

SUNY Online White Paper

Draft Document for Comment

5 February 2019

Introduction:

What is the Online Learning Opportunity?

Online learning, or distance learning, has evolved significantly over the past 20 years. The digital evolution truly began in the US in 1985 with the first completely online courses for graduate credit offered by Connected Education leading to a MA in Media Studies from The New School. The first new and full online university was founded in 1994 as the Open University of Catalonia, headquarter in Barcelona, Spain. In 1992 the Alfred P. Sloan Foundation funded several institutions, including SUNY, for the development of Asynchronous Learning Networks (ALN) to develop online alternatives for students who could not attend traditional face-to-face college classes. The next major milestone came in the late 1990s with technology platforms and course management systems, like Blackboard, which colleges and universities used to add exclusively online programs to their offerings. SUNY's President's Task Force focused on Distance Learning was convened in January 1995 followed by the University Faculty Senate Distance Learning Committee in April 1996. A Report of the University Distance Learning Panel was delivered to SUNY Executive Leadership in April 1998.

Over the last two decades, virtual universities providing exclusively online educational programs have become commonplace in the education marketplace, e.g., University of Phoenix. Today the online education market has entirely different and novel players. For example, Apple offers lectures through iTunes U and companies like Coursera and EdX offer "Massive Open Online Courses" (MOOCs) and fully online degree programs composed of MOOCs to students around the globe. Currently over 3 million students in the United States are earning their degrees exclusively online, and another 3.5 million take at least one course online. In addition, approximately 77% of U.S.-based companies provide their employees with continuing education and professional development opportunities through online learning. The most recent estimated value of this global eLearning market is over \$165 billion, which includes an approximate \$46 billion in annual revenue generated from online courses [1].

The traditional higher education model is also experiencing dramatic changes. This model has historically traditional, residential, undergraduate students who: (1) are enrolled for two or four year degrees; (2) are full time; (3) attend classes face-to-face with their professors at physical campuses; and (4) are between 18 and 25 years of age. The number of traditional, residential, undergraduate students at NY institutions is declining due to the decrease in the number of high school graduates. In the past when a student earned a degree it differentiated them from their peers for the length of their careers. Today, many professionals are finding that they need to take new courses, obtain new certificates, and learn new skills to stay current and/or get ahead

in their careers. This creates additional opportunities for higher education institutions to expand their enrollment base in addition to their traditional undergraduate and graduate degree programs.

These changing market and societal forces are creating opportunities for higher education institutions to both meet the changing needs of today's students while remaining successful and viable institutions. This opportunity is seized by extending the reach of our institutions to nontraditional students; namely, the exclusively online student and life-long learner. Doing so will increase enrollments and revenue, which, in turn, supports the delivery of high-quality education that will meet the needs of today's learners as well as our current and future workforce.

Current State: SUNY and Online Education

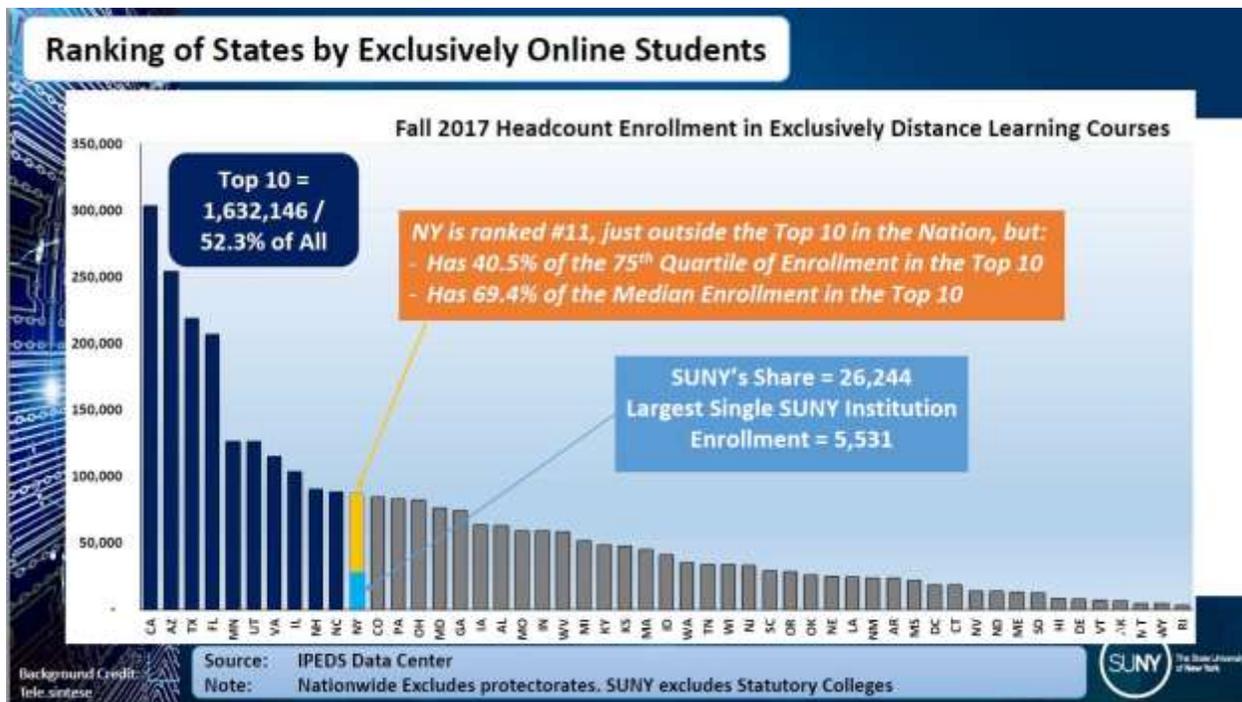
How Does SUNY Compare in the Online Education Marketplace?

To date, funding of online learning is through a campus-based model for developing, supporting, and promoting existing courses and programs at each individual campus with some campus and system-funded shared services provided centrally. In 2014, SUNY launched "Open SUNY," a system-level strategy for leveraging online learning to increase enrollments and improve completion rates. Today SUNY offers more than 800 online-enabled degree and certificate programs with approximately 22,000 course sections from its 64 campuses. In the 2017-2018 academic year, the SUNY system enrolled approximately 42% of its 431,855 students – approximately 183,000 – in one or more online classes annually. While impressive, only about 26,000 students, or 6%, are learning exclusively online through SUNY.

In contrast, other state systems and individual universities are investing in this area and surpassing SUNY in exclusively online students. This generates hundreds of millions of dollars in revenue for reinvestment into their programs. For example:

- Southern New Hampshire University, with a total on-campus enrollment of 6,405 students, has over 100,000 exclusively online students generating well over \$1 billion annually for the university.
- The California Community College system received \$100 million in California's 2018 state budget to create an entirely online community college, which will receive \$20 million annually from the state for 7 years.
- The University of Massachusetts system with a total enrollment of 74,572 undergraduate and graduate enrollment made \$104 million in 2017 from approximately 30,000 exclusively online students. The UMass system projects revenue growing to \$400 million, with most of the growth coming from out-of-state students.

Recent IPEDs reports show that national online education enrollment increased for the fourteenth year in a row, showing an accelerated growth rate. Meanwhile, NYS's online enrollments have grown more slowly than its competitors, as seen through the data points cited in the below illustration.



These numbers show that, despite its size, reputation, diversity, and high caliber programming, New York State is trailing other states when it comes to serving online learners. Only two New York institutions enroll more than 5,000 exclusively online students (Excelsior's 34,000 and Empire State's 5,500). Therefore, to compete nationally and regionally in the exclusively online education space, SUNY must change its approach and leverage the full scale of the system's educational assets. A centralized SUNY initiative can increase exclusive online enrollment through increasing master's degree level programs; developing new programs/degrees/certificates in areas currently missing from existing offerings; and facilitating inter-campus collaborations to create unique programs that capitalize on SUNY expertise across the system.

SUNY's campus-based operating model presents challenges for SUNY to achieve its growth goals and be successful in this 21st century online market. As public institutions, SUNY campuses must adhere to Middle States accreditation standards and NYS finance and State Education Department operating regulations and requirements. These add time constraints in an electronic

era where first-to-market or first-to-serve will matriculate students over its competition. Challenges for SUNY in this market space also include:

- Decentralized nature of the SUNY system and operations
- Competition among campuses
- Ambiguous lines of authority between campus and System
- Disjointed data systems and technology solutions (student information systems, learning management systems, ERP, etc.)
- Inconsistency across system such as processes, practices, systems, support services, etc.
 - Variance in student facing processes for recruitment, admissions, enrollment, advising, and technical support
 - Variance in faculty support services and course development models
 - Lack of real time data collection and data standardization across the system
 - Faculty workload model vary across SUNY system
- Resource limitations and lack of financial incentives for academic units to increase enrollments for exclusively online students
- Historically limited cross-campus collaborations in academic programming and reliance on campus silo-style operations
- Student engagement and service models that are designed for traditional students that do not extend well to post-traditional or online learners
- Time consuming program approval processes
- Time consuming and complicated procurement processes
- Innovative pedagogical strategies to move students from transactional to transformative learning

Future State: SUNY and Online Education

How Will SUNY Seize the Online Education Opportunity?

The Request for Information and Working Group Discussions:

In July 2018 SUNY issued a Request for Information (RFI) seeking insight, experience, examples and information from potential partners and services available to help SUNY build a successful, system-wide model and approach to attracting, educating, supporting and retaining exclusively online students. SUNY received 25 responses from a variety of vendors including consultants, technology platform providers, online program managers (OPMs), and other service providers. Thirteen respondents were invited to meet synchronously (face-to-face and virtually) with the SUNY Online Working Group. These discussions enabled SUNY to get clarification from each vendor on the technology needs, roles and responsibilities needed to accomplish all aspects of this vision, potential challenges facing SUNY, and recommendations for SUNY to be successful.

The vendor recommendations can be summarized into three different approaches through which SUNY could organize and structure support for online learning in order to attract and enroll many more exclusively online students.

1. Outsource to an OPM: This approach would be based on outsourcing much (or all) of the marketing, program development, and program operations to a vendor or Online Program Manager (OPM). In this approach, the OPM would provide significant support for market analysis, new program development in curricular areas where SUNY has gaps, and significant portions of the program support to faculty and students. An OPM would likely focus on a small number of online programs in markets where there is significant need and expertise amongst SUNY faculty/academic units. SUNY could purchase as much or all of the development, services, and delivery of our online programs as desired. Outsourcing to an OPM would enable a comprehensive, integrated technology environment. However, this approach could include an upfront investment by the OPM to enable scaling rapidly but would also include a revenue sharing/distribution model; possibly generate IP issues; raise faculty governance issues; and create quality assurance questions. Therefore, the most invasive OPM models would be challenging (and undesirable) for SUNY to implement.
2. Establish a unit within SUNY: This approach would establish a SUNY administrative unit to provide for a range of centrally provided support and services similar to that which could be provided by an OPM. In this scenario, SUNY could build on the existing shared services provided by Open SUNY and other System Administration functions (marketing, recruitment, institutional research, etc.) Additional marketing, recruitment, and student/faculty support services would need to be built centrally along with a comprehensive, integrated technology environment. In this scenario, investment by SUNY and/or NYS, and/or partners would be required to scale up additional supports and technology solutions. A financial model for sharing revenue with participating programs and campuses would have to be established.
3. Identify a Campus: This approach would involve identifying an existing campus or creating a new campus to lead SUNY's effort. The campus provider would operate a set of centrally provided functions and support services to other SUNY campuses offering targeted online programs. Initial investment would also be required for this scenario and like the other options, a new financial model for sharing revenue with participating campuses would have to be established.

Based on the RFI output and multiple meetings/discussions, the Online Working Group created 3 hypothetical models for a new SUNY Online. In an all day workshop, the Working Group applied a cost-benefit analysis to each possible model. The Working Group recognizes the challenges of

each of the models above; governance, revenue sharing, quality assurance and responsiveness are all great concerns. Therefore, the SUNY Online Working Group proposes a **hybrid model** for going forward. In this model, SUNY System Administration will *establish an administrative unit to create and manage a coordinated online learning environment that provides and supports student, faculty and campus services that are common to all campuses as well as engage OPMs as needed* to provide vital consultations and services as identified. This approach takes advantage of both the tremendous assets and investments SUNY has made in online learning and commercial expertise to enable rapid scaling in those areas where we lack capability or capacity. Through this blended approach, SUNY will provide high quality online education opportunities for New York State's students as well as its current and future workforce while growing enrollments and generating significant revenue to support SUNY programs.

This approach combines components of two of the three scenarios considered above with some functions being outsourced to one or more vendors, some functions being established or expanded within SUNY System Administration, and other functions being provided by individual campuses. Functions where we need outside expertise or capacity would be outsourced, likely to a combination of consultants and OPMs. Functions where we have existing internal capability, e.g., set strategy at the System level, or where we need to ensure consistency for a seamless student experience will be provided by SUNY System Administration in conjunction with SUNY's Shared Services. This approach will require initial investments at both the System and campus level as well as a revenue sharing model that incentivizes growth and provides resources to scale support services and maintain quality as enrollments increase.

It is important to note that the existing individual campuses' online offerings will continue to function as they current do now. This initiative will not replace nor take over those efforts. This initiative will provide funding, support, and infrastructure for new strategic programs that are distinctive (not duplicative of existing offerings) curricula that we believe can be offered at scale (1,000 or more students) as well as those that can serve strategic areas for NYS employers. System Administration will *partner* with campus departments interested in offering degree programs at scale. Students will enroll in these programs at the home campus offering the academic program. Likewise, degrees will continue to be granted by the campus providers. System Administration will also assist cross-campus collaborations to establish new programs optimizing expertise across the system.

In this hybrid model of operation, specific functions for SUNY Online will be conducted as outlined below.

Outside Partners (and/or consultations):

- Conduct market research and develop market strategy, including assistance in identifying potential B2B partnerships
- Develop brand strategy, development and positioning

- Advise on necessary business process re-engineering to optimize the student experience
- Advise on technology strategy and integration, as needed, for technology systems, such as Client Relationship Management technologies, Learning Management systems, application development, student support tools, cloud support, digital content, etc.
- Develop and potentially implement marketing / recruitment strategy for brand positioning, digital and social media, print media, etc., including growth in out-of-state, military, international and corporate markets
- Advise on financial models – both from System-to-campus and at an individual campus level – to incent growth and scaling of targeted programs where there is significant market demand

SUNY System Administration:

- Procure, oversee and manage all outside consultants / OPMs
- Establish business and educational strategy
- Establish an Online Strategy and Planning Team focused on prioritizing programming, degree and credential development, business development, policy direction, alignment with existing programs and activities at SUNY, e.g., existing online activities, high needs programs, inclusion / diversity efforts, etc.
- Provide funding for modernization efforts
- Develop a front-end portal (i.e., the “SUNY Online Express”) and run the back-end systems for the SUNY Online initiative including all necessary integrations
- Serve as the hub for inquiry management/admission processing, inquiry routing and management, enrollment application and documentation collection, application screening and applying selection criteria and admission standards in collaboration with campuses
- Establish a Student Support Services Division that will provide:
 - Student retention and support mechanisms
 - Student placement support services
 - Student Help Desk
 - Initial/additional academic staffing required for student support services and academic Teaching Assistants / Digital Coaches
 - Academic advising (shared with campuses)
- Coordinate and develop mechanisms to provide “teaching and learning” support for programs that will:
 - Develop SUNY Online course template (look and feel for course and materials)
 - Support for course development and instructional design
 - Faculty development for innovation
 - Faculty and staff training
 - Pedagogical research
- Coordinate and develop B2B/partnerships in collaboration with campuses, SUNY Foundation and other System units
- Responsible for quality assurance and operational excellence
- Establish and conduct advanced analytics which includes data and process standardization across the system

- Establish inventory of existing SUNY courses online and optimizes courses offerings for competitive purposes
- Coordinate with Academic Affairs to get new programs approved (system and SED)
- Seek legal and compliance advice as required; provides guidance to campuses
- Coordinate with System HR to establish contract templates for faculty hiring, for intercampus faculty sharing, etc.
- Develop methodology for sector specific faculty workload models
- Develop revenue sharing models – both from System to campus and at the campus level to incentivize growth
- Identify the curricula gaps in the System’s overall online offerings and facilitate academic partnerships to meet the needs of students and employers
- Identify and expand online platform to serve other educational needs in the SUNY System such as Continuing Education, high school extension courses, etc.
- Create and operate an Innovation Hub to study, test and develop next generation education-related solutions
- Coordinate with campuses to supplement/complement academic student support

SUNY Campus - Degree programs:

- Provide admissions standards for programs
- Develop curricula and program submission for approval by campus, System, SED
- Provide student financial aid
- Provide academic support (disability services, tutoring services, library, student relations, alumni relations, clubs and honor societies, career services, etc.)
- Provide accreditation and other regulatory requirements
- Coordinate within campus (Faculty, Chairs, Deans, Directors) for course offering expansion and faculty recruitment needs
- Coordinate with campus (Faculty, Chairs, Deans, Directors) and with SUNY Online for academic support service needs
- Market programs using brand awareness, digital and social media and public relations and external communications,
- Coordinate with Academic Affairs at campuses and SUNY System Administration to provide quality assurance
- Responsible for student onboarding and orientation program development □ Offer course /degree programs and issue degrees

Regardless of the model chosen, the Online Working Group recommends SUNY commit to the following characteristics in SUNY’s development of the new Online model:

- Accessible
- Inclusive
- Affordable
- Agile
- Engaged

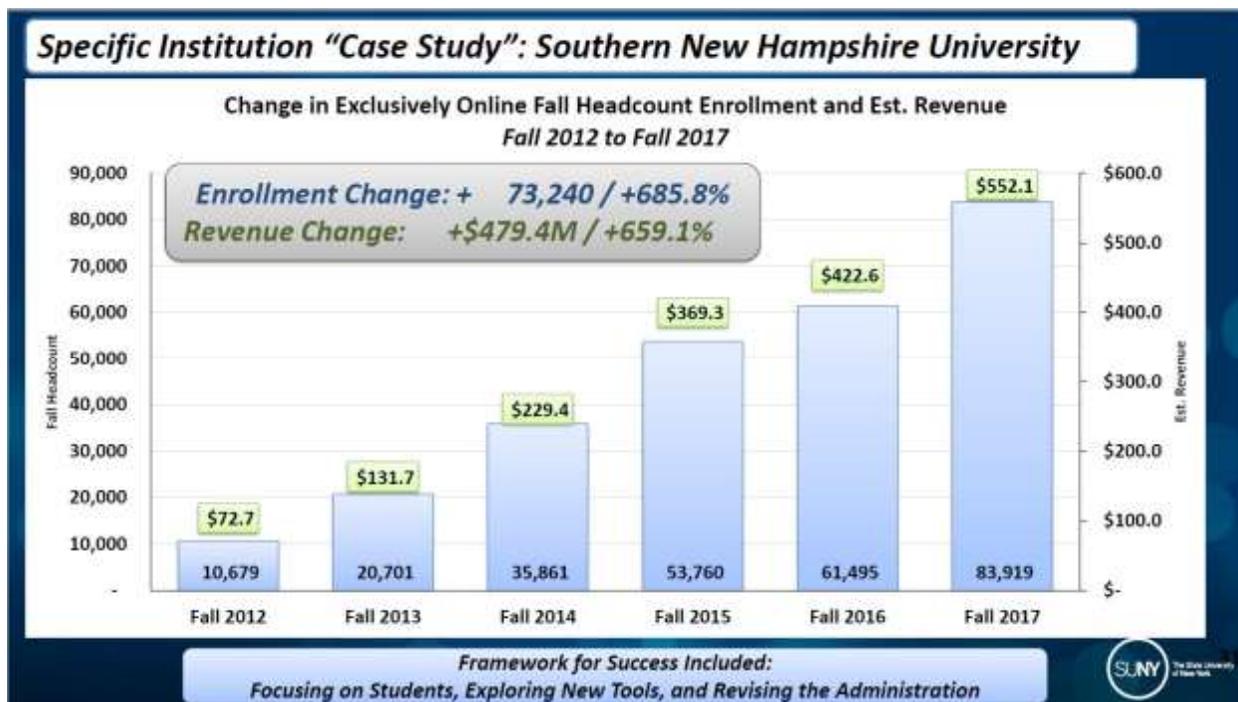
- Connected
- Student focused
- Responsive to NYS needs relevant industry
- Committed to excellence
- Innovative and entrepreneurial
- Individualized education
- Collaborative
- Digital and physical integration
 - Platform independent

- Frictionless student experience
- Seamless digital environment
- Proactive
- Sustainable
- Optimized resource utilization
- Self-initiated learning
- Secure
- Collaborative
- Transparent
- Dynamic
- Global
- Sustainable
- Interactive
- Communicative

Implementing the SUNY Proposal: Initial Financing

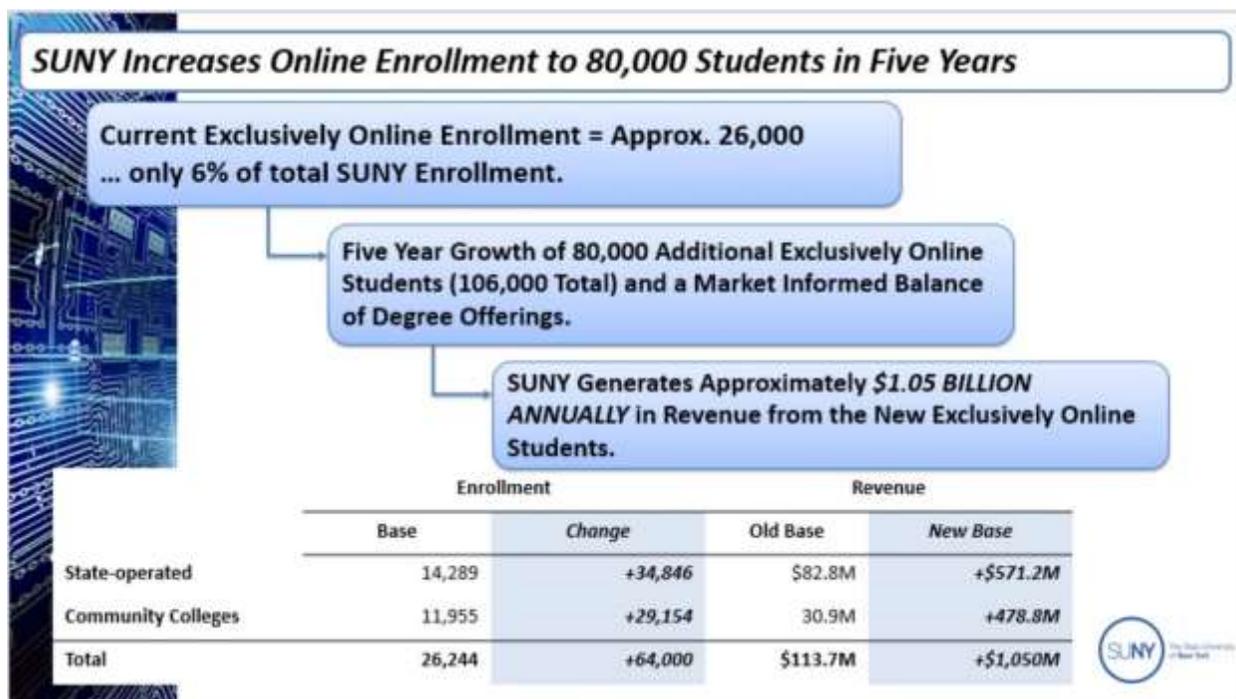
Currently, only 26,000 students are enrolled in SUNY for exclusively online programs. To move the needle, we will need to look at new markets for enrollment. This includes establishing partnerships with NYS companies to identify their workforce needs and training requirements, e.g., SEFCU, National Grid, Amazon, etc. SUNY can take advantage of the high number of Fortune 500 companies located in NYS to serve their workforce training needs. We will also target organizations such as Guild Enterprises that work with large corporations to fulfill their clients’ educational benefits, e.g., Walmart, Disney. We also see other opportunities such as: to create a relationship with the US Department of Defense; and market to NYS employees training and international markets. Given SUNY’s strong position in developing micro-credentials, we should consider leveraging several very successful MOOCs into certificate programs. We are hopeful that with coordinated, centralized improvements, we can hedge the flow of NYS residents going out-of-state for their online educational needs.

As illustrated on the following slide, Southern New Hampshire University (SNHU) has seen significant growth and revenues over the last five years through the exclusive online learners.



The SUNY Online Working Group is aiming to move the needle, but not at the level as illustrated by SNHU. If SUNY can increase its exclusive online enrollment to match the median enrollment of the top ten in the US, we would increase the numbers of students by 38.5K. This will significantly change the System and campuses’ ability provide the necessary student and

academic support services needed and to fund and operate more online programs. The financial impact of this increase is shown below.



Given the lack of technology solution discussions by the RFI respondents, SUNY System Administration initiated discussions with technology providers to understand the market and the current state of large-scale systems. Discussions with technology providers such as Amazon, Google, Microsoft, Ellucian, SAP, etc. will inform assessment of our current technology.

To implement this initiative, SUNY will need to identify initial investments and start-up funding for ongoing expenses until which time the program can be self-sustaining. Attached is a 5-year estimate of expenses and revenues. Below are budget estimates for establishing the proposed model with initial and recurring expenses.

SUNY Online				SUNY Online	
Estimated Annual Operations Revenue and Expenses				Estimates of Start-up Costs (up-to 24 months)	
As of 02/04/19				As of 02/04/19	
Projected Revenue	With 80k New Students		With 400k New Students		High Estimate
	Low End	High End	Low End	High End	
Gross Revenue: High		\$ 1,050,000,000			\$ 1,000,000
Gross Revenue: Low	\$ 750,000,000		\$ 3,750,000,000		\$ 1,000,000
Projected Expenses					
Instructional & Student Advisory	\$ 300,000,000	\$ 420,000,000	\$ 1,500,000,000	\$ 2,100,000,000	\$ 3,300,000
Marketing	\$ 135,000,000	\$ 189,000,000	\$ 675,000,000	\$ 945,000,000	\$ 3,300,000
Admissions General Administration	\$ 52,500,000	\$ 73,500,000	\$ 262,500,000	\$ 367,500,000	\$ 300,000
Other	\$ 75,000,000	\$ 105,000,000	\$ 375,000,000	\$ 525,000,000	\$ 400,000
Initial Investment	\$ 15,000,000	\$ 21,000,000	\$ 75,000,000	\$ 105,000,000	\$ 60,150,000
High Estimate	\$ 100,200,000	\$ 100,200,000	\$ 100,200,000	\$ 100,200,000	\$ 100,200,000
Annual Operating Income	\$ 72,300,000	\$ 141,300,000	\$ 762,300,000	\$ 1,107,300,000	

* Low end assumes 25 FTE at an average of \$80K salary with fringe of 65%. High end assumes 75 FTE at an average \$100k salary with fringe of 65%.

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***Assumptions: Based on averages for several online institutions from 2014-2016, as well as input from RFI respondents. The low revenue formula slight growth in average revenue per student, based on tuition, fees, trainings, certificates, seminars, digital library resources and other services. The high revenue formula assumes a more rapid growth. The projections in the first chart assume that the initial investment will be \$100,200,000, which is spent during the initial two years.

SUNY Online											
Estimated 5 Year Operations Revenue and Expenses											
As of 02/04/19											
	2019-20	2020-21	2021-22	2022-23	2023-24	Projected Low	Projected High	Projected Low	Projected High	Projected Low	Projected High
Projected Net Revenue											
Projected High	\$ 11,000,000	\$ 68,250,000	\$ 247,500,000	\$ 537,625,000	\$ 1,050,000,000						
Projected Low	\$ 10,000,000	\$ 57,750,000	\$ 198,000,000	\$ 411,125,000	\$ 750,000,000						
			*Excludes current 26k students. Calculated on 2k new students	*Excludes current 26k students. Calculated on 30k new students	*Excludes current 26k students. Calculated on 55k new students						*Excludes current 26k students. Calculated on 80k new students
Projected Expenses											
Instructional & Student Advisory	\$ 4,000,000	\$ 23,100,000	\$ 79,200,000	\$ 99,000,000	\$ 164,450,000	\$ 300,000,000	\$ 420,000,000				
Marketing	\$ 1,800,000	\$ 10,395,000	\$ 35,640,000	\$ 44,550,000	\$ 74,002,500	\$ 135,000,000	\$ 189,000,000				
Admissions	\$ 700,000	\$ 4,042,500	\$ 13,860,000	\$ 17,325,000	\$ 28,778,750	\$ 52,500,000	\$ 73,500,000				
General Administration	\$ 1,000,000	\$ 5,775,000	\$ 19,800,000	\$ 24,750,000	\$ 41,112,500	\$ 75,000,000	\$ 105,000,000				
Other	\$ 200,000	\$ 1,155,000	\$ 3,960,000	\$ 4,950,000	\$ 8,222,500	\$ 15,000,000	\$ 21,000,000				
Operating Income	\$ 2,300,000	\$ 13,282,500	\$ 45,540,000	\$ 56,925,000	\$ 94,558,750	\$ 172,500,000	\$ 241,500,000				
Initial Investment	\$ 40,000,000	\$ 60,200,000									
ROI						228%	339%				
Cumulative Net	\$ (37,700,000)	\$ (84,617,500)	\$ (39,077,500)	\$ (25,047,500)	\$ 55,481,250	\$ 227,981,250	\$ 340,106,250				
<p>***Assumptions: Based on averages for several online institutions from 2014-2016, as well as input from RFI respondents. The low revenue formula slight growth in average revenue per student, based on tuition, fees, trainings, certificates, seminars, digital library resources and other services. The high revenue formula assumes a more rapid growth. This projection assumes that the initial investment will be \$100,200,000, which is spent during the initial two years.</p>											

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SUNY Online Working Committee

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