UC San Diego

EVOLUTION OF EXTENSION DISCUSSION GROUP FINDINGS AND RECOMMENDATIONS

Table of Contents

Discussion Group Charge and Approach

UC San Diego Extension (Extension) has represented a catalyst for economic, intellectual, and cultural growth since opening its doors more than 50 years ago. Extension's core offerings have evolved to fulfill a range of needs, including over 1,200 continuing education and professional development courses and certificate programs; community initiatives that support economic and social development; and a wide array of public-service lectures, forums, and special events delivered both on and off campus and through print, internet, radio, and television.

The Evolution of Extension Discussion Group was charged in Winter 2020 by the Executive Vice Chancellor (EVC) and Dean of Extension as a key next step from the Educational Innovation Checkpoint discussions throughout Fall 2019[1]. The overarching goal is to make Extension a more integral part of Academic Affairs and the campus, while preserving crucial elements of its portfolio that are unique within the university system and particularly valuable to the broader community.

The continuing evolution of Extension and its integration with other campus units are part of strategic planning discussions about advancing progress toward common goals at UC San Diego. There is a growing need for collaboration in institutional efforts to find solutions to complex challenges, enhance the student experience, enrich the campus community, and coordinate activities to maximize collective impact. With work well underway to unify the landscape of Extension and campus information systems, the **charge was to imagine future directions for intellectual and operational collaboration between Extension and the campus**. The group was not tasked with developing a strategic plan; that is work that will be led by the next Dean of Extension, informed by this report. Nor was this exercise intended as an organizational or operational review; its focus was the campus-integrating aspects of Extension.

Chaired by the Dean of the Rady School of Management, the discussion group included members of the Extension leadership team, leaders of Academic Affairs units with potential for a strong partnership with Extension, and faculty members deeply knowledgeable about Extension. Conversations were invaluably enriched by contributions also from the Provost and Executive Vice President for Academic Affairs, University California (UC), and the Vice Provost of Continuum College at the University of Washington (UW) (*Appendix 1*). In addition to a thorough review of documentation describing the programs, policies, and practices of Extension, the group considered the findings of an informal exercise initiated by the EVC and Dean of Extension in Spring 2019 to begin to assess the opportunities for closer collaboration. The group then

---

[1] Convened by the EVC, "Checkpoint" comprised a series of discussions across the Academic Senate and Deans, and leaders from the Health Sciences, Marine Sciences, and General Campus, including Extension. The goal was to affirm institutional commitment to continued investment and advancement in what is now termed Educational Innovation, and to chart a clear path forward.

consulted broadly, seeking input from UC San Diego faculty and staff colleagues across divisions and offices, and from leaders of several peer extension organizations across the country (*Appendix 2*). The full group met throughout 2020, supported by three sub-groups formed to respectively conduct the peer review, assess opportunities and challenges in intellectual collaboration, and consider the scope and need for different approaches to operational collaboration and the budget model.

Introduction to Extension

Extension offers an exceptional compendium of courses across multiple disciplines that span the "60-year curriculum", serving the lifelong learning and skill development or personal enrichment needs of over 57,000 learners or 180,000 enrollees. Some of these are matriculated UC San Diego students, but the vast majority are non-matriculated learners, from high schoolers to alumni to working practitioners to companies and community organizations to retired individuals. Extension also provides operational and administrative support for several campus programs, including Master of Advanced Studies (MAS) degrees, as well as market intelligence and marketing services to several academic units. Beyond instruction, Extension has a strong track record of partnering with departments and faculty in community-anchored research and academic outreach, activities that further both faculty passions and UC San Diego's public mission. The case studies distributed throughout this report demonstrate the breadth and impact of these various partnerships[2].

> **UC SAN DIEGO'S FIRST ONLINE MASTER'S DEGREE**
>
> The creation of a new program of study requires time and resources to ensure success, capacity that may be not available within an academic unit. For decades, Extension has provided management across the life cycle of self-supporting master's programs and certificates, from market analysis to creation of advisory boards to student marketing and recruitment to support for program delivery and renewal. Understanding the value of these services, the School of Medicine and School of Pharmacy sought Extension's assistance in the creation of a MS in Drug Development and Product Management. From program inception to design, Extension worked in collaboration with the Schools, also providing upfront funding that was recovered with the recruitment of three student cohorts. Promoted by Extension, the program became increasingly selective, attracting both domestic and international applicants. Extension is now managing the approvals process to convert the program to an online format. **CONTACT: Williams Ettouati**, Skaggs School of Pharmacy and Pharmaceutical Sciences

The history of Extension sheds light on its governance. The founders of the UC System were determined that the resources of the University be available to all. Accordingly, public service is integral to Extension, with Extension serving as an important nexus between campus and community. This is especially true at UC San Diego Extension, with its long list of public programs and its mission as voice for the University through UCTV. To avoid interference with the ideal of broader community service, UC regulations and procedures intended that the local Academic Senates exert little control over Extension, a vision that has been maintained and operationalized over time. As administrative control over Extension has been devolved to the local campuses, academic controls have remained at the level of the Systemwide Academic Senate of the University of California. UC San Diego has had a full-time Dean of Extension since its founding in 1960. All Extension courses and curricula at the campus were at one point reviewed by an academic department through various mechanisms, but this authority has largely been delegated to the Dean of Extension.

---

[2] Extension contacts for all are Edward Abeyta or Hugo Villar. The campus or community contact is noted at the end of each study.

LIBRARY NExT: PARTNERSHIP WITH THE PUBLIC LIBRARY

As part of the Chancellor's strategic plan to connect the institution to the greater San Diego area, Extension has partnered with the San Diego Public Library to provide events, lectures, and courses at over 26 library locations, at no cost to community members or the campus. Library NExT was created in collaboration with Extension-based Sally Ride Science, which runs offerings to inspire young people in STEM, in coordination with the Scripps Institution of Oceanography (SIO) and the San Diego Supercomputer Center. Jacobs School of Engineering and Rady School of Management also support Library NExT. Workshop topics include Messy Science, Introduction to Virtual Reality, and Introduction to Python, and the program also provides test preparation and college counseling for students and their families, with a focus on underserved communities. Initially started as a pilot program at six libraries in 2017, Library NExT has plans to be offered at all City of San Diego library locations. **CONTACT: Misty Jones**, San Diego Libraries

All courses and certificate programs offered by UC San Diego Extension are accordingly developed and administered with Extension policy and the regulations of the UC Systemwide Academic Senate. In addition, Extension at UC San Diego uses a thorough process to ensure the quality of instruction across all courses, which involves faculty and department chairs or their designees in the academic unit most closely aligned with the topic. While most Extension courses are not credit-bearing, those twenty or so X and XSD courses that yield credit towards a degree are governed by the UC San Diego Academic Senate.[3] Extension – like all other UC San Diego schools, colleges, and departments – is accredited by the Western Association of Schools and Colleges (WASC) through the University.

As a self-supporting entity, Extension is responsible for funding and sustaining all aspects of its operations and facilities, from program development to payroll to rent for off-campus facilities to utilities. Since the 1980s, Extension programs have operated without any state or campus funds, including for the Dean's salary.

Some of these costs are paid through tuition, fees, and contracts, but many are financed by Extension's network of donors who value the work and trust the organization. Beyond supporting its own activities, Extension has transferred over $8M to the campus over the last three fiscal years. Moreover, under Extension's leadership, a new downtown center for UC San Diego is in its final stage of construction. This state-of-the-art building will be a platform for greater access to and visibility for the campus, as well as for strategic community collaborations, providing space for educational experiences and cultural activities that inspire lifelong learning.

The announcement of Mary Walshok's retirement as Dean of Extension, after forty years in the position, creates a natural opportunity for reflection and renewal. Finding ways to integrate Extension and the campus in new ways, while preserving Extension's proven ability to respond to stakeholder needs, will be an underpinning goal of the transition.

---

[3] The relevant quality assurance policies and practices, both those that are mandated and those that have been developed by Extension, are outlined in two companion UC San Diego Extension documents: "*Quality Assurance Methods for Course Instruction*" and "*Quality Assurance Methods for Certificate Programs*".

Extension Strengths and Challenges

UC San Diego Extension has a mission to serve the community, connecting the evolving knowledge needs of society with the expertise and resources of the campus. Shaped by this purpose, and propelled by dedicated and visionary leadership, Extension has developed highly complementary strengths to campus. Agility and entrepreneurialism have been pivotal to its success, as has its extensive network of relationships. Peer units at other universities commend UC San Diego Extension for its strong industry connections and community outreach. Extension also has unique assets that contribute to its reach and impact. Its Center for Research and Evaluation supports market research and program evaluation across the all UC campuses and community. UCTV and UCSD-TV, both operated by Extension, broadcast educational and enrichment programming to over 4 million homes nationwide, powerfully extending the reach and impact of UC San Diego research and education. Extension's commitment to lifelong learning and to underserved communities are defining features of much of its work, reinforcing strategic priorities of UC San Diego. Notably, no sister campus has anything remotely close in scope or reach to Extension's K–12 programming for students, teachers, and parents alike. Extension is also highly innovative in educational financing, developing an Income Share Agreement that is managed through the San Diego Workforce Partnership. Unique in the UC system, this fund fronts the cost of a program, which the student pays back over time after securing employment. Discussions with some of Extension's external partners confirmed that these strengths are widely recognized.

RADY SCHOOL AND EXTENSION PARTNERSHIP

University business schools ordinarily compete with their campus extension units in professional education. However, in a partnership between the Rady School of Management and UC San Diego Extension established in 2020, the two entities will coordinate their professional education activities, creating more efficient operations and a unified front for learners. The partnership will offer programs for all levels of practitioner: from frontline employees to C-suite leaders. Rady and Extension will serve different segments of this market, realigning and streamlining their respective offerings accordingly. Both units bring valuable assets to the venture and resultant renewed and new programs and courses. Rady provides world-class research faculty and will leverage Extension's strong operational abilities, marketing experience, and deep corporate relationships. **CONTACT: Lisa Ordóñez**, Rady School of Management

As a bridge between campus and community, Extension plays a key role in both training students and employees for the demands of local industry and informing academic endeavors across the campus. For example, Extension offered courses in the 1990s and early 2000s in bioinformatics, a nascent field at the time, with large enrollments meeting the needs of local industries while campus academic programs were being implemented. Fields such as data science, communications, healthcare, and defense may offer similar potential going forward. Extension is broadly viewed as a literal extension of UC San Diego: its expertise, its resources, and its name.

In many ways, UC San Diego Extension is a model of excellence in its current paradigm, with its initiative and responsiveness predicated on its autonomy. Yet multiple successful collaborations,

too many to compile in an exhaustive list, demonstrate that there are ways to combine its capabilities with those of campus to yield more than the sum of the parts. CONNECT, today a standalone organization, had its origins in a joint effort between campus and Extension. CREATE, together with some self-supporting master's programs and courses, were transferred to campus after a period of incubation and refinement at Extension. Other partnerships are ongoing, from concurrent enrollment to the Post-Bacc Pre-Med and Pre-Health programs to the Sally Ride Science Junior Academy to Process Palooza. Many of these ventures are organic and relationship based; a core goal of this exercise is to establish a more systemic framework for collaboration.

The primary challenge is a prevailing lack of campus awareness and understanding of Extension capabilities and contributions. This issue is not exclusive to Extension, also pervading other campus units that could be better leveraged by the institution. Relatedly, while faculty who have worked with Extension are overwhelmingly positive about the experience, there is a commonly held belief that Extension courses are of poor quality compared to those on campus and academic appointment models in Extension, somehow inferior. These perceptions represent an apparent contradiction as courses are delivered and appointments made with the consent of the academic unit with expertise in the relevant area. But they are no less real as a result. Moreover, Extension learners are not counted as UC San Diego alumni.

Beyond a lack of faculty engagement, there is limited Extension participation in institutional governance, and few formal opportunities for interaction. While the endeavors of Extension are, by design, not overseen by the UC San Diego Academic Senate, the relationship between the two is an important one. However, the connections are not strong currently. For example, the Academic Senate Committee on Extended Studies and Public Service should provide advice to the Chancellor and Dean of Extension on functional, educational, budgetary, and personnel policies of Extension, but the Committee does not in practice fulfill these roles. The general view is that the Committee is ineffective, not least because of the lack of Extension representation; in some years, the Committee has been virtually inactive. Academic policy reinforces the divide between Extension and the academy. UC does not enable Extension units to offer academic degrees and there are Systemwide limits on the transferability of Extension course work for major campus credit. In areas where both Extension and campus have educational offerings, such as certificates and summer programs, there are no coordinating mechanisms.

There is a strong sense that financial models do not create sufficient incentive for collaboration, with faculty members and academic units citing the lack of explicit upfront funding and risk sharing as key deterrents to joint innovation and program development. Operational and organizational inconsistencies further impede collaboration. Campus systems, notably in student information and external relationship management, are neither well established nor linked. There is a disconnect between the pace of program development and renewal in Extension as a self-supporting unit relative to the pace of activity in academic units. Moreover, there are

different compensation levels between Extension and campus, creating inequities and retention challenges in Extension.

Context and Connections with Educational Innovation

The work of this discussion group was conducted at an important inflection point. Many underlying trends in post-secondary education have been accelerated by the COVID-19 pandemic, including a rapid expansion in online learning and in modular and skills-based offerings. Both create benefits for learners in terms of flexibility and access, and both create opportunities and challenges for institutions in adapting their programs, modalities, and learning infrastructure. The demand for domestic, public continuing education – the traditional domain of extension units – is softening with price pressure from online offerings. Moreover, state disinvestment and the global public health crisis are exacerbating fiscal challenges in higher education. UC San Diego's work in Educational Innovation (EI) has heightened campus attention to these various dynamics and the resultant priorities.

With the establishment of the position of Associate Vice Chancellor, Educational Innovation (AVC-EI), in 2020, UC San Diego affirmed its commitment to developing new academic programs and infrastructure in support of strategic campus priorities. These include, amongst others, diversity and access, student experience, and organizational sustainability. This decision was informed by extensive analysis and discussion during the preceding three years, initially under the auspices of the Strategic Academic Program Development (SAPD) exercise. That work was initiated in response to the complexities facing all public universities: evolving learner needs, technological advances enabling innovation, and growing financial pressures.

Under the leadership of the AVC-EI, the EVC Office will take an active role in facilitating and fast-tracking program development and renewal, providing guidance to faculty and coordinating access to available resources. Recognizing the importance of financial incentives, the Office will oversee and manage an investment pool to channel seed institutional funding to those opportunities that will most strongly help advance the strategic aims of both academic units and the institution. This could be in the form of a loan to help a unit cover significant costs, such as faculty lines, in the initiation of a self-supporting program. Matching in-kind resources, such as instructional designer expertise and capacity, could also be allocated.

> **RESEARCH SCHOLARS AT UC SAN DIEGO EXTENSION**
>
> A review of the summer offerings of UC San Diego and peer institutions as part of the Strategic Academic Program Development (SAPD) initiative suggested that UC San Diego was underrepresented in programs targeting high-achieving students. Pre-college research experiences enhance the research self-efficacy of students, which demonstrably leads to interest and confidence in conducting research at college. These insights inspired the establishment of the Research Scholars program, through which students are selected to participate in an intensive summer experience that leverages the research excellence for which UC San Diego is known. In collaboration with the School of Engineering, the School of Medicine, and the Boz Institute, Extension provides students with unparalleled opportunities, from developing hypotheses to conducting fieldwork to communicating their findings. These crucial research skills make them more competitive candidates for college admissions and internship programs. **CONTACT: Goran Bozinovic**, Biological Sciences

Extension is an integral player in EI and a differentiating strength for UC San Diego in this context. The operating model of Extension is designed for agility, innovation, and external engagement, and the team has relevant experience and expertise in many facets of educational innovation. The other key campus partner in EI is the Teaching and Learning Commons (Commons), which promotes and enables excellence through comprehensive services for students and educators. Working together, the EVC Office, the Commons, and Extension create the foundation for UC San Diego's efforts to advance educational innovation.

Insights from Peer Extension Organizations

Our exploration of peer perspectives confirmed the critical importance of balance between collaboration and agility. The review highlighted a growing institutional preference for extension units to be "elevated and integrated" through a closer partnership with campus, but also the need to preserve some independence.

Like at UC San Diego Extension, continuing education is the cornerstone of the operations of most peer extension units. A scan of their respective offerings confirms that there are clear connections with regional industry given the role of such courses and programs in supporting practitioner skill development, as well as the partnership opportunities. The same is true at UC San Diego. One of the key insights from the peer review, in the domain of traditional continuing education, was that Extension at UC San Diego works in a relatively autonomous way, with fewer formal campus connections than at other institutions. *Appendix 3* maps various universities along a conceptual spectrum of integration in their continuing education operating model. Harvard is at one end, with Harvard Extension functioning as a separate division, and Stanford at the other, where continuing education is almost entirely embedded in academic units.

Consistent with this greater level of connection, most peers were able to articulate one or two major programming foci beyond continuing education. Their experience suggests that extension units are often given a formal mandate from campus leadership to work with academic partners to lead significant institutional growth efforts in priority, non-traditional programming areas, with incentives aligned accordingly. In part, this is like the experience at UC San Diego, with Extension at different times delegated responsibility for establishing a television station (UCSD-TV), developing cost-free pipeline programs for underrepresented and low-income students, and opening off-campus educational centers. And the first self-supporting Master of Advanced Studies programs in the UC system were initiated by UC San Diego Extension at the request of, and in partnership with, the Dean of Engineering and the Dean of the Medical School. But Extension at UC San Diego has also in many ways charted its own path, propelled by the entrepreneurialism of its leaders. This is reflected not only in the extraordinary breadth of its programs and courses, but also in its

---

JACOBS SCHOOL AND EXTENSION PARTNERSHIP

21st-century employers need a talent pool with the problem-solving skills essential for success in technical and engineering work environments. Recognizing this requirement, the Jacobs School and UC San Diego Extension identified a way to together help expand the region's workforce in these areas. Leveraging its external relationships, Extension helped both facilitate connections across the school sector and secure $1.6 million to fund this initiative. Underpinned by the domain expertise of the Jacobs School and Extension's experience in K–12 teaching and bridging, the two organizations will together develop and deliver an immersive course in problem-solving foundations for high school students and first-year undergraduates. This will also create professional development opportunities for secondary school teachers in helping build a pipeline of ready-to-learn, ready-to-work graduates. **CONTACT: Al Pisano**, Jacobs School of Engineering

relative traction and success in community-based research and public outreach. Peers, including Harvard and UC Berkeley, acknowledge that UC San Diego Extension has far stronger relationships and greater impact than they do in their respective communities, with K–12 programming cited as a remarkable contribution.

In some cases, these joint ventures at other universities include credit-bearing offerings. For example, Continuum College at the University of Washington (UW) provides academic and operational support for over 110 self-sustaining graduate degrees across campus. Georgia Tech Professional Education was asked to lead the university's ground-breaking expansion into online Master of Science degrees and now delivers centralized program management for degrees serving 30,000 students. In other cases, the collaborations include mandated support for academic units in their programming endeavors. UC Berkeley Extension and UC Irvine Extension were tasked respectively with establishing resource centers for online learning, with these effective operations mostly now transferred to campus in both cases. UC Berkley sought the help of Extension in building its First Year Pathways program, now offered to all admitted students, in which students spend the first semester as part of a cohort at Extension. During this bridging period, students benefit from hands-on advising and instruction from both campus and Extension instructors as they transition to a new level of learning.

In part, these approaches reflect differences in institutional operating models to that of UC San Diego; in part, they reflect different policies in terms of articulation and credit provision by extension units, with Extension constrained by UC policy in its ability to offer courses for major campus credit. Either way, there are notable variations between the educational scope and role of UC San Diego Extension and those of some of its peers. Extension leaders from these research universities noted that the value of their units is often not accurately assessed or perceived by faculty, like at UC San Diego. But the invitation to help drive and maintain these educational innovation initiatives creates an important opportunity to build academic credibility, as well as recognition for their contributions to university sustainability.

Differences in administrative participation and presence are also significant. Extension at UC San Diego was once more actively engaged with the EVC's direct reports and Chancellor's Cabinet in identifying and serving campus priorities. But this is less the case today, with Extension not formally represented in institutional governance. By contrast, Harvard Extension is a degree-granting entity, one of thirteen at the university, and its alumni are Harvard alumni. The Dean of UW Continuum College, which contributes approximately $25 million to campus annually, sits on both the President's Cabinet and the Board of Deans. While Harvard Extension operates more independently than UC San Diego Extension, both these peers have a position at the institution that promotes academic respect and collaboration.

There are also differences in terms of the approach to brand, with some peers recognizing explicitly the value of extension units as mechanisms for reputation building and learner relationship management. For example, UC Berkeley Extension is the designated representative for the Berkeley global brand. At UC Irvine, the Division of Continuing Education (Extension) provides career advisory services to graduating students, with close ties also to the Alumni Association. Such connections are more tenuous and less explicit at UC San Diego.

A final insight from the peer review, which is less specific to Extension, but highly germane to educational innovation, is the financial model through which others incentivize program development and innovation. Exemplified best at UW, Continuum College effectively operates an investment fund for self-supporting program development. The academic unit pays a fixed fee to cover all development, market research, and marketing costs; Continuum College assumes all the risk, with any net revenue flowing back to campus and the academic unit. If the program does not succeed, these costs are covered by a risk pool created through a small tax imposed on all successful offerings; if it does, the academic unit is the sole beneficiary.

Recognizing that contexts and aims differ, the recommendations of the discussion group were meaningfully shaped by lessons learned through this examination of extension unit experience at other campuses and universities.

Recommendations

The objective is to effect a step-change in the level of integration between Extension and campus, taking advantage of complementary strengths to support programming and outreach in areas of institutional focus and aligning systems and structures to capture economies of scale and scope where possible.

The arrow in *Appendix 3* depicts, in the context of continuing education, the conceptual shift towards an operating model in which Extension and campus work as partners in all forms of educational innovation. More broadly, Extension has an important role to play in extending the capabilities and resources of the campus in advancing the mission of UC San Diego not only in education, but also in research and service. Extension should be positioned as an important partner to campus in all activities that help the institution extend its reach, expand access and diversity, and enrich local and global connections.

To achieve these aims, the institution needs to encourage and facilitate joint activity between Extension and the campus, and it needs to remove barriers to them working together. The first five recommendations help create the conditions for success and synergy; the last five represent the ways in which Extension can work with the campus in academic collaboration.

1. ***Communication. Reinforce the role and capabilities of Extension as a strategic partner to campus and disseminate this message across the institution.*** Faculty and campus awareness and understanding of Extension are limited, and this is a significant barrier to closer integration. Moreover, peer experience demonstrates the power of more purposeful and integrated articulation of the value of Extension. It is vital to communicate Extension's programs and services to motivate academic interest and collaboration, and to ensure that Extension's quality control mechanisms are fully recognized and appropriately calibrated. Messaging should be coordinated with wider efforts to build alignment around EI. As the EVC Office establishes itself as a responsive

> **EXTENSION SUPPORT FOR PROGRAM DEVELOPMENT**
>
> In the fall of 2019, the Extension Center for Research and Evaluation was asked to conduct market research for a certificate program in antibiotic resistance proposed by the UC San Diego School of Medicine. The research included three components: 1) competitive landscape analysis to map similar existing programs, 2) occupational outlook to assess funding opportunities and job prospects for program graduates, and 3) surveys of biomedical professionals and industry interviews to measure prospective student demand. The research revealed few programs like the proposed UC San Diego certificate, which includes instruction in novel approaches to treating antibiotic resistance. Survey results further illuminated the most important topics, as well as a clear divide among medical professionals by degree type, with doctors (MD, PharmD, PhD, DVM) expressing a much higher degree of interest in the program than non-doctors. While there was little evidence of job postings that specify knowledge or skills in antibiotic resistance, Extension's work also highlighted moderate funding opportunities in related research. Though the program is yet to launch, the market analysis provided powerful input to curriculum development and decisions around target learners. **CONTACT: Victor Nizet**, School of Medicine

support team in educational innovation, it is expected that faculty and academic units will seek out these services as they contemplate program development and renewal. In addition to direct communications from and about Extension, the EVC Office can play a role in channeling prospective campus partners to Extension.

2. ***Faculty relationships****. Establish a network of faculty champions for public service, lifelong learning, and Extension, including those currently teaching in Extension*. These relationships are fundamental to closer collaboration between Extension and the campus. Where they exist, they have fostered successful joint ventures, but these connections need to be expanded and institutionalized. The appointment of divisional liaisons, possibly in conjunction with broader EI efforts, could create a natural link. The role of such individuals would be to initiate collaborations based on their understanding of motivations and capabilities in their respective units, combined with their knowledge of Extension. Faculty with Extension experience could also play a role in fostering a community of practice. There are different perspectives on how to strengthen coordination with the Senate, but this is an important step. At minimum, the mandate of the Academic Senate Committee on Extended Studies and Public Service should be reviewed and, if appropriate, renewed, and the value of ex-officio Extension representation on other Senate committees explored. In time, it may be advisable to assess the scope for an academic advisory group to Extension to further strengthen connections, if such a group could play a complementary role to those that exist through the Academic Senate.

3. ***Institutional governance****. Include Extension more expansively and systematically in institutional dialogue and decision making, notably in Academic Affairs.* As highlighted in the peer review, presence and participation are critical enablers of impact. The EVC Office is formalizing the designation of Extension as a division, working with discipline-based academic units alongside Graduate Division and Undergraduate Education. Restoring the participation of the Dean of Extension in academic and leadership councils is a critical step. The Dean should attend deans' meetings to be more aware of campus decisions and able to inform the other deans of Extension activities. Extension should also be more systematically invited to join key cross-institution working groups and committees. Any changes must preserve Extension's agility and ability to act within its UC system parameters, while also pursuing closer integration with campus administration.

4. ***Financial model****. Clarify the financial model to incentivize program development and update standard terms and templates to support collaborations*. The perceived lack of incentive is a key deterrent to all program development, including efforts that involve campus engagement with Extension. The current model for self-supporting program development allocates a share of the revenue to campus to support central investments and indirect costs, with the share retained by the units used to support direct costs and,

if there is a surplus, program enhancements. Campus is forgoing some of its ordinary revenue share for the first two years to assist units in overcoming the challenges inherent in a start-up situation. While necessary, faculty report that these elements are not generally sufficient to stimulate new activity. The campus is in fact also willing to provide seed investment and matching resources upfront to support compelling program proposals, however there is currently no clear process for accessing these funds. The AVC-EI is formalizing such a mechanism, which will help incentivize innovation and collaboration, also creating a vehicle through which the EVC Office can encourage partnership with Extension. This is imperative given the prevailing inertia across faculty and academic units. Some colleagues have expressed the need for greater levels of campus investment in program innovation; continued attention, and possibly refinement, to the incentivization model is strongly recommended.

In addition, recognizing the need for different approaches in different contexts, at least two Memorandum of Understanding (MoU) templates should be created to expedite the establishment of joint ventures: one for self-supporting degree programs and one for non-degree programs. These should reflect a default approach to revenue sharing when multiple units are involved. The Extension service list should be revised to clarify which costs are fixed and which scaled and to specify custom services. It should highlight that Extension's costs are fully burdened as a self-supporting organization. While academic units may have greater flexibility in how they manage their resources, it is important that they consider full-cost alternatives when contemplating partnership with Extension[4]. Extension's services should also be expanded to include pricing support given the importance of price level and relative price positioning in determining program sustainability.

EXTENSION ROLE IN HUMPHREY FELLOWSHIP PROGRAM

This competitive non-degree program in Substance Abuse Education, Treatment, and Prevention is designed for mid-career professionals working in related fields. The program represents a $230K annual grant, renewable for five years, with opportunities for additional funding to expand reach. Extension assisted with the proposal and, if selected, the School of Medicine's Department of Psychiatry will host and deliver the program. Extension will provide immigration services; orientation activities; housing, meals, and transportation support; social and cultural programming; and health services for students, as well as grant administration, marketing, and website development. Extension will also manage concurrent enrollment for participants seeking to register in credit-bearing graduate courses in consultation with their SoM academic advisors and mentors. Through such collaborations, Extension enables UC San Diego faculty to develop and extend programming to new audiences, in this case, including rising professionals from countries such as Burma, Iraq, and Ukraine. **CONTACT: Igor Koutsenok**, Psychiatry, Health Sciences

---

[4] The salaries of many faculty and staff are paid by the institution. There are times that these individuals perform duties beyond their normal responsibilities to support work that could be performed by Extension. Extension services may therefore appear more expensive simply because faculty and staff resources have been deployed in an unintended manner.

5. ***Shared systems and operational coordination****. Pursue systems integration and establish working relationships between Extension and campus partners for institutional advantage*. These are tools for collaboration, and the benefits include greater operational effectiveness and reduced cost duplication, both of which are priorities for the institution. The Student Information System (SIS) portion of the Enterprise System Renewal (ESR) program is well underway, with deep involvement from Extension and relevant campus stakeholders. Additional shared systems priorities to support coordination should be assessed, including relationship management for alumni and institutional partners. It is also critical to complement the personal connections between Extension and campus units with structural collaborations. Admissions, the Career Center, Corporate Relations, Alumni, Advancement, and Global Education are all entities with which Extension should work more closely – notably to support strategic pipeline development, graduating students, and external engagement. There is almost certainly scope for economies, and Extension could help boost institutional capabilities in areas less developed on campus. These include recruitment, program marketing, industry and community outreach, and international learner support. These arrangements need to be established based on a shared understanding of the value of all players.

> **UC SAN DIEGO EXTENSION AND UC MERCED PATHWAY**
>
> Extension has partnered with UC Merced to develop an undergraduate degree pathway program, with Extension supporting international students in attaining their first year through UC San Diego Extension before transferring to UC Merced to complete their degrees. The collaboration was initiated by Merced, seeking to build upon Extension's extensive International Programs operations. Students are enrolled in their required credit courses at UC San Diego through concurrent enrollment, with Extension also providing English language training and broader student support services. This venture demonstrates the capacity of Extension to create bridges to credit study for non-matriculated students, consistent with campus aims to expand learner access and diversity.
> **CONTACT: Jill Orcutt**, Admissions at UC Merced

6. ***Extension as enabling function****. Promote Extension's role in providing operational support for faculty, departments, and colleges in academic program development and delivery*. These services leverage Extension's skills in market intelligence and program evaluation, marketing, and program administration, as well as its key assets: connections with local industry and community stakeholders, international student infrastructure, public reach through UCTV and UCSD-TV, and access to downtown space. Extension is already supporting several campus programs in these areas, but there is potential for expanded collaboration. Building on experience, Extension could also contribute as an incubator for campus innovation in program modalities and educational technologies, given the flexibility of its business and operating model. Extension needs to ensure that its business model supports the resourcing required to provide consistent service excellence in all these endeavors. There may also be a need for Extension to align and streamline its programs and services to enable the most effective interface with the campus.

7. ***Partnership in institutional growth****. Position Extension to work in collaboration with campus partners to drive growth in programs that advance reach, access and diversity, learner preparation, and time to degree*. In all ventures, regional industry expertise and demands should be key criteria in program development, especially given the strength of Extension's relationships. Extension's international connections and experience should be leveraged to ensure that UC San Diego considers opportunities worldwide. Extension's expertise in alternate tuition models may also be valuable given the importance of learner representation. Areas of focus include:

   a. *Concurrent enrollment*, through which Extension facilitates access to credit for non-matriculated learners, a mechanism that is more effective to the extent that the "supply of credit seats" can be increased by online learning or additional sections.

   b. *Lower division programming* (X and XSD courses) delivered by Extension, which can help ease capacity pressures not otherwise addressable through concurrent enrollment and help prepare pre- and non-matriculated learners for campus study and success, including transfer students.

   c. *Summer offerings* for matriculated and non-matriculated students, building on existing traction and infrastructure in Extension and campus-based Summer Session, to expand options for learning at UC San Diego.

   d. *Non-degree credentials*, expanding the provision of graduate and other certificates that create pathways to degrees, support skill building for matriculated student to help them transition to non-academic careers, and facilitate alumni and practitioner retooling.

8. ***Partnership in online learning.*** *Advance closer collaboration between Extension and the Commons to support quality and consistent learner experience across online offerings*. This is especially important as UC San Diego rapidly expands its online presence. Extension and the Commons both have teams supporting online learning, with these teams working well together in their respective foci on non-matriculated and matriculated learners. A continued emphasis on shared infrastructure, tools, and training for online instructors is recommended, to support quality, consistent learner experience, and operating efficiencies. The institution would benefit from a joint marketing strategy and dedicated brand for online offerings. The open edX platform could be valuable for any programming collaborations as it serves a wide spectrum of pre- and non-matriculated learners. UC San Diego should also explore the scope to position UC as a scale player in global online learning through a coordinated approach to cross-campus courses.

9. ***Partnership in lifelong learning****. Determine how to motivate academic units to contribute to Extension's portfolio of offerings across the 60-year curriculum.* Faculty involvement

enriches these offerings, also helping re-set academic perceptions around Extension quality. There is an opportunity for expanded faculty curriculum oversight and engagement in K–12 and 50+ programming. K–12 and teacher training collaborations are especially valuable given their connections with student pipeline development, as well as access and diversity. Nearly 12% of the San Diego population is retired, many of whom are alumni of UC San Diego. The institution should also align more coherently the multiple offerings distributed across Extension and campus that are servicing these important learner groups.

10. ***Partnership in research and public service***. *Promote Extension's role in supporting research and mobilizing the infrastructure for community-anchored academic outreach.*

EXTENSION SUPPORT FOR BIOLOGICAL SCIENCES RESEARCH

Extension participates actively in research grants, mostly through its Center for Research and Evaluation, which conducts program impact analysis and aids in research design for community-based programs. Grants often also include the need to develop a training program, which Extension is well positioned to support. The work done by Extension to facilitate a multi million-dollar grant from the California Department of Labor exemplifies such partnership. The task was to implement workforce training for careers in the green economy. Led by Dr. Steve Mayfield in the Division of Biological Sciences, Extension managed the creation and approval of certificates designed and delivered by faculty. The effort required working with multiple campus departments, notably Biological Sciences, Chemistry, and SIO, and coordinating with community colleges and trade organizations. For the duration of the grant, Extension trained hundreds of individuals and helped create a MOOC to extend the reach of the investment. **CONTACT: Stephen Mayfield**, Biological Sciences

There are multiple examples of excellence in such ventures, and there could be several more. Most directly, Extension could more systematically and expansively support research proposals through its program evaluation capacity or disseminate research through channels such as UCTV and UCSD-TV. Extension could also help advance research and public education through leveraging its extensive experience in effecting connections between academic units and community partners, as well as in establishing grant- and corporate-based funding mechanisms to accelerate such activities. Again, faculty awareness and engagement are key enablers, and is important to coordinate with and across other related campus activity in support of research and public service.

Collaboration Framework

Closer connections through engagement, governance, processes, and systems are preconditions to advancing the goals of enhanced partnership in education, research, and outreach. Their importance cannot be overstated. But it is the collaborations that impact learners, faculty, and the community that are most exciting. These educational opportunities align well with the domains of innovation that emerged through the EI Checkpoint discussions in 2019: academic degrees, university bridging, career progression and reskilling, and community enrichment. These four areas were endorsed through that exercise as a campus-wide framework to support opportunity identification, operationalization, and learner communication across all of UC San Diego's educational offerings.

The various possibilities for intellectual and operational collaboration are outlined in Table 1 below. They reflect the convergence of UC San Diego strategy, learner demand, and the complementary strengths of campus and Extension. Each derives from programming or activity in which Extension is already engaged. In addition to collaborations within the four domains of the campus, the support functions of Extension are represented at the bottom of the table.

Table 1: Overview of Collaboration Opportunities

Education and outreach domains	Current Extension role at UC San Diego	Possible scope for greater collaboration	
		Opportunity	Campus partners
University bridging (student pipeline)	K–12 programming (e.g., Sally Ride, lower division credit) (ECO)	Faculty engagement and cross-campus coordination	Admissions, schools / divisions, other programs (e.g., CREATE)
	Pre-college summer programming (e.g., Academic Connections) (ECO)	Coordinated growth and operational alignment	EVC (EI, SS), Admissions, Global Education, other programs
	Administration of concurrent enrollment, for individual access and program delivery (ECO)	Coordinated growth and operational alignment	Schools / divisions, Admissions, Global Education
	University preparatory programming (e.g., Post-Bacc Pre-Med, lower division credit)	Strategic alignment and targeted development	
Academic degrees	Operational support for degree programs (OAPED)	Expanded support and operational synergies to drive online growth	Schools / divisions, TLC, Global Education
Career progression and reskilling	Certificates for matriculated and non-matriculated learners (professional education)	Coordinated growth and operational synergies to drive online growth	EVC (EI), schools / divisions, TLC
	Custom programing for corporations	Joint pursuit of opportunities	Schools / divisions, CR
	Career preparatory programming (e.g., LAUNCH)	Cross-campus coordination	Career Center, UCSD Alumni
Community enrichment	Non-credit programming (continuing education)	Cross-campus coordination	Schools / divisions, other programs
	50+ programming (ECO)	Faculty engagement	Schools / divisions, UCSD Alumni
	Community and corporate programming	Cross-campus coordination	Schools / divisions, CR, GR
	Public education and research dissemination (UCTV, UCSDTV)	Strategic alignment and cross-campus coordination	Faculty members, schools / divisions, Advancement
	Support for community-anchored research		
Research, marketing, and pricing	Market research (CR+E), marketing, and pricing support for Extension and other programs	Expanded support, including online brand, and program pricing	EVC (EI), schools / divisions, TLC, CCMO

NOTE: EI – Educational Innovation; SS – Summer Session; TLC – The Learning Commons: CR+E = Center for Research & Evaluation (Extension); ECO = Education & Community Outreach (Extension); OAPED = Office of Advanced Professional Education & Development (Extension); CCMO – Chief Communications & Marketing Officer; CR – Corporate Relations; GR – Government Relations

In some cases, the opportunity is for growth in partnership with campus, in others it is for closer faculty engagement, and in others it is for alignment in direction or cross-campus coordination. They are purposefully not prioritized; faculty, academic units, and other institutional entities will choose to engage in those collaborations that align with their respective aims and contexts. Extension's elevated and integrated role as a strategic partner, albeit in different capacities, across these four domains reinforces its critical role at UC San Diego.

Success Factors

The evolution of Extension is a collaborative endeavor, relying on the contributions of many players across the institution. The overriding need is to protect the current advantages of Extension while also charting new and expanded opportunities for integration. This is an imperative at the highest level in the institution, and one which will need resolute attention as well as sensitivity and creativity to navigate.

It is critical that the recommendations are strongly endorsed by campus leadership given the strategic interdependencies, importance of faculty engagement, and implications for governance. Messaging about the role of Extension in advancing the priorities of UC San Diego must originate with the Chancellor and EVC. Relatedly, there may be a need for institutional investment in Extension to ensure that it is not only empowered, but also fully equipped, to act as a service provider and partner to academic and other campus units. At a minimum, there is a requirement to recognize and formalize in Extension the responsibilities associated with campus liaison, possibly in a new or expanded senior position. More broadly, while Extension is self-sustaining, the deeper relationship with the campus may warrant a re-examination of the financial model.

The transition in leadership at Extension creates an inflection point, consistent with a reaffirmation of Extension's purpose and renewal in direction, but it also invariably creates uncertainty and anxiety. The organic nature of activities at Extension creates an added risk during the transition as several of the facets that define Extension are embodied in individuals, rather than the organization. The next Dean of Extension will play a pivotal role in leading the next phase in the evolution of Extension. This report should inform the search process, and it is hoped that it will provide a valuable starting point for discussions within Extension around objectives, priorities, and resource allocation. One of the goals of the next strategic plan developed by Extension will be to create a roadmap that balances the needs and aims of its organization with the broader ambitions and priorities of UC San Diego.

There will be ongoing challenges in building faculty and campus interest in collaboration. A sensitive and multi-faceted approach to communication and engagement, working together with the academy, will be critical. The lead role of the AVC-EI in mobilizing campus-wide efforts in innovation, investment, and incubation is integral. As educational innovation gathers momentum, practices and mechanisms will be put in place to promote and support program development. Extension is a key partner in this journey, and EI efforts will create greater visibility around Extension and reinforce the value of collaboration.

While Extension has significant skills, assets, and connections from which to build, the extent of change cannot be underestimated. Whether in new ways of working, expanded program domains, or elevated institutional accountabilities, there will be meaningful implications for the

operations of the organization. It will be important to take a considered approach to change management. Moreover, financial exposure is inherent in amplified program development and renewal and there are ongoing market risks affecting Extension's financials. Amplified by socioeconomic uncertainties, new technologies, and prevailing shifts in learner demand, these, in turn, could impact critical fiscal commitments to the downtown center and the replacement of the existing Extension campus complex. While promoting and protecting Extension's capacity for entrepreneurialism and innovation, close partnership with the EVC Office and the Commons will be crucial to ensure that decisions are sound, program development well supported, and collective progress evaluated objectively and comprehensively.

The Path Forward

Given the pending leadership transition at Extension, the current complexities created by the pandemic, and various interdependencies, some actions can and should take place sooner than others. While not fully sequential, there is a sense of phasing in the priorities outlined below. Any plan must respect the autonomy of different players, and there is an important need for agility as the institution moves forward. Clear communication is a key element across all three, given the critical importance of faculty awareness, understanding, and engagement.

Priority 1. Building the foundation for closer integration and driving immediate impact

The objectives are to address some of the most pressing impediments to collaboration and to initiate or amplify growth efforts in areas of strategic urgency. Led by the Chancellor and EVC, communication efforts should empower Extension through a clear articulation of its role and capabilities. The campus should take steps to elevate the position of Extension in institutional governance, certainly at the EVC level and across key committees and task forces. In coordination with the creation in the EVC Office of a responsive faculty support team in EI, the financial model for self-supporting program development and renewal must be clarified. Extension should update its service lists, also working with the EVC to create MoU templates to support joint activity. In terms of programming, attention should focus on collaborative support for online learning, expansion of seats and operational coordination in concurrent enrollment, and coherent growth in K–12 and summer offerings.

Priority 2. Building Extension and institutional alignment

The objectives are to strengthen faculty relationships and to establish closer structural alignment between Extension and campus units where there are costs or risks in sustained lack of connection. Communication and engagement activity should focus on building faculty relationships, together with efforts to formalize a community of practice around educational innovation and lifelong learning. Under new leadership, Extension should complete a strategic planning exercise to confirm its priorities in the context of broader institutional ambitions and external dynamics. In terms of programming, work should expand to include the development of an institution-wide approach to certificates. Attention should turn also to operational coordination, formalizing connections between Extension and campus units in areas of core competence, such as student pipeline development, and assessing the value of further systems development and integration, including in external relationship management.

Priority 3. Building the capacity for strategic growth

The objective is to equip Extension to play an expanded role across the campus as it continues to work with partners to advance various collaborations. Communication efforts should continue to

enhance visibility and invite engagement, also promoting a shared vision for Extension, informed by its renewed strategic plan. Extension may need to build skills or realign resources to support its ongoing and new programming and activity. The institution should consider the administrative structure and financial model of Extension, as well as the establishment of an academic advisory group to Extension. There may also be scope for greater alignment in branding or alumni engagement.

Appendix 1: Evolution of Extension Discussion Group Membership

Administration

Lisa Ordóñez, Dean of the Rady School of Management – Chair

Edward Abeyta, Associate Dean of Community Engagement and Pre-College Programs, Extension

Carlos Jensen, Associate Vice Chancellor for Educational Innovation

Douglas Lincoln, Chief Administrative Officer, Extension

Steve Ross, Associate Vice Chancellor for Resource Administration

Hugo Villar, Associate Dean of Professional and Continuing Education, Extension

Gurpreet Dhiman, Administrative Officer, Extension

Marina Hayden, Principal Analyst, Academic Affairs

Senate Faculty

John Hildebrand, Professor, Scripps Institute of Oceanography

Elizabeth A. Komives, Professor, Chemistry and Biochemistry

Hemal Patel, Professor, Anesthesiology

Laurie Smith, Professor, Cell and Developmental Biology

Shankar Subramaniam, Professor, Bioengineering

External Consultants

Rovy Branon, Vice Provost of Continuum College, University of Washington

Michael Brown, Provost and Executive Vice President, Academic Affairs, University of California

Carolyn Kirkwood, Founder and Director, Hunter Kirkwood Limited

Appendix 2: Evolution of Extension Interviewees

Peer Institutions

Nelson Baker, Dean, Professional Education and Professor, School of Civil and Environmental Engineering, Georgia Tech

Rovy Branon, Vice Provost, Continuum College, University of Washington

Michael Brown, Provost and Executive Vice President, Academic Affairs, University of California

Hunt Lambert, Former Dean, Division of Continuing Education and University Extension, Harvard University

Gary Matkin, Dean, Continuing Education and Vice Provost, University of California Irvine

Radhika Seshan, Dean, San Diego State University World Campus

Diana Wu, Dean, Berkeley Global and UC Berkeley Extension

UC San Diego Stakeholders

Edward Abeyta, Associate Dean of Community Engagement and Pre-College Programs, Extension

Adele Brumfield, AVC Enrollment Management

Anthony Burr, former UGC Chair

Steven Constable, Chair Academic Senate

Geoff Cook, EPC Chair, Academic Senate

Peter Cowhey, Dean, Global Policy and Strategy

Cristina Della Coletta, Dean, Arts and Humanities

Karen Flammer, Director, Digital Learning

Matthew Herbst, former Chair, Committee on Extended Studies and Public Services, Academic Senate

Tara Javidi, Vice Chair, Academic Senate

Pradeep Khosla, Chancellor, UC San Diego

Douglas Lincoln, Chief Administrative Officer, Extension

Anne O'Donnell, Senior Executive Director, Corporate Relations

Becky Petitt, Vice Chancellor, Equity, Diversity, and Inclusion

Al Pisano, Dean, Jacobs School of Engineering

Elizabeth Simmons, Executive Vice Chancellor, Academic Affairs

Hugo Villar, Associate Dean of Professional and Continuing Education, Extension

Mary Walshok, Dean and Associate Vice Chancellor, Extension

Paul K. Yu, Provost of Revelle College and Chair of Council of Provosts

Doug Ziedonis, Associate Vice Chancellor of Health Sciences

External Extension Partners

Treavor Callum, Director of Ships Management and Lindsay Fluty, Manager of Organizational Development, General Dynamics NASSCO

Mark Cafferty, President of Economic Development Corporation
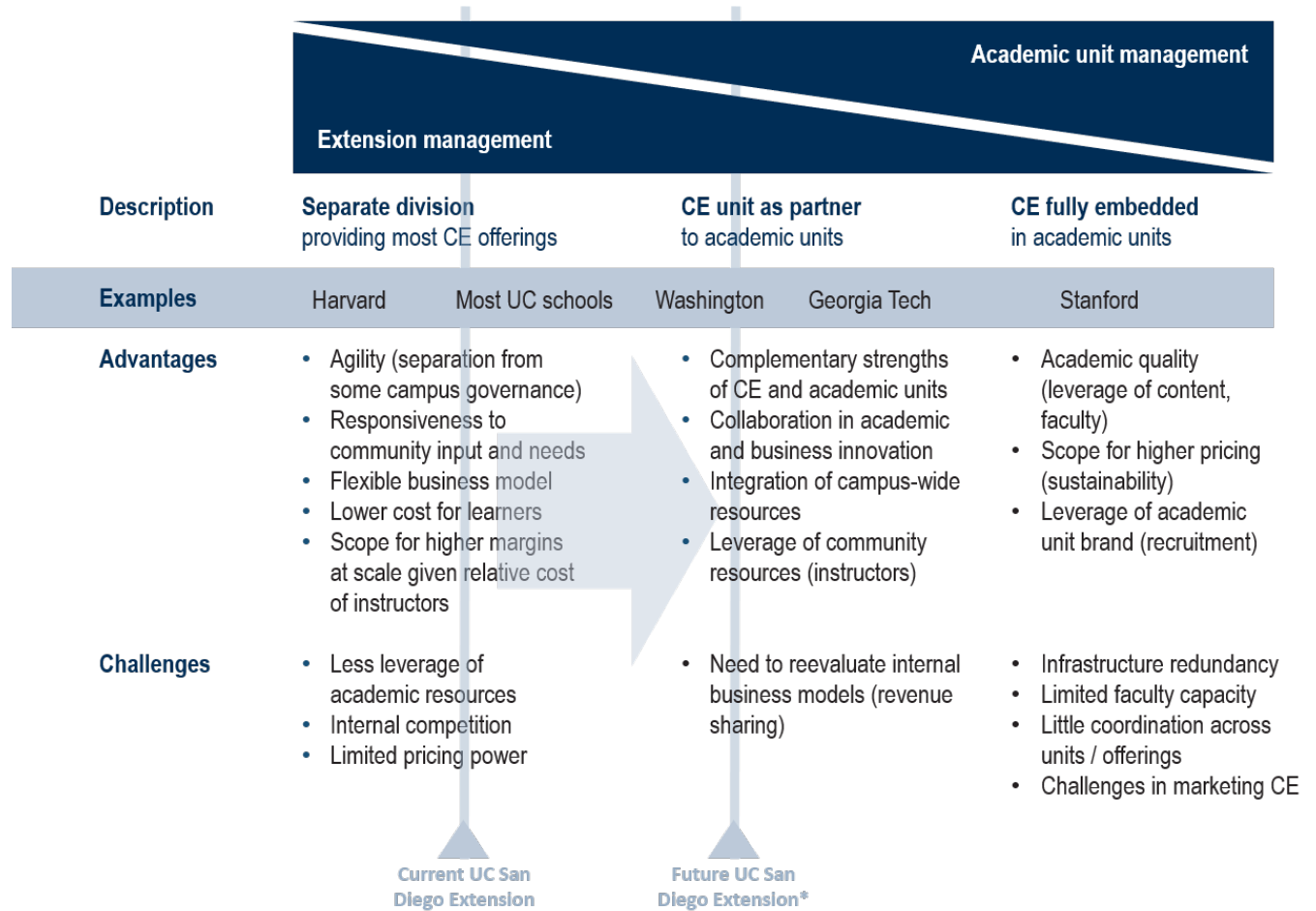
Carey Fernandes, Senior Project Manager, Dudek

Christopher Foster, Vice President of New Business Development, Modern Postcard

Andy Hall, Chief Impact Officer, San Diego Workforce Partnership

Misty Jones, Director, City of San Diego, San Diego Public Library

Jim Rioux, Vice President of Product Development and Inna Elsner, Global Talent Management Program Leader, Seagate Technology

Appendix 3: Conceptual Shift in Educational Collaboration

Academic unit management

Extension management

Description	**Separate division** providing most CE offerings	**CE unit as partner** to academic units	**CE fully embedded** in academic units
Examples	Harvard Most UC schools	Washington Georgia Tech	Stanford
Advantages	• Agility (separation from some campus governance) • Responsiveness to community input and needs • Flexible business model • Lower cost for learners • Scope for higher margins at scale given relative cost of instructors	• Complementary strengths of CE and academic units • Collaboration in academic and business innovation • Integration of campus-wide resources • Leverage of community resources (instructors)	• Academic quality (leverage of content, faculty) • Scope for higher pricing (sustainability) • Leverage of academic unit brand (recruitment)
Challenges	• Less leverage of academic resources • Internal competition • Limited pricing power	• Need to reevaluate internal business models (revenue sharing)	• Infrastructure redundancy • Limited faculty capacity • Little coordination across units / offerings • Challenges in marketing CE

Current UC San Diego Extension

Future UC San Diego Extension*

* Analogous to role played by other cross-cutting entities (Graduate Division, Undergraduate Education)