<p>Each application offering should have a steering committee that can look at licensing issues, service issues, implementation issues, etc. I think all subcommittees would be representative of the community. Recommendations can go directly to eCampus. Level 1 service desk is already offered through Buchanan through OECM.</p>	
<p>I'm not convinced based on past examples that a consortium approach always means longer times, etc., though might have added complexity.</p>	<p>The answer often seems to be some key driver or almost mandatory need - and then it's willingness and support from senior admin.</p>
	<p>OCUL does this - but it is "fragile". They still succeed though. Follow-up: Curious as to why OCUL is thought of as fragile and how we might avoid that problem. This is just my opinion and UL's may differ, but the diversity of organizations is a challenge and the ongoing costs are frequently contention. There may be a correlation there. That being said, I will reiterate, it has and is delivering.</p>
<p>Yes - need for clearly defined roles AND what are fallbacks if one partner withdraws - how do remaining proceed?</p>	
<p>Opt in and opt out is a critical concept in a province with such diverse educational institutions</p>	
<p>Sorry, I'm still hearing this as a shared procurement opportunity</p>	<p>Perhaps to fix this and move to a shared service, is to develop an implementation toolkit, kind of like the way Canarie developed eduroam to be implemented by providing plugins to existing networks I'm looking for implementation toolkits</p>
<p>Governance from a security and privacy perspective, ensuring that selected services meet the requirements of the various organisations. Rephrased, ensuring agreement on the manner to assess the security and privacy stance of the service.</p>	<p>Alignment to a provincial or federal assessment technology. Different provinces may have differing (not sure to what extent) requirements ... would that mean that the most stringent requirements across the provinces be the required minimum?</p>
<p>I agree with the above comment, it should be listed three times^^^^^^</p>	<p>Standardized criteria and listing of vendors based on compliance and/or data practices</p>
<p>Can we do a model where an agreed upon contract price can be negotiated and each institution can do their contract from there? Trying to negotiate all the details for everyone could be too complex and take too long.</p>	<p>In the box on left -That is OECM model and it doesn't always get lowest price, but it helps us overcome the RFP process and is a starting point. :-)</p>
<p>UOIT-Durham College long standing shared service agreement (not perfect but exists)</p>	
<p>Decision-making groups should have adequate representation from all relevant disciplines. It is extremely important that there is adequate representation from IT and that IT is involved early on. It could be very risky to make decisions and then just bump it over to IT to implement. Non-IT people are not always aware technical challenges around decisions. For shared systems across multiple institutions such challenges are even more.</p>	
<p>Understanding similarities and differences between schools, paint the landscape to see where synergies could be</p>	

Transparency	Board to oversee, supported by working groups. Look to existing cloud based vendor agreements for governance of operational matters. Board to comprise of edtech leaders (college and uni).
Building a roadmap for initiatives (with a long run way) is important -- the more institutions are involved the slower decision making and implementation could be. So, there should be adequate time for institutions to weave initiatives into their thinking and budgets (if relevant).	The London hospitals and those from Tillsonburg to Chatham have a shared service model that is very mature and could be referenced. Not sure we need to go to their level but there would be some good practices to follow
Would need representation outside of IT Follow-up question: which voices do we need at the table?	My reaction to the comment above, I would take the opposite position and say that if institutions push for more linguistically and culturally diverse needs, this is a push for tech companies to develop product which reflect diversity.
Should we collaborate with OUPMA? Procurement Group	
http://www.oupma.ca/	
Leadership is key to shared services to establish and maintain a trust level for shared services. Shared services also requires some level of SLA's	
Could be institutional representative from each school who then work on a collective committee	
	Ontario College Library Service (OCLS) is a good example of a service to meet procurement needs of college libraries
University Libraries very successful with consortium: OCUL	

5. Final Comments and Questions

Decent session. Looking forward to the next steps and recommendations
Interesting to see what results would've been if we were permitted to select 2 candidate technology possibilities.
Don't do early start unless you go smoothly to main session. There was a problem this time; otherwise things went well.
This is a great and cost efficient way to connect. There were difficulties at the beginning in connecting to the audio. Otherwise it was a great session.
Loved this session...It was wonderfully organized and fun to participate in. I loved the ability to converse in real time with the other participants. Thank you and great job. I just wish I got to be the "anonymous skunk" The best webinar, I have ever taken part of. I agree with the below.
Well run....the shared document collaboration is an excellent way to capture thoughts in an honest way
This is the best webinar I've every participated in!
In addition to addressing the Shared Services topic in the workshop, I'm coming away with some great ideas on how to use similar tools (e.g. web conferencing, Google Docs) for engaging students! Thanks! Me too!
Great work, team! Very helpful and useful session.
I really liked the Google docs.

Like the google doc idea. I would have liked to be able to vote up ideas.
Really liked the format - and the ability to provide feedback using google docs. Thank you - facilitators did a great job.
Good to have a mix of IT/CIO office reps and learning technology leaders in the same conversation.
Well done. I appreciate organizations that work in eLearning walking the talk.
I, too, liked the Google doc approach, but perhaps there was one too many. A bit more direction for the governance doc would have been helpful. Voting this one up :)
I don't like the google doc format as there is no revision history. It works if you're signed in.
I am still not sure what your mandate is here and what the objective is of eCampus Ontario. Maybe I missed that in the summer. Loved the engagement and tool though ;-)
One area I did not see mentioned was research. As it stands now, all the institutions are researching new technologies now. If there was research done centrally as a starting point for the individual institutions would be beneficial.
Well handled. Good way to have interaction and dialogue. Thanks.
It was a great model! Might want to have a small discussion session
Was handled quite well. I like the idea of anonymous (zoo) input. It allows for an open discussion.
Very well done. Great way to get a read on what is happening across other colleges.
Complicated undertaking and will take considerable commitment and should not be under resourced
I appreciated the interaction in the feedback process. Very good approach - the meeting was productive, which makes it encouraging and a good use of our time.
Glad you used leading edge technologies to support discussion around leading edge technologies and how to share
Seemed to work well. Loved this approach. It was easy to contribute. Focussed and I can see how follow up will happen

Appendix F: Record of Web Conference Participation

Roles	16	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	21	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
	TOTAL PSISE= 37	Uhn's	Brook	Carleton	Laurentian	Lakeland	McMaster	Queens	Ryerson	Toronto	Trent	UOIT	Waterloo	Western	WLU	Wilfrid	York	Colleges	Bornal	Cambran	Carleton	Central	Confederation	Durham	Finchway	Fleming	George Brown	Georgian	Humber	La Cite	Loyalist	Niagara	Northern	OCA D	RMC	Seneca	Shenando	Sault	St Lawrence
CIO-IT	32	14	1	3	1	1			1	1	1	2	2	1			18		1		2	1	1	2		1	1	1	1			1	1	1	1	1	1	1	
Academic, Dir T&L, Library	44	23	1	1	1	2	3	5	2	1	2	1	1		1	1	21	1	1	1	1	1	4	2	2	1	2	1	1	1	1			1	1	1	1	1	1
# of Participants	76	37	2	4	2	1	2	3	5	3	2	3	3	1	1	1	39	1	2	1	3	2	1	6	2	2	2	3	2	2	1	1	1	1	1	1	2	1	1

NOTE: There were more people who registered than participated (by about 6 people), which suggests slightly more institutions and people are aware of this initiative and perhaps read the Backgrounder in the email invite.

A spreadsheet version of web conference participation is [accessible here](#).